



**IMPACT
SURVEY
2018**

62%

91%

89%

57%

Executive introduction

Welcome to the 2018 Fit For Nuclear impact survey, showing how the Nuclear AMRC's flagship supplier development programme is delivering real value to the industry.



Since its launch in 2011, Fit For Nuclear (F4N) has matured into a robust industry-driven programme that is adding real value to manufacturers. Companies continue to provide positive feedback about the real benefits of the business improvements they have made through F4N. The majority of participating manufacturers say they are confident of winning new business, and not just in terms of winning work in nuclear – many say the process has helped them win work in other sectors.

The Nuclear AMRC is committed to the continuous development and improvement of the F4N programme. Over the past year, we have added additional resource in terms of personnel and processes to satisfy demand and ensure that F4N is delivered in an effective and consistent manner.

While we are pleased with the progress that has been made, we recognise the ongoing challenges that our F4N community face, and we welcome all constructive feedback. This survey gives us the opportunity to reflect on the less strong areas of the programme, and how it can be improved.

F4N companies continue to report a lack of real commercial opportunities to break into the nuclear sector, or to develop relationships within the nuclear supply chain. We are working hard to address these concerns, and are developing new capabilities in nuclear sector demand modelling.

Our demand modelling work will assess and analyse the next 50+ years of activity in the UK and global nuclear sector. This will allow us to map out

commercial opportunities, and how UK companies can align their planning and strategies to best position their offering into the future.

We are also focusing on engagement with nuclear buyers to raise their awareness of the F4N programme and its value. We are working with the Nuclear Institute's Safety Directors Forum, which brings together stakeholders from across the nuclear industry, to identify where F4N dovetails with sector requirements and can be recognised as at least an entry-level requirement for organisations.

The developing momentum in the nuclear new build arena, ongoing commitments to decommissioning and defence programs, and the imminent announcement of the Nuclear Sector Deal all make up for a very positive future for the UK nuclear sector.

2018 marks a hugely exciting time for the Nuclear AMRC and the F4N programme, and I am delighted to be joining the team to drive our onward journey.

Ian Williams, head of supply chain development, Nuclear AMRC

Fit For Nuclear (F4N) is a unique service to help UK manufacturing companies get ready to bid for work in the nuclear supply chain.

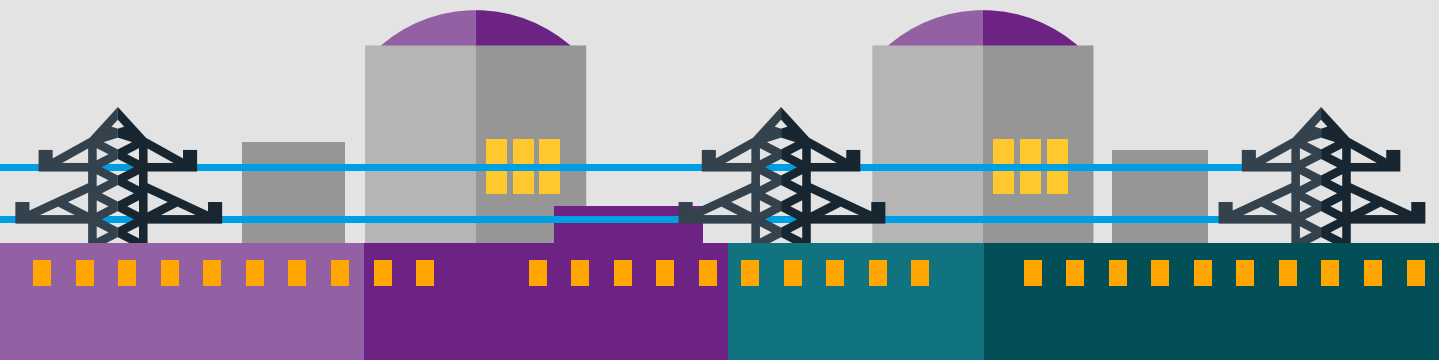
F4N lets companies measure their operations against the standards required to supply the nuclear industry – in new build, operations and decommissioning – and provides support to take the necessary steps to close any gaps.

