

FIT FOR NUCLEAR (F4N) IMPACT SURVEY

**FEBRUARY
2016**



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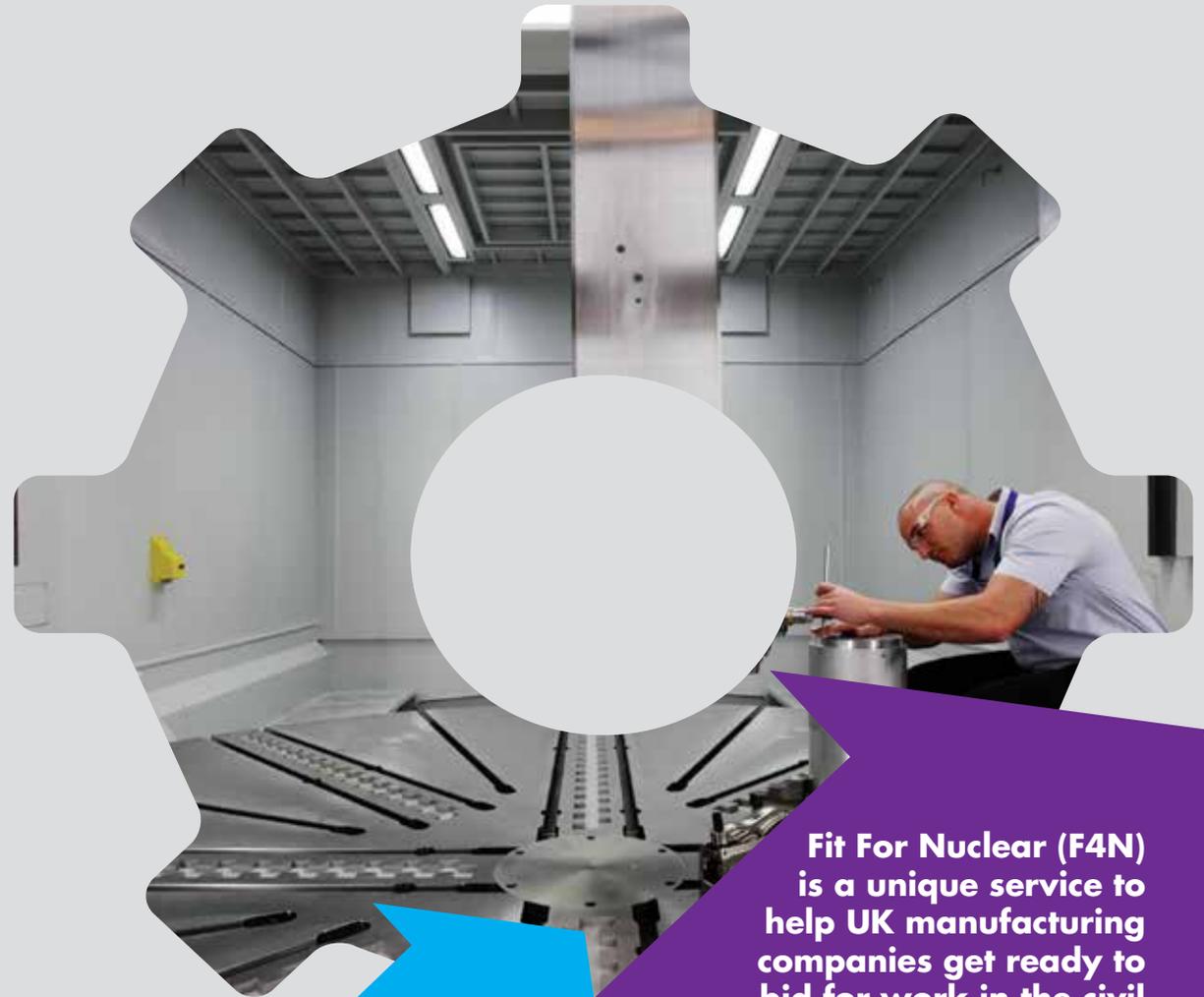
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Fit For Nuclear (F4N) is a unique service to help UK manufacturing companies get ready to bid for work in the civil nuclear supply chain.



INTRODUCTION

Welcome to the Fit For Nuclear impact survey of companies which have participated in the Nuclear AMRC's flagship supplier development programme.

