

NIA UK Nuclear Capability Study 2012

Status Report

NAME REDACTED

Chair, New Build Group

Nuclear Industry Association

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NIA UK Capability Study 2012

- Objectives
 - To determine UK capability in the nuclear industry
 - To inform policy & decision makers, Government, Local Authorities, trade unions, training organisations and industry
- Scope
 - Focussed on new build programme
 - Also looked at existing NPPs, decommissioning, export
- Methodology
 - NPP divided into 140 work packages
 - Team of 15 experts at leading edge of industry assessed
 - **Current UK capability**
 - **Capacity requirements for multi-station programme**
 - **Competitiveness**
 - **Challenges**





UK Nuclear New Build Programme

- 16 GWe UK New Build Programme
 - Creates 10s of Ks of high quality jobs from now into next century
 - Major challenge to all - investors, developers, suppliers, regulators
 - Uncertainties in size and timing of programme causing concerns
- UK Involvement
 - UK companies cannot supply RPV, SGs, Turbo-generators, Ultra large forgings, RC Pumps and currently have no plans to invest in these areas
 - **UK companies could supply almost all other equipment & services**
 - Depends on
 - Capacity
 - Competitiveness





Current status of study

- **Assessments of the 140 line items complete**
- **Capacity requirement estimates complete**
- **Conclusions & recommendations being developed**
 - Will cover what Government, developers, contractors, NIA should do
 - Should form baseline for Government Action Plan & other initiatives
- **Report drafted, being debated/refined by Steering Group**
 - Requires internal review by developer organisations
 - Review by external experts planned
- **Target to complete report by October for publication in November**
 - Dialogue with Government can proceed in parallel





Capability & Capacity

- Assessment of line items
 - Identified strengths, gaps and of ease/difficulty in mitigating
 - **Front End Support** - well resourced, specialists may be attracted overseas
 - **Civil Engineering & Construction** - well resourced, several big players
 - **Plant & Equipment supply** - may need investment, dependent on scope
 - **Plant & Equipment Installation** - well skilled & familiar with UK requirements
 - **Commissioning & Operation** - transition from existing plant & installation
- Capacity requirements
 - Manpower estimated for single, twin reactor units and programme scenarios
 - Manufacturing facilities may need to be increased, dependent on target scope
- Conclusions
 - UK has substantial capability
 - Capacity will clearly need to be increased (no one has resources waiting)
 - Some hurdles to be overcome





UK Competitiveness

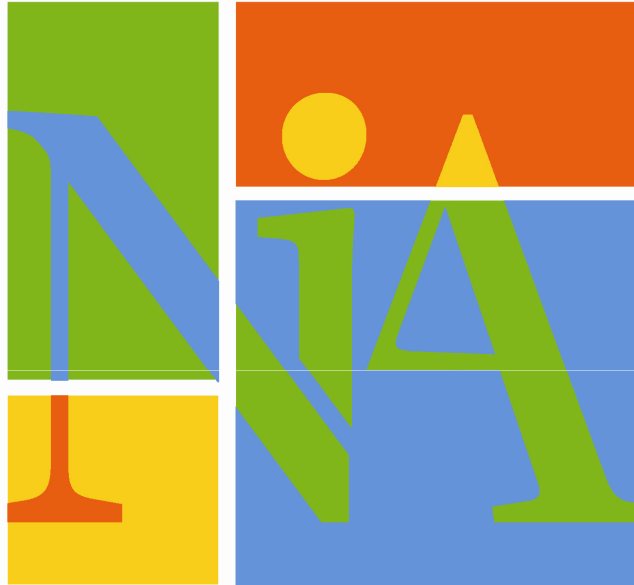
- UK companies competing against companies which have already
 - Designed, supplied and are in process of installing equipment
- UK companies must demonstrate
 - Excellence in performance
 - Equivalent experience
 - Competitive edge to overcome situation
- JVs formed with overseas companies
 - Combines skills & experience
 - Saves costs of work already done
 - Reduces risks
 - But requires sharing work



NiA Challenges

- Short term
 - Increase certainty of programme proceeding to ensure investment
 - Improve UK competitiveness – quality, capacity, productivity
 - Successful delivery of Hinkley C (or other projects may not proceed)
- Medium term
 - Prepare for Horizon, NuGen and Sizewell C projects
 - Horizon & NuGen likely to contract differently than EDF
- Longer term
 - Increase UK scope in domestic and global markets by
 - Effective introduction of world best practice
 - Development improved/new technology
 - Utilise legacy of high quality resources in
 - Maintenance & operation of new stations
 - Global decommissioning market
 - Power station local industries/communities
 - Non-nuclear high technology markets





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