Start your F4N journey: namrc.co.uk/services/f4n

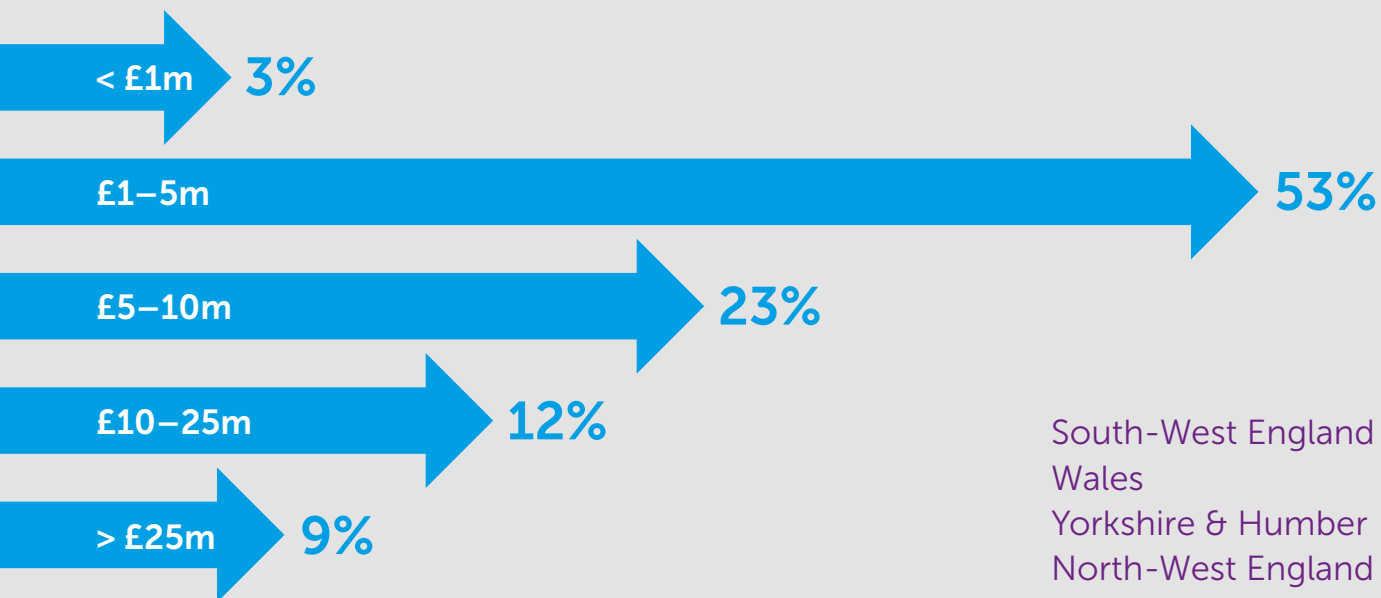
About the survey

In April 2018, more than 300 companies participating in the Fit For Nuclear programme were invited to complete a survey about their experiences of the programme. Companies ranged from those which have just completed the initial online assessment, to those which have been granted F4N.

In total, 116 companies completed all or part of the survey – the percentages below are for responses to that specific question.