More than 130 companies have responded (53%), and it's very encouraging to read the overwhelmingly positive comments from companies at all stages of their F4N journey. Seventy per cent say they have increased confidence in entering the nuclear market, and half say they already have a better understanding of buyer requirements. As one respondent succinctly put it: "It has helped to remove the fear of the nuclear industry."

Fit For Nuclear (F4N) was developed five years ago by the Nuclear AMRC and industry partners to help manufacturers prepare to bid for work in the civil nuclear supply chain. With the enhanced and expanded programme launched in late 2014 and delivered in partnership with the Business Growth Service, we've been able to reach even more companies across the country, and provide even more targeted support.

Over the past year, with support from the Regional Growth Fund, we have offered match funding worth an average of £10,000 to help companies put business and manufacturing improvement projects into action. Over 110 projects have been funded. Participating companies have reported that the funding will help create £48.6 million of added value in their businesses and over 554 jobs.

We fully appreciate that F4N is a demanding journey for any company,

particularly for smaller businesses with limited resources for any initiative that doesn't immediately boost the bottom line. F4N requires leadership, commitment and drive from the senior management team, and can affect every aspect of a business. For businesses with the drive and focus to see it through, it can deliver demonstrable results.

The response from this survey shows that UK manufacturers are certainly keen to get involved with the nuclear sector, have the capabilities to compete, and are prepared to take the steps necessary to meet the industry's justifiably stringent quality requirements – but many are still crying out for focused support and guidance to help them better understand the specific opportunities and requirements of the market.

The Nuclear AMRC's mission is to help UK manufacturers win work in the civil nuclear sector. We do this through manufacturing innovation at our production-scale research factory in South Yorkshire, and through supplier development programmes such as F4N.

It's vital that we continue this work to develop the UK civil nuclear supply chain. These programmes provide focus and improvement planning for participating organisations, and the benefit of this work – as demonstrated in the results of this survey – should not be underestimated.

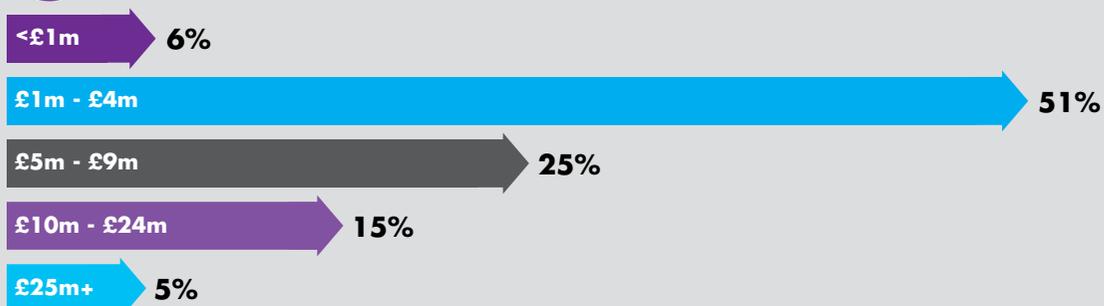
Mike Tynan
CEO, Nuclear AMRC



SURVEY DEMOGRAPHICS

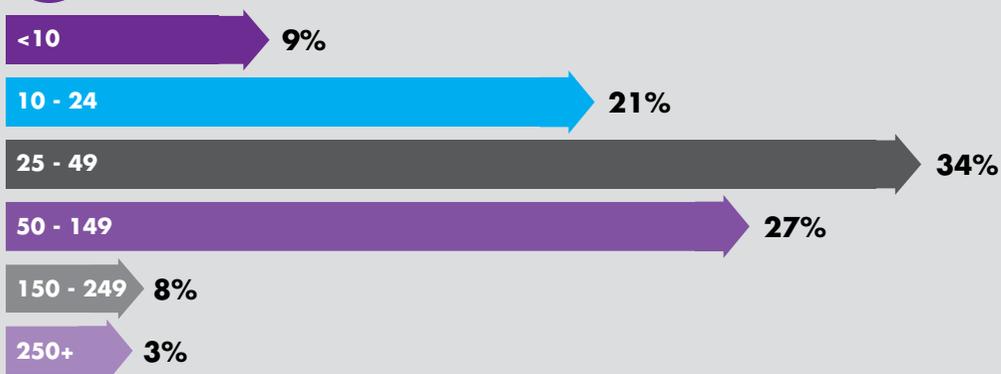
Only companies that have taken part in the Fit For Nuclear programme to 'onsite review' stage by January 2016 have been invited to complete the F4N Impact Survey. 258 companies were invited to complete the survey, generating an overall response rate of 53%.

