



**IMPACT
SURVEY
2019**

53%

85%

78%

27%

Executive introduction

Welcome to the 2019 Fit For Nuclear impact survey, showing how the Nuclear AMRC's flagship supply chain development programme continues to deliver real value to the UK supply chain.



Since launching Fit For Nuclear (F4N) in 2011, we have continually developed and enhanced the programme to provide even more support to UK manufacturers of all sizes, and help them meet the demands of nuclear customers from new build to decommissioning.

To date, some 750 companies have completed the initial online assessment to identify the potential gaps in their operations and capabilities, and more than 150 have been granted F4N after driving business improvements with a targeted action plan.

We gave the programme a major overhaul in late 2017, providing additional support to companies after granting and launching the F4N Connect portal as a full-searchable showcase for granted companies. We have introduced a three-year time limit to certification – we've always said that F4N is a journey not a destination, and it's great to now see so many companies completing their re-assessment and maintaining their F4N status.

We fully appreciate that F4N demands a lot of time and effort from managers – especially at smaller companies – with no guarantee of an immediate pay-off. It can be particularly frustrating at a time of wider economic challenges, with continuing uncertainty over Brexit and growing signs of a global slowdown.

The past year has been particularly hard for the UK's nuclear new build programme, with Horizon and NuGen withdrawing their plans – a very

painful blow for the many companies who were already preparing to enter the supply chains for Wylfa and Moorside.

In these circumstances, it is heartening to see more than half of the companies engaged in F4N are confident of winning new work in nuclear in the coming year, and more than three quarters expecting their overall turnover to grow. Would-be nuclear suppliers still see plenty of challenges, however, particularly in connecting with potential buyers. Many manufacturers still say that the top tier companies need to reach out more to the UK supply chain and put fewer hurdles in their path.

Increasing the UK supply chain's share is one of the main goals of the nuclear sector deal agreed last year. The deal includes funding for a new national supply chain competitiveness and productivity programme, to build on the success of F4N and our other supply chain programmes. We hope to share more information shortly.

There's never been a better time for companies to get involved with F4N. Our nationwide team of industrial advisors are always ready for an informal discussion about how F4N can help you meet your ambitions. Get in touch today.

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.

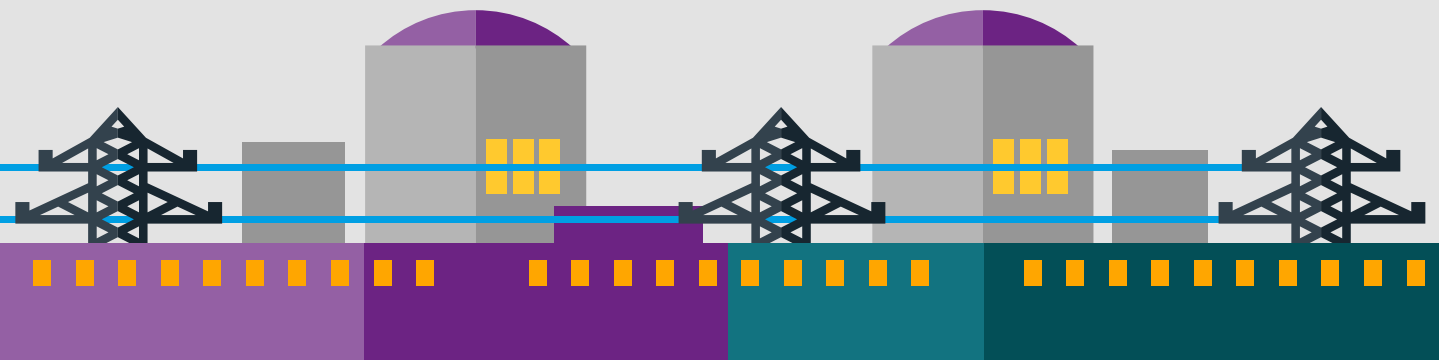
F4N lets companies measure their operations against the standards required to supply the nuclear industry – in new build, operations and decommissioning – and provides support to take the necessary steps to close any gaps.