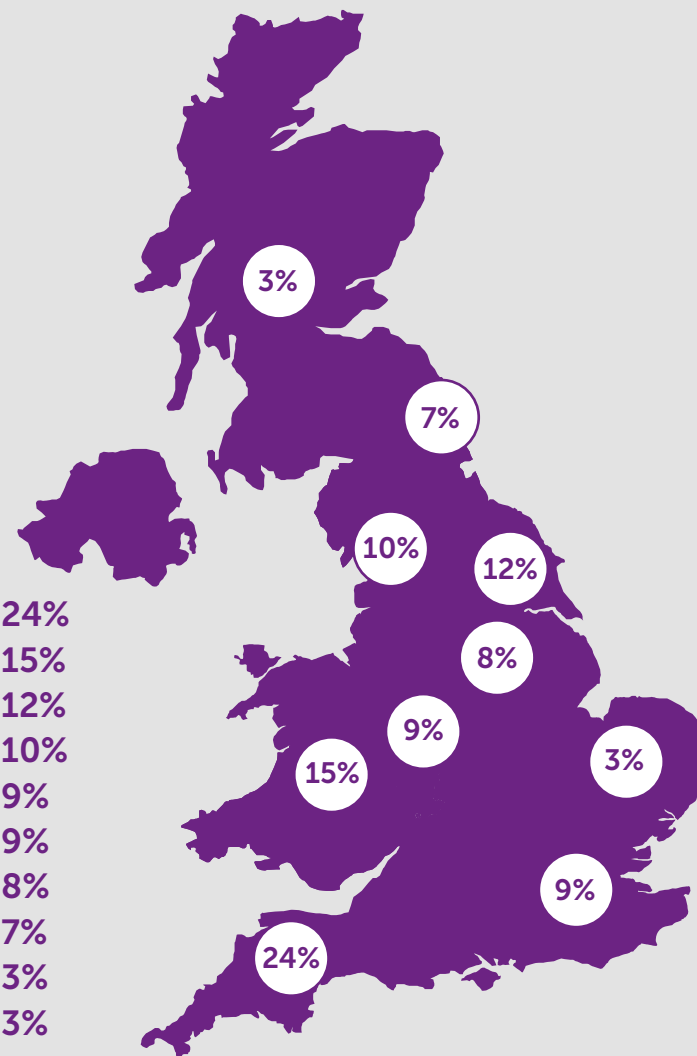


What's your turnover?