TURNOVER



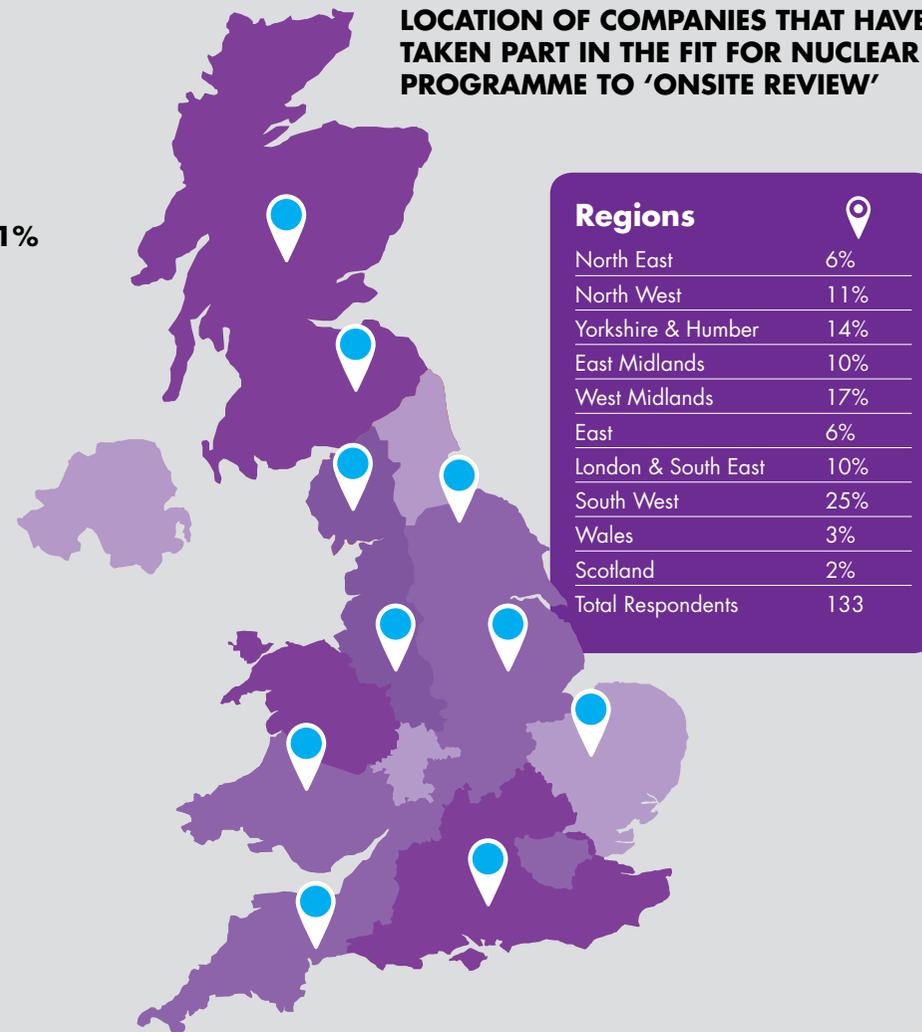
Total Respondents 134

FTE EMPLOYEES



Total Respondents 134

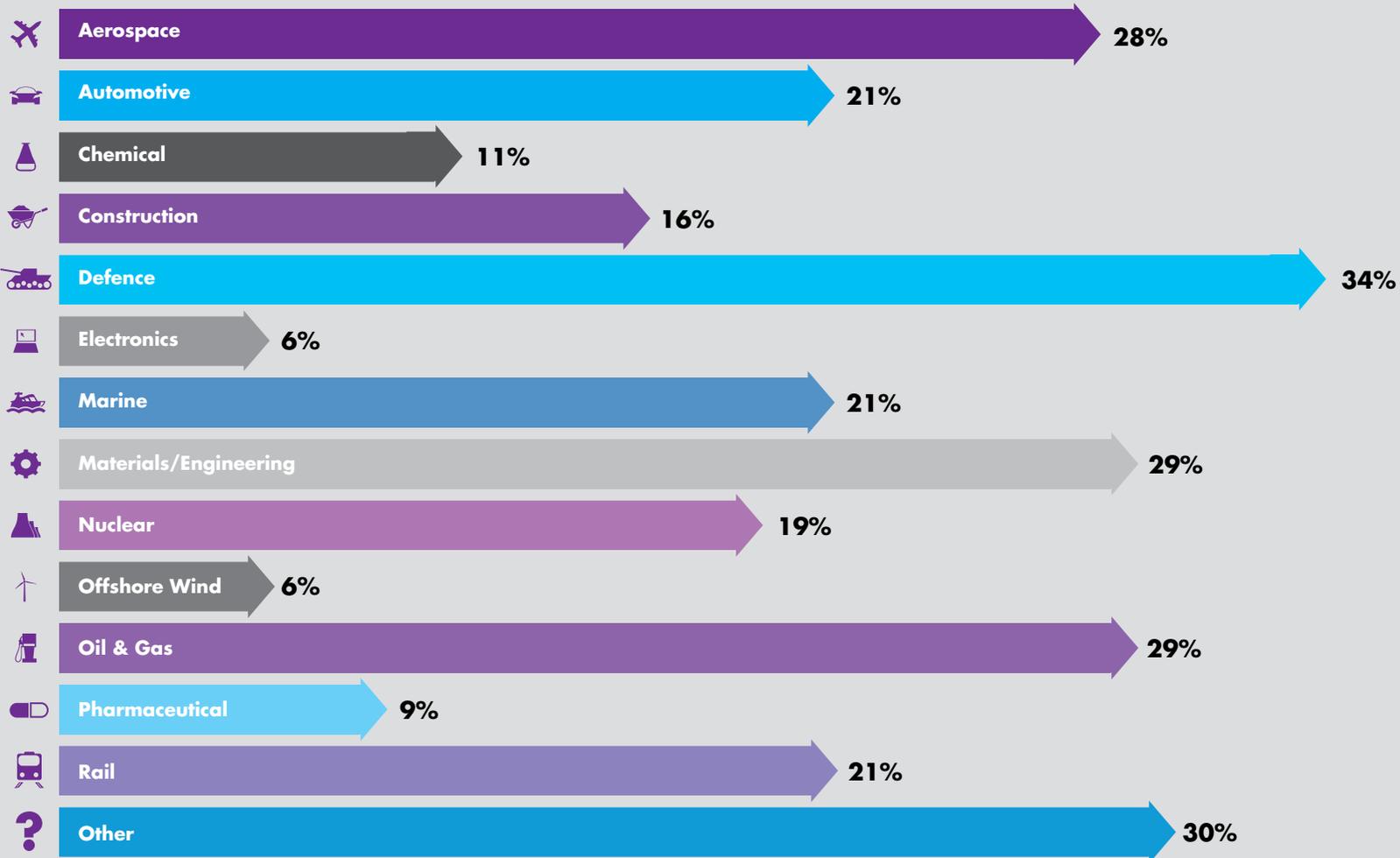
LOCATION OF COMPANIES THAT HAVE TAKEN PART IN THE FIT FOR NUCLEAR PROGRAMME TO 'ONSITE REVIEW'



SECTORS REPRESENTED

Q. Please indicate any markets that account for at least 10% of your sales turnover. Indicate as many as apply.

SECTOR



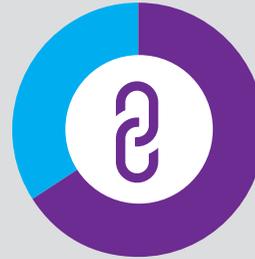
Total respondents
134

THE FIT FOR NUCLEAR JOURNEY



F4N JOURNEY

40% of respondents have been on the F4N journey for six months or more



ACTION PLANS

66% of respondents have developed their action plans and are working towards F4N status



F4N STATUS

16% of respondents are already 'Fit For Nuclear'



GRANT FUNDING

57% of respondents have applied for grant funding for a consultancy project (business excellence / R&D)



MISSED FUNDING DEADLINE

44% of those that did not apply for a grant missed out because they were too late to meet the deadline for grant applications

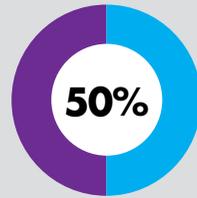
**Total respondents
132**

IMPACT OF FIT FOR NUCLEAR

Q. Please give details of any significant impacts your business has seen as a result of taking part in the F4N programme (please select as many as appropriate).



