Economic Impact Assessment of NDA Sites

A report by PwC UK

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Scope and coverage of the analysis

17

sites are in-scope for this report

**PwC UK (PwC) was commissioned by the Nuclear Decommissioning Authority (NDA) in June 2025 to develop a data-led economic impact assessment of 15 nuclear decommissioning sites,
in addition to two non-nuclear offices. This includes sites operated by Sellafield Limited, Nuclear Waste Services Limited (NWS) and Nuclear Restoration Services Limited (NRS).**

The analysis for this report has been prepared based on a methodology that can be applied across all the 17 NDA sites that are in-scope for this report. The approach used (input-output modelling) is similar to that used in the three previous reports that were commissioned by the NDA in relation to Sellafield and the NWS Low-Level Waste Repository (LLWR)[1], NRS[2] and NRS Dounreay[3].

There are some differences between the three previous reports, in the detail of the approach taken. A single methodology has been developed for this report, but there are inevitably some differences in the specific approach compared to each of the previous individual reports.

Furthermore, there have been some changes to the structure of local government in England since the previous reports were commissioned. The formation of Cumberland local authority in April 2023[4] means that there are differences to the geographical units used for both the main Sellafield site and the LLWR site, which are both based in the new Cumberland unitary authority.

The 17 NDA sites in scope for this analysis do not capture the full extent of the NDA's operations. As a result, the economic contributions associated with the following elements are not reflected in the results presented in this report:

1. The NDA's core (central) operations
2. Nuclear Transport Services (NTS)
3. The Geological Disposal Facility (GDF), which forms part of NWS.

[1] Oxford Economics (2022), The Economic Contribution of the NDA to the West Cumbria Economy, link.
[2] Economic Insight (2022), Updated Economic Impact Assessment of Magnox Sites, link
[3] Mace (2022), Dounreay Socio-Economic Report, link
[4] Cumberland replaced three previous district local authorities: Allerdale, Carlisle and Copeland

The early transition of EDF's three Advanced Gas Cooled Reactor (AGR) sites (Hunterston B, Hinkley Point B and Dungeness B) were discussed as potentially being in scope for this analysis. However, during the development of this report and analysis, appropriate input data required to undertake the economic modelling was not attainable. Therefore, the impact of the three AGR sites have not been included in this report.

PwC has not reviewed the inputs or detailed calculations undertaken for the previous reports. The results are provided in this report for comparison purposes only.

This means that any comparisons to the previous analysis should be considered carefully and results may not always be directly comparable.

Notes:

1. Figures in this report may not always sum to totals due to rounding differences.
2. GVA figures are converted into millions and billions where appropriate in the main text of the report but are typically rounded to the nearest whole number in figures and tables.
3. FTE figures are typically rounded to the nearest 1,000 FTEs in the main text but are typically rounded to the nearest whole number throughout figures and tables.

Executive summary

PwC UK (PwC) was commissioned by the Nuclear Decommissioning Authority (NDA) in June 2025 to develop a data-led economic impact assessment of 15 nuclear decommissioning sites, in addition to two non-nuclear offices.

These sites are operated by subsidiary operating companies of the NDA: Sellafield Limited, Nuclear Waste Services Limited (NWS) and Nuclear Restoration Services Limited (NRS). The purpose is to support the NDA in having a strong understanding of the current economic contribution of nuclear sites to the communities close to them, as this will help to inform the implementation of the NDA Social Impact and Communities Strategy.

The analysis focusses on the impact of the sites at a UK, regional and local level. This includes the economic activity generated by the site (gross value added - GVA) and the employment associated with this (captured as full-time equivalents – FTEs). Consideration is given to direct impacts (from activity by the sites themselves), indirect impacts (through the supply chain) and induced impacts (from the spending of both NDA site and supply chain employees).

The report provides a consistent, comparable estimate of the estate-wide economic contribution of NDA sites based on economic activity in FY25 (31st March 2025), using a single methodology applied across all locations. Care should be taken when comparing to previous results however, as there are differences in methodology so any comparison will be indicative only.

Summary of key results

Total UK GVA contribution:

£4.1bn

Total UK employment contribution:

~56,000

FTEs

Largest single site contribution: Sellafield

£3.1bn

of GVA; ~41,000 FTEs

Biggest regional impact: North West England

£2.1bn

of GVA; ~29,000 FTEs

National impacts

At a UK level, the sites are estimated to contribute £4.1bn in GVA in FY25, equivalent to ~0.2% of UK economic activity. The overall employment impact is estimated at ~56,000 FTEs. A large proportion of this is contributed by the main Sellafield site, with a total GVA contribution of £3.1bn and ~41,000 FTEs. The remaining contributions are made up of contributions from the Dounreay site (£267m and ~4,000 FTEs), the Sellafield Risley office (£156m and ~2,000 FTEs), the Low-Level Waste Repository site (£139m, ~2,000 FTEs) and remaining NRS sites (£530m and ~7,000 FTEs).

After adjusting for inflation, the estimated total national direct GVA contribution of all the NDA sites is £105m higher than the previous analysis. This represents a ~9% increase in real terms, compared to the previous estimates relating to 2021.

Regional impacts

The sites are situated in six of the UK's 12 regions. Figure 1 illustrates the estimated impacts of the NDA sites in their home region. These figures reflect in-region impacts only and exclude economic activity generated outside each site's home region.

The total in-region impacts are estimated at £2.6bn in GVA and ~37,000 FTEs. The remaining £1.5bn and ~19,000 FTEs relate to inter-region activity and are included in the national GVA and employment contribution figures.

Figure 1: Direct, indirect and induced regional GVA and employment, ordered highest to lowest total regional economic contribution, FY25

Source: PwC analysis based on NDA data and statistics from the ONS

Local impacts

The sites under consideration are in 15 different local authorities (there are two sites in South Gloucestershire and two sites in Cumberland). The largest local contribution is from the main Sellafield site, which is estimated to contribute £1.7bn to the Cumberland economy, equivalent to ~21% of local GVA. Other sites contribute between 0.1% and 2.3% of economic activity in their local authority.

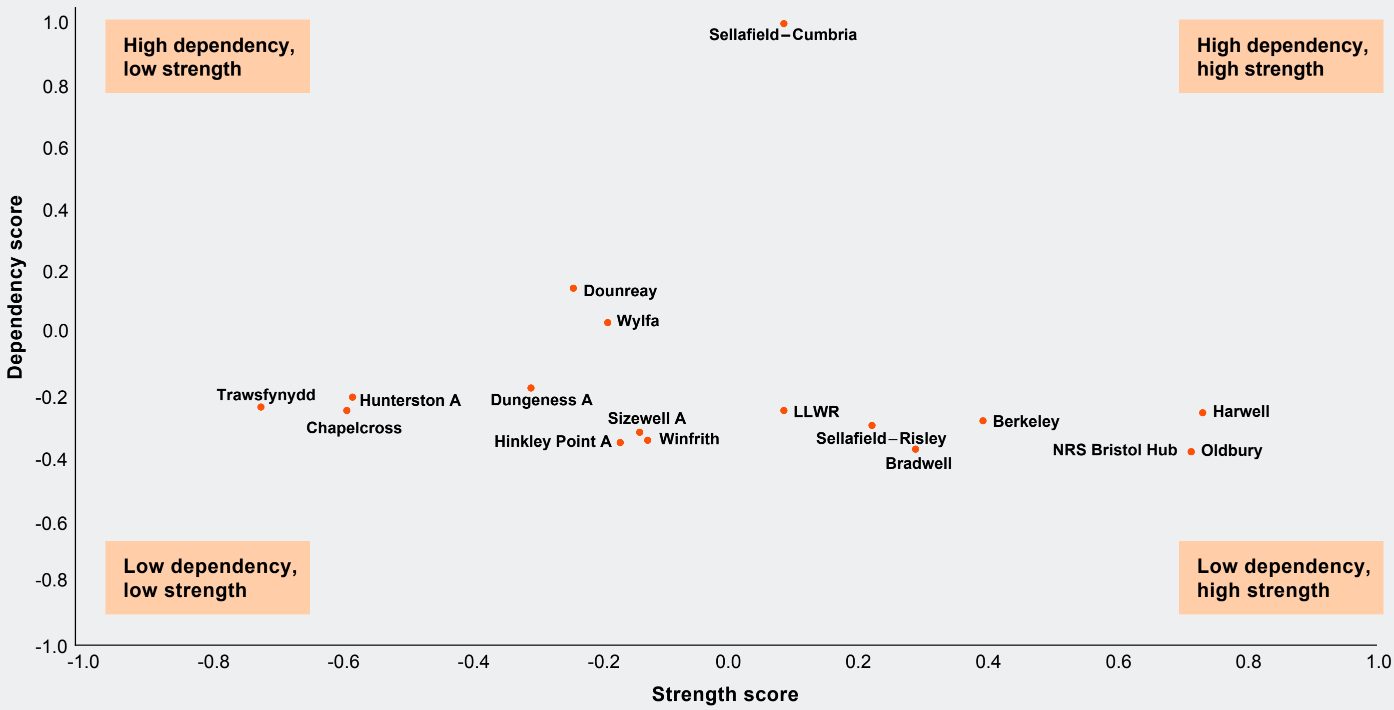
The total impact of NDA sites on their home local authority is estimated at £2.2bn in GVA and ~30,000 FTEs. The remaining £1.9bn and ~25,000 FTEs relate to impacts outside the sites' local area and are included in the national GVA and employment contribution figures.

Importance of sites to their local area

Analysis was conducted to present an indication of the relative importance of each site to the economy of the local authority in which they are situated. Strength has been calculated based on local authority average incomes, the employment rate and GVA per person levels, based on data from the Office for National Statistics (ONS). Dependency has been calculated based on the proportion of local FTEs and GVA that are supported by the respective NDA site.

The overall relative scores are summarised in Appendix E: Strength and dependency scores.

Figure 2: Summary of strength and dependence scores for NDA sites



Source: PwC analysis based on NDA data and statistics from the ONS

Relative economic importance of NDA activity is greatest in Cumberland, Highland and Isle of Anglesey.

The interpretation of the site scores is as follows:

- Areas towards the top left represent sites where the local economy is relatively more dependent on their NDA site and relatively less strong in comparison with other UK local authorities.
- Areas towards the bottom right indicate relatively lower dependency on NDA sites and relatively stronger local economies compared with other UK local authorities.
- The other positions on the chart (towards the bottom left and top right) indicate combinations of higher strength with higher dependency, or lower strength with lower dependency.

The local economies of the following sites fall into the 'high dependence, low strength' quadrant:

- **Sellafield – Cumbria:** Cumberland scores around the UK average on economic strength, showing below average earnings and GVA per person. At the same time, it exhibits relatively high dependency due to Sellafield's contribution to local employment and GVA.
- **Dounreay:** The Highland local authority was scored as having relatively low economic strength due to its low average earnings and employment rate, while showing high dependency due to Dounreay's contribution to local employment and GVA.
- **Wylfa:** The Isle of Anglesey was scored as having relatively low economic strength due to its employment rate and GVA per person. It was scored as having relatively high dependency due to Wylfa's contribution to local employment and GVA.

While all sites make an important contribution to their local area, this analysis indicates that the relative economic importance of NDA activity is greatest in Cumberland (home to Sellafield and LLWR), Highland (NRS Dounreay) and Isle of Anglesey (Wylfa).

Conclusion

Overall, the findings highlight both the scale of the NDA's economic footprint and the degree of reliance on NDA activity in parts of the UK. While all sites make an important contribution, the analysis shows that in a small number of locations, particularly Cumberland, the NDA plays a disproportionately significant role in supporting local employment and economic activity.

The overall findings are:

- The sites are estimated to contribute £4.1bn in GVA, equivalent to ~0.2% of UK economic activity. The overall employment impact is estimated at ~56,000 FTEs.
- The sites are situated in six of the UK's 12 regions. The largest regional contribution is made in the North West of England, followed by Scotland, South West of England, South East of England, Wales and the East of England.
- The sites are situated in 15 local authorities in England, Scotland and Wales. The largest local contribution is from the main Sellafield site, which is estimated to contribute around a fifth of Cumberland's total GVA. Other sites contribute between 0.1% to 2.3% of economic activity in their local authority.

1

Context and approach

1 Context and approach

This section sets out the background and purpose to this report, the methodology undertaken to estimate the economic impacts of each site under the scope of this report and the key assumptions and limitations associated with results of this analysis.

1.1 Background

The Nuclear Decommissioning Authority (NDA) commissioned PwC UK (PwC) in June 2025 to develop a data-led economic impact assessment of the NDA's 15 nuclear decommissioning sites, in addition to two non-nuclear offices - satellite sites that constitute part of the NDA portfolio.

The NDA is an executive non-departmental public body responsible for leading the clean-up and decommissioning work for the UK's civil nuclear programmes. The mission of the NDA is to clean up the UK's earliest nuclear sites, manage the UK's nuclear waste and lead the search for a suitable site for a Geological Disposal Facility (GDF). The NDA is sponsored and funded by the Department for Energy Security and Net Zero (DESNZ), in addition to commercial revenue generated by individual operating companies.

To understand the impact that decommissioning activities may have to the local, regional and national economies of each site, the NDA requires an analysis of the economic contribution of its sites at these three levels.

1.2 Purpose

The purpose of this report is to support the NDA in having a strong understanding of the current economic contribution of nuclear sites to the communities close to them, as this will help to inform the implementation of the NDA Social Impact and Communities Strategy.

The report is intended to provide a single, comparable assessment of the estimated economic contribution of each of the individual nuclear and non-nuclear office sites and respective operating companies, building upon the previously commissioned reports for the following operating companies.

1. **Sellafield and LLWR: Oxford Economics (2022),** The Economic Contribution of the NDA to the West Cumbria Economy, link

2. **Magnox: Economic Insight (2022),** Updated Economic Impact Assessment of Magnox Sites, link

3. **Dounreay: Mace (2022),** Dounreay Socio-Economic Report, link

This report provides an updated assessment of the economic contribution of each NDA site at local, regional and national levels[5], including a breakdown of direct, indirect and induced economic effects. In addition to this, it also provides an insight into the impact NDA sites have in their local communities to help inform strategy and decision-making. The impacts are assessed for the 17 sites outlined in Table 1.

Note that this report provides a single, comparable assessment of the 17 NDA sites. There are slight differences to the approach and methodology undertaken for this report, which will inevitably generate slightly different results.

[5] For NRS Dounreay, there is an additional fourth assessment at the Caithness and North Sutherland level. This is included as Appendix D: The impact of Dounreay in Caithness and North Sutherland.

Table 1: NDA sites in scope of this report, including their operating company, site name and type

#	Operating company/division	NDA site name	Site type
1	Nuclear Restoration Services Limited (NRS)	Berkeley	Nuclear site
2		Bradwell	Nuclear site
3		Chapelcross	Nuclear site
4		Dounreay	Nuclear site
5		Dungeness A	Nuclear site
6		Harwell	Nuclear site
7		Hinkley Point A	Nuclear site
8		Hunterston A	Nuclear site
9		NRS Bristol Hub	Non-Nuclear office
10		Oldbury	Nuclear site
11		Sizewell A	Nuclear site
12		Trawsfynydd	Nuclear site
13		Winfrith	Nuclear site
14		Wylfa	Nuclear site
15	Nuclear Waste Services Limited (NWS)	Low Level Waste Repository (LLWR)	Nuclear site
16	Sellafield Limited (Sellafield)	Sellafield - Cumbria	Nuclear site
17		Sellafield - Risley	Non-Nuclear office

Source: NDA

FY25

Relevant period for analysis

1.3 Methodology and approach

This section sets out a brief overview of the methodological approach undertaken in this analysis to estimate the economic contribution of NDA sites to the local, regional and national economies. The relevant period for this analysis was selected as the financial year ending March 2025 (FY25). All data are based upon business activities within this period.

For a summary of the procurement data used in the analysis, see Appendix A: Procurement expenditure. Further details on the methodology are included in Appendix B: Methodology.

NDA site impacts are reported in terms of gross value added (GVA) and employment, which is measured as the number of full-time equivalents (FTEs). GVA is a monetary measure of the economic activity based on the 'value added' an organisation creates during its production process. It is the difference between the price of its products (outputs) and the price of the inputs it uses in producing these (known as intermediate consumption). GVA is an alternative term for gross domestic product (GDP) at factor cost, which is GDP before taxes and subsidies on products. As such, GVA is the contribution a sector or region makes to GDP.

FTEs measure the relative workload or resources dedicated to a role, converting any part-time hours into the equivalent proportion of a full-time employee. 1.0 FTE is equivalent to one person working full-time hours, while 0.5 FTE is equivalent to one person working exactly half of the full-time working hours.

To measure the performance of each site in GVA and FTE terms, an input-output approach has been used. Input-output modelling analyses the flow of money through an economy, showing the extent to which each industry buys and sells from one another. It accounts for factors such as household spending, government spending, investment and net imports.

Summary of the input-output model used for this report

The input-output model used in this report has been developed to estimate the economic impacts of the NDA on UK regions. The basis of this model is the 2022 input-output analytical tables produced by the ONS for the UK. The derived input-output table describe how products (and primary inputs) are used to produce further products and satisfy final use. This allows for national impacts to be estimated.

To estimate regional and local economic impacts, the input–output model used in this report adjusts UK-level data to reflect the specific regions in which NDA sites operate. It uses a location quotient approach, consistent with methods employed by the ONS and by specialists in input–output modelling. The location adjustment calculations are also based on data from the ONS, using 2022 figures to align with the year of the input–output analytical tables.