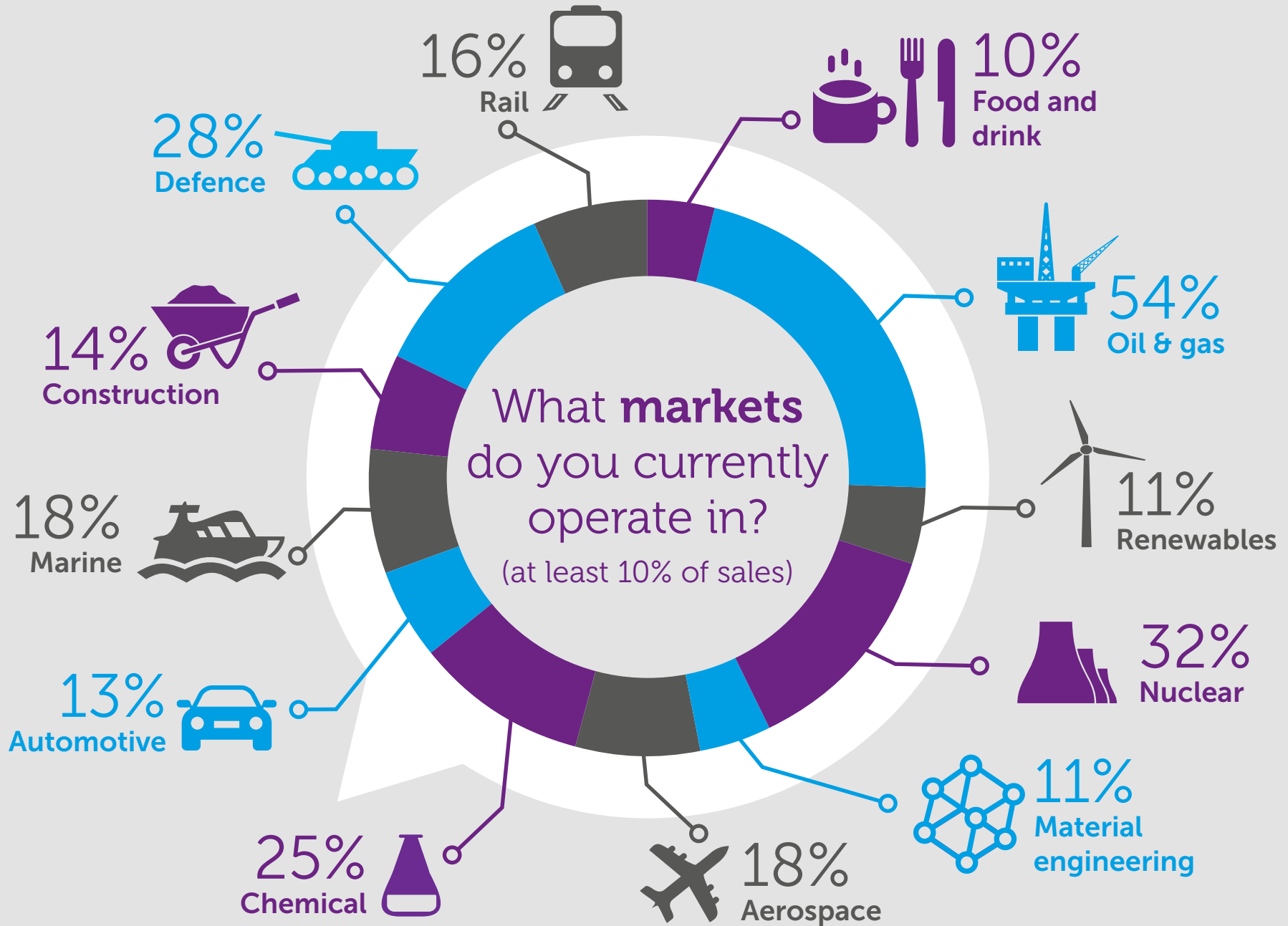


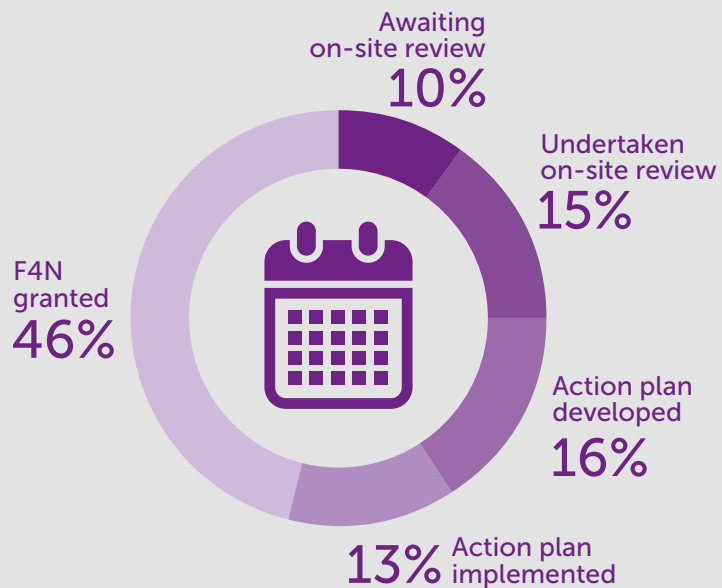
91%
expect their turnover to
grow in the coming year.

South-West England	24%
Wales	15%
Yorkshire & Humber	12%
North-West England	10%
West Midlands	9%
South-East England	9%
East Midlands	8%
North-East England	7%
East of England	3%
Scotland	3%

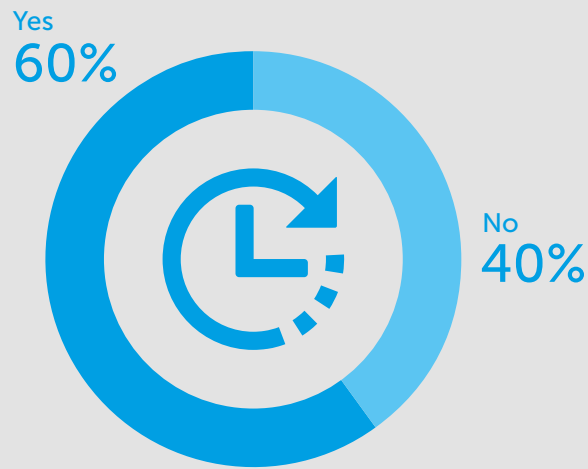


Where are you based?

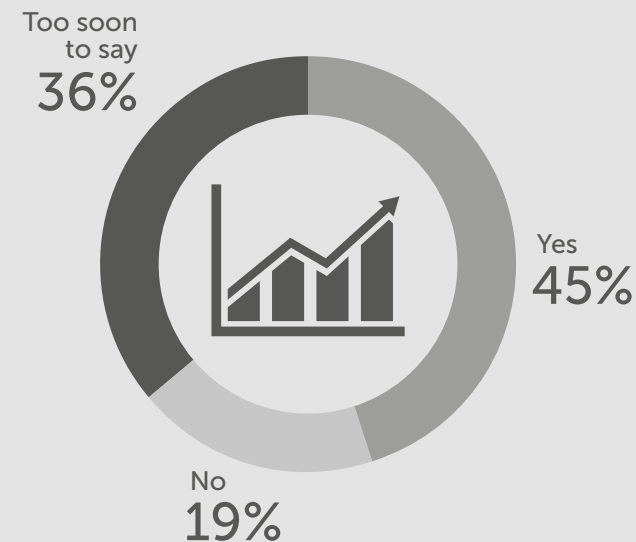




At what stage of your F4N journey are you?