Increased Confidence
70% of respondents feel they have greater confidence in entering the nuclear market



Industry Buyers
50% of respondents feel they have a better understanding of the requirements of industry buyers

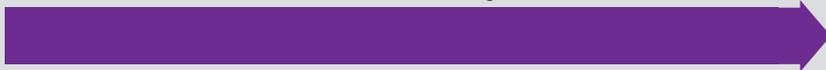


Training
40% of respondents say their staff have engaged in industry-relevant training

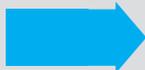


Too Early
12% stated in comments that they are too early in the process to identify any significant impacts

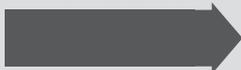
70% Increased confidence in entering the market



7% Nuclear tender/s have been submitted



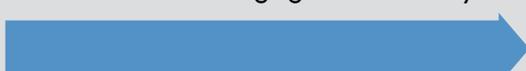
19% New accreditation/s achieved



5% New orders secured



40% Staff have engaged in industry-relevant training



361% Marked improvement in quality/health & safety standards



32% Marked improvement in business culture



50% Better understanding of the requirements of industry buyers



16% Introduced to new supply chain connections (buyers or suppliers)



IMPACT OF FIT FOR NUCLEAR

Q. What have you valued most in taking part in the Fit For Nuclear programme?

"A full review of the company processes and procedures and the prospect of moving into a new avenue of work for the future."

Fred Hosken, R & M Clarkson

"The upskilling of the whole team to a level whereby we feel ready to take on nuclear work."

Anthony Downes, CAM Machine Components Ltd

"Leadership & strategy development, the assessment has shown us where we fail in this area and will be of great benefit to us in the future. Improvements are already taking place, and this is exactly what our company needed, valuable lessons are being learned."

Chris Steele, WKW Precision Engineering Ltd

"It has been a breath of fresh air not to receive generic responses to our enquiries and note that all the information that we have received has been tailored to our business needs."

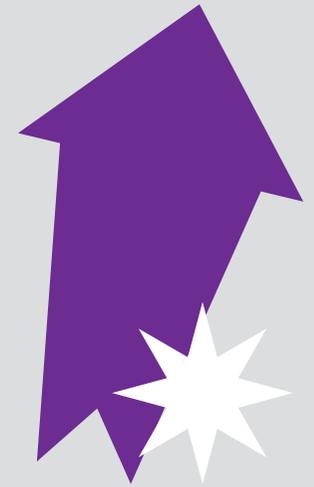
Mark Woodrow, Abacus Fabrications Ltd

"Improved operating procedures and a tightening up on operational control across the whole business, empowering management and staff. It's also tightened up our H&S, ISO and environmental controls."

Craig Naylor, NTR Ltd

"It has helped to remove the fear of the nuclear industry."

Kevin Wheeler, WES Ltd



SERVICE RECEIVED

F4N MAS Assessor

94% of respondents have been pleased with the service they have received from their F4N MAS Assessor

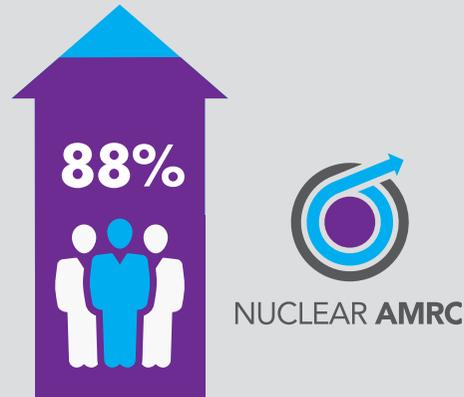


Q. How would you rate the information and support you have received from your MAS F4N Assessor?

- ✓ Excellent
- ✓ Very Good
- ✓ Good
- Reasonable
- Poor

Nuclear AMRC

88% of respondents have been pleased with the service they have received from the Nuclear AMRC.