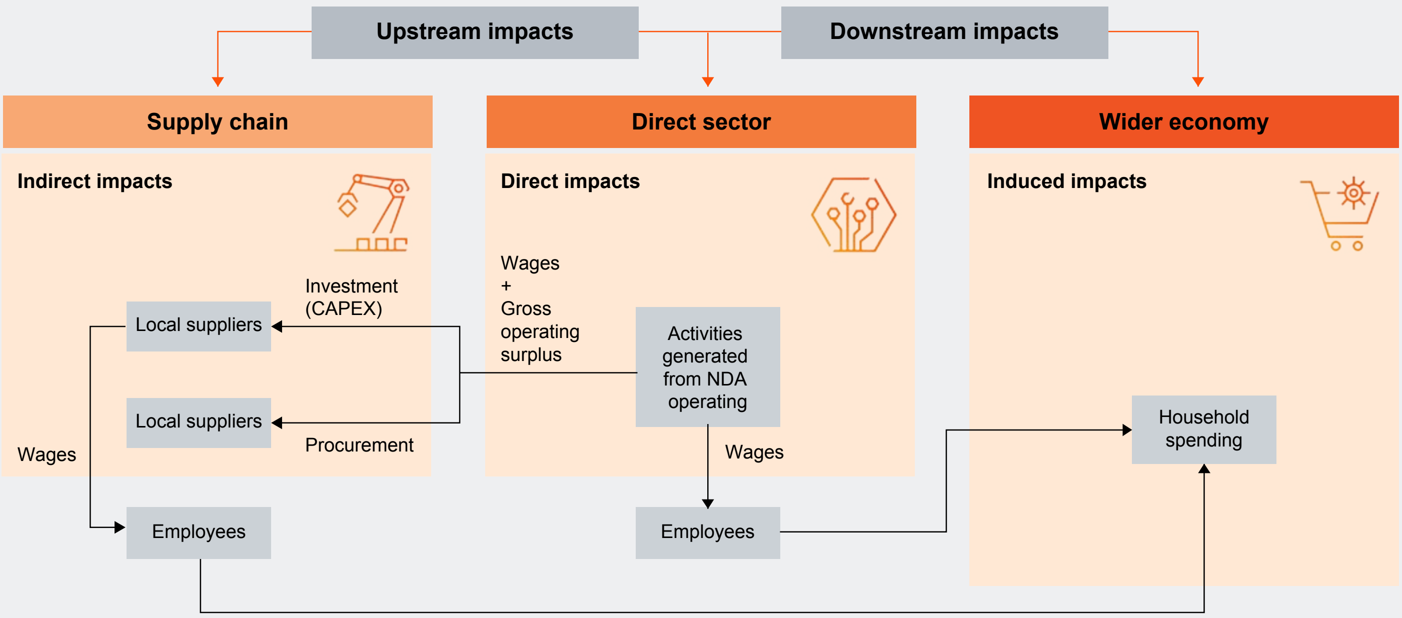
This data includes:

- 2022 regional gross value added (balanced) by industry, for Scotland, Wales, Northern Ireland and the nine statistical regions of England
- 2022 employment count by industry (Standard Industry Classification 2007 division), for Scotland, Wales, Northern Ireland and the nine statistical regions of England

For both GVA and FTE contributions made by the NDA sites, three levels of economic effects are analysed in this report:

- **Direct effects:** the immediate impacts that arise from the operations of the NDA sites and include aspects such as the number of staff employed by NDA and the immediate 'value' created by the activities undertaken at the sites.
- **Indirect effects:** the impacts that arise through the supply chains that support each NDA site. Suppliers buy inputs from their suppliers, and their suppliers buy inputs from others, and so on, creating further economic impacts that impact the economy.
- **Induced effects:** the impacts that arise through employees at the NDA sites and the companies in the supply chains spending their wages in the economy gained from the NDA site. This creates further impacts which impact the wider economy. No specific assumptions around propensity to consume or save has been included in these calculations. This is illustrated graphically in Figure 3.

Figure 3: Illustrative overview of the relationship between direct, indirect and induced economic effects



Source: PwC

NDA and its operating companies each provided PwC with a series of datasets for FY25 to quantify the economic impacts of each NDA site. Data was gathered individually for each NDA site, including:

1. Employee demographic data
2. Detailed procurement and supply-chain data
3. Wage/salary data (anonymised)
4. Other relevant financial information as required

Further to this quantitative analysis, consideration is given to the relative strengths and dependence of the local economies in which each NDA site is based. This uses both the data provided by the NDA and publicly available data for the local authorities in which they are based.

1.4 Assumptions and limitations

In the preparation of this analysis, there are various assumptions and limitations that need to be considered when interpreting the results.

Assumptions

To conduct the analysis, PwC has used the following assumptions:

- **Procurement of goods and services for non-nuclear office sites are assigned to their nuclear site counterparts, where possible, and are otherwise excluded from the analysis:** The two non-nuclear office sites in this analysis (Sellafield – Risley and NRS Bristol Hub) are satellite offices that support the nuclear sites. However, these non-nuclear offices act in support of the decommissioning activities that takes place on the nuclear sites themselves. As a result of this, it was agreed with the NDA that in this analysis, all procurement activities listed against these sites are either assigned to their nuclear site counterparts (where information is available to do so) or excluded from the procurement analysis. Of the total applicable NRS spend for analysis, approximately 32% of the spend is excluded NRS spend.
- **Local authority GVA figures for 2023 are increased in line with UK-wide growth to estimate their 2024 values:** At the time of analysis (November 2025), the ONS were yet to publish their 2024 local authority district GVA figures (Regional gross value added (balanced) by industry: local authorities by ITL1 region). However, equivalent figures at the UK level were published at the time of analysis, so 2023 local authority GVA figures have been uplifted in line with the difference between the 2023 to 2024 figures at the UK level (4.2%).

Limitations

- **Use of supply-use tables for 2022 to estimate Type I and Type II multipliers for spending in FY25:** Supply and use tables from 2022 (and their respective Type I and Type II multipliers) are the latest datasets available from the ONS at the time of the analysis. Type I multipliers measure the direct and indirect economic contributions of the initial change in spending, capturing impacts through in the supply-chain, and its respective linkages (i.e. business-to-business purchases). Type II multipliers extend this by also including induced effects, reflecting additional economic activity generated when employees spend their wages in the wider economy (see Figure 3).

- **Total impacts have not been adjusted for net factors such as displacement:** The analysis has been conducted on a gross basis and does not consider the extent to which similar GVA and employment impacts might have been achieved in the absence of the NDA operations. This means that there are factors that have not been considered that may influence the net impacts NDA sites have on the local, regional and UK economies. No adjustment has been made for deadweight, displacement or substitution effects[6].
- **Reliance on available input data:** Input data have been provided by NDA and the operating companies. PwC has not tested, audited or carried out any testing of these data.
- **Direct GVA is likely to be a lower estimate of the overall value added:** As the NDA sites do not generate operational surplus (e.g. operating profit), direct GVA is based on wages only. This may underestimate the true value provided by the activities.

1.5 Report structure:

The structure of the remainder of this report is as follows:

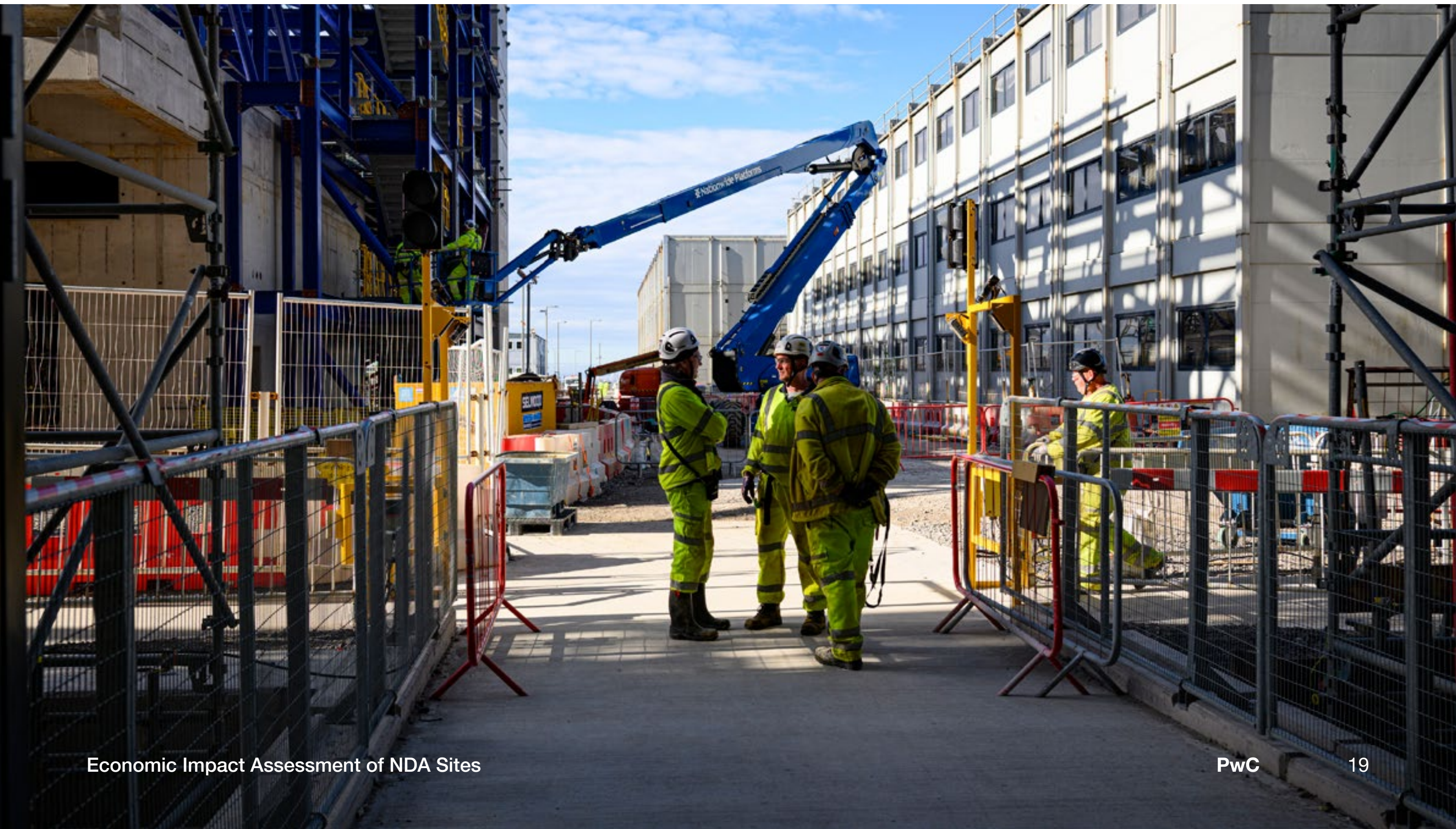
- **Chapter 2** presents the national impacts, outlining the UK contributions by individual NDA sites and as a collective. This includes analysis of employee demographics.
- **Chapter 3** presents the regional impacts, outlining the in-region contributions by each NDA site individually.
- **Chapter 4** presents the local impacts, outlining the local authority contributions by NDA site and includes an analysis of the relative strength of each local authority and the degree of dependence on the NDA site.

The aim of this report is to provide a view of the economic contributions each NDA site makes at a UK, regional and local level. For regional and local contribution assessments, impacts outside the NDA site's home region or local authority are excluded from the calculations. The aim of reporting these figures is to demonstrate the 'in-region' and 'in-local authority' impacts. Figure 4 illustrates the concept of how the contribution are measured at each geographical level:

[6] Adjustments for deadweight, displacement and substitution reflect the extent to which the GVA and employment benefits might have occurred anyway under a counterfactual scenario. For example, some of the jobs and GVA impacts could be created elsewhere in the economy, which would mean the net employment contribution to the UK economy should be lower. Economic Impact Assessment of NDA Sites

Figure 4: Overview of relevant geographical impacts at each level

This means regional impacts are typically lower than national ones, as the analysis only focuses on the impacts relevant to that region. As the NDA does not have a presence in regions such as London, the aggregate impact of regional effects will be lower than that of the total national impact. Similarly, local impacts are always lower than regional ones, as the analysis only focuses on the impacts of that local authority.



2

UK impact

2 UK impact

This section sets out the economic contribution at a UK-level for each NDA site and in aggregate.

Summary of key results at a UK level

Figure 5: Overview of economic impacts for all NDA sites at the UK level

Total aggregate UK GVA contributed to the UK economy: £4.1bn	**Total aggregate employment contributed to the UK economy:** ~56,000 FTEs
Total aggregate tax contributed to public sector budget: £670m	**Relative total aggregate GVA contribution to the UK economy:** 0.2%

2.1 Contribution to national GVA

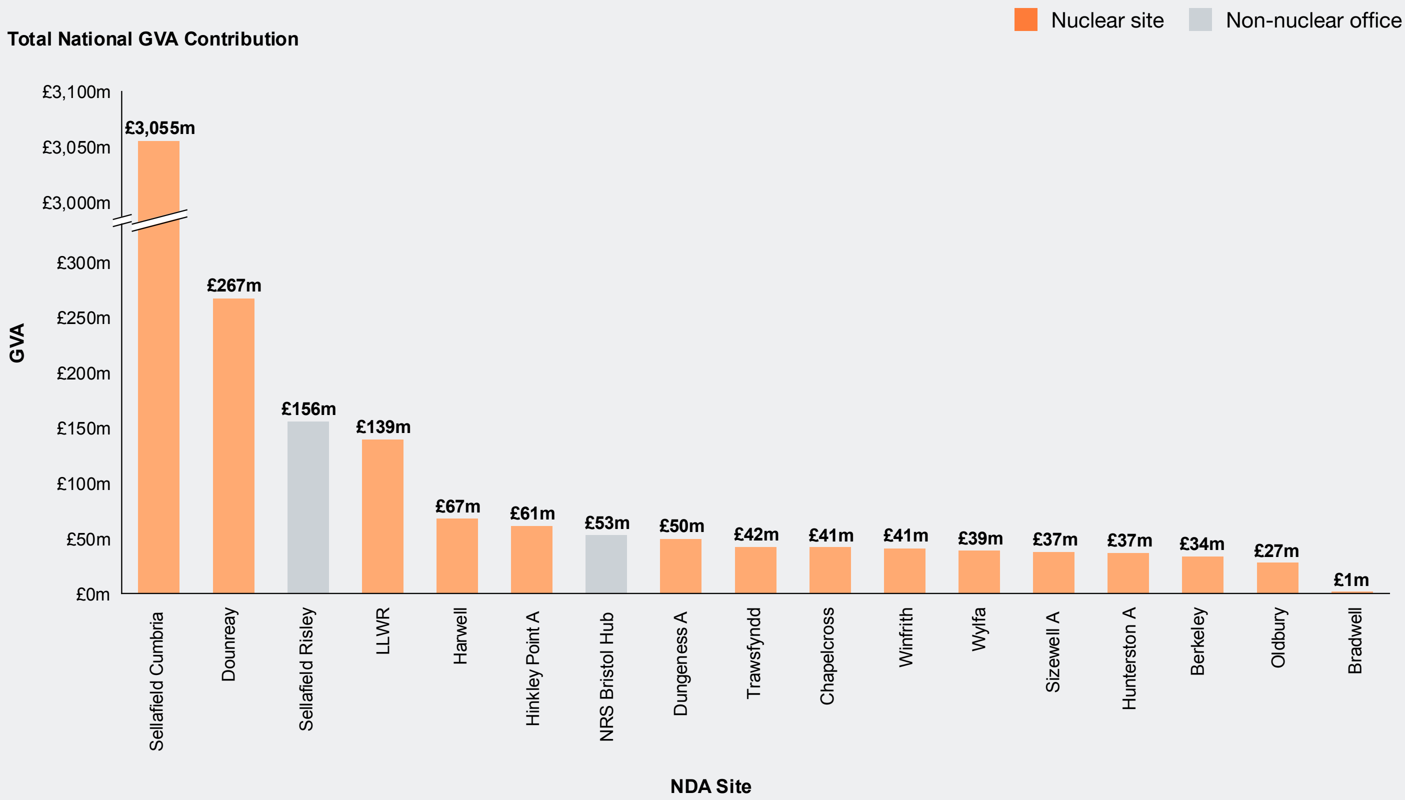
The contribution to UK GVA of the 17 NDA sites reflects the combined economic value associated with three channels of economic impact: direct, indirect and induced effects. These results provide an estimate of the contribution made to the UK economy by each site and by the sites collectively.

GVA by site

Figure 6 presents the estimated total GVA contribution across all NDA sites, expressed in millions of pounds and ordered from highest to lowest total contribution. Based on FY25 activity, the NDA sites in aggregate are estimated to contribute £4.1bn in GVA to the UK economy, equivalent to 0.16% of UK economic activity[7].

[7] Based on an estimate of £2.6tn in GVA for 2024. Source data: ONS (2025) - Regional gross value added (balanced) by industry: all ITL regions and ONS (2025) - Gross Value Added (Average) at basic prices: CP SA £m

Figure 6: Total national GVA contributions by NDA site, ordered from highest to lowest total GVA contribution, FY25



Source: PwC analysis based on NDA data and statistics from the ONS

The majority of the GVA contribution for the NDA is accounted for by the main Sellafield site in Cumbria. This is consistent with the scale and size of the operations in comparison to other sites. Sellafield – Cumbria's estimated total GVA contribution to the UK economy is £3.1bn in FY25, equivalent to 74% of NDA's total contribution to the UK economy. The Sellafield sites (Cumbria and Risley) collectively constitute 0.12% of UK economic activity in 2024[8].

The remaining sites contribute £1.1bn in aggregate GVA to the UK economy:

- Dounreay accounts for the second largest share of all NDA sites (~6%), estimated at £267m.
- The majority of the remaining nuclear NRS sites are estimated to contribute relatively smaller amounts to national GVA, typically ranging from £35m-£65m.
- Smaller nuclear NRS sites such as Oldbury and Berkeley record GVA contributions below £35m.
- Bradwell contributes the lowest amount of GVA for the UK economy, which reflects the fact that the site is in long-term decommissioning management.

[8] Based on an estimate of £2.6bn in GVA for 2024. Source data: ONS (2025) - Regional gross value added (balanced) by industry: all ITL regions and ONS (2025) - Gross Value Added (Average) at basic prices: CP SA £m

The two non-nuclear office sites in this analysis, NRS Bristol Hub and Sellafield – Risley, also contribute through their own employees, which contribute towards direct and induced effects. This highlights that administrative, research, and support functions play a role in NDA's economic impact. These sites do not have a defined indirect effect in this analysis as the supply-chain for non-nuclear office sites has been assumed to be linked to the nuclear sites (see assumptions in Section 1.4).

Direct, indirect and induced GVA

The split of GVA into direct, indirect and induced impacts is outlined in Table 2.

Table 2: Estimated direct, indirect and induced GVA contribution by NDA site, ordered alphabetically, FY25

	GVA (£m)			
Site name	**Direct**	**Indirect**	**Induced**	**Total**
Berkeley	14	10	9	**34**
Bradwell	1	<1	<1	**1**
Chapelcross	18	11	12	**41**
Dounreay	101	91	75	**267**
Dungeness A	20	16	14	**50**
Harwell	25	24	19	**67**
Hinkley Point A	22	22	16	**61**
Hunterston A	17	9	11	**37**
LLWR	45	56	38	**139**
NRS Bristol Hub	35	-	17	**53**
Oldbury	12	8	8	**27**
Sellafield - Risley	105	-	51	**156**
Sellafield - Cumbria	862	1,375	819	**3,055**
Sizewell A	16	10	11	**37**
Trawsfynydd	18	12	12	**42**
Winfrith	17	13	12	**41**
Wylfa	19	8	12	**39**
Total	**1,348**	**1,664**	**1,135**	**4,147**

Source: PwC analysis based on NDA data and statistics from the ONS

£1.7bn

of GVA

Largest contribution from indirect effects

Across the NDA sites collectively, the largest contribution comes from indirect effects (£1.7bn) – which represents the economic value generated within the supply chains of the NDA sites, including the immediate effects of procurement spending and any subsequent second and further-round procurement effects. This accounts for ~40% of the total NDA site contribution to the UK economy[9].

Direct effects – the immediate economic value generated by the NDA, constitutes approximately a third (£1.3bn) of the total economic output of the NDA sites to the UK economy.