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

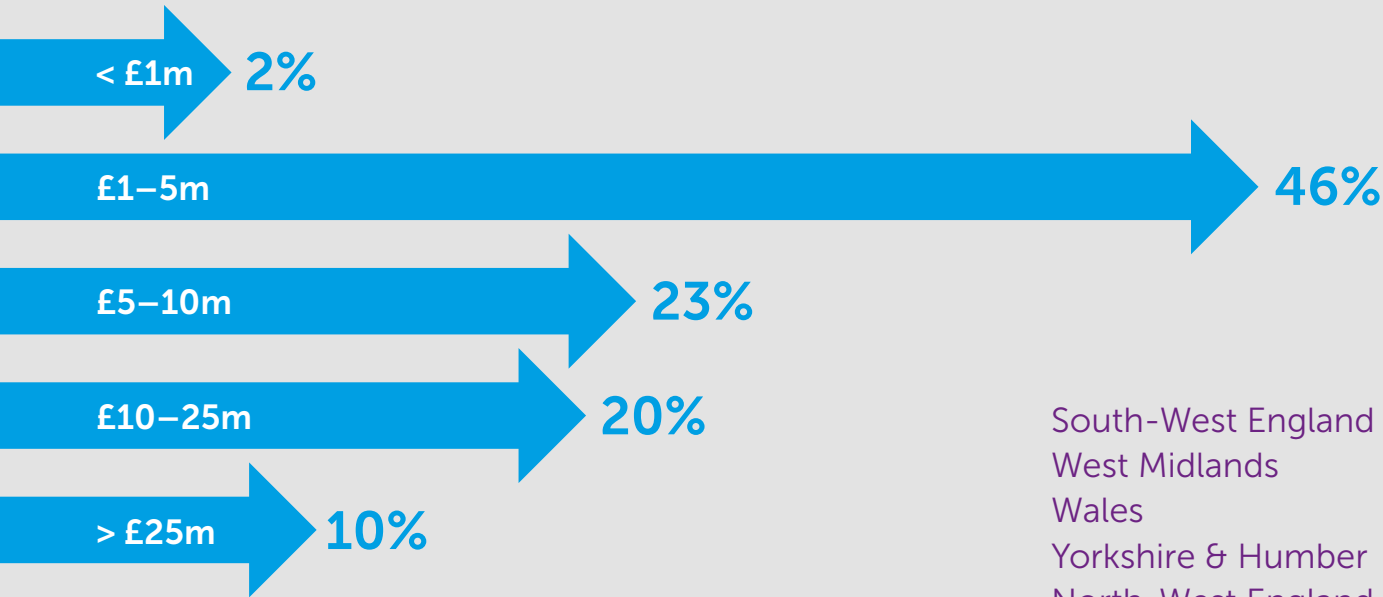
About the survey

In March 2019, 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 for several years.

In total, 92 companies completed all or part of the survey – the percentages below are for responses to that specific question.

