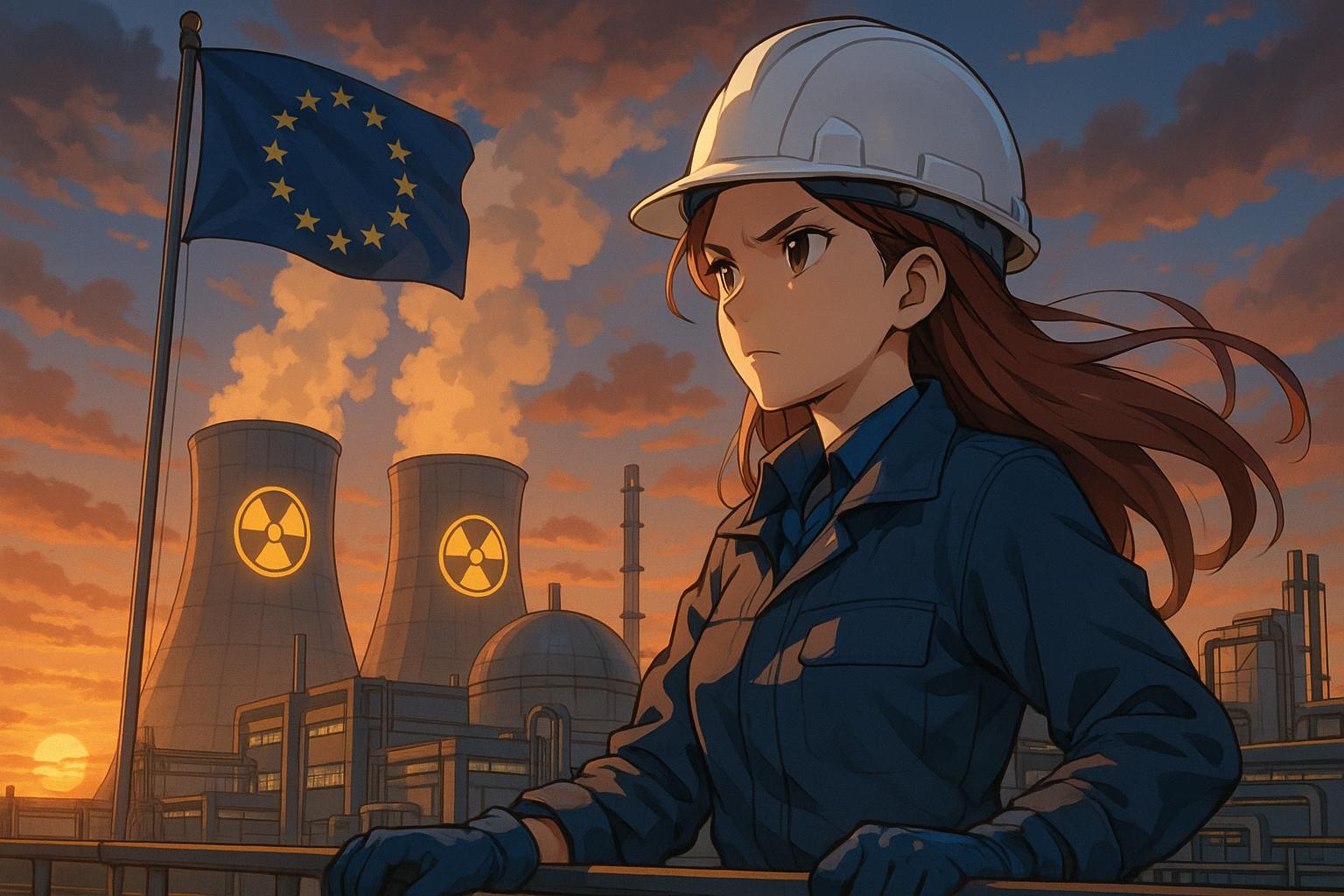
# Blackout sparks fresh debate as Spain weighs nuclear phase-out amid energy crisis



Recent events on the Iberian Peninsula have sparked a renewed debate over the future of nuclear energy in Europe, particularly after one of the largest power outages in decades left millions without electricity. This incident has spurred a reassessment of renewable energy's reliability and reignited discussions about the role of nuclear power in meeting the continent's escalating energy demands.