The contribution through induced effects is the lowest at £1.1bn. This is the value generated from purchases of goods and services by site employees and those employees within the supply chain. These effects account for ~27% of the total GVA to the UK economy for all NDA sites.

The proportions differ, however, between sites. For most sites, direct effects make up the largest share of contributions to the UK economy. The exceptions are Sellafield – Cumbria, LLWR and Hinkley Point A where there is a more even distribution between direct, indirect and induced impacts. This is because these sites have a slightly higher share of expenditure on procurement relative to wages, which is associated with higher indirect and induced effects within the modelling framework. An overview of the breakdown between different economic effects with the proportionate contribution of each economic channel, by NDA site is outlined in Appendix C: Proportion of site GVA from direct, indirect and induced effects.

[9] Indirect effects do not account for the procurement activities of NRS Bristol Hub as these could not be assigned to specific nuclear sites and have been excluded (see assumptions in section 1).

GVA by sector

Table 3 presents the estimated GVA contribution that the NDA sites make to each sector of the economy, broken down into direct, indirect and induced effects, with totals expressed in millions of pounds. Sectors are based on the ONS Standard Industrial Classification (SIC) and have been grouped as described in Appendix B: Methodology.

Table 3: Total national GVA contribution for all NDA sites, by aggregated sectors, ordered by highest to lowest totals, FY25

	GVA (£m)			
Site name	**Direct**	**Indirect**	**Induced**	**Total**
Other services	1,348	23	125	**1,496**
Financial, law & real estate	-	141	11	**549**
Professional, scientific and technical activities	-	323	38	**359**
Administrative and support	-	274	17	**330**
Construction	-	262	8	**283**
Wholesale & retail trade	-	101	51	**271**
Manufacturing	-	153	819	**226**
Production & utilities	-	162	11	**223**
Government, health and education	-	68	12	**174**
Information and communications	-	116	12	**153**
Transport & distribution	-	41	12	**82**
Total	**1,348**	**1,664**	**1,135**	**4,147**

Source: PwC analysis based on NDA data and statistics from the ONS

The strongest economic contribution comes from the other services sector, contributing a total of £1.5bn to the UK economy. This includes the direct effects arising from the functions delivered by the NDA sites, which were included in this sector.

In relation to indirect and induced effects, the financial, law and real estate sector sees the highest economic contribution of any sector, with GVA of £549m, around £200m more than that of the next sector: professional, scientific and technical activities. Financial, law and real estate has a significant contribution in part due to the real estate sector - individuals typically spend a significant portion of their income on housing costs, which results in induced economic effects making up a large portion of this sector's modelled economic contribution.

Professional, scientific and technical activities make up £359m of total economic value to the UK economy, driven in part by the most substantial supply-chain impact of any sector (£323m). This sector includes amongst others, the procurement of architectural and engineering firms which the NDA sites typically spend a significant proportion of their procurement on. The remainder of the GVA contribution is spread across a range of sectors, notably administrative and support services, construction, and wholesale and retail trade. The NDA sites collectively create economic value from indirect and induced effects across the economy.

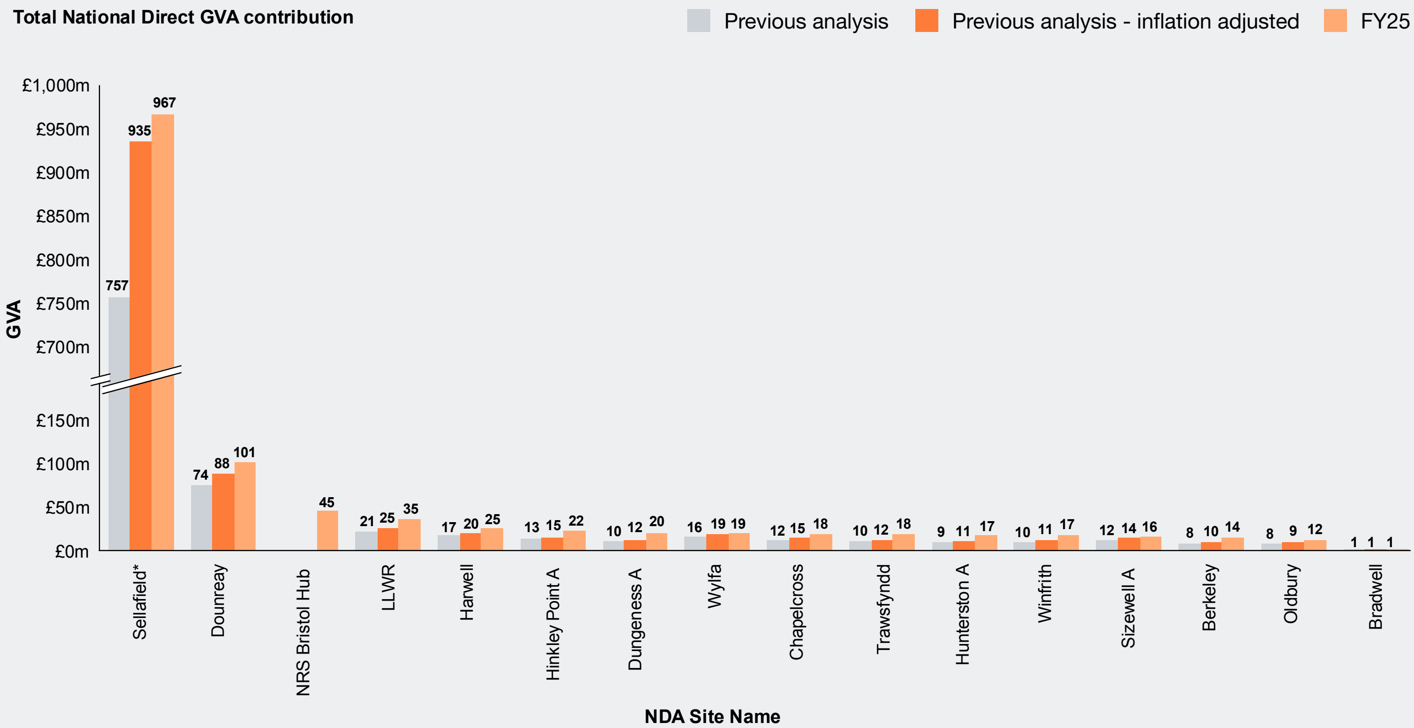
Comparison of GVA to previous analysis

Analysis has been carried out to compare the results with the previous reports, published in 2022. The previous analysis for Sellafield and LLWR was based on figures from FY20 with other analysis for NRS and Dounreay based on figures from FY22.

Due to the methodological and input data differences between three previous reports, it is not possible to provide a like-for-like comparison of total GVA. Comparisons are therefore focussed on direct GVA effects, which can be more accurately compared between the three reports, and with the updated analysis in this report.

Figure 7 compares the total national direct GVA contributions for each NDA site in the previous analyses, compared to the figures in this report.

Figure 7: Total national direct GVA contributions by NDA site, £m, ordered by highest contribution in FY25 to lowest, previous figures in unadjusted and adjusted terms presented



*Both Sellafield - Cumbria and Sellafield - Risley sites are included in this figure.

Source: FY25 figures from PwC analysis based on NDA data and statistics from the ONS. Previous analysis based on published reports from Oxford Economics (2022), Economic Insight (2022) and Mace (2022)

Before adjusting for inflation, the estimated direct GVA contributions are higher across all NDA sites compared with the previous analysis. In aggregate, estimated direct GVA contributions are 33% higher in nominal terms (excluding NRS Bristol Hub, which was not included in the previous analysis).

To facilitate comparison, the previous results have been adjusted for inflation since FY20 (for Sellafield and LLWR) or FY22 (for all NRS sites). On this basis, the latest estimates are 9% higher than the previous analysis[10].

[10] Previous direct GVA figures are adjusted used GDP deflators published by the ONS.

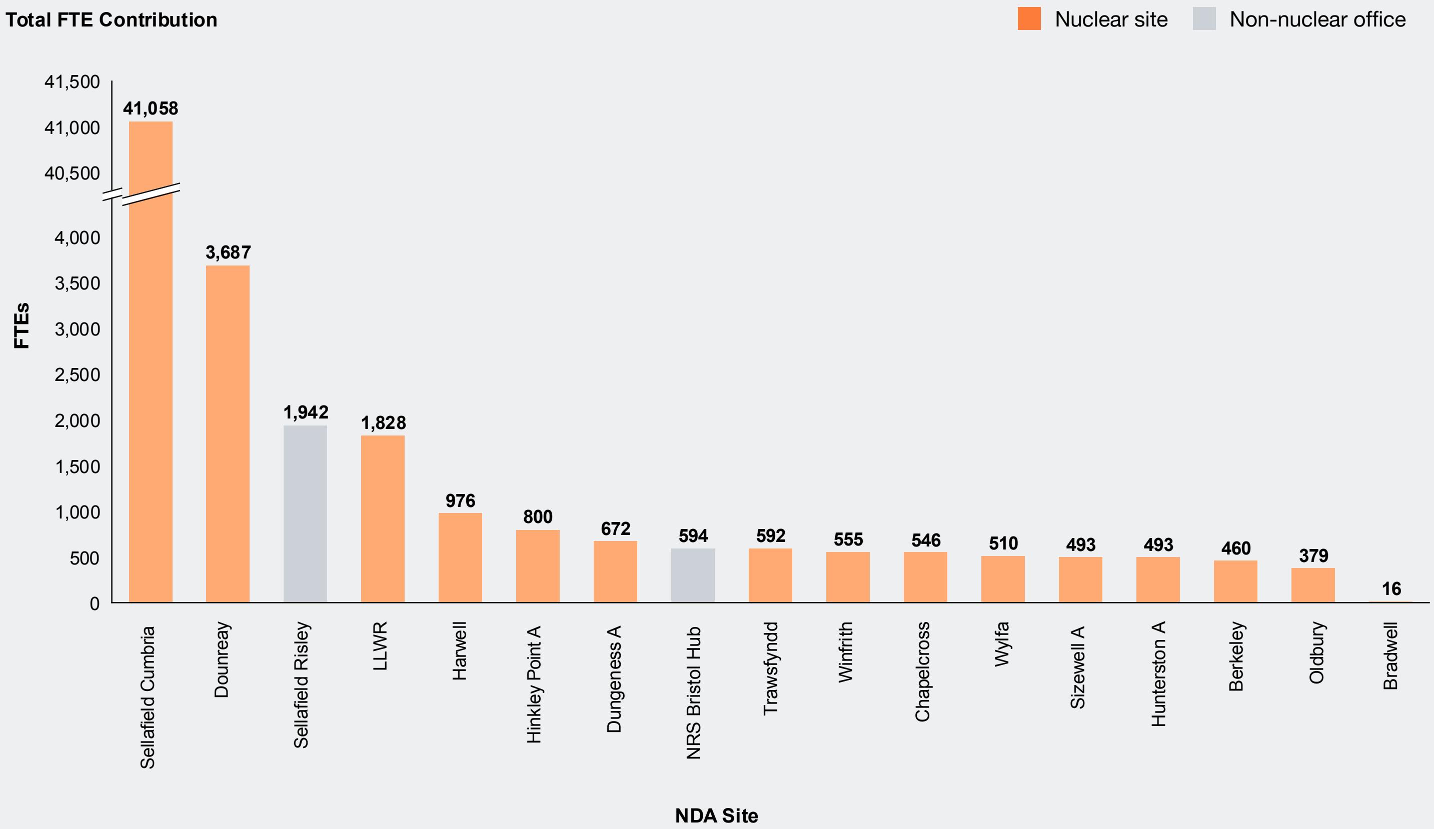
2.2 Contribution to national employment

The total national employment contribution across the 17 NDA sites captures the combined employment impact through direct, indirect, and induced effects.

Employment by site

Figure 8 illustrates the total estimated FTE contribution across NDA sites, differentiated by nuclear sites and non-nuclear offices. The NDA sites in aggregate contribute ~56,000 FTEs to the UK economy. As with GVA contributions, the main Sellafield site in Cumbria makes the largest contribution in employment terms, with an estimated ~41,000 FTEs in FY25, considerably higher than any other site considered in this analysis.

Figure 8: Total national FTE contributions by NDA site, ordered from highest to lowest contribution,FY25



Source: PwC analysis based on NDA data and statistics from the ONS

Dounreay and Sellafield - Risley follow as the next highest contributors of employment, contributing ~4,000 and ~2,000 FTEs respectively, with Sellafield – Risley illustrating the importance of non-nuclear offices in respect of employment impacts from the wider NDA estate portfolio.

Other sites contribute smaller numbers of FTEs, less than ~2,000 on an individual site basis. However, in total these sites contribute ~9,000 FTEs.

Use of FTEs when measuring employment contributions

In line with standard guidance on input-output modelling, this report measures employment contributions in FTE terms. FTEs represents the relative amount of time spent working by employees, adjusting for any individuals that work part-time.

This is different to measuring employment contributions in 'jobs' terms - one part-time employee, who works 60% of the full-time working hours will represent less than 1.0 FTE. But the same individual will represent one job in the organisation.

Therefore, given the NDA hires part-time employees, the analysis presented will be of a lower estimate than when considering contributions from other perspectives, such as jobs, employees or headcount.

Direct, indirect and induced employment

Table 4 presents the estimated employment supported by NDA sites, disaggregated into direct, indirect, and induced effects.

Table 4: Direct, indirect and induced FTE contribution by NDA site, ordered alphabetically, FY25

	Jobs (FTEs)			
Site name	**Direct**	**Indirect**	**Induced**	**Total**
Berkeley	204	138	118	**460**
Bradwell	11	1	4	**16**
Chapelcross	240	159	147	**546**
Dounreay	1,370	1,382	934	**3,687**
Dungeness A	284	213	175	**672**
Harwell	325	411	239	**976**
Hinkley Point A	302	294	204	**800**
Hunterston A	236	123	135	**493**
LLWR	554	803	471	**1,828**
NRS Bristol Hub	378	-	216	**594**
Oldbury	170	111	98	**379**
Sellafield - Risley	1,305	-	637	**1,942**
Sellafield - Cumbria	10,684	20,130	10,243	**41,058**
Sizewell A	218	141	134	**493**
Trawsfynydd	253	183	155	**562**
Winfrith	225	185	145	**555**
Wylfa	256	109	144	**510**
Total	**17,016**	**24,383**	**14,199**	**55,598**

Source: PwC analysis based on NDA data and statistics from the ONS

The main Sellafield site in Cumbria is estimated to support ~11,000 FTEs directly on site, alongside ~20,000 FTEs in its supply chain (indirect) and ~10,000 FTEs arising from spending by those employed by the site and through its supply chain (induced).

The estimate of FTEs created through direct effects is generally the highest contributor out of the three economic effects. Dounreay, Harwell, LLWR and Sellafield – Cumbria are the exceptions to this, where indirect effects are stronger than direct effects. This is driven in part by the higher proportion of spending on procurement relative to wages in these sites.

Employment by sector

Table 5 presents the estimated job impacts that the NDA sites make to broad sectors of the economy, broken down into direct, indirect and induced effects, with totals expressed in FTEs. Sectors are based on the ONS SIC and have been grouped as described in Appendix B: Methodology.

Table 5: Total national FTE contribution for all NDA sites, by aggregated sectors, totals, FY25

	Jobs (FTEs)			
Site name	**Direct**	**Indirect**	**Induced**	**Total**
Other services	17,016	549	3,218	**20,784**
Financial, law & real estate	-	6,178	1,338	**7,516**
Professional, scientific and technical activities	-	6,044	542	**6,586**
Administrative and support	-	1,492	3,387	**4,879**
Construction	-	2,995	238	**3,233**
Wholesale & retail trade	-	1,034	1,981	**3,015**
Manufacturing	-	1,779	882	**2,661**
Production & utilities	-	1,106	987	**2,093**
Government, health and education	-	1,255	480	**1,736**
Information and communications	-	791	772	**1,563**
Transport & distribution	-	1,158	374	**1,532**
Total	**17,016**	**24,383**	**14,199**	**55,598**

Source: PwC analysis based on NDA data and statistics from the ONS

Direct employment is exclusively reported within the other services sector, accounting for ~17,000 FTEs. This reflects the workforce of NDA, which has been included in this sector. Around 4,000 additional FTEs are generated in the other services sector, captured through indirect and induced effects.

In contrast, indirect and induced employment spans a broader range of sectors, highlighting the extended economic impact of the NDA's activities through supply chains and household spending. Indirect employment is estimated at ~24,000 FTEs, while induced employment, or jobs generated by expenditure from employees and suppliers, is estimated at ~14,000 FTEs.

Notably, sectors such as administrative and support services, which supports a total of ~8,000 FTEs, and professional, scientific and technical activities, with ~7,000 FTEs, are significant beneficiaries of induced employment effects in particular. The relatively higher induced figures in wholesale and retail trade suggest household spending linked to NDA employment plays an important role for this sector.

The government, health and education sector also supported around ~3,000 FTEs in total. Sectors including manufacturing, which totals ~3,000 FTEs, transport and distribution (~2,000 FTEs), and financial, law and real estate (~2,000 FTEs) see considerable indirect and induced employment effects, highlighting the breadth of employment effects from NDA's activities.

The total employment supported through direct, indirect and induced effects sums to ~56,000 FTEs, demonstrating the substantial UK economic footprint of the NDA's operations.

Comparison of employment contributions to previous analysis

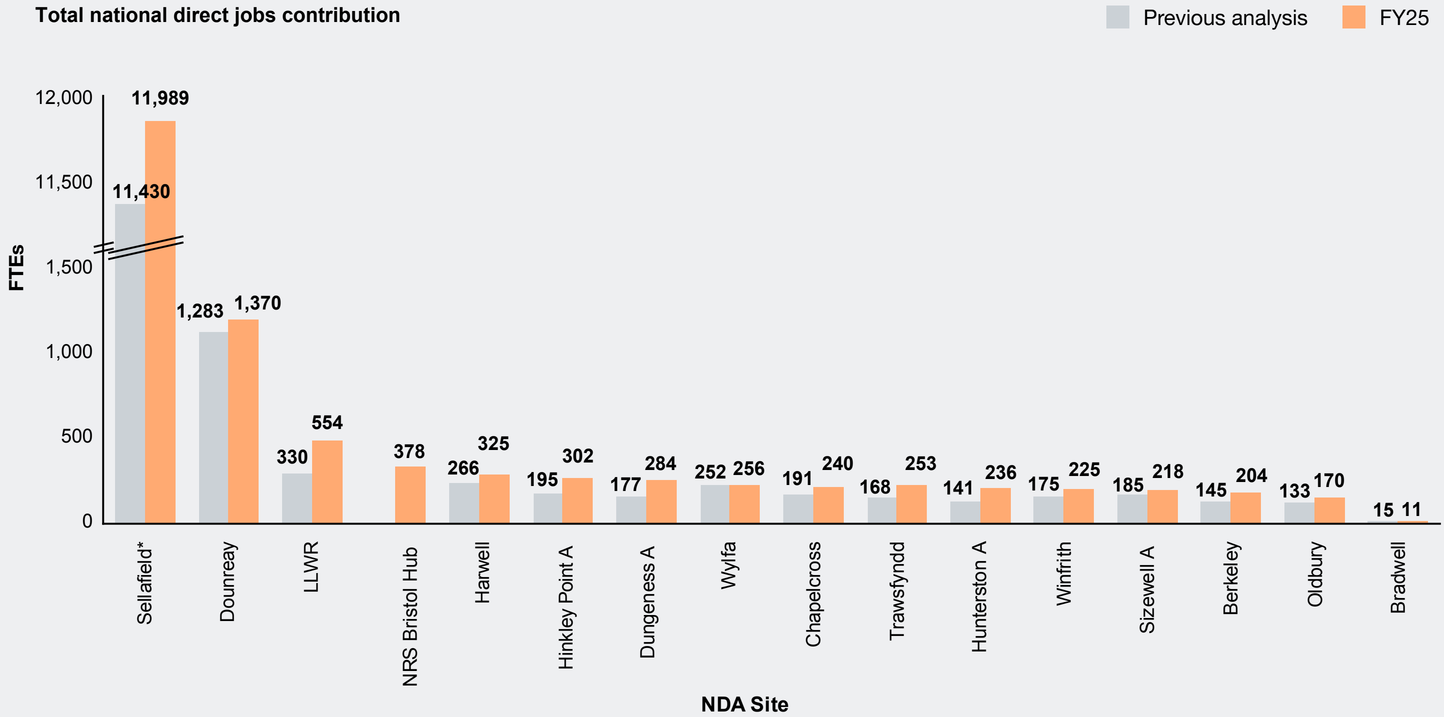
Analysis has been carried out to consider the differences in results since the previous reports were published in 2022 (based upon input data from either FY20 or FY22, depending on site).