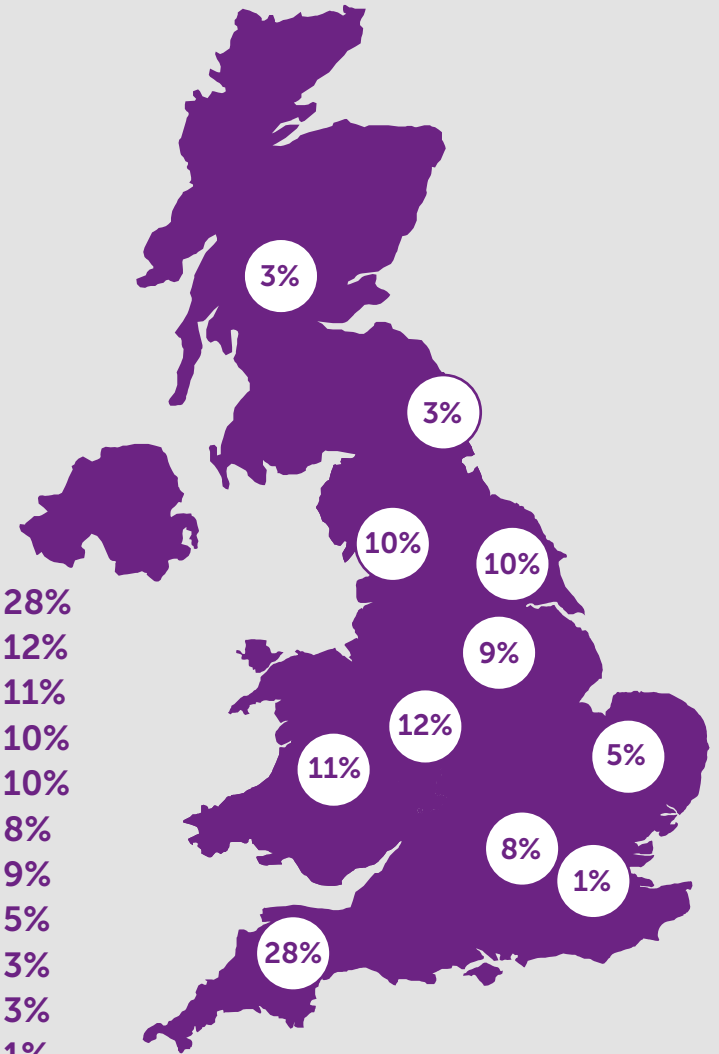


What's your turnover?