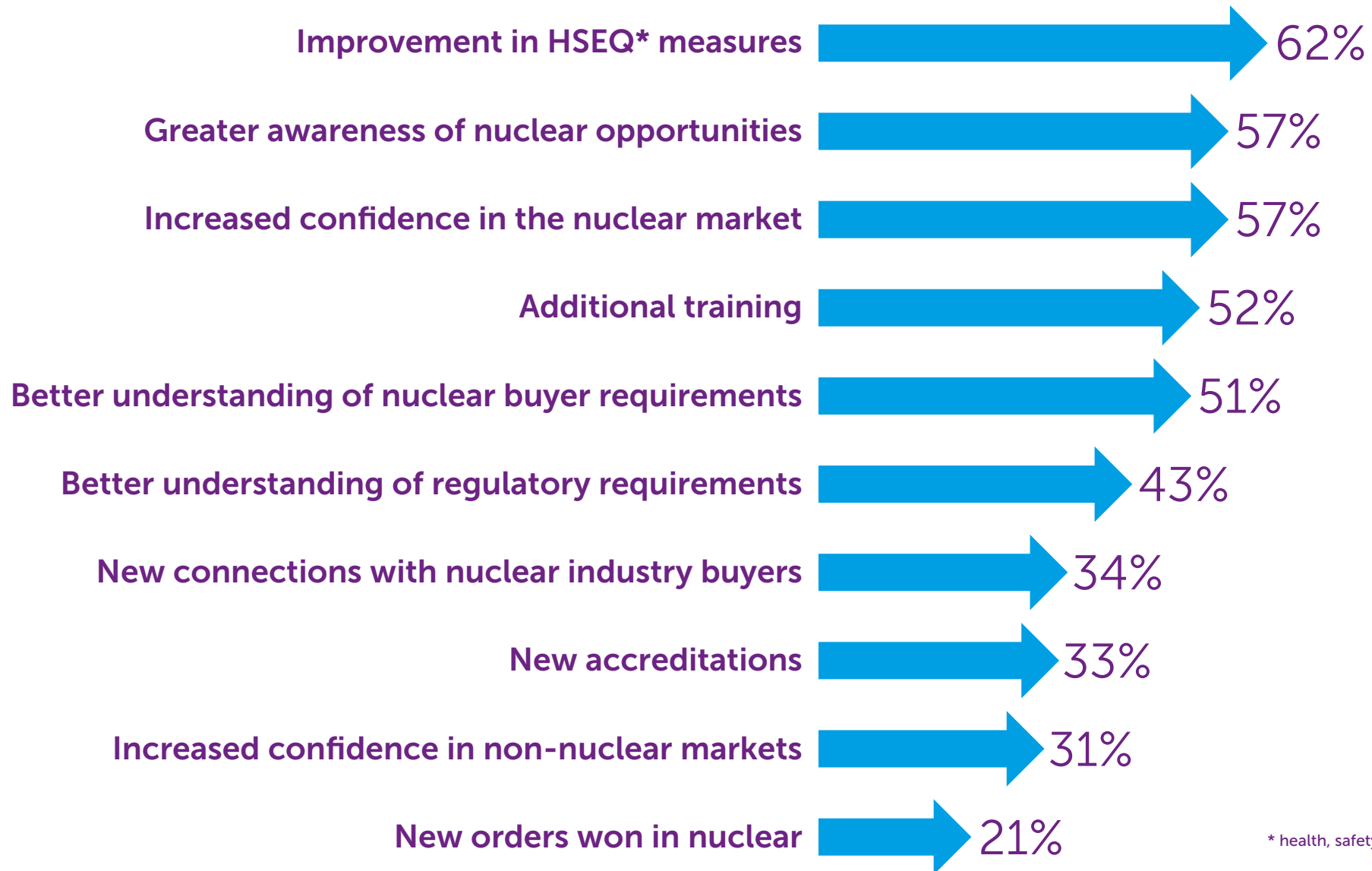


So far, have you made as much progress as you expected?



Have you experienced demonstrable benefits as a result of F4N?

What benefits have you experienced as a result of F4N?



* health, safety, environment & quality

Benefits

"Improved focus on health and safety. Improved communication. Better evidence of records of staff and management meetings. Better evidence of KPIs being tracked. More focus on management training."

North-East SME

"Modern manufacturing techniques have been beneficial and helped us win company awards."

South-West SME

"A company on site at HPC required some urgent assistance and we were able to satisfy the demand in terms of work."