As with GVA, the focus for employment comparisons is on direct impacts. This is due to the differences in methodology between the three previous reports, which means that like-for-like comparisons are not possible for total employment.

The updated analysis estimates a higher level of employment for almost all sites, except for Bradwell.

[11] The previous report by Economic Insight may have excluded contingent and agency-supplied workers from employment estimates for NRS sites or captured them outside direct employment effects. In the current analysis, some workers in these categories are recorded on the NRS payroll and have therefore been included in the direct employment figure, as it was not possible to identify and exclude individual employees. As a result, FTE estimates for NRS sites are not directly comparable with those in the previous report and may appear higher because of this difference in treatment.

Figure 9: Total national direct employment contributions by NDA site, ordered by highest to lowest site national contribution in FY25[11]



*Both Sellafield - Cumbria and Sellafield - Risley sites are included in this figure.

Source: FY25 figures from PwC analysis based on NDA data and statistics from the ONS. Previous analysis based on published reports from Oxford Economics (2022), Economic Insight (2022) and Mace (2022)

In aggregate, estimated employment contributions are around ~2,000 FTEs higher than indicated by the previous analysis. NRS Bristol Hub is excluded from this comparison, as it was not included in the previous reports.

Of the NDA sites, the estimated employment at Sellafield has increased by the largest absolute amount of ~500 FTEs (5%). Estimates of direct employment for LLWR and Hunterston A have seen the most significant proportionate increases of ~70%.

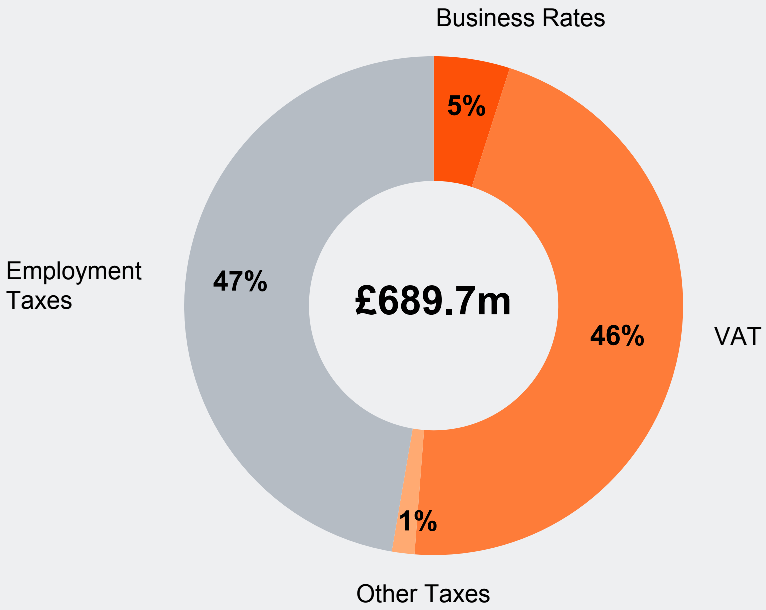
2.3 Taxes

This section presents the tax contributions of the 17 NDA sites across the UK.

Figure 10 outlines the estimated relative tax contributions for the NDA sites in aggregate. The NDA sites are estimated to collectively generate £690m in tax revenues from direct activities, with the majority of this from employment taxes (employer National Insurance contributions and income tax) and value added tax(VAT). This includes taxes from direct activities only, i.e. the tax paid by NDA itself or on behalf of employees. It does not include any additional taxation (e.g. income tax or corporation tax) from the economic activity or employment stimulated in the supply chain.

[11] The previous report by Economic Insight may have excluded contingent and agency-supplied workers from employment estimates for NRS sites or captured them outside direct employment effects. In the current analysis, some workers in these categories are recorded on the NRS payroll and have therefore been included in the direct employment figure, as it was not possible to identify and exclude individual employees. As a result, FTE estimates for NRS sites are not directly comparable with those in the previous report and may appear higher because of this difference in treatment.

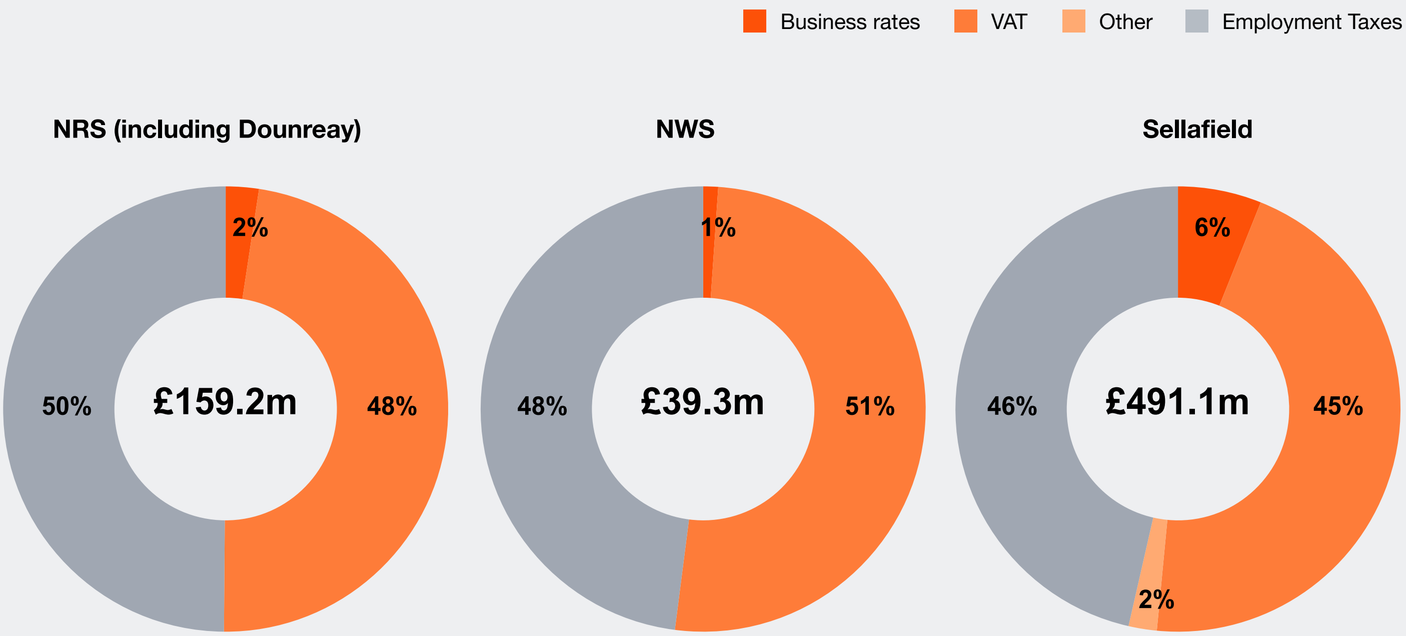
Figure 10: Total contributions across all sites by tax, FY25



Source: PwC analysis based on NDA data

Figure 11 provides an overview of the estimated tax contributions generated by each operating company within the NDA. Employment taxes and VAT collectively make up most of the tax contribution for each operating company. For NWS and NRS, the shares of tax are similar with around half collected through employment taxes and the other half through VAT with relatively smaller amounts from other taxes. Sellafield, on the other hand, has a higher share of tax contributions arising from business rates (6%) and other taxes (2%) with a little less than half from employment tax and VAT.

Figure 11: Total contributions Operating Company, FY25



Source: PwC analysis based on NDA data

3

Regional impacts

3 Regional impacts

This section sets out the economic contribution at a regional level for each NDA site and in aggregate for the regions that are home to the NDA sites.

Summary of key results at a UK level

Figure 12: Overview of economic impacts for all NDA sites at the regional level

Total aggregate GVA contributed to regions where sites are based:

£2.6bn

Total aggregate employment contributed to regions where sites are based:

~37,000
FTEs

Biggest regional impact:
North West England

£2.1bn
of GVA; ~29,000 FTEs

Median age of NDA employee:

35.9 years

3.1 Contribution to regional GVA

The GVA impact of the 17 NDA sites by region captures the economic value generated in each of regions the NDA sites are located in. As with UK impacts, this is defined through the three channels of economic impact: direct, indirect and induced. These results outline the contribution each site makes to their own respective region.

Table 6 outlines the regions each site is located in. For this analysis, impacts generated in other regions outside of the home region each NDA site is located in, has been excluded from the analysis. For example, any economic contributions outside of Scotland for the Chapelcross site, is not included within this analysis.

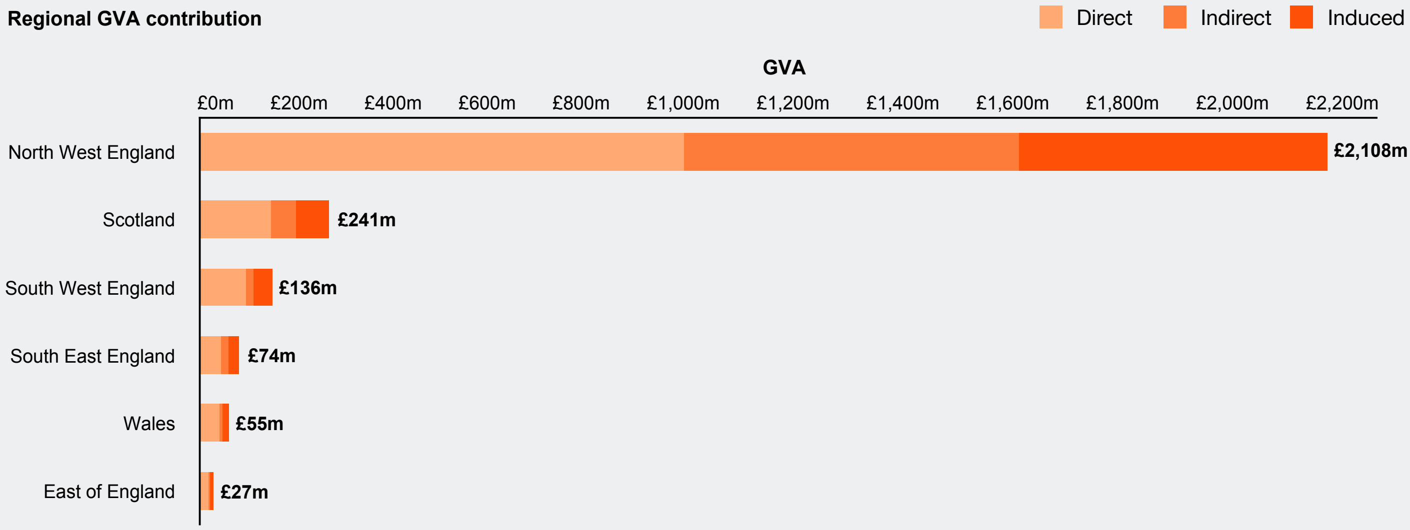
Table 6: Regions allocated to each NDA site, ordered alphabetically by NDA site name

#	NDA site	Region
1	Berkeley	South West England
2	Bradwell	East of England
3	Chapelcross	Scotland
4	Dounreay	Scotland
5	Dungeness A	South East England
6	Harwell	South East England
7	Hinkley Point A	South East England
8	Hunterston A	Scotland
9	LLW Repository	North West England
10	NRS Bristol Hub	South West England
11	Oldbury	South West England
12	Sellafield - Risley	North West England
13	Sellafield - Cumbria	North West England
14	Sizewell A	East of England
15	Trawsfynydd	Wales
16	Winfrith	South West England
17	Wylfa	Wales

GVA contribution by region

Figure 13 outlines the economic contribution of the six regions where NDA sites reside within.

Figure 13: Direct, indirect and induced regional GVA, ordered highest to lowest total regional economic contribution, FY25



Source: PwC analysis based on NDA data and statistics from the ONS

The regional breakdown of GVA contributions from NDA sites suggests that the majority of the estimated GVA is created in North West England, with a total regional GVA impact of £2.1bn. This is driven by the concentration of large sites such as LLWR and both Sellafield sites in the region.

The large impact on North West England (the three NDA sites contribute 0.8% of the 2024 North West England GVA) illustrates the scale of the estimated economic contribution of these sites within the region, not just in terms of direct output but also through associated supply chain and household spending effects.

Scotland has the second highest share of economic activity from the operation of the sites, with £241m of GVA contributed to the Scottish economy, supported by three sites: Chapelcross, Dounreay and Hunterston A. South West England is home to the largest count of sites, (Berkeley, Hinkley Point A, NRS Bristol Hub, Oldbury and Winfrith), resulting in an estimated £136m of GVA impact in the region. The NDA has a smaller presence in South East England, Wales, and the East of England, which benefit from an estimated economic contribution of

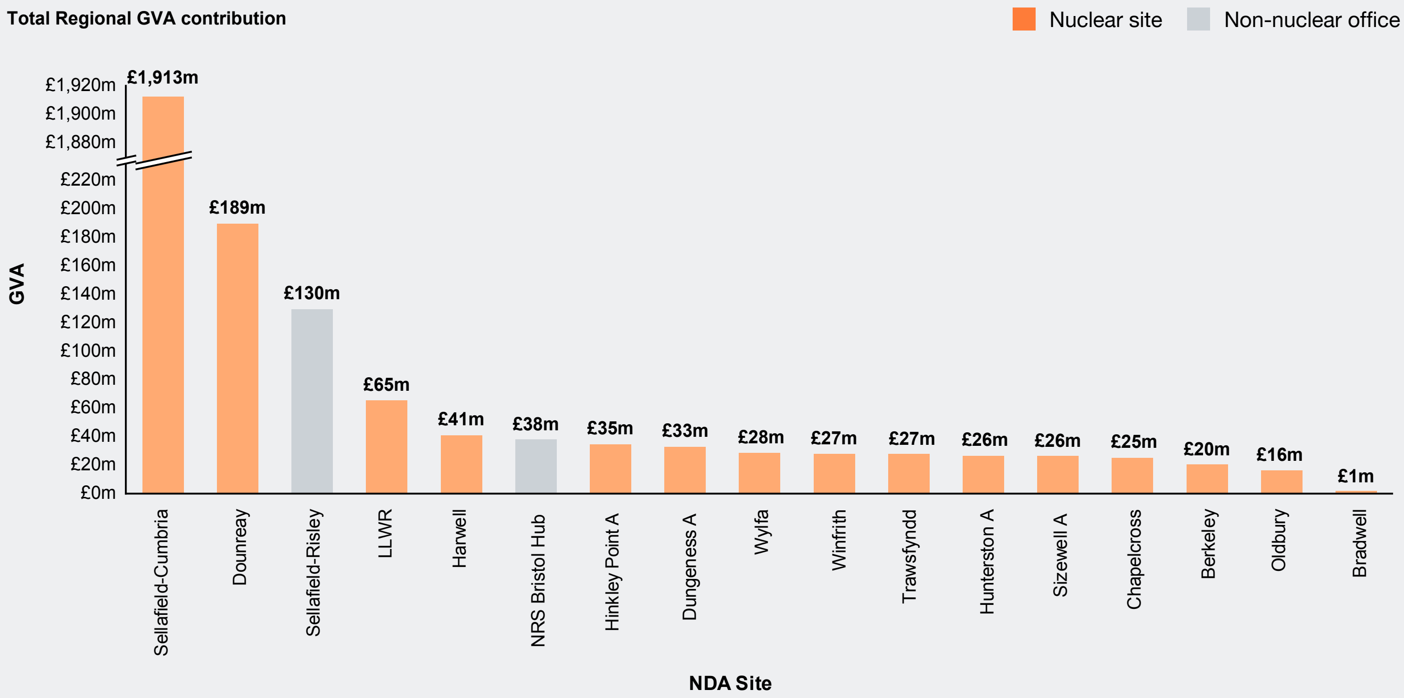
£74m, £55m, and £27m respectively. Therefore, while a number of regions see GVA impacts, this is most concentrated in North West England, Scotland and South West England.

The economic activity created through indirect and induced effects illustrates that a share of economic contribution occurs beyond immediate site operations, through additional activity across a variety of sectors locally and regionally.

Regional GVA contribution by site

Figure 14 presents the total GVA contributions of each individual NDA site in their home region, with the economic value generated between nuclear sites and non-nuclear offices distinguished.

Figure 14: Total regional GVA contributions by NDA site, £m, ordered from highest to lowest total GVA contribution, FY25



Source: PwC analysis based on NDA data and statistics from the ONS

The main Sellafield site in Cumbria is the single largest contributor within the NDA footprint, generating an estimated £1.9bn of GVA in North West England. This accounts for around 91% of the NDA's total economic contribution to the region. For context, North West England's overall GVA in 2024 is estimated at £257bn[12], meaning Sellafield - Cumbria's contribution represents an estimated 0.7% of the region's total economy alone.

[12] Based on data sourced from: ONS (2025) - Regional gross value added (balanced) by industry: all ITL regions and ONS (2025) - Gross Value Added (Average) at basic prices: CP SA £m

Dounreay generates the second highest in-region contribution, generating £189m of GVA to the Scottish economy, equivalent to approximately 0.1% of Scotland's total GVA in 2024. The Sellafield – Risley non-nuclear office site ranks third, contributing £130m to its region, followed by the LLWR site with a contribution of £58m. Both sites contribute less than 0.05% of their respective regional total GVA.

Other NDA sites, including Harwell, Hinkley Point A, and Wylfa each contribute between £20m to £40m to their home regions. While these figures are smaller in scale compared to the leading sites, they nonetheless represent meaningful economic contributions locally. This geographic distribution of GVA contributions highlights the breadth of the NDA's economic impact.