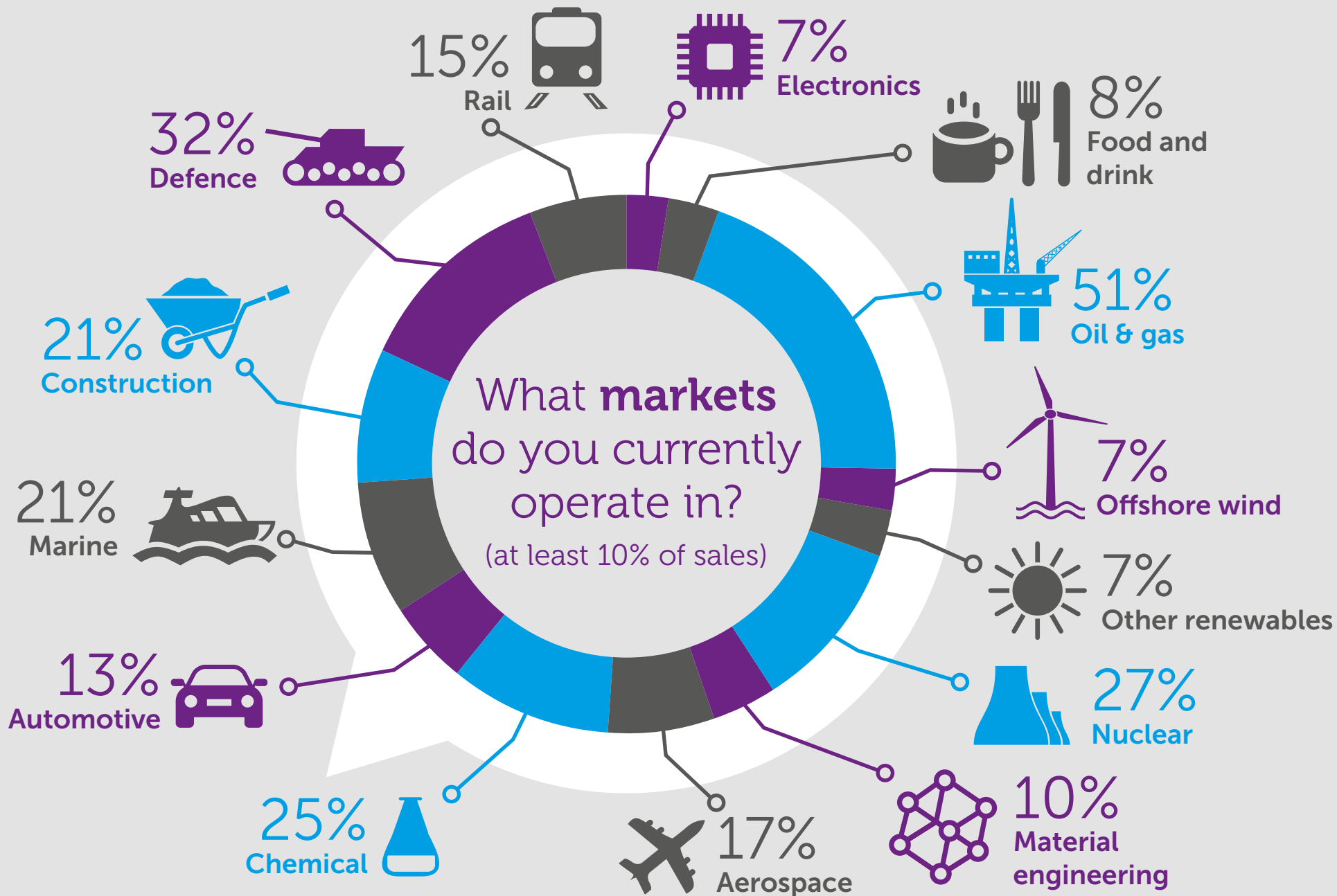


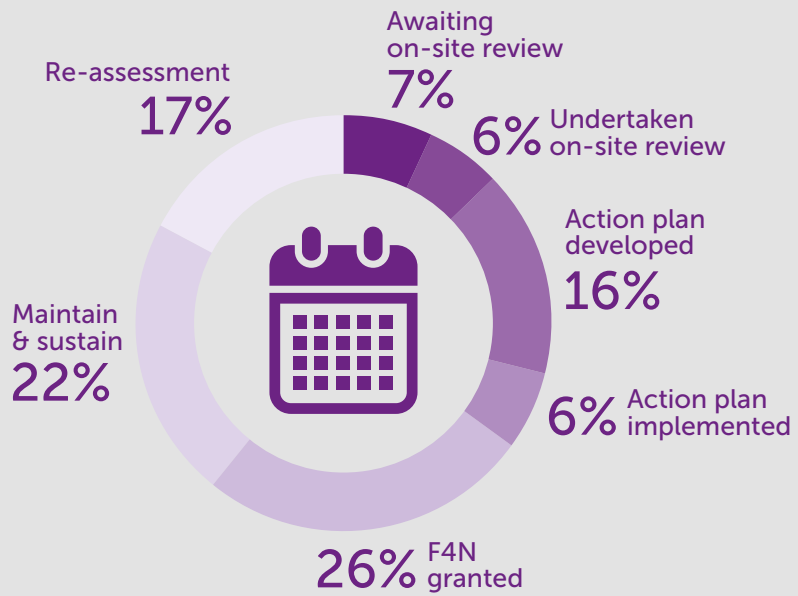
78%
expect their turnover to
grow in the coming year.

South-West England	28%
West Midlands	12%
Wales	11%
Yorkshire & Humber	10%
North-West England	10%
South-East England	8%
East Midlands	9%
East of England	5%
North-East England	3%
Scotland	3%
London	1%

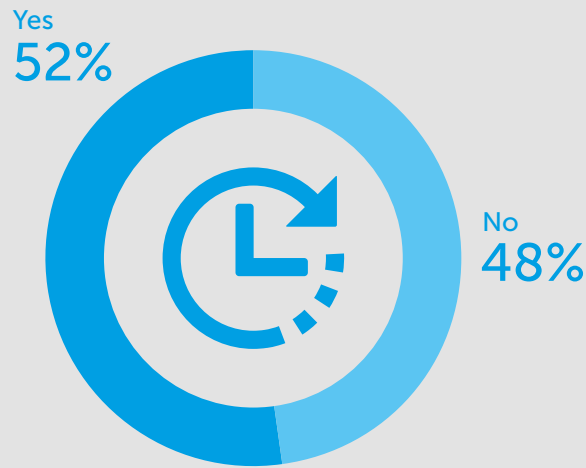


Where are you based?

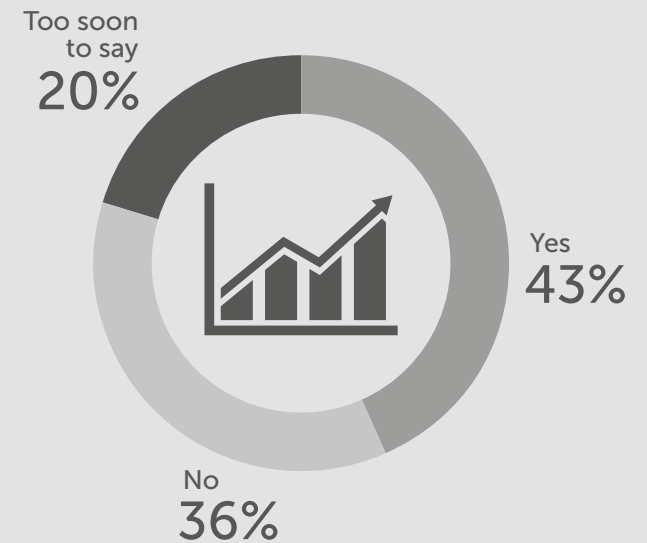




At what stage of your F4N journey are you?

