

Evidence in Action – Case Study 002

Building More Than a Nuclear Power Station

How Strategic Supply Chain Intelligence Increased Expected Welsh Content from 10% to 80%

Better Decisions Start with Better Intelligence

Industrial investment is rarely constrained by technology alone.

Success depends upon understanding locations, supply chains, stakeholders, infrastructure and manufacturing capability.

When these elements are brought together effectively, opportunities expand.

When they are not, opportunities are often overlooked.

This philosophy underpins every GSCI project.

Better Decisions Start with Better Intelligence.

The Challenge

As Europe seeks secure, low-carbon sources of electricity, advanced nuclear technologies are becoming an increasingly important part of the future energy mix.

Last Energy, an innovative microreactor developer, was exploring Wales as a potential location for investment, manufacturing and long-term deployment.

The company recognised Wales as an attractive proposition but had only a limited understanding of the manufacturing capability already available across the Welsh supply chain.

Initial estimates suggested that approximately **10% of the project value** could potentially be sourced from Welsh businesses.

The challenge was straightforward.

Was that really the limit of Welsh capability?

Or was there considerably more industrial capacity waiting to be discovered?

Recognising the Opportunity

Mike Gillard first became involved after being introduced to Last Energy through a specialist consultancy already working within the nuclear sector.

Following an initial discussion, he immediately recognised the strategic potential of the project, not only for clean energy generation but also for advanced manufacturing, inward investment and long-term export opportunities.

Rather than simply discussing Wales as an investment location, Mike began connecting the organisations needed to turn that ambition into reality.

He introduced Last Energy to Neath Port Talbot Council to explore potential development opportunities in South Wales and helped establish relationships that enabled constructive discussions around possible locations and future industrial development.

At the same time, he identified another challenge.

Although Last Energy maintained regular contact with Welsh Government representatives in the United States, the company believed those representatives had limited visibility of the progress being made in Wales.

Mike acted as an informal bridge between the project and Welsh Government's international team, helping ensure that conversations taking place overseas reflected the latest developments within Wales.

Sometimes better intelligence is simply making sure the right people have the right information at the right time.

Building the Supply Chain

Identifying manufacturing capability required more than publishing an invitation to industry. It required engaging the right businesses.

Using the Business Wales Events Service, existing Industry Wales networks, direct communications and LinkedIn, Mike developed and delivered a targeted supplier engagement programme designed to reach manufacturers across Wales.

Two major supplier engagement events were organised.

- **Cardiff** – approximately **120 delegates**
- **Swansea** – approximately **104 delegates**

Both events combined presentations with structured one-to-one meetings, allowing potential suppliers to discuss their capabilities directly with the Last Energy team.

The Swansea event proved particularly significant.

Many attendees were established suppliers to Tata Steel who recognised the need to diversify their customer base as the steel industry evolved.

For many companies, the event represented their first opportunity to explore participation within the emerging advanced nuclear sector.

Changing Perceptions Through Evidence

The supplier events were only the beginning.

Following the events, Mike arranged visits to a number of Welsh manufacturers, allowing Last Energy to assess engineering capability first-hand.

The impact was immediate.

Rather than relying on assumptions about the Welsh supply chain, the company experienced the capability for itself.

Advanced fabrication.

Precision engineering.

Complex manufacturing.

Quality systems.

Specialist skills.

Companies with decades of experience serving demanding sectors including steel, aerospace, defence, rail and energy demonstrated that many of the capabilities required for advanced nuclear manufacturing already existed within Wales.

The discussion changed.

Instead of asking:

"How much can Wales supply?"

The conversation became:

"How much should Wales supply?"

As confidence in the Welsh supply chain increased, Last Energy's estimate of potential Welsh content increased dramatically—from approximately **10% to around 80%**.

The difference was not created by building new factories.

It was created by revealing capability that had previously been invisible.

Better Intelligence. Better Decisions.

The project demonstrated that successful inward investment depends upon far more than identifying available land or promoting financial incentives.

It depends upon understanding industrial capability and ensuring that investors can see it for themselves.

Mike's contribution extended well beyond organising events.

He connected organisations.

He improved communication between stakeholders.

He identified manufacturing capability.

He introduced potential suppliers.

Most importantly, he helped replace assumptions with evidence.

The methodology developed throughout the project provides a repeatable model for supporting inward investment, strengthening supply chains and increasing local economic value.

It demonstrates how evidence-based industrial intelligence can influence commercial decisions long before contracts are awarded.

Why It Matters

The transition to electrification is increasing demand for secure, reliable and low-carbon electricity across industry.

At the same time, new manufacturing investment, digital infrastructure and advanced industrial processes require dependable power supplies and resilient supply chains.

Projects such as Last Energy therefore represent more than individual energy developments.

They have the potential to stimulate manufacturing, attract inward investment, strengthen industrial capability and create export opportunities.

Helping investors understand existing capability before they make major decisions can significantly increase the long-term economic benefits delivered to the region.

The Outcome

The project demonstrated how strategic supply chain intelligence can materially influence investment decisions.

By revealing manufacturing capability that had previously been underestimated, the work helped increase expected Welsh supply chain participation from approximately **10% to around 80%**.

More importantly, it showed that Wales already possessed much of the engineering capability required to support an emerging advanced nuclear industry.

Rather than asking what Wales lacked, the project demonstrated the value of understanding what Wales already had.

That is the principle that underpins every GSCI project.

Better Decisions Start with Better Intelligence.

Evidence at a Glance

Client	Last Energy
Sector	Advanced Nuclear Energy
Role	Strategic Supply Chain Development and Stakeholder Engagement
Key Activities	Stakeholder introductions, investor engagement, Welsh Government liaison, supplier engagement, capability promotion
Supplier Events	Cardiff (c.120 attendees), Swansea (c.104 attendees)
Engagement	One-to-one supplier meetings and manufacturing site visits
Measured Impact	Estimated Welsh supply chain participation increased from approximately 10% to around 80%
Strategic Contribution	Demonstrated Welsh manufacturing capability and strengthened the project's understanding of the regional supply chain