South-West SME

"We have secured our first project within the nuclear arena – whilst not directly related to F4N granting, the process helped the company understand the nuclear area requirements and prepare to work in this industry."

East of England SME

"At this early stage of being granted accreditation, showing the logo has started to draw attention from the nuclear companies. However, getting access to the supply chain is difficult."

Brian Kermode, WKW Precision Engineering

"All aspects are very useful and are helping to improve our business."

Peter Bruch,
AE Aerospace

"Nuclear industry work takes a long time to develop and win orders, but it helps getting onto bid lists."

Michael Ventre, Laker Vent Engineering

"Opened doors to companies that would not otherwise engage with us."

North-East SME

What aspect of F4N have you found most useful?

"The journey! We are such a better business as a result of the investment."

John French, IT4Automation

"The checklist by which the company is assessed is a good benchmarking tool, and we have made internal improvements from this."

South-West SME

"A higher expectation of operational performance covering a wider range of key business areas – not just focused on one thing such as quality."

Noel Sugden, Tiverton Fabrications

"Information about what the market is doing."

East Midlands SME

"Benchmarking our systems and procedures against the requirements of the nuclear industry."

East of England SME

"Step-by-step approach with clear channels of communication."

Matthew Williams, EP (Industrial & Commercial Painting) Ltd

"The online process is very effective."

North-East SME

"For nuclear customers that are aware of the programme, it is taken that your company has the necessary qualifications and procedures in place. For my organisation, the most valuable aspect is the discipline that it brings to systems and procedures."

Martin Booth, Fan Systems Group

"Being guided through the assessment by someone with experience of other industries – that independent view is extremely valuable."

Yorkshire SME

"The opportunity to look at the business from a different angle and invest time and resource into transforming the business."

Scottish SME

What have you found most challenging?

"Ensuring the 60-point action plan matched up with our business needs and requirements."

East of England SME

"Keeping oversight with the current structures/requirements is genuinely difficult – if I didn't have this printed out on my wall, I would easily lose track."

Bronte Precision

"Meeting some of the nuclear specific criteria without being current suppliers of the nuclear industry."

South-West SME

"Linking F4N companies to industry."

Andrew James, Heatric

"In a fast-growing business, finding the time to make the changes we would like is proving challenging."

Welsh SME

"We are an SME and did not have lots of available resource to manage the improvements identified by the assessment. We engaged the help of a trusted external expert, who now supports us on a regular basis."

Noel Sugden, Tiverton Fabrications

"Maintaining progress on over 50 objectives at the same time."

Julian Vance-Daniel, Vessco Engineering

"The realisation that while we were well on our way, the promised nuclear industry wasn't."

Yorkshire SME

"Formalising business strategy and leadership and improving people excellence."

Paul Bunn, S+H Systems

"Getting adequate training for staff in the local area."

South-West SME

"Committing the time and resource to do it justice."

Peter Bruch, AE Aerospace



27%

would not have tried to develop their capabilities for civil nuclear without F4N support

"Perhaps, but certainly not this far in advance of the industry's anticipated development."

South-West SME

"We now realise that if we did try, we probably would not be taken seriously by the nuclear sector."

North-East SME

"With our current accreditation we could have tried but, after reviewing and re-structuring in accordance with the guidelines laid out by the F4N programme, it appears we would not have been successful with our efforts."

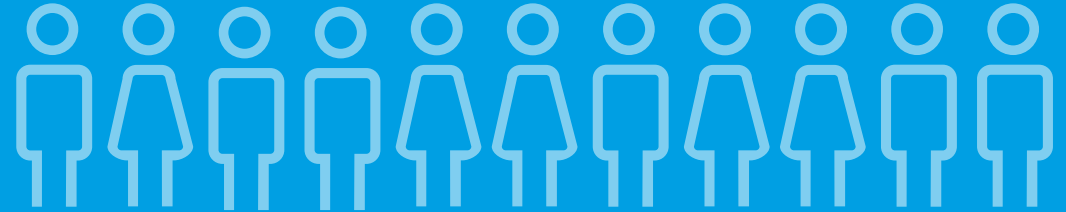
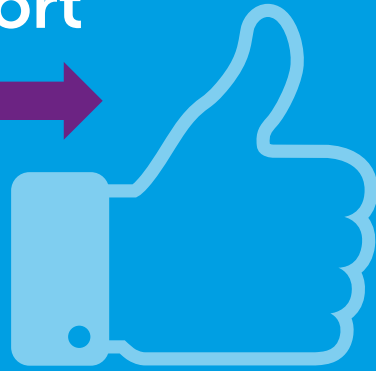
Brian Kermode, WKW Precision Engineering

"The direction from F4N is necessary to achieve this."