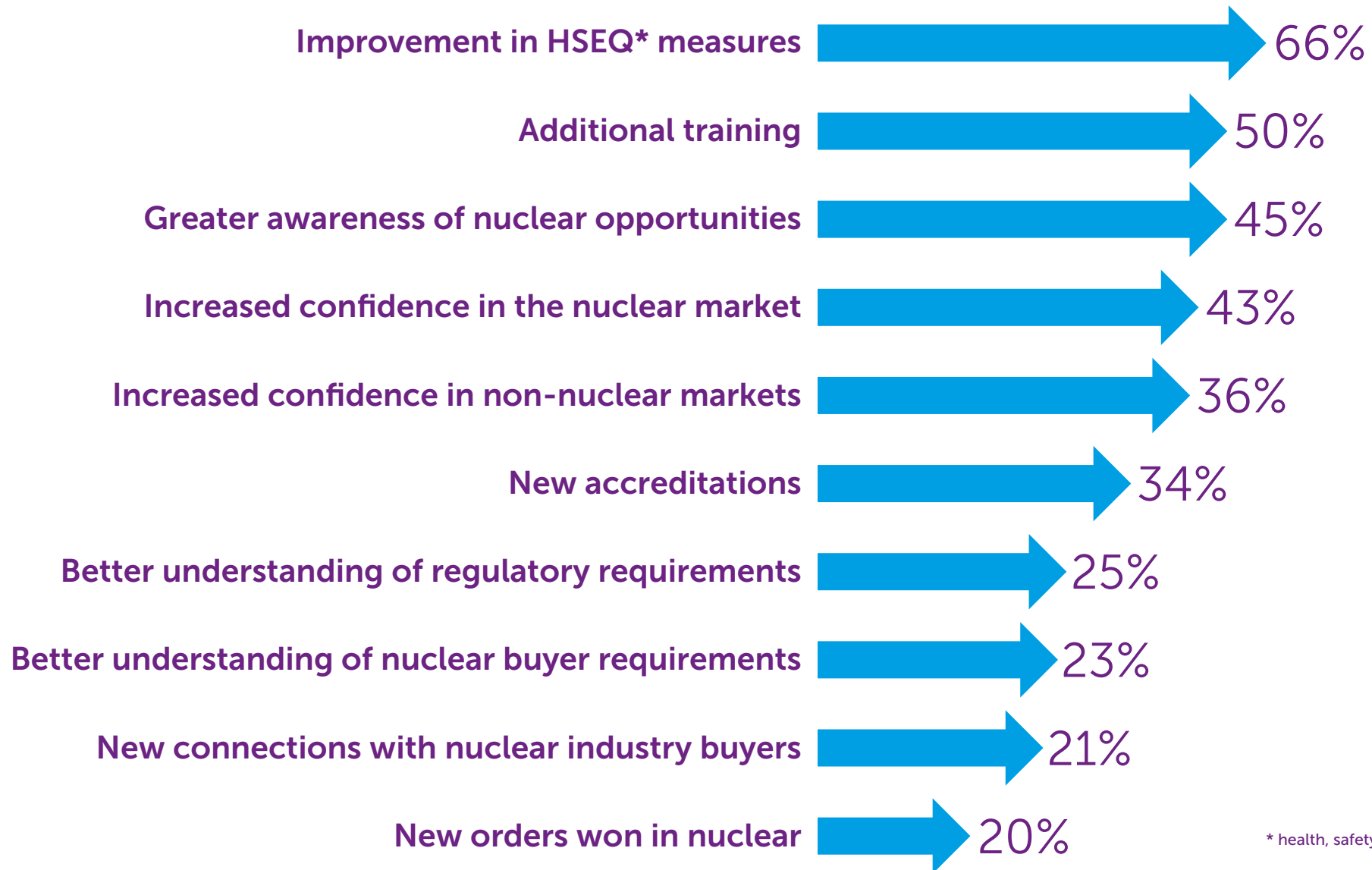


So far, have you made as much progress as you expected?