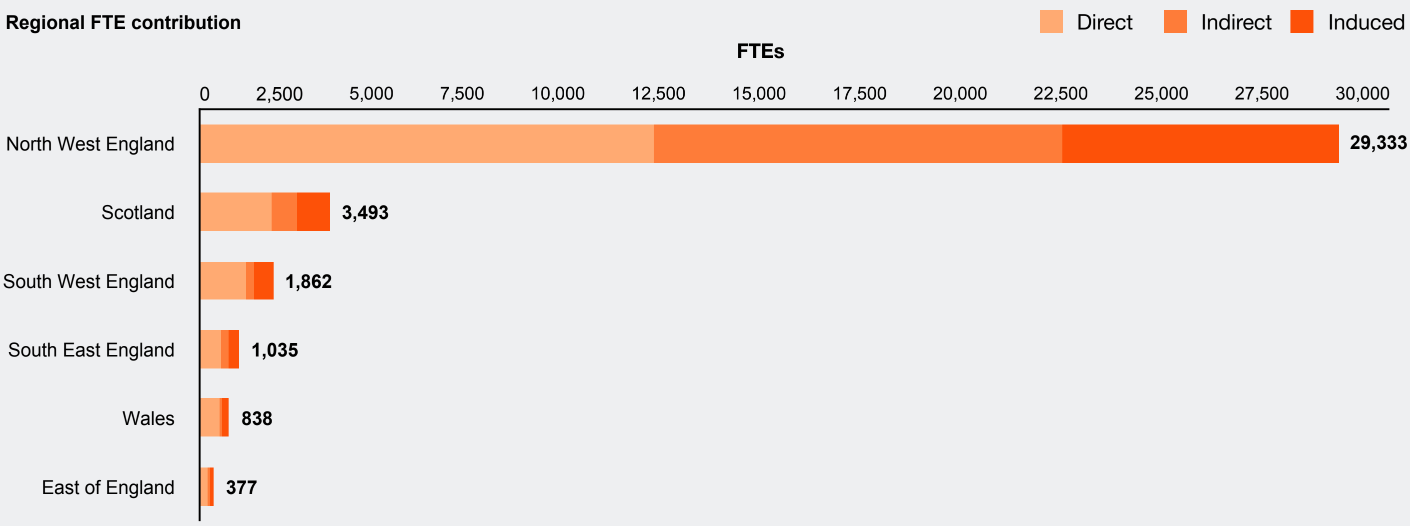
3.2 Contribution to regional employment

As with GVA impacts, the dispersed nature of the NDA estate means that employment is spread across the regions of the UK.

Regional employment by region

Figure 15 illustrates the in-region employment contribution by select regions where NDA sites are located. Figures include direct, indirect and induced employment.

Figure 15: Total regional job contributions by region, ordered from highest to lowest total job contribution,FY25



Source: PwC analysis based on NDA data and statistics from the ONS

North West England accounts for the majority of NDA-supported employment, totalling ~29,000 FTEs. This includes ~12,000 direct FTEs linked to on-site activities, alongside significant indirect employment (~11,000 FTEs) generated through supply chain linkages, and induced employment (~7,000 FTEs) arising from consumption by employees.

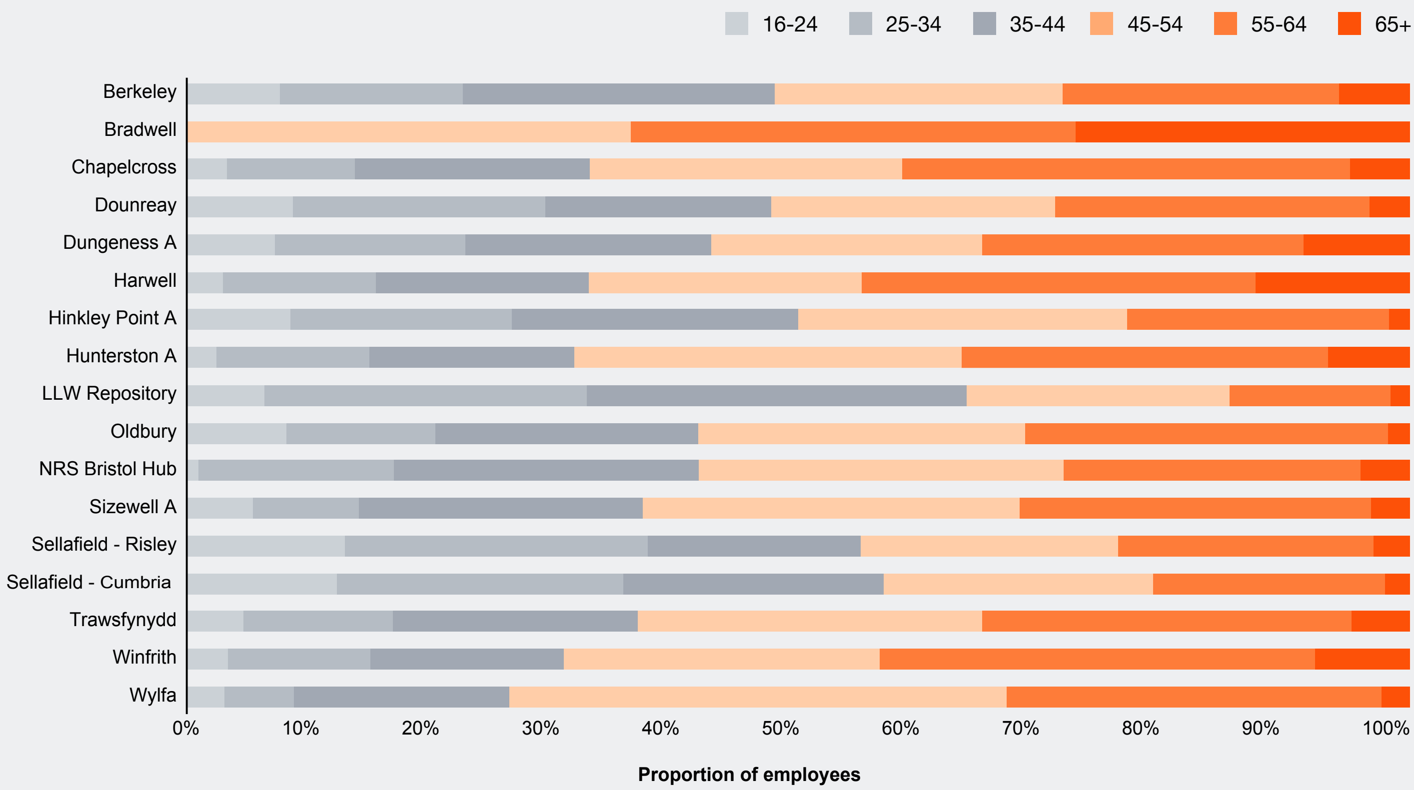
Scotland and South West England follow, with ~3,000 and ~2,000 FTEs respectively. Here, the direct employment component remains the principal driver of economic impact, reflecting the operational scale of NDA sites in these areas. Indirect and induced impacts, while smaller in absolute terms, play an important role in sustaining regional economic activity, particularly in sectors linked to manufacturing, logistics, and local services.

Other regions including South East England, Wales, and East of England exhibit lower overall levels of NDA-related employment, largely driven by direct effects.

3.3 Employee age comparison

Figure 16 illustrates the age distribution of employees across various NDA sites.

Figure 16: Comparison of employee age demographic profiles, by NDA site, ordered alphabetically, by select age groups, FY25



Source: PwC analysis based on NDA data

35.9 years

Median age of NDA employees

The chart highlights clear differences in workforce age profiles across the estate, with some sites displaying more balanced age mixes than others.

Key observations include:

- Sites with relatively strong representation of younger and mid-career employees, such as LLWR, both Sellafield sites and Hinkley Point A. These sites display a more balanced age mix, with a sizeable share of employees aged under 45.
- Sites with a mixed age profile, with some younger staff alongside substantial mid-career and experienced cohorts. These locations have a broad spread across age groups, indicating potential for continuity in the workforce but also a significant concentration of experienced employees.
- Sites with a pronounced concentration of employees in the oldest age bands, including Bradwell, Harwell, Winfrith and Chapelcross. These sites have relatively limited representation from younger and mid-career employees, indicating a higher risk of experience loss as a substantial proportion of the workforce approaches retirement.
- The median age of NDA employees is 35.9 years, which is largely driven by the relatively younger workforce at the Sellafield sites, and at LLW Repository.

4

Local impacts

4 Local impacts

This section sets out the economic contribution at a local authority level for each NDA site that are home to the NDA sites only.

Summary of key results at a local authority level

Figure 17: Overview of economic impacts for all NDA sites at the regional level

Total aggregate GVA contributed to local economies:

£2.2bn

Total aggregate employment contributed to local economies:

~30,000 FTEs

Average salary of NDA sites:

£60,800

Average difference to local authority salaries:

38% higher

4.1 Contribution to local authority GVA

The local GVA impact of the 17 NDA sites captures the economic value generated by each NDA site in the local authority in which they are based.

Table 7 outlines the local authority district that each site is located in. This is based on 'lower tier' authorities (e.g. district councils) or single tier areas (unitary authorities in England, Welsh principal areas and council areas in Scotland). Given the nature of the Dounreay site, further analysis has been carried out at a smaller geographic level (Caithness and North Sutherland). This is included Appendix D: The impact of Dounreay in Caithness and North Sutherland.

Table 7: Local authority districts for the 17 NDA sites, ordered alphabetically by site name

#	NDA site	Local authority district
1	Berkeley	Stroud
2	Bradwell	Maldon
3	Chapelcross	Dumfries and Galloway
4	Dounreay	Highland
5	Dungeness A	Folkestone and Hythe
6	Harwell	Vale of White Horse
7	Hinkley Point A	Somerset
8	Hunterston A	North Ayrshire
9	LLWR	Cumberland
10	NRS Bristol Hub	South Gloucestershire
11	Oldbury	South Gloucestershire
12	Sellafield - Risley	Warrington
13	Sellafield - Cumbria	Cumberland
14	Sizewell A	East Suffolk
15	Trawsfynydd	Gwynedd
16	Winfrith	Dorset
17	Wylfa	Isle of Anglesey

Local Government Reorganisation

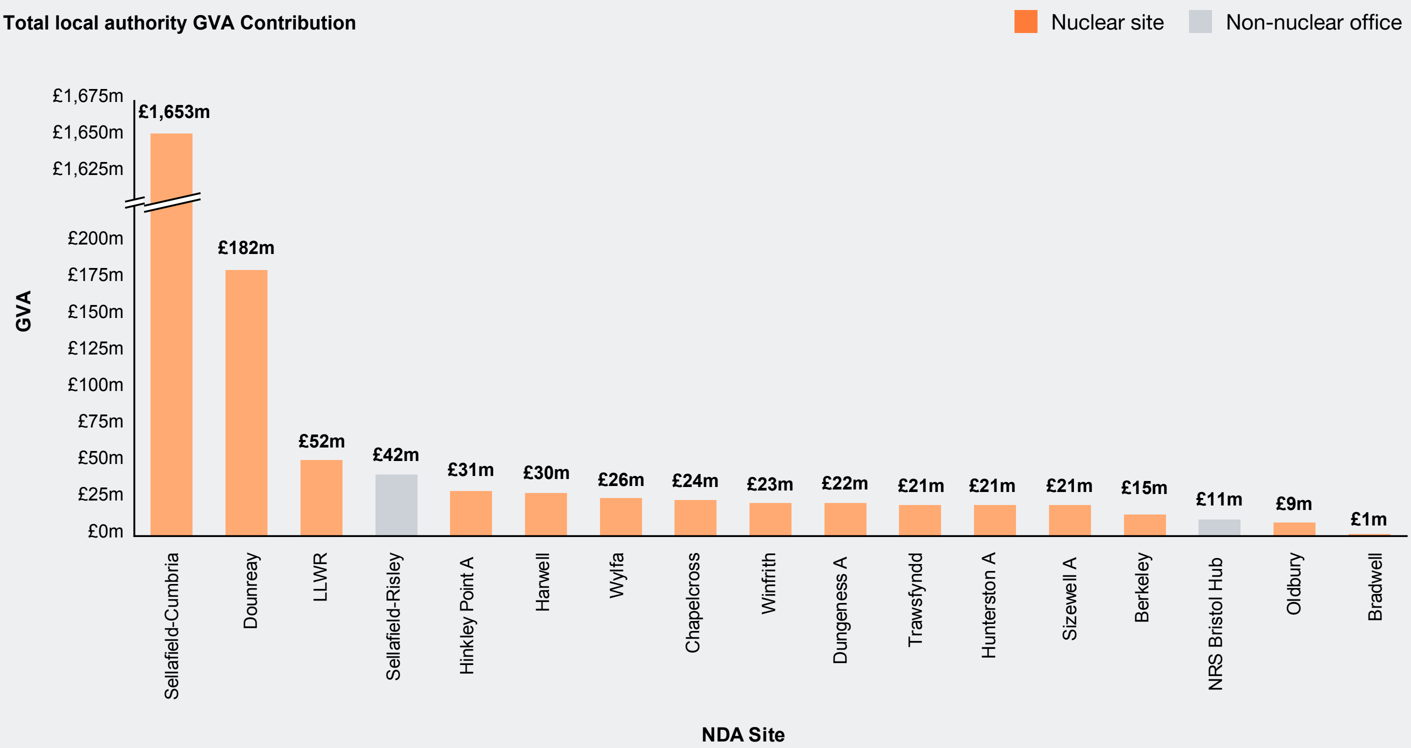
There have been some changes to the structure of local government in England in recent years. Specifically, local government reorganisation has resulted in the creation of the new Cumberland unitary authority in April 2023. This replaces the previous district councils of Allerdale, Carlisle and Copeland.

This means that results will not be entirely comparable with previous analysis, which considered the administrative boundaries in place at the time, for example Sellafield's impact would have been considered in relation to the district of Copeland, a smaller area than Cumberland.

Local authority GVA contribution by site

Figure 18 presents the estimated GVA contribution by individual NDA site to their local authority area.

Figure 18: Total local authority GVA contributions by NDA site, £m, ordered from highest to lowest total GVA contribution, FY25



Source: PwC analysis based on NDA data and statistics from the ONS

The main Sellafield site in Cumbria is the largest single contributor to the local authority in which it is based, generating an estimated £1.7bn in Cumberland. Dounreay has the second highest contribution to its local authority, generating an estimated £182m in the Highland area. LLWR and the Sellafield site in Risley are estimated to contribute £52m and £42m respectively to the local authorities of Cumberland and Warrington.

Other NDA sites including Chapelcross, Hinkley Point A, Harwell and Wylfa and are estimated to each contribute between £21m to £30m to their respective local authorities. Though smaller in scale, these contributions remain material in the context of their local economies and illustrate the broader geographic spread of the NDA's economic impact beyond the largest centres.

Relative GVA contribution to local authority

Table 8 outlines the total GVA contribution of each site to its local economy, compared to the overall economic activity of the respective local authority.

Table 8: Relative contribution of NDA site to their local authority economies, ordered alphabetically, FY25

NDA site	Local authority district	Total GVA contribution (£m) to local authority	2024 local authority GVA (£m)	% of local authority GVA
Berkeley	Stroud	15	3,388	0.4%
Bradwell	Maldon	1	1,445	0.1%
Chapelcross	Dumfries and Galloway	24	4,381	0.6%
Dounreay	Highland	182	8,076	2.3%
Dungeness A	Folkestone and Hythe	22	2,958	0.8%
Harwell	Vale of White Horse	30	6,220	0.5%
Hinkley Point A	Somerset	31	16,374	0.2%
Hunterston A	North Ayrshire	21	3,240	0.7%
LLWR	Cumberland	52	7,716	0.7%
NRS Bristol Hub	South Gloucestershire	11	17,644	0.1%
Oldbury	South Gloucestershire	9	17,644	0.1%
Sellafield - Risley	Warrington	42	11,052	0.4%
Sellafield - Cumbria	Cumberland	1,653	7,716	21.4%
Sizewell A	East Suffolk	21	6,796	0.3%
Trawsfynydd	Gwynedd	21	3,000	0.7%
Winfrith	Dorset	23	10,536	0.2%
Wylfa	Isle of Anglesey	26	1,536	1.7%

Source: PwC analysis based on NDA data and statistics from the ONS

This indicates that three sites contribute more than 1% of their respective local economy's GVA: the main Sellafield site, Dounreay and Wylfa. Sellafield - Cumbria is by far the most significant, contributing an estimated 21.4% of Cumberland's GVA in 2024.

Two local authorities have two NDA sites each – Cumberland and South Gloucestershire. From the perspective of Cumberland local authority, the two NDA sites in Sellafield – Cumbria and LLWR have a combined contribution of £1.7bn in GVA, equivalent to 22.1% of the local authority's total GVA in 2024. In South Gloucestershire, where NRS Bristol Hub and Oldbury are based, an aggregate contribution of £20m in GVA is created through these two NDA sites. This equates to 0.1% of South Gloucestershire's total GVA in 2024.

4.2 Contribution to local authority employment

Relative employment contribution to local authority

Table 9 shows the employment impact of each NDA site on their respective local authority district. This highlights the scale of the main Sellafield site's contribution to the local labour market, directly contributing 7.3% of employment in the Cumberland local authority district, rising to 16.4% when indirect and induced employment impacts are included. Dounreay and Wylfa have the next largest relative share of FTEs, with direct employment accounting for 1.0% of employment in the Highland and Isle of Anglesey local authorities respectively. Other NDA sites account for less than 1% of employment in their local authorities.