Yorkshire SME



89%



would recommend F4N to other manufacturers

"We would recommend F4N to manufacturers wanting to go beyond the standard. The company reorganisation has improved the efficiency of the company for all customers, and was well worth completing even if nuclear work is not the end aim."

Brian Kermode, WKW Precision Engineering

"The journey will make you a better company: more responsive, more agile, more customer-focused, safer."

South-East SME

"But don't expect to be inundated with nuclear enquiries. Use it as a tool for all your business sectors."

Yorkshire SME

"I think it's a useful service to benchmark your current progress, but it depends what happens if/when we actually complete it."

Bronte Precision

"As a general tool, it promotes self improvement."

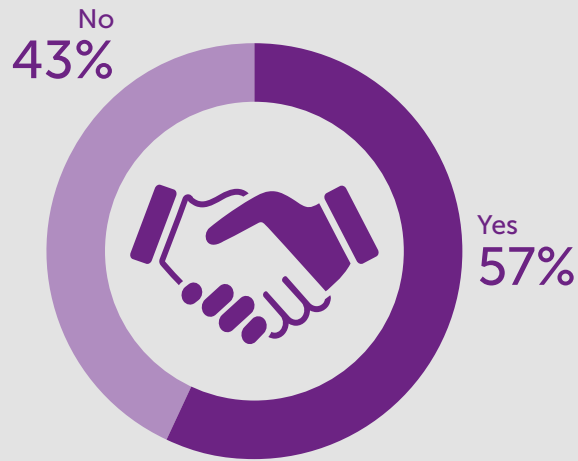
South-West SME

"But only if they're prepared to invest the time and effort needed to maintain the high standard required by the F4N programme."

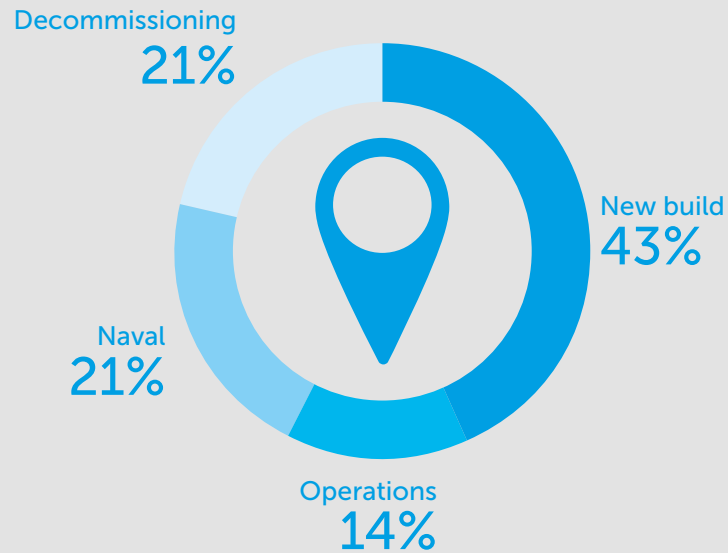
Noel Sugden, Tiverton Fabrications

"It's not for all manufacturers – it's a tough and expensive journey with no guaranteed commercial gain at the end of the programme."

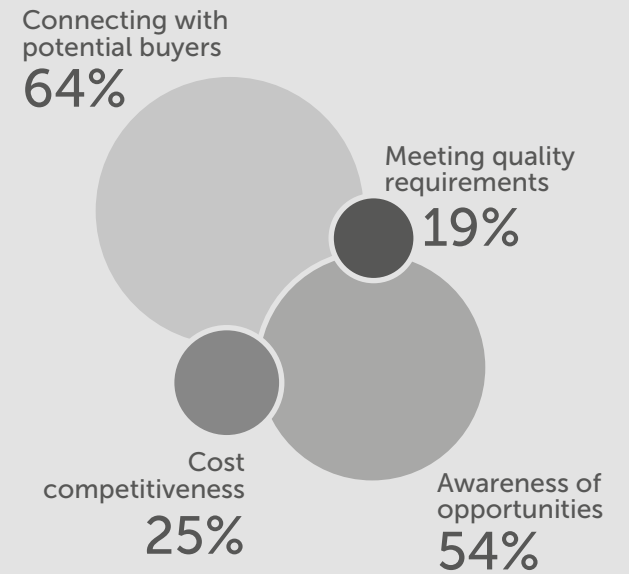
Martin Booth, Fan Systems Group



Are you confident of winning new work in nuclear in the next 12 months?