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

"Additional contracts already being won."

Darren Sadler,
TP Group

"The business is much more organised and more easily achieves compliance with many external auditing activities including customers."

South-West SME

"Internally, 5S boards and other process improvements have helped us."

Yorkshire SME

"We are a better and more focused company."
Yorkshire SME

"Other clients like the external validation of quality."

John French,
IT4Automation

"Improvements for sure – difficult to say if we would have made the steps forward without being involved with F4N."

South-East SME

"All benefits are internal – ie, readiness to undertake the nuclear work we have won to date."

Julian Vance-Daniel,
Vessco Engineering

"The improvements in safety have been invaluable."

Peter Bruch,
AE Aerospace

"Improvement of overall systems."

Chris Batty,
Lestercast

What aspect of F4N have you found most useful?

"Learning and implementing requirements for the nuclear industry. This improves the company as a whole."

Jason Aldridge, Arrowsmith Engineering

"Bringing F4N into our workforce has been a valuable learning curve and helped us to move forward as a business and improve."

South-West SME

"The awareness of our weaknesses but also the strengths as well. The on-site assessment was very informative and useful."

Steve Lewis, Carpenter & Paterson

"Improved vision on continuous improvement planning."

Scottish SME

"Improving occupational safety and production processes."

Welsh SME

"We are a better organised company now."

East of England SME

"Continued support and the ability to network with other F4N companies."

Martin Booth, Fan Systems – Witt UK

"Driving the need for cultural change within the business, better awareness of available techniques to improve employee communication and involvement."

Yorkshire SME

"Understanding the quality requirements and customer expectations."

North-West SME

"The questionnaire and spider graph is a great tool for gap analysis."

Yorkshire SME

"The whole approach to making your business better, not just for nuclear but all round."

Tanya Brennan, Polycast

"The focus on efficiency, quality and procedures."

South-West SME

"It has helped us to improve our health and safety in the company."

West Midlands SME

"It got us in front of potential clients we previously struggled to be seen by."

North-East SME

What have you found most challenging?

"Measuring our improvements in all the different areas."

Chris Batty, Lestercast

"The speed at which the industry operates doesn't seem to match with our business expectations. You cannot rely on revenue from this industry coming to fruition quickly, and must have other mechanisms to fund the overheads needed to operate in the marketplace."

South-East SME

"The ability for us to commit time, plus the understanding of our people – 'what's in it for me, we don't serve the nuclear market'."

Peter Bruch, AE Aerospace

"F4N needs to sit around our other business improvements."

South-West SME

"Applying the requirements to a practical outcome."

Lisa Randall, Diffusion Alloys

"Sustaining improvements in difficult trading conditions."

South-West SME

"Certain aspects of process excellence provide particular challenges, as the product portfolio is fairly mature and there are limited opportunities to drive and implement change."

Yorkshire SME

"Resourcing the activities required to support it and the activities on our improvement plan. Lack of true opportunities in nuclear new build."

South-West SME

"The nuclear industry is a bit of a chicken and egg. You need to be operating at a level to get orders, but to get to that level needs investment with no guarantee of work."

Yorkshire SME

"Finding where we fit into the nuclear industry."

Jason Aldridge, Arrowsmith Engineering

"Aligning F4N within our internal business opportunities."

South West SME

"Some of the action points are very difficult to achieve for SME businesses – and not necessarily required by nuclear customers."

Julian Vance-Daniel, Vessco Engineering

"Maintaining the momentum because of losing key people who were part of the process."

North East SME



30%

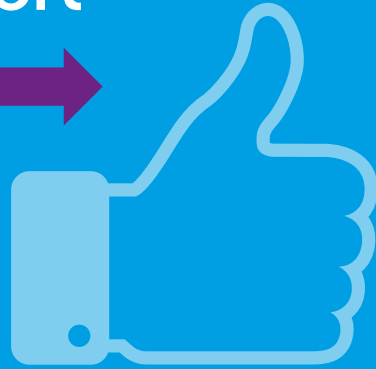
would not have tried to develop their capabilities for civil nuclear without F4N support