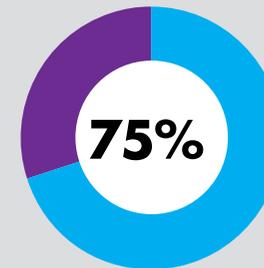


Q. How would you rate the information and support you have received from the Nuclear AMRC?

- ✓ Excellent
- ✓ Very Good
- ✓ Good
- Reasonable
- Poor

Civil Nuclear Sector

63% of respondents would have attempted to explore the civil nuclear sector independently without the support of the F4N programme.



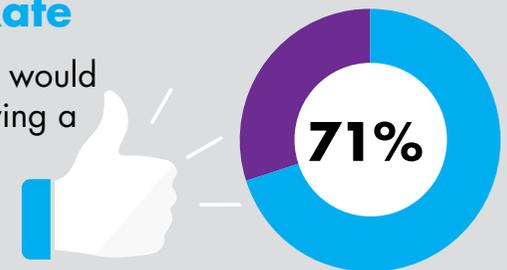
AND

75% of these would have done so within the next 12 months.



Commercial Rate

71% of respondents would have considered paying a commercial rate for F4N support



FUTURE SUPPORT

Q. What future support do you feel is needed from the Nuclear AMRC to help companies progress in the industry?

“To ensure the profile is not lost in what is a long gestation period to business. Keep on keeping companies informed”

Michael Rendell, PD Devices Ltd

“Further support to push each company to the next level and maintain the standards achieved.”

Richard Young, AJT Engineering

“Assistance on integration of SMEs and large players for long term strategies”

Phil Harper, Tribosonics

“Best practice white papers, conferences and webex for continual update learning support and advice”

**Jennifer Hall,
Bristol Fluid System Technologies Ltd**

“By representing and promoting UK companies in what is a global market and by providing support and guidance during both the tendering and manufacturing stages”

Mark Elliott, Manthorpe Engineering Ltd

“Keep on keeping companies informed”



CLIENT COMMENTS

Q. Any further comments...

"A fabulous experience which has moved our business immeasurably beyond any other programme we have undertaken"

Craig Naylor, NTR Ltd

"F4N is not a five minute journey but we hope that the outcome will prove beneficial to us and our workforce and we hope that this in turn will enable us to employ new staff"

Carl Pearce, Onward Fabrications Ltd

"Excellent programme, even if we unable to gain entry into the nuclear sector the benefits to the company of working through the action plan and training will improve the running of the company in all areas."

Chris Steele, WKW Precision Engineering

"There are massive opportunities for many British based companies - but training and awareness of such opportunities is critical. F4N is ideally placed to provide this."

Phil Harmer, Al-Met Ltd

"An excellent programme with huge impact on a business (SME) that is not available anywhere. Direct information and training through MAS that has helped engage staff by using real trainers that have on hand experience."

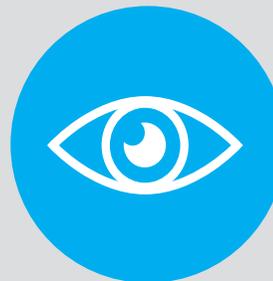
Bob Wilkins, Truturn Precision Engineering (Charfield) Ltd

"Fit For Nuclear is an excellent vehicle for the Industry and the suppliers to utilise to gain advantage for both parties, commercially and technically."

David Bufton, Francis and Lewis International Ltd



"A FABULOUS EXPERIENCE WHICH HAS MOVED OUR BUSINESS IMMEASURABLY BEYOND ANY OTHER PROGRAM WE HAVE UNDERTAKEN"





F4N
Fit For Nuclear

Supported by
**BUSINESS
GROWTH
SERVICE**

Incorporating
mas
manufacturing advisory service


NUCLEAR AMRC

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Fit For Nuclear (F4N) has been developed by the Nuclear AMRC with the support of its nuclear industry partners, and is delivered to businesses in England in partnership with the Manufacturing Advisory Service (MAS), now part of the Business Growth Service.