The blackout that affected Spain and Portugal has drawn attention to the vulnerabilities of a grid heavily reliant on renewable energy, which accounted for approximately 70% of Spain's electricity at the time. Experts suggest that this dependency may have hindered efforts to maintain grid stability. Despite these concerns, Spanish Prime Minister Pedro Sánchez staunchly denied that the blackout was linked to an excess of renewable energy, asserting in parliament that attributing the incident to a lack of nuclear capacity was misguided.

However, voices in the energy sector advocate for a different perspective. Ignacio Sánchez Galán, the CEO of Iberdrola, warned that cutting nuclear power could lead to a spike in electricity prices by up to 25% and a significant reduction in system reliability. In a similar vein, Sama Bilbao y León, representing the World Nuclear Association, expressed alarm over Spain's impending decisions to phase out its nuclear reactors, emphasising that the country’s economic future hinges on a stable supply of clean energy.

As Spain grapples with its energy strategy, countries like Germany are reassessing their previous anti-nuclear policies. The recent election of Chancellor Friedrich Merz has prompted discussions around potentially reviving the country’s nuclear energy programme, which was markedly curtailed following the widely publicised Fukushima nuclear disaster. Merz’s administration is exploring investment in new technologies, including small modular reactors (SMRs), which are seen as more cost-effective and versatile than traditional nuclear plants.

Indeed, a global trend appears to be emerging, with a notable shift in attitudes towards nuclear energy. Australia’s government has lifted its ban on nuclear power, signalling intent to invest heavily in new reactors, while Taiwan is poised to vote on the potential restart of a nuclear reactor to meet surging energy demands from its primary economic sector—semiconductors. The rising energy needs tied to artificial intelligence and extensive data operations underscore the urgency for reliable power sources, further adding to nuclear power’s appeal.

In the United States, the discussion has further evolved, particularly with the significant energy requirements anticipated from tech giants like Microsoft and Amazon. Contracts for new nuclear capacity are emerging, reflecting a growing acceptance of nuclear energy as a viable option to meet the demands of AI data centres. This trend is ingrained in a broader drive to reduce carbon emissions while ensuring round-the-clock power availability.

Despite these shifts, challenges remain surrounding the reliability of aging nuclear infrastructure. Facilities like Torness in Scotland are facing hurdles as critical components deteriorate, prompting calls for cautious updates rather than outright closures. Experts argue that the expansion of existing nuclear facilities, exemplified by the push for even older plants to extend their operational life, should be approached with caution given historical records of budgets running over and schedules slipping.

As European nations navigate the complexities of energy policy, Spain’s government is under pressure to reconsider its planned nuclear phase-out. Industry leaders, including José Bogas of Endesa, are advocating for a review of the closure timeline, arguing that changing energy demands necessitate a reevaluation of nuclear energy's role. The consensus is clear: a balanced and adaptable energy strategy is key to achieving sustainability without compromising economic stability in the face of growing power consumption demands.

The conversation around nuclear energy is far from settled. With advocates highlighting the urgency of reliable energy supplies in an evolving market, and detractors citing historical issues associated with nuclear technology, the coming years will be crucial in determining whether nuclear energy can reclaim its place as a cornerstone of Europe’s energy strategy.