"At the time of starting F4N, the opportunities around the nuclear new build scheme were significant. We knew that this would require some operational improvements. However, the opportunity at Hinkley is now smaller than anticipated, and Wylfa and Moorside look unlikely to materialise in the medium term."
Welsh SME

"We would have. However our systems would not have been robust enough."
Steve Lewis, Carpenter & Paterson

"Maybe yes a few years ago, but now, given the state of the UK nuclear industry, no."
Lisa Randall, Diffusion Alloys

85%



would recommend F4N to other manufacturers

"F4N helps improve your entire business."
Peter Bruch, AE Aerospace

"I have always used the term 'Fit for Business' and would recommend it to any business not currently working on the methodologies employed by the F4N programme."
Roger Kimber, Strata Technology

"But it is a very long journey with absolutely no promises at the end."
Cam Machine Components

"The programme does force a business to re-visit and review its systems, practice and procedures."
Yorkshire SME

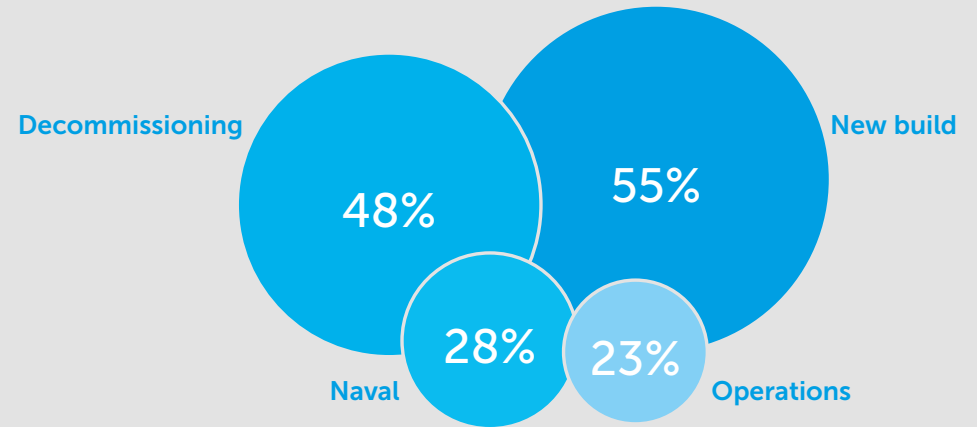
"I would suggest other manufacturers review it to see if they think it would help them."
South West SME

"It helps you make great changes in your business."
South-West SME

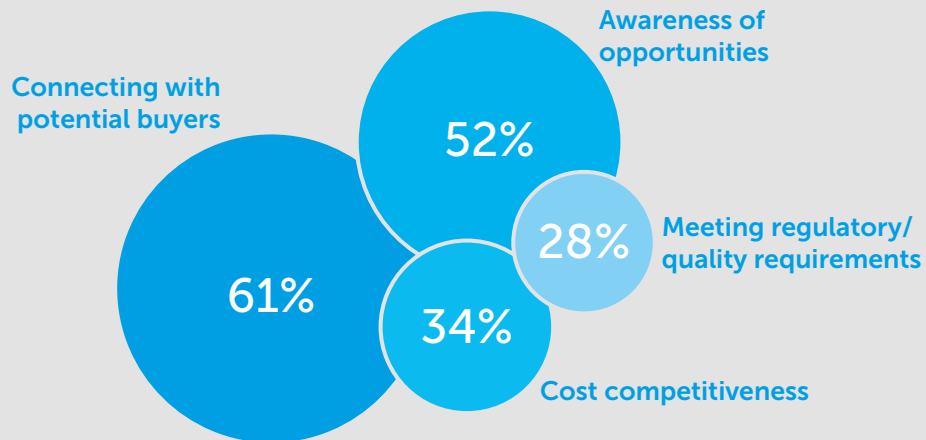
Are you confident of winning new work in nuclear in the next 12 months?