Table 9: Direct and total employee contribution of each NDA site, as a proportion of total local authority employment, FY25

		Employment as a proportion of jobs in local authority	
NDA site	**Local authority district**	**Direct employment only**	**Total employment**
Berkeley	Stroud	0.2%	0.4%
Bradwell	Maldon	<0.1%	0.1%
Chapelcross	Dumfries and Galloway	0.3%	0.5%
Dounreay	Highland	1.0%	2.1%
Dungeness A	Folkestone and Hythe	0.5%	0.8%
Harwell	Vale of White Horse	0.3%	0.6%
Hinkley Point A	Somerset	0.1%	0.2%
Hunterston A	North Ayrshire	0.5%	0.7%
LLWR	Cumberland	0.3%	0.5%
NRS Bristol Hub	South Gloucestershire	0.1%	0.1%
Oldbury	South Gloucestershire	<0.1%	0.1%
Sellafield - Risley	Warrington	0.2%	0.3%
Sellafield - Cumbria	Cumberland	7.3%	16.4%
Sizewell A	East Suffolk	0.2%	0.3%
Trawsfynydd	Gwynedd	0.3%	0.6%
Winfrith	Dorset	0.1%	0.2%
Wylfa	Isle of Anglesey	1.0%	1.6%

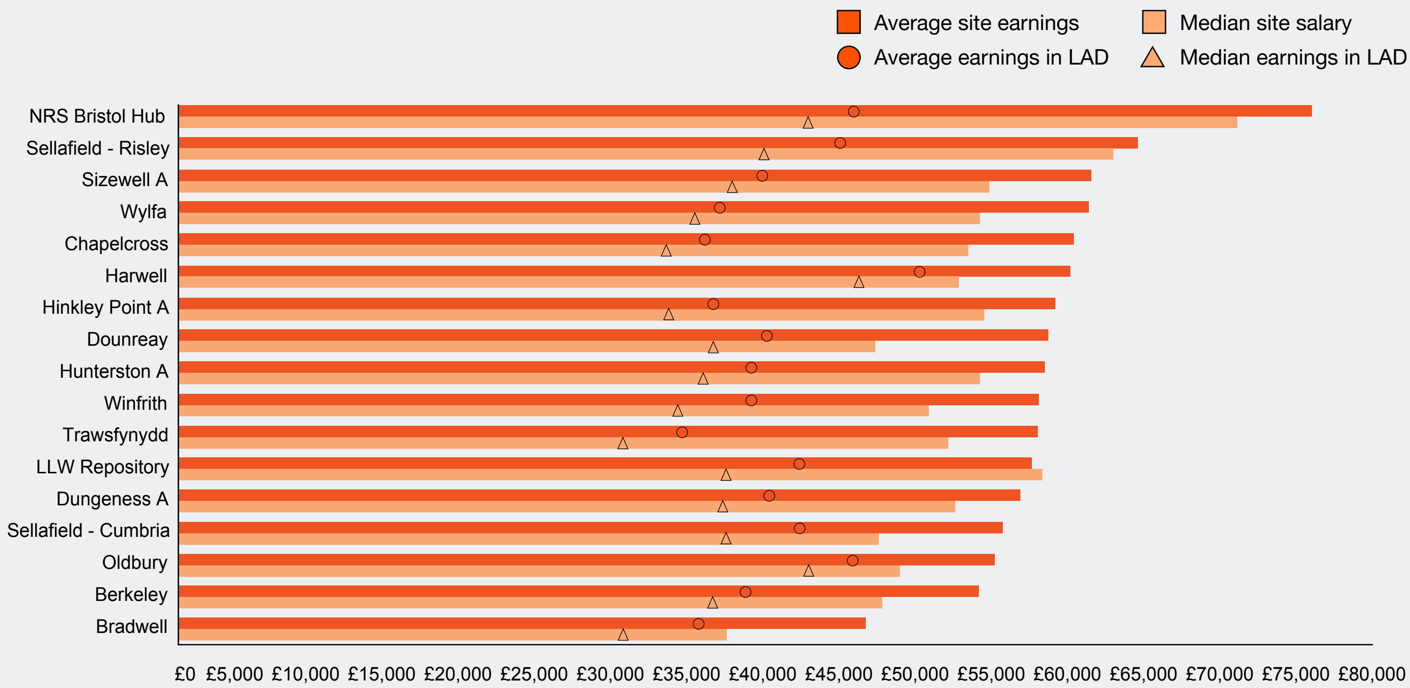
Source: PwC analysis based on NDA data and statistics from the ONS

4.3 Employee pay comparison

Comparison of employee pay demonstrates how salaries differ between NDA sites and those in the surrounding local authorities. In this section, two comparisons are explored: median salary (base) and mean (average) earnings (base salary plus additional pay such as bonuses and overtime).

Figure 19 compares the median salaries and average earnings of employees across the NDA sites with published data for their corresponding local authority district.

Figure 19: Comparison of median salaries and average earnings by NDA site to their corresponding local authority districts, ordered from highest to lowest median salary by NDA site, FY25 data



Source: PwC analysis based on NDA data and statistics from the ONS

Across all NDA sites, average earnings and median salaries consistently exceed the respective figures for their local authority equivalents. NRS Bristol Hub maintains the highest difference between these metrics, with the average salary at the site at ~£76,000, considerably higher than the local average salary of ~£45,000.

Other sites such as Sellafield – Risley and Sizewell A also pay relatively higher salaries than local averages, with earnings of ~£64,000 and ~£61,000 respectively, compared to local averages of ~£44,000 and ~£39,000. Similarly, Wylfa and Chapelcross show salaries significantly above local averages, reinforcing this pattern.

Even the sites with lower overall salaries, such as Bradwell and Berkeley, maintain a similar trend where the site salary is above the local salaries, though with a narrower margin.

Overall, this pattern indicates that employment at NDA sites generally commands a salary premium compared to the surrounding labour markets. This is likely due to the specialised skills, technical complexity and critical importance of many roles within the nuclear sector.

Such salary premiums increase the attraction and retainment of talent in the geographies where NDA sites operate. This in turn, supports the local economy through increased household incomes and wider economic activity.

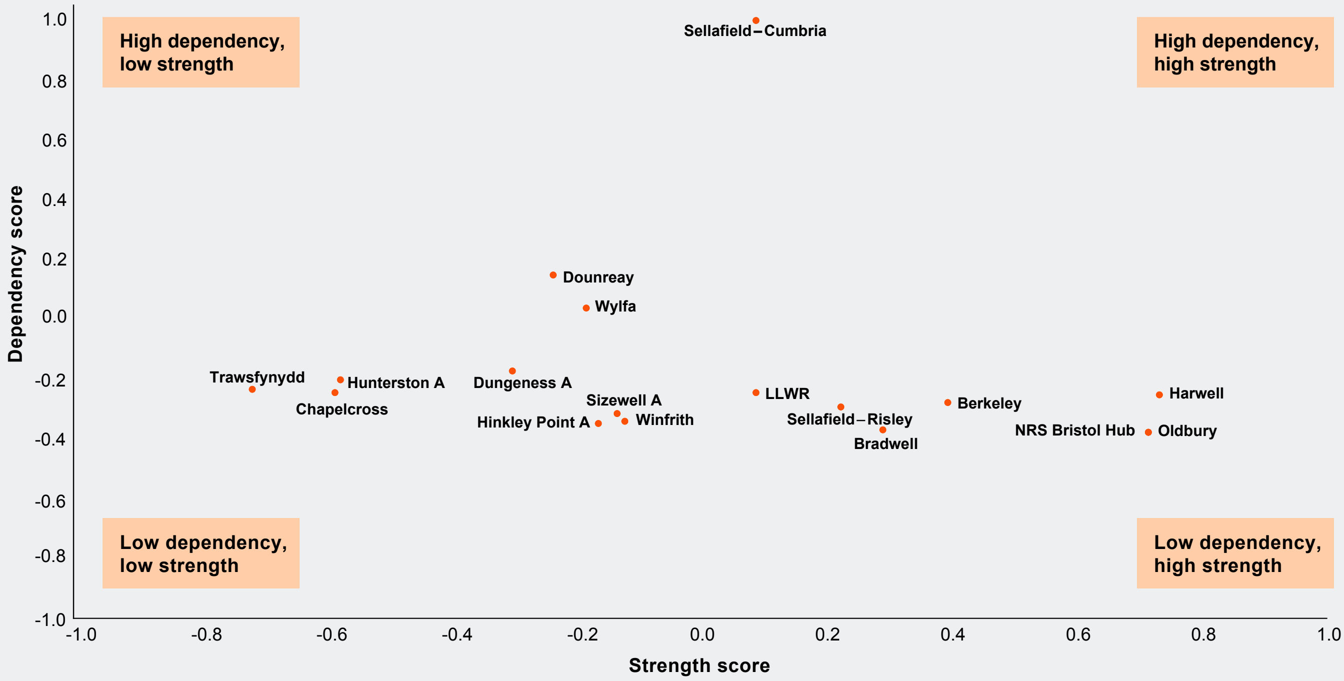
4.4 Evaluation of strength and dependence of local economies

Analysis was conducted to present an indication of the relative importance of each site to the economy of the local authority in which they are situated.

Strength has been calculated based on local authority average incomes, the employment rate and GVA per person levels. Dependency has been calculated based on the proportion of local jobs and GVA that are supported by the respective NDA site. More detail on the approach to strength and dependency scores is included in Appendix E: Strength and dependency scores.

The overall relative scores are summarised in Figure 20.

Figure 20: Summary of strength and dependence scores for NDA sites



Source: PwC analysis based on NDA data and statistics from the ONS

The interpretation of the site scores is as follows:

- Areas towards the top left represent sites where the local economy is relatively more dependent on their NDA site and relatively less strong in comparison with other UK local authorities.
- Areas towards the bottom right indicate relatively lower dependency on NDA sites and relatively stronger local economies compared with other UK local authorities.
- The other positions on the chart (towards the bottom left and top right) indicate combinations of higher strength with higher dependency, or lower strength with lower dependency.

This analysis is based on an evaluation of the current strength and dependence of the local economies. Therefore, the results do not reflect future considerations such as the UK's first small modular reactor nuclear power station to be developed in Wylfa, which is expected to support 3,000 new jobs in the local economy.[13]

The local economies of the following sites fall into the 'high dependence, low strength' quadrant:

- **Sellafield – Cumbria:** Cumberland scores around the UK average on economic strength, showing below-average earnings and GVA per person. At the same time, it exhibits relatively high dependency due to Sellafield – Cumbria's contribution to local employment and GVA.
- **Dounreay:** The Highland local authority was scored as having relatively low economic strength due to its low average earnings and employment rate, while showing high dependency due to Dounreay's contribution to local employment and GVA.
- **Wylfa:** The Isle of Anglesey was scored as having relatively low economic strength due to its employment rate and GVA per person. It was scored as having relatively high dependency due to Wylfa's contribution to local employment and GVA.

[13] Gov – UK Press Release (2025): North Wales to pioneer UK's first small modular reactors

These locations are characterised by lower scores on the economic indicators used in this assessment, alongside a relatively high dependence on NDA activity. As a result, any changes to the scale, timing or nature of NDA operations would, based on current levels of dependence, be expected to have relatively larger local economic implications than elsewhere. This context is relevant when considering how the NDA prioritises engagement, long-term planning, and delivery of its Social Impact and Communities Strategy, with attention informed by the relative strength and dependence of local economies. Sellafield – Cumbria, in particular, exhibits a higher dependency score than other sites in this quadrant, reflecting its especially significant contribution to local employment and GVA.

By contrast, the local economies of Sellafield Risley, Harwell, Berkeley, Oldbury, NRS Bristol Hub and Bradwell fall into the ‘low dependence, high strength’ quadrant. These areas benefit from stronger and more diversified local economies and are therefore less sensitive, in relative terms, to changes in NDA activity. The remaining NDA sites can be viewed as occupying an intermediate position.

Appendix A: Procurement expenditure

Appendix A: Procurement expenditure

Expenditure framework

Procurement expenditure data was provided by NDA and reviewed by the individual operating companies. To estimate economic activity supported through procurement, this data was adjusted to remove the following:

- Intra-group transactions, removed as this does not represent external procurement.
- Spending that has been identified as non-procurement, including spending identified by the NDA commercial team as not relating to the purchase of goods and services, personal expenses or purchase card transactions.
- Spend related to temporary labour (agency, contingent and contract support workers). This is instead included in direct GVA impacts (through the wages captured in the estimate of compensation of employees).
- Tax payments, such as business rates. This does not represent procurement activity.

Applicable expenditure

Table 10 provides a breakdown of the applicable expenditure for the input-output analysis by category across the four operating companies.

Table 10: Domestic expenditure by category, by operating company and total

Category	Treatment	Sellafield (£m)	NRS (£m)	Dounreay (£m)	LLWR (£m)	Total (£m)
Total supplier expenditure	-	1,800	195	117	78	**2,189**
…of which UK suppliers	Included	1,793	192	115	77	**2,177**
Intra-group Transactions	Excluded	(14)	(6)	(1)	(5)	**(24)**
Commercial categorisation (incl. personal expenses)	Excluded	(<1)	(4)	(1)	(1)	**(5)**
Purchase card transactions	Excluded	(1)	-	-	(<1)	**(1)**
Temporary labour	Excluded	(18)	-	-	-	**(18)**
Tax-related spend	Excluded	-	(<1)	(1)	-	**(1)**
Total applicable spend		**1,760**	**183**	**112**	**71**	**2,125**

Source: PwC analysis of data provided by NDA

Procurement spend by site

Figure 21 illustrates the final expenditure by NDA site and compares the FY25 expenditure used in this analysis to expenditure in the latest previous report available.

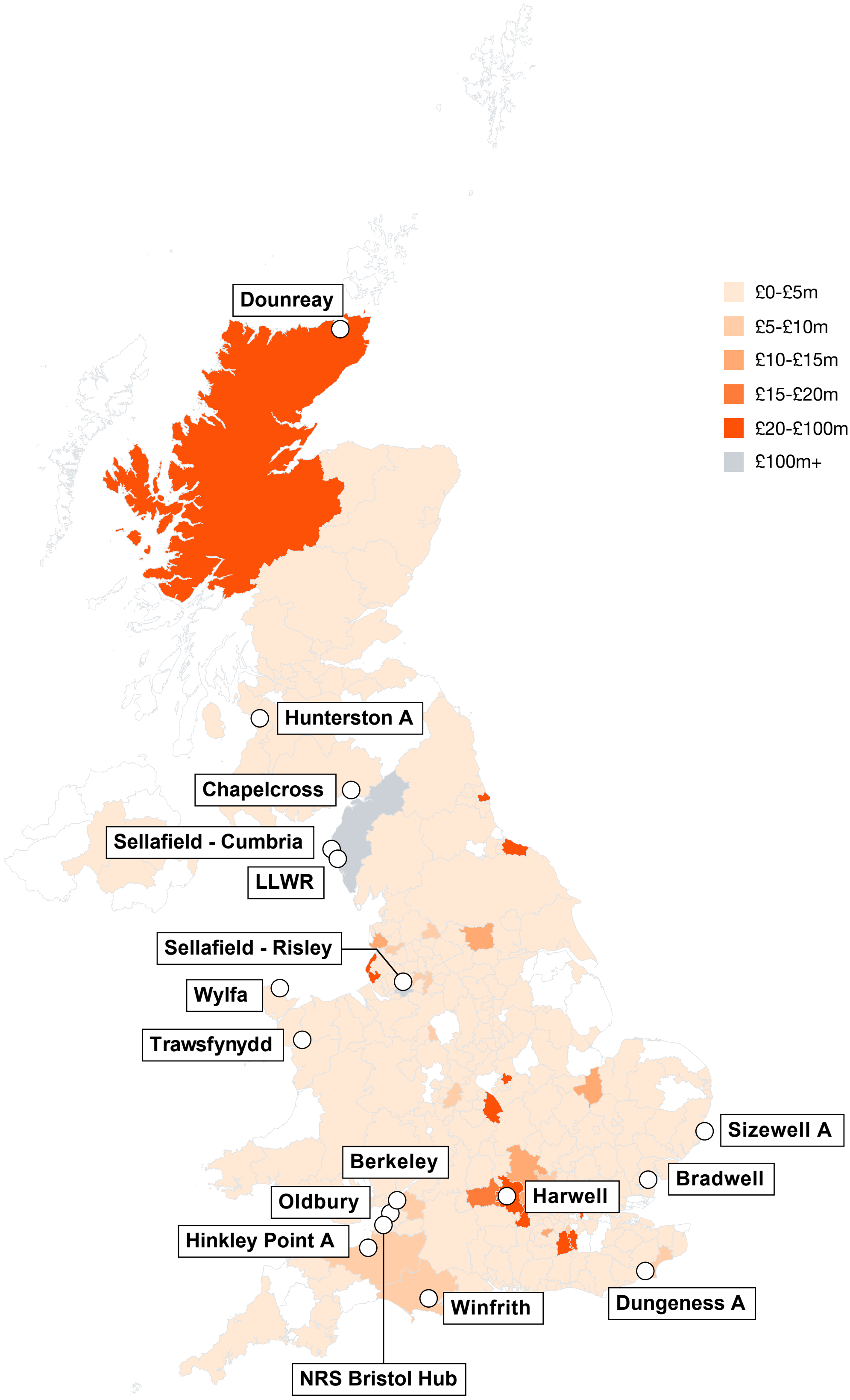
Figure 21: Total applicable procurement expenditure by NDA site, ordered by highest to lowest total expenditure for FY25

Source: FY25 figures based on PwC analysis of data provided by NDA. Previous analysis based on published reports from Oxford Economics (2022), Economic Insight (2022) and Mace (2022)

Procurement spend by local authority

Figure 22 outlines the relative amount of expenditure for procurement of goods and services within each local authority across the UK.

Figure 22: Total applicable procurement spend by UK local authority, categorisation listed in key, FY25



Source: PwC analysis of NDA procurement data

Site spend by sector

Table 11 reveals the distribution of procurement expenditure by sector and site. There are patterns in procurement expenditure across NDA sites, highlighting how sectoral priorities vary in accordance with each site's operational status and activities.

Administrative and support services, construction and utilities generally make up the most significant share of spending at most NDA sites, highlighting their essential role in site management.

Bradwell's entire spend is based on the administrative and support services sector which reflects the site's transition into the care and maintenance phase, which reduces operational, capital and other service demands.

Table 11: Percentage breakdown of procurement spend by NDA site, by high-level sector, ordered alphabetically, FY25. Percentages represent relative proportion of spend under each site.