## Reference Map:

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2. <https://www.huffingtonpost.es/opinion/mantener-energia-nuclear.html> - This article discusses the advisability of maintaining or closing nuclear power plants in Spain and Europe amid the current energy and geopolitical crisis. It criticizes former German Chancellor Angela Merkel's decision to shut down nuclear plants post-Fukushima, which, combined with reliance on Russian gas, has contributed to Germany's industrial decline. The European Commission has included gas and nuclear energy in the green taxonomy, allowing them to receive sustainable technology aids, a decision that primarily benefits France. Although initially opposed, Germany has accepted this measure and does not rule out reopening nuclear plants if necessary. In Spain, the April 28 blackout raises questions about the stability of relying solely on renewable energy. The country plans to close its nuclear plants before 2035, but the government is willing to reconsider this plan based on economic conditions and the analysis of the blackout's causes. Prudence and a flexible approach may be key to ensuring the energy transition.
3. <https://cincodias.elpais.com/economia/foro-creo-creando-oportunidades/2025/05/29/reynes-naturgy-pide-revisar-el-calendario-de-cierre-de-las-nucleares-es-razonable-darle-una-vuelta.html> - Francisco Reynés, CEO of Naturgy, has called for a review of the nuclear plant closure schedule in Spain, agreed upon in 2019 by major electricity companies. The plan foresaw shutdowns starting in 2027 (Almaraz) and total closure by 2035. Reynés argues that energy conditions have changed, with increased demand and a slowdown in photovoltaic energy installation, as well as new challenges like the expansion of artificial intelligence and data centers. He also mentioned the complexity of breaking long-term gas supply contracts with Russia, particularly Naturgy's contract with Yamal LNG, which extends until 2042, not 2038 as previously believed. Additionally, the CNMV has approved the repurchase of up to 9% of Naturgy's shares, amounting to €2.3 billion, supported by its main shareholders. Reynés has also recently assumed the role of executive vice president of Criteria.
4. <https://cincodias.elpais.com/economia/foro-creo-creando-oportunidades/2025/05/29/bogas-endesa-adelanta-un-acuerdo-con-iberdrola-y-naturgy-para-solicitar-la-extension-de-la-vida-de-las-nucleares.html> - José Bogas, CEO of Endesa, announced at the CREO 2025 forum that Endesa, Iberdrola, and Naturgy are in agreement to soon request the extension of the operational life of nuclear plants in Spain, whose closure was scheduled between 2027 and 2035. The argument is based on technical changes and the electrical system, especially at the Almaraz plant, whose closure could be postponed from 2027 to 2030. Foro Nuclear has defended this revision, proposing fewer fiscal burdens and fixed tariffs to ensure profitability. Bogas highlighted that the Spanish electrical system has transformed in five years, attracting higher demand, which requires investments in networks of €5.2 billion annually according to the PNIEC, but currently only half is invested. Endesa, owned by Enel, significantly depends on the distribution business, whose return is regulated by the CNMC. Regarding the April 28 blackout, Bogas partially blamed Red Eléctrica de España (REE) for its system management, though without dramatization. Endesa also adjusted its dividend policy after a €530 million fine imposed in 2024. The company remains focused on the Spanish market after divesting its operations in America to Enel.
5. <https://www.ft.com/content/91784663-eba2-48e6-a0a3-47e04774c5c0> - The Torness nuclear power station in Scotland, like many aging reactors worldwide, faces challenges due to the deterioration of essential components, such as its graphite bricks. EDF, the plant’s owner, expects to extend its operation until 2030. This effort is part of a broader global trend of extending the lifespans of existing nuclear power plants to meet surging electricity demands and reduce carbon emissions. The aging reactors present both opportunities and risks, with extensions being more cost-effective and quicker than building new plants. The U.S. has initiated support programs like the Inflation Reduction Act, allocating funds to keep plants like Diablo Canyon operational. However, some experts, like Paul Dorfman, highlight the risks of operating old reactors, urging a focus on newer technologies. Notably, France and Japan are pursuing reactor extensions despite past nuclear disasters and political opposition. The cost of life extensions is competitive with renewable energy, yet aging infrastructure presents challenges, and changing climate conditions impact plant operations. The ongoing debate reflects differing perspectives on balancing energy security, safety, and economic viability.
6. <https://cincodias.elpais.com/companias/2025/03/20/sanchez-galan-avisa-de-una-subida-brusca-del-25-en-los-precios-de-la-luz-con-el-final-de-las-nucleares.html> - Ignacio Sánchez Galán, CEO of Iberdrola, warned that closing nuclear plants in Spain could increase energy prices by more than 25%, based on a similar experience in Germany. In an interview with the Financial Times, Galán mentioned that the planned closure of seven nuclear reactors by 2035 would result in higher prices and a less reliable energy system. According to a PWC analysis, without nuclear energy, Spain would rely more on combined cycle plants, which would raise the wholesale electricity price and increase the electricity bill by 23% for small businesses and households, and 35% for industry. Additionally, closing nuclear plants would add 21 million tonnes of CO₂ annually. Sánchez Galán urged the Spanish government to avoid repeating Germany's "great mistake.
7. <https://cadenaser.com/nacional/2025/03/24/nuclear-si-o-nuclear-no-vuelve-el-debate-energetico-cadena-ser/> - The debate over extending the life of nuclear power plants in Spain resurfaces, with a schedule agreed upon between the government and electricity companies to close all plants between 2027 and 2035. Companies suggest prolonging the life of reactors to prevent an increase in electricity costs of up to 23% for consumers and up to 35% for industry. Currently, there are five nuclear plants and seven reactors in operation with scheduled closures. This long-standing debate, which began 57 years ago, intensifies again in the context of high electricity prices and concerns about supply security. While countries like France are building new reactors, Spain remains committed to closing its nuclear plants gradually in the next decade.