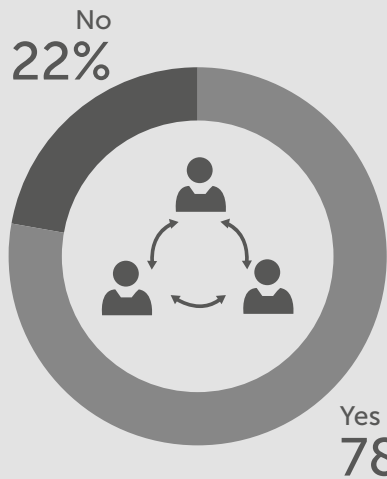
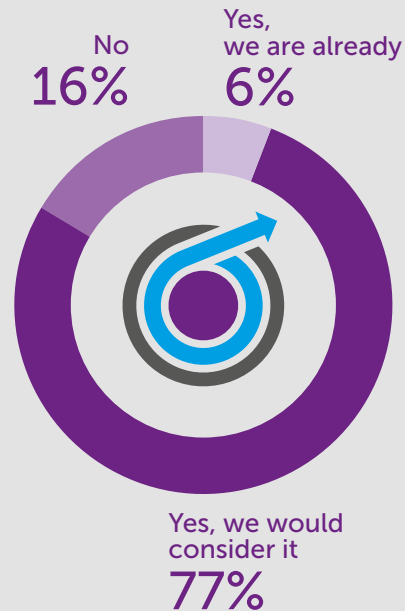


Where do you see the greatest opportunity within nuclear?



What do you see as the biggest challenges to winning work in nuclear?

Would you consider working with the Nuclear AMRC's manufacturing innovation team to solve your manufacturing problems or develop your technical capabilities?



Would you be interested in joining a local cluster group to share best practice and support collaboration in your region?

What improvements would you like to see to F4N?

"Create opportunities for mentoring from large tier one/two nuclear organisations that are either aligned with or would benefit from the activities/capabilities of the SME."

Roger Kimber, Strata Technology

"More information for those with little industry knowledge, for example where our specific expertise could help the industry."

South-West SME

"We would like to see more regular information on what type and anticipated volume of parts or components are likely to be required for the new and decommissioning programme."

Noel Sugden, Tiverton Fabrications

"More help finding that first contract and getting a foothold in the nuclear industry, as it seems to be a closed shop where contracts are concerned."

Brian Kermode, WKW Precision Engineering

"More opportunities to network with the actual buyers and tier one/two companies."

South-West SME

"More emphasis on connecting people at the correct tiers. Presentations by the likes of EDF are very interesting, but they are not interested in talking to SMEs."

Yorkshire SME

"Examples of good practice among small businesses, and proactive initiatives to support collaborative relationships or joint working partnerships."

Paul Oram, Qualitek Engineering

"Sell the formal recognition to customer groups, especially to limit overseas suppliers winning UK nuclear business."

Delta Controls

"None, it's us that need to improve."

Peter Bruch, AE Aerospace

Final comments

"Overall this has been a fantastic scheme which has certainly helped to develop and improve the business. I am hopeful that more recent developments, such as the F4N Connect portal, will improve our chances of winning work in the nuclear sector."

Roger Kimber, Strata Technology

"The F4N programme has improved our company in many areas. This has provided benefits with the potential increase in business within the nuclear sector, and given confidence to clients in other areas."

Paul Bunn, S+H Systems

"F4N has made us take a good look at ourselves. It has helped us improve our business, health, safety and environment. It has also helped us to build a continuous sustainable improvement plan that is realistic."

Tanya Brennan, Polycast

"We like F4N, but it must keep developing and improving – we are prepared to help that objective."

Clive Odell, Turnell and Odell

"Thank you. We greatly appreciate the support of F4N."

Yorkshire SME



To find out more about how F4N can help your business, contact us at:

 0114 222 4993

 f4n@namrc.co.uk