Site/Sector	Berkeley	Bradwell	Chapelcross	Dounreay	Dungeness A	Harwell	Hinkley Point A	Hunterston A	Low-Level Waste Repository	Oldbury	Sellafield - Cumbria	Sizewell A	Trawsfynydd	Wylfa	Winfrith
Administrative and Support	23%	100%	22%	21%	19%	50%	15%	19%	19%	26%	17%	26%	31%	22%	30%
Construction	1%	-	15%	28%	23%	21%	7%	18%	7%	18%	23%	30%	8%	28%	13%
Financial, Law & Real Estate	<1%	-	<1%	1%	1%	<1%	<1%	1%	3%	-	<1%	-	<1%	<1%	1%
Government, Health and Education	2%	-	<1%	8%	<1%	1%	1%	1%	4%	1%	2%	1%	1%	<1%	1%
Information and Communications	1%	-	<1%	7%	<1%	1%	1%	3%	8%	2%	6%	1%	2%	2%	1%
Manufacturing	<9%	-	14%	2%	18%	11%	4%	13%	1%	8%	9%	4%	21%	9%	11%
Other Services	2%	-	2%	2%	1%	<1%	1%	4%	7%	1%	<1%	1%	1%	<1%	<1%
Production & Utilities	45%	-	37%	13%	21%	4%	55%	15%	23%	30%	13%	21%	8%	19%	30%
Professional, Scientific and Technical Activities	10%	-	5%	10%	12%	9%	13%	23%	27%	10%	27%	11%	23%	13%	8%
Transport & Distribution	<1%	-	<1%	2%	<1%	<1%	<1%	<1%	2%	<1%	<1%	<1%	<1%	-	<1%
Wholesale & Retail Trade	7%	-	4%	7%	4%	3%	4%	4%	<1%	4%	3%	4%	5%	5%	5%

Source: PwC analysis of NDA procurement data

Table 12: Mapping of UK Sector Industry Classifications to relevant sectors contained within this analysis

#	Detailed sector	Grouped sector
1	Agriculture, mining, electricity, gas, water and waste	Production & Utilities
2	Manufacture of food, beverages, textiles and clothing	Manufacturing
3	Manufacture of wood, petroleum, chemicals and minerals	Manufacturings
4	Manufacture of metals, electrical products and machinery	Manufacturing
5	Other manufacturing, repair and installation	Manufacturing
6	Construction	Construction
7	Motor trades	Wholesale & Retail Trade
8	Wholesale trade	Wholesale & Retail Trade
9	Retail trade	Wholesale & Retail Trade
10	Land, water and air transport	Transport & Distribution
11	Warehousing, transport support, postal and courier activities	Transport & Distribution
12	Accommodation and food service activities	Other Services
13	Information and communication	Information and Communications
14	Financial and insurance activities	Financial, Law & Real Estate
15	Real estate activities, excluding imputed rental	Financial, Law & Real Estate
16	Owner-occupiers' imputed rental	Financial, Law & Real Estate
17	Legal and accounting activities	Financial, Law & Real Estate
18	Head offices and management consultancy	Professional, Scientific and Technical Activities
19	Architectural and engineering activities	Professional, Scientific and Technical Activities
20	Other professional, scientific and technical activities	Professional, Scientific and Technical Activities
21	Rental and leasing activities	Administrative and Support
22	Employment activities; tourism and security services	Administrative and Support
23	Services to buildings and landscape activities	Administrative and Support
24	Office administration and business support activities	Administrative and Support
25	Public administration and defence	Government, Health and Education
26	Education	Government, Health and Education
27	Human health and social work activities	Government, Health and Education
28	Arts, entertainment and recreation	Other Services
29	Membership organisations; repair of household goods	Other Services
30	Other personal service activities	Other Services
31	Households as employers and own use production	Other Services

Source: PwC categorisation (2025)

Appendix B: Methodology

Appendix B: Methodology

The following data sources were used to calculate the 'strength' component of the analysis presented in section 4.4 Evaluation of strength and dependence of local economies.

Table 13: Data sources used to calculate strength score of NDA sites

#	Metric	Measure	Data source	Years analysed
1	Jobs	Unemployment rate by UK Local Authority	ONS	01 Apr 2023 –31 Mar 2025 (averaged, inclusive)
2	Income	Median gross weekly pay, by UK Local Authority	ONS	2022-23 to 2024-25 (averaged, inclusive)
3	Economic performance	Industry GVA by UK Local Authority, Table 3: Current Prices, by UK Local Authority	ONS	2021, 2022, 2023 (averaged)

Input-Output Methodology

The following outlines the approach used to estimate the economic impacts of each NDA site. This includes key input tables with sources and hyperlinks to these locations.

Figure 23 outlines the steps used to conduct the input-output modelling. Difference in the specific steps undertaken for each geography is outlined in each section below.

Figure 23: Overview of approach for calculating direct, indirect and induced economic effects.

1 Data request

Data requests were sent to each one of the four Operating Companies for employee demographic data, tax and revenue information and other relevant financial data to each NDA site.

Requests were also sent to the NDA commercials team to get a full, end-to-end picture of the FY25 procurement data for all NDA sites. This included information regarding each site's contracts and spend with third parties.

2 IO table generation

While data requests were being completed, latest UK supply-use tables and relevant multipliers for national-level input output analysis from the ONS was gathered. Where needed, Type II UK multipliers were calculated.

Separately, Type I and Type II multipliers for UK regions were calculated to provide a more localised, specific IO-table for regional and local authority IO analysis. This is in line with the approach used in Flegg et al. (1995).

3 Data cleansing

Following dissemination, the NDA FY25 procurement data was cleaned to prepare it for IO analysis. This included appending correct geographical entries to each procurement item, disaggregating joint entries to assign a correct amount of expenditure to each procurement entry and adding in each entity's respective UK SIC code based on either data included in the procurement data, or matching entity names from UK Company House.

4 Aggregation & Analysis

Direct effects – were calculated based on the financial data which were shared by Operating Companies. Since NDA sites are non-profit making entities, only these effects could be considered under the income approach.

Indirect effects – using UK and relevant regional Type I multipliers from the ONS, multipliers were generated for a series of 31 sectors, and then multiplied through each NDA's site spend against each of these sectors. Direct effects were substituted from this final figure, to isolate the indirect effects.

Induced effects – using UK and relevant regional Type II multipliers from the ONS, multipliers were generated for a series of 31 sectors, and then multiplied through each NDA's site spend against each of these sectors. Direct and indirect effects were substituted from this final figure, to isolate the induced effects.

Data requests were sent out to each four operating companies during July 2025 – October 2025. Data was collected under the four key headers outlined in Figure 24.

Figure 24: Data categories used to identify the data required to undertake the Input-Output analysis

1 Employee Demographics

Objective

To gain an understanding of the demographic profile of employees at each NDA site.

Components, by site

- Total count of employees
- % of employees that are full-time or part-time
- Age profile of employees, in 9-year age bands from 16–24 up to 65+
- Home location profile of employees, by UK outward code (first part of a UK postcode)

2 Compensation

Objective

To gain an understanding of the compensation that employees at each site are receiving.

Components, by site

- Aggregate basic salary compensation
- Other remuneration and compensation (e.g. pension contributions, annual bonuses, etc.)
- Employer NIC contribution
- Wage distribution of employees, £10,000 salary bands up to £100,000+

3 Other Financials

Objective

To inform the wider economic contribution each site makes to the local, regional and UK economies.

Components, by site

- Revenue
- Taxes paid, including:
  - Corporation tax
  - Income tax
  - VAT
  - Business rates
  - Other relevant taxes

4 Procurement

Objective

To gain an understanding of the domestic supply chain expenditure and inform the input-output analysis.

Components, by site

Procurement data was received in different formats across the OpCos, but the key elements to include for each spend item were:

- Business name
- Location of spend (UK postcode)
- Amount of spend (£)

Socioeconomic baseline development

As part of developing the economic profiles for each NDA site, socioeconomic baselines were constructed to demonstrate their impact on the local and regional workforces in which they operate. These baselines also informed other elements of the report. For example, analysis of employees' home locations supported the calculation of direct FTEs supported, as well as the total employee compensation within the local authorities and regions where the sites are located. Socioeconomic baselines for each NDA site were developed using a combination of data received by the OpCos and publicly available data.

The following metrics that were calculated for each NDA site, as well as the local authority and region it operates in:

- Percentage of full-time and part-time employees. The percentage split between full-time and part-time employees for each NDA site data was provided by the OpCos. The number of full-time and part-time employees for each local authority and region is taken from the Business Register and Employment Survey (BRES), using the most recently available data year, 2024.
- Age profile of employees. The number of employees in each age band was provided by the OpCos. This was used to calculate the proportion of the employee base in each age band. Employment rate data by age range for each local authority and region was used to calculate the proportion of the working age population in each age band. This data is taken from the Annual Population Survey, using the period April 2024 to March 2025 to accurately reflect the time period for the OpCo data. Due to the difference in age ranges between ages 35 to 64, additional calculations were required to transform the ONS data.

Calculation: Transforming ONS age bands

To transform ONS age bands, it was assumed that the total number of employees in each original age band was evenly distributed across the individual ages within that band.

First, the total number of employees in each band was allocated equally to each single year of age in that band. This per-age figure was then multiplied by the number of single-year ages contained in the corresponding NDA age band.

Transforming ONS age ranges and employment numbers.

ONS data:

35–49	50–64
37,000	43,000

Summary of calculations:

35–44	45–54	55–64
37,000	((37,000/15)*5 +(43,000/15)*5)	50–64

New age bands for comparsion:

35–44	45–54	55–64
24,667	26,667	28,667

In addition, the Maldon local authority had missing data for the 16–24 and 25–34 age bands. To address this, the total number of employees aged 16–34 was first derived by subtracting the sum of employees in the 35–44, 45–54, 55–64 and 65+ age bands from the total number of employees aged 16 and over.

A percentage split of employees aged 16–34 between the 16–24 and 25–34 bands was then calculated using the average distribution observed across the local authorities of the NDA sites. The total number of employees aged 16–34 in Maldon was subsequently allocated to the 16–24 and 25–34 age bands according to this average percentage split.

- **Average earnings.** The average earnings for each site are calculated using compensation data received from the OpCos and consists of base salary and annual bonuses, excluding non-cash benefits such as pension contributions and private medical care allowances. This is compared with the mean annual pay for each local authority and region, taken from Table 7.7a of the Annual Survey of Hours and Earnings (ASHE), 2024.

- **Median salary.** The median salary for each site is calculated using the wage distribution of employees. For each NDA site, OpCos provided the number of employees in each salary band, ranging from '£0 - £10,000' to '£100,000 +'. Linear interpolation was used to extract an estimated median salary.

Calculation: Using linear interpolation to extract the median salary

To estimate the median salary at each NDA site, linear interpolation was applied. The steps are:

1. Calculate the frequency for each salary band.
2. Identify the median position $\left(\frac{n}{2}\right)$
3. Determine which salary band contains this position (the median class).
4. Apply the following formula to estimate the median salary:

$$\text{Median} = l + \left(\frac{\frac{n}{2} - cf}{f}\right)$$

Where:

l = lower limit of median class

n = total number of employees

cf = cumulative frequency of class preceding the median class

f = frequency of the median class

h = width of the median class (i.e. the size of the salary band)

Example:

Median position	Salary band	Lower limit
104.5	£40,000-£50,000	40,000.00
Cumulative frequency in band	**#of employees in band**	**Median salary**
85.0	27.0	£47,222.22

Tax contribution assessment

Tax data for FY25 was collected as part of the data requests sent out to each four operating companies during July 2025 – October 2025. The data collected includes Employer NIC contributions and the taxes paid as listed under header three in Figure 24.

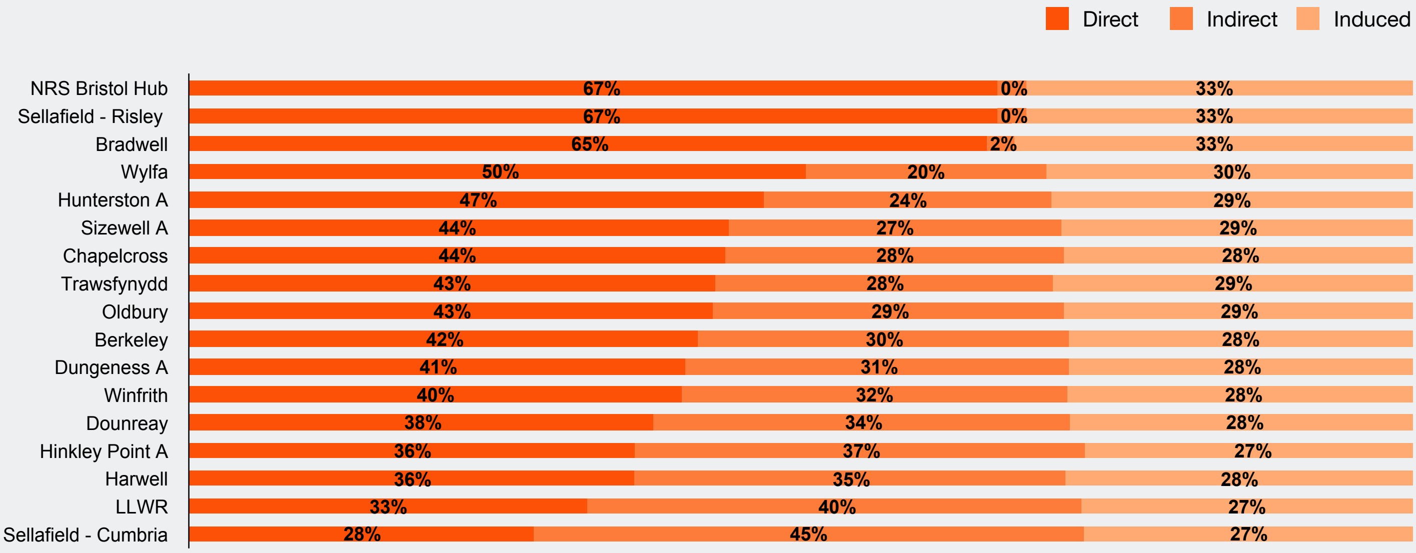
The approach to calculating total tax contributions varied by operating company:

- **Sellafield** – All tax data was provided for both the Cumbria and Risley sites and aggregated to the operating company level. Sellafield also provided data on environmental taxes paid, which has been assigned to the 'other taxes' category.
- **NWS** – Tax data was provided for LLWR and assigned to the appropriate tax categories illustrated in Figure 10 and Figure 11.
- **NRS** – Tax data was provided separately for Dounreay and all other NRS sites (including sites not in scope). For the other NRS sites, business rates were provided at the site level, while income tax, VAT, and employer NIC were supplied at operating company level. .14 The latter were apportioned to individual NRS sites based on reported employee numbers and then reaggregated for the sites within scope of this report.

Appendix C: Proportion of site GVA from direct, indirect and induced effects

Appendix C: Proportion of site GVA from direct, indirect and induced effects

Figure 25: Relative contribution of each economic type, by NDA site, FY25, ordered by highest to lowest contribution by direct GVA



Source: PwC analysis based on NDA data and statistics from the ONS

The distribution of direct, indirect and induced GVA across NDA sites demonstrates the varied ways in which each site's economic value is generated and circulated. While the aggregate figures are influenced by the large scale of certain sites, at the individual NDA site level, direct contributions constitute the highest proportion of economic value across almost all sites.

Appendix D: The impact of Dounreay in Caithness and North Sutherland

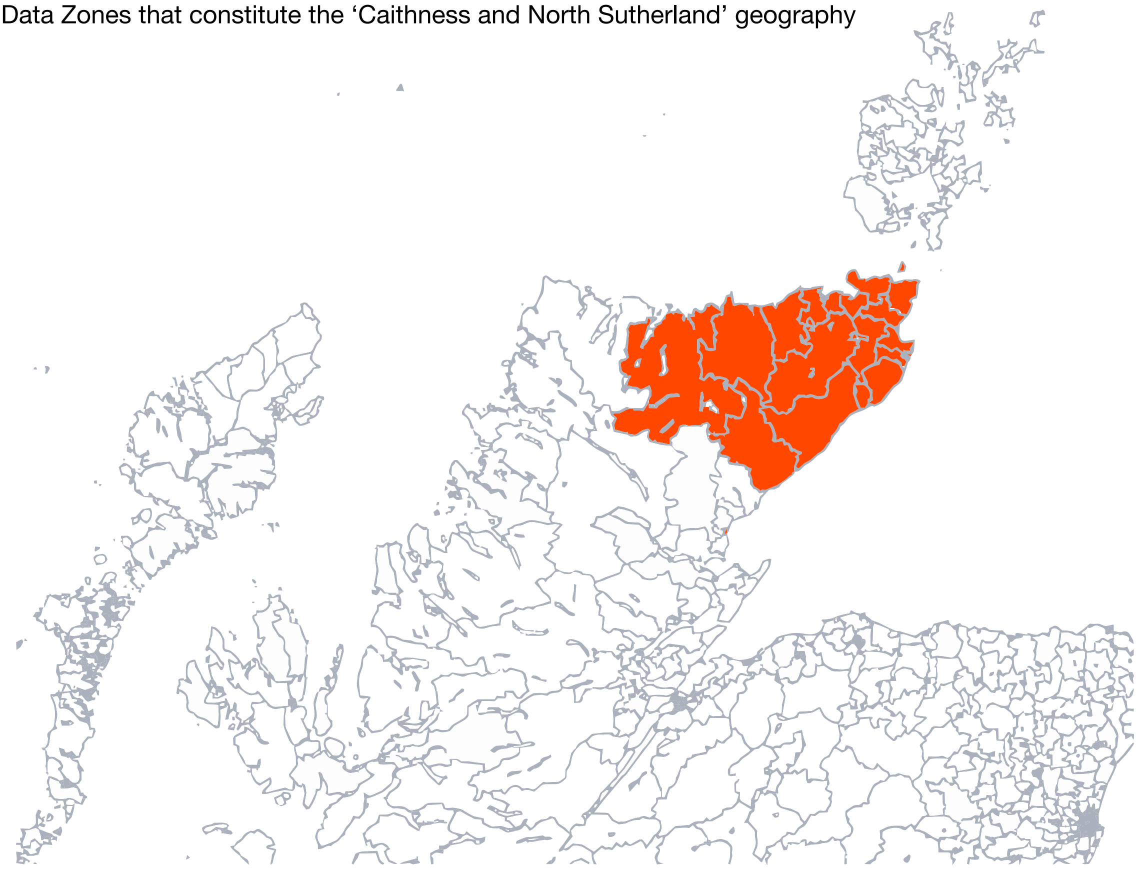
Appendix D: The impact of Dounreay in Caithness and North Sutherland

The Highland local authority district is the largest local authority in the UK, by area. Therefore, to be consistent with previous studies and enable more local comparisons, an additional analysis has been carried out to estimate Dounreay's impact on Caithness and North Sutherland.

Scottish Data Zones in Caithness and North Sutherland

For this report, the Caithness and North Sutherland geography consists of the Scottish Data Zones presented in Figure 26. A full list of corresponding Data Zones names and codes is included in Table 14.