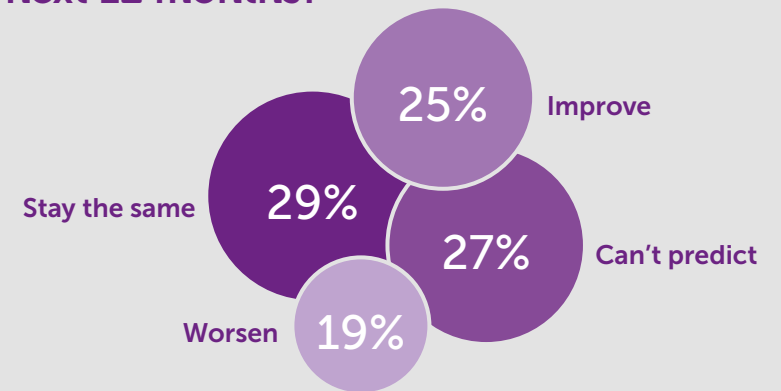
Where do you see the greatest opportunities within nuclear?



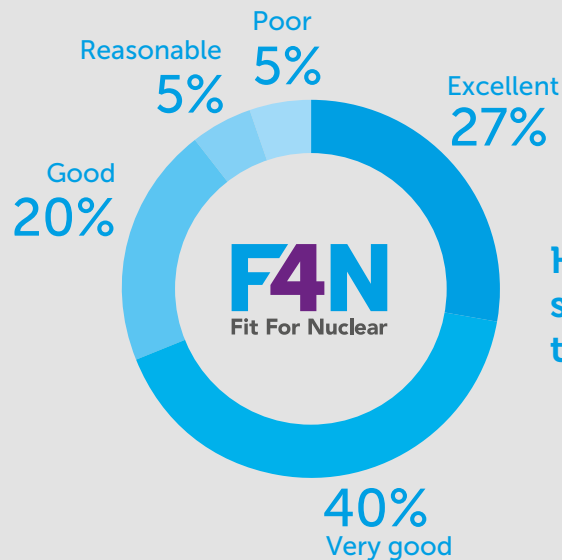
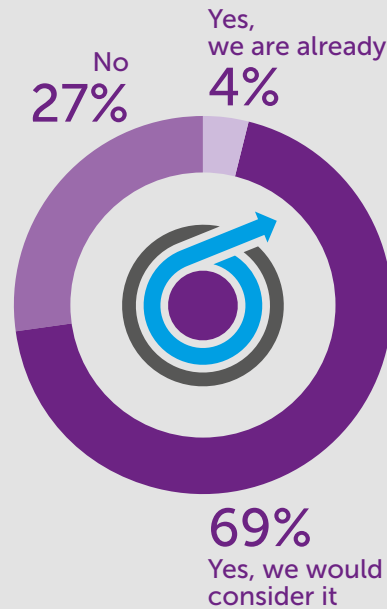
What do you see as the biggest challenges to winning work in nuclear?



How do you expect the general economic climate for manufacturing to change over the next 12 months?



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



How would you rate the support you received from the F4N team?

What improvements would you like to see to F4N?

"To address actual factory floor issues for each company – practical improvements as well as the more esoteric."

Julian Vance-Daniel, Vessco Engineering

"A greater degree of flexibility, particularly in terms of manufacturing technology. Not all industries are state-of-the-art high tech."

Yorkshire SME

"Increased acknowledgement of the scheme and what the F4N status means in the supply chain by the nuclear industry."

Welsh SME

"A section looking at the company and signposting where in the nuclear industry the company could gain work."

Jason Aldridge, Arrowsmith Engineering

"Introductions to relevant companies and contacts."

North-West SME

"Better engagement of F4N-approved businesses with the nuclear industry. There are signs that this is happening now."

Roger Kimber, Strata Technology

Final comments

"We cannot fault the support and enthusiasm from all the members of the F4N programme in the last couple of years of working together."

Lisa Randall, Diffusion Alloys

"F4N is in itself a great programme – if it can gain greater international acceptance that would be good, and any links to the new international standard (ISO 19443) will be welcomed."

Clive Odell, Turnell and Odell

"I have always been a big advocate of the F4N programme and believe that the support provided to improve businesses is fantastic. However, the nuclear sector is a difficult market to penetrate. The government wants more SMEs to work in the nuclear sector, but does the sector actually want them? Are the existing large players able and willing to utilise these new entries, or are the perceived risks simply far too great?"

Roger Kimber, Strata Technology

"The journey never ends, and we have only become a much better company due to F4N and our commitment to continually improve."

Tanya Brennan, Polycast



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

 0114 222 4993

 f4n@namrc.co.uk