Figure 26: Map of Data Zones that constitute the 'Caithness and North Sutherland' geography



Source: Scottish Government - Scottish Data Zone Boundaries 2022

Table 14: List of Scottish Data Zones and Data Zone Names included in the Caithness and North Sutherland geography

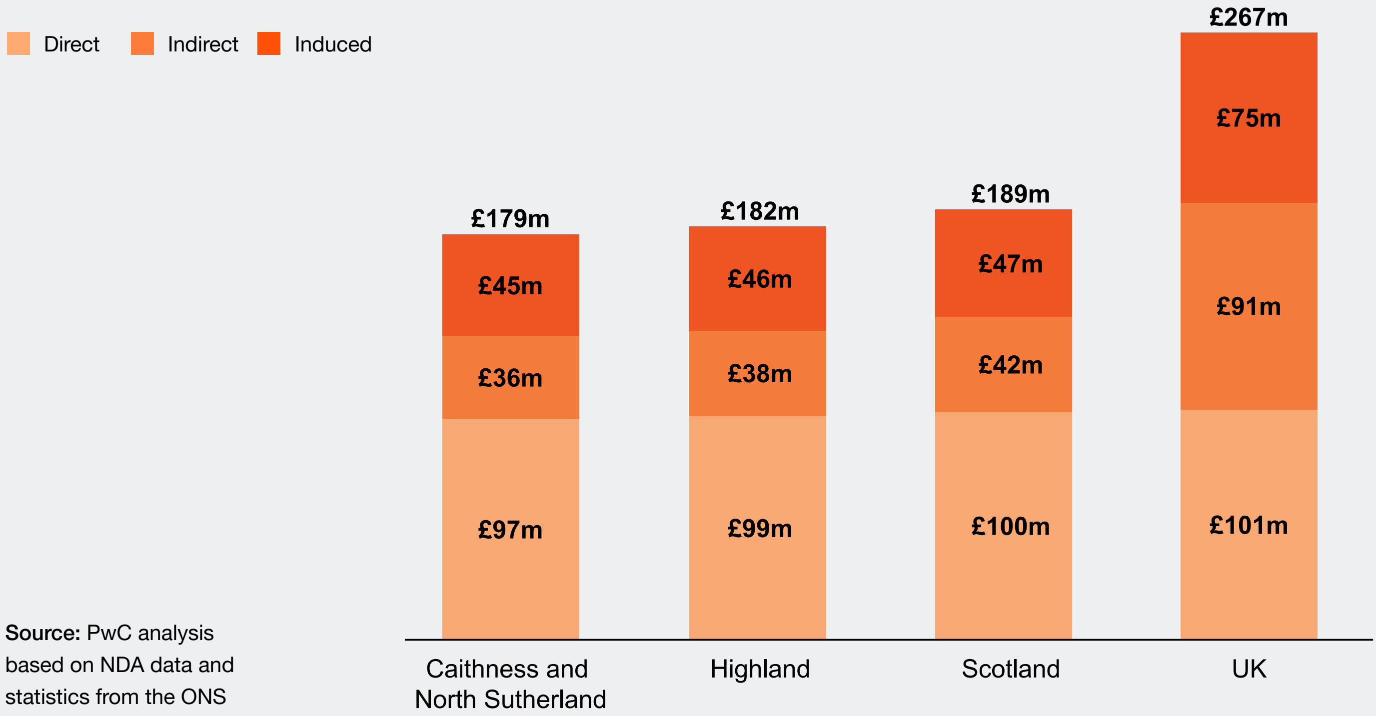
#	Scottish data zone code	Scottish data zone name
1	S01010771	Sutherland East
2	S01010810	Sutherland North and West - 01
3	S01010811	Sutherland North and West - 02
4	S01010772	Caithness South - 01
5	S01010773	Caithness South - 02
6	S01010774	Caithness South - 03
7	S01010775	Caithness South - 04
8	S01010787	Caithness North East - 01
9	S01010788	Caithness North East - 02
10	S01010789	Caithness North East - 03
11	S01010790	Caithness North East - 04
12	S01010791	Caithness North East - 05
13	S01010792	Caithness North West - 01
14	S01010793	Caithness North West - 02
15	S01010794	Caithness North West - 03
16	S01010795	Caithness North West - 04
17	S01010796	Caithness North West - 05
18	S01010797	Caithness North West - 06
19	S01010798	Caithness North West - 07
20	S01010776	Wick South - 01
21	S01010777	Wick South - 02
22	S01010778	Wick South - 03
23	S01010779	Wick South - 04
24	S01010780	Wick South - 05
25	S01010781	Wick South - 06
26	S01010782	Wick North - 01
27	S01010783	Wick North - 02
28	S01010784	Wick North - 03
29	S01010785	Wick North - 04
30	S01010786	Wick North - 05
31	S01010799	Thurso East - 01
32	S01010800	Thurso East - 02
33	S01010801	Thurso East - 03
34	S01010802	Thurso East - 04
35	S01010803	Thurso West - 01
36	S01010804	Thurso West - 02
37	S01010805	Thurso West - 03
38	S01010806	Thurso West - 04
39	S01010807	Thurso West - 05
40	S01010808	Thurso West - 06
41	S01010809	Thurso West - 07

Source: List provided by NRS Dounreay

GVA contribution to Caithness and North Sutherland

Figure 27 outlines the estimated GVA contribution of the Dounreay site to the economy of Caithness and North Sutherland, alongside the results for the UK, Scotland and Highland impacts, as set out in the main report.

Figure 27: GVA contribution of Dounreay to Caithness and North Sutherland, compared to the Highland, Scotland and UK impacts, FY25



Source: PwC analysis based on NDA data and statistics from the ONS

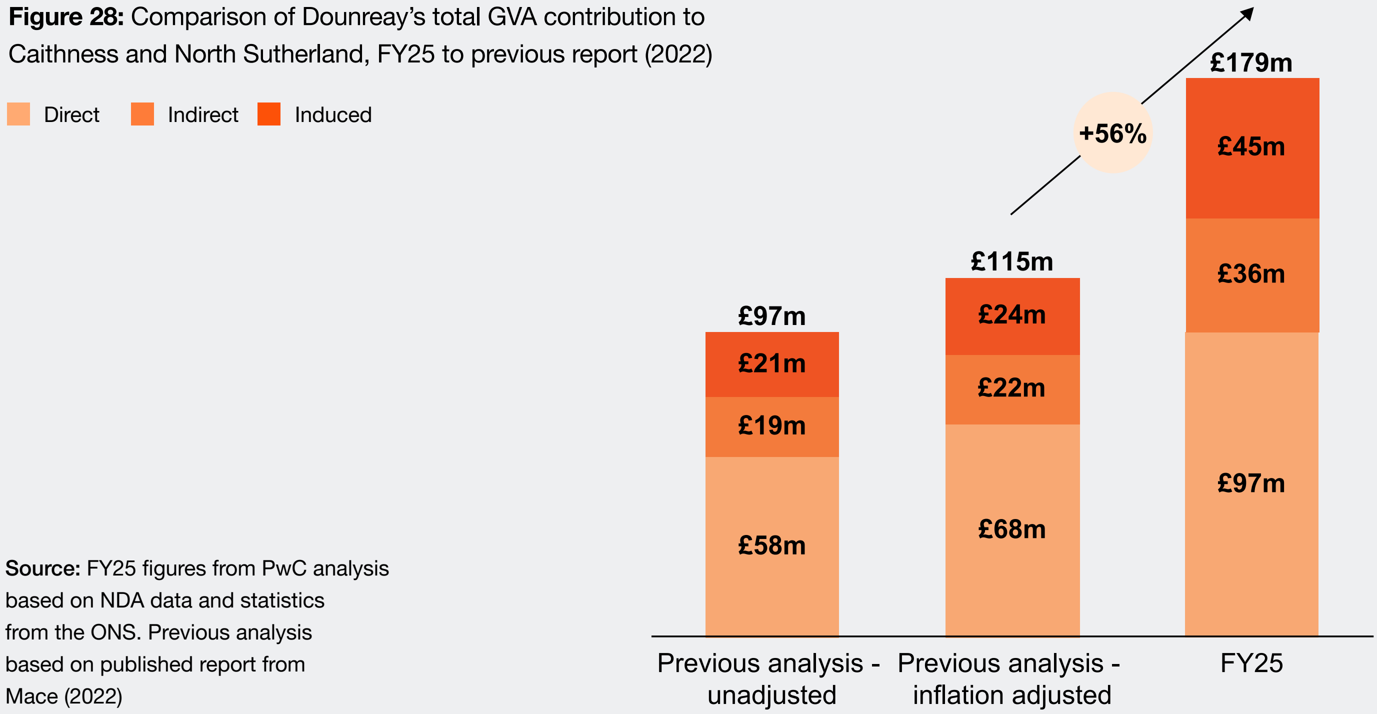
Dounreay is estimated to contribute £179m of GVA to the local economy of Caithness and North Sutherland, which is most of the contribution it makes to the Highland local authority (£182m) and Scotland economies (£189m). This is largely driven by direct impacts, due to the large number of Dounreay employees who are resident in the local Caithness and North Sutherland area.

The contribution to the Caithness and North Sutherland economy is 84% higher than the estimated GVA contribution to the local economy estimated in the previous report conducted for Dounreay[15]. To enable this comparison, the total figure for the 2022 Caithness and North Sutherland Labour GVA contribution has been compared with the total FY25 GVA contribution to Caithness and North Sutherland, which is outlined above.

When comparing this in real terms using FY25 prices, this represents a 56% increase in GVA contribution to the Caithness and North Sutherland economy.

[15] Mace (2022), Dounreay Socio-Economic Report, link

Figure 28: Comparison of Dounreay's total GVA contribution to Caithness and North Sutherland, FY25 to previous report (2022)



Source: FY25 figures from PwC analysis based on NDA data and statistics from the ONS. Previous analysis based on published report from Mace (2022)

In comparison to the previous analysis, the most significant driver driving the increase in total GVA are the induced GVA contributions, which have grown by 88% (£19m). This partially driven by the relatively higher amounts spent by Dounreay on employee wages, which in itself has grown by 43% (£29m). Indirect contributions have also increased, growing by 64% (£14m), although these effects make up the smallest proportion of the total Dounreay contribution to the Caithness and North Sutherland economy.

The differences driven by the relatively higher expenditure on the supply-chain and wages spent in comparison to the previous analysis.

Table 15 outlines the Dounreay site contributions to the total GVA in Caithness and North Sutherland and the Highland local authority district.

Table 15: GVA contributions at Dounreay relative to Highland and Caithness and North Sutherland areas, FY25

	Direct GVA		Total GVA	
Area	**Direct GVA contribution 2024 (£m)**	**Direct GVA as a proportion of area's total GVA 2024 (%)**	**Total GVA contribution 2024 (£m)**	**Proportion of area's total GVA 2024 (%)**
Highland	99	1.2%	182	2.3%
Caithness and North Sutherland	97	10.8%	179	19.9%

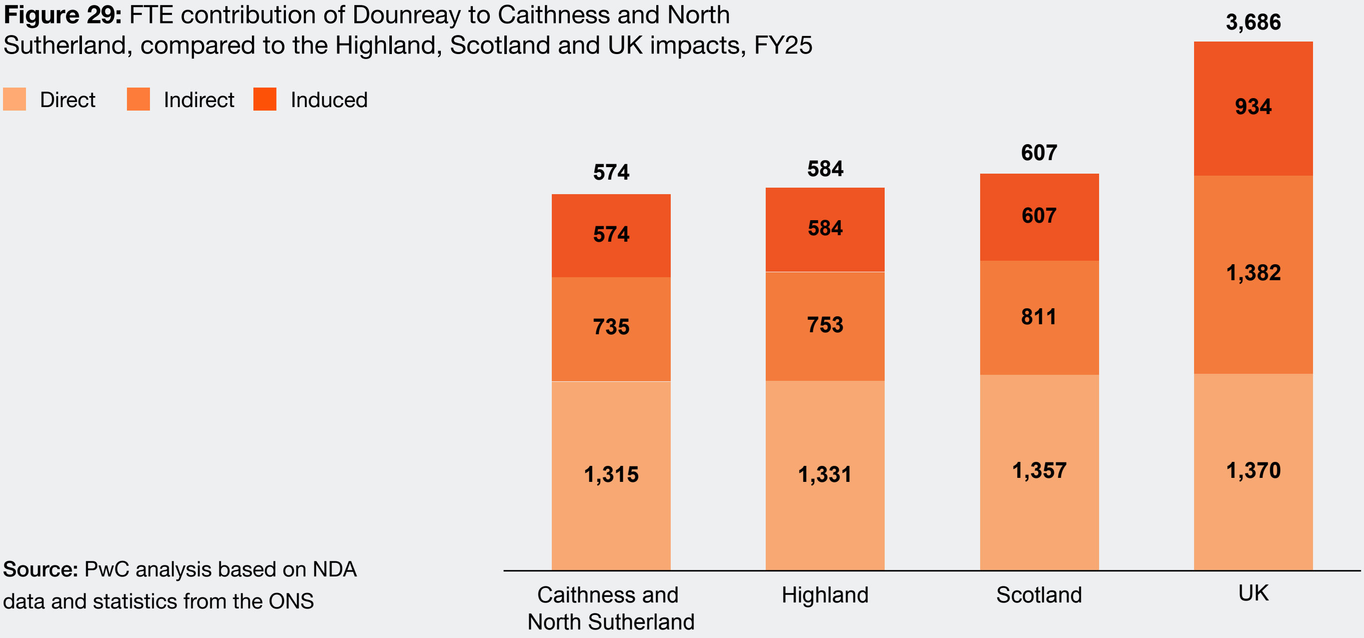
Source: PwC analysis based on NDA data and statistics from the ONS

Nearly a fifth of the Caithness and North Sutherland GVA is supported by Dounreay, highlighting the importance of the site to its local economy.

Employment contribution to Caithness and North Sutherland

Figure 29 compares the employment contributions of Dounreay at different geographical levels. Of an estimated UK employment impact of 3,686 FTEs, 2,624 are located within Caithness and North Sutherland area, approximately 71% of the total employment contribution. Of this, Dounreay is estimated to support 1,315 direct FTEs, 735 FTEs in its supply chain (indirect) and 574 FTEs in the wider economy through employee household spending (induced).

Figure 29: FTE contribution of Dounreay to Caithness and North Sutherland, compared to the Highland, Scotland and UK impacts, FY25



Source: PwC analysis based on NDA data and statistics from the ONS

Table 16 outlines how the Dounreay site contributes to the total jobs in Caithness and North Sutherland and the Highland local authority district.

Table 16: Proportion of total and direct employees at Dounreay relative to employment in the local economies, FY25

	Direct employment		Total employment	
Area	**Employment contribution 2024**	**As % of total jobs in local area**	**Employment contribution 2024**	**As % of total jobs in local area**
Highland	1,331	1.0%	2,668	2.1%
Caithness and North Sutherland	1,315	11.5%	2,624	23.0%

Source: PwC analysis based on NDA data and statistics from the ONS

The estimate that 23% of local jobs are supported by Dounreay in the Caithness and North Sutherland area is higher than the 11% estimated in the previous analysis.

Appendix E: Strength and dependency scores

Appendix E: Strength and dependency scores

This appendix sets out the approach used to assess the relative strength of each local authority and the dependency on the NDA site.

Strength scores

Three metrics are used to determine a strength score for each local authority:

1. Income – gross median weekly pay.
2. Jobs – employment rate.
3. Economic performance– GVA per person.[16]

To assess standardise the metrics, z-scores were calculated for each local authority for each metric, measured in terms of standard deviations from the mean. This is based on the mean for all local authorities, rather than solely the local authorities where NDA sites are located.

The three z-scores are averaged for each site to estimate a total strength score, where a higher score reflects a stronger economic performance in the local authority district where the site is located.

[16] Note: the local authority of City of London has been excluded from these productivity calculations as the profile of this local authority is extremely different to that of other UK local authorities (very high economic output, very low population).

Table 17: Summary of scores across strength metrics for NDA sites

NDA site	Local authority district	Income	Jobs	Economic performance	Average
Berkeley	Stroud	-0.09	1.57	-0.22	0.40
Bradwell	Maldon	0.06	1.30	-0.46	0.29
Chapelcross	Dumfries and Galloway	-0.99	-0.83	-0.17	-0.58
Dounreay	Highland	-0.35	-0.31	-0.04	-0.23
Dungeness A	Folkestone and Hythe	-0.11	-0.49	-0.33	-0.30
Harwell	Vale of White Horse	1.37	1.15	0.29	0.74
Hinkley Point A	Somerset	-0.88	0.64	-0.25	-0.16
Hunterston A	North Ayrshire	0.20	-1.76	-0.40	-0.57
LLWR	Cumberland	-0.21	0.74	-0.26	0.09
NRS Bristol Hub	South Gloucestershire	0.28	1.64	0.78	0.72
Oldbury	South Gloucestershire	0.28	1.64	0.78	0.72
Sellafield - Risley	Warrington	0.05	0.09	0.55	0.23
Sellafield - Cumbria	Cumberland	-0.21	0.74	-0.26	0.09
Sizewell A	East Suffolk	-0.88	0.73	-0.24	-0.13
Trawsfynydd	Gwynedd	-1.72	-0.63	-0.33	-0.71
Winfrith	Dorset	-0.51	0.38	-0.24	-0.12
Wylfa	Isle of Anglesey	-0.14	0.04	-0.45	-0.18

Dependency scores

Three metrics are used to determine a dependency score:

1. Proportion of local direct jobs related to the site relative to the number of all local jobs.
2. Proportion of local direct, indirect and induced jobs relative to all local jobs.
3. Direct, indirect and induced GVA as a proportion of total local GVA.

As per the methodology for calculating strength scores of each NDA site, a z-score methodology is applied to calculate the dependency score for each NDA site. This standardises the data across the three metrics, measured in terms of standard deviations from the mean. The average of the three metrics results in a score for strength, where a higher score reflects a stronger dependency of the local economy on the NDA site. The weighted averages for both scores are bounded between -1 and 1 to place all sites on a common, easily interpretable scale. This transformation reduces the influence of any potential outliers whilst preserving the order of scores across sites.

Table 18: Summary of scores across dependency metrics for NDA sites

NDA site	Proportion of local direct jobs related to the site relative to the number of all local jobs	Proportion of local direct, indirect and induced jobs relative to all local jobs	Direct, indirect and induced GVA as a proportion of total local GV	Average
Berkeley	-0.30	-0.28	-0.28	-0.28
Bradwell	-0.42	-0.38	-0.36	-0.37
Chapelcross	-0.25	-0.26	-0.26	-0.25
Dounreay	0.18	0.16	0.09	0.14
Dungeness A	-0.13	-0.17	-0.22	-0.17
Harwell	-0.27	-0.25	-0.27	-0.26
Hinkley Point A	-0.38	-0.35	-0.33	-0.34
Hunterston A	-0.16	-0.21	-0.24	-0.20
LLWR	-0.26	-0.27	-0.23	-0.25
NRS Bristol Hub	-0.41	-0.38	-0.36	-0.36
Oldbury	-0.42	-0.38	-0.36	-0.37
Sellafield - Risley	-0.30	-0.31	-0.29	-0.29
Sellafield - Cumbria	3.94	3.96	3.97	1.00
Sizewell A	-0.34	-0.32	-0.31	-0.31
Trawsfynydd	-0.26	-0.25	-0.22	-0.24
Winfrith	-0.37	-0.34	-0.32	-0.33
Wylfa	0.14	0.02	-0.03	0.04

Appendix F: Economic profile by Operating Company

NRS

This section below provides an overview of the economic contributions split by Operating Company – NRS, NWS and Sellafield Limited.

Results are an aggregation of the underlying NDA sites that constitute each Operating Company.

Summary of key results

Total UK GVA contribution:

£0.8bn

Total UK employment contribution:

~11,000

FTEs

Largest single site contribution: Dounreay

£0.3bn

of GVA; ~4,000 FTEs

Largest single sector contribution: Other services

£0.4bn

of GVA; ~5,000 FTEs

GVA contribution by sector

Table 19: Total national GVA contributions for all NRS sites only, by aggregated sectors, ordered by highest to lowest totals, FY25

	GVA (£m)			
Site name	**Direct**	**Indirect**	**Induced**	**Total**
Other services	336	5	25	**367**
Financial, law & real estate	-	18	82	**100**
Professional, scientific and technical activities	-	51	11	**62**
Administrative and support	-	18	34	**52**
Construction	-	32	12	**44**
Wholesale & retail trade	-	34	4	**38**
Manufacturing	-	21	15	**36**
Production & utilities	-	25	7	**32**
Government, health and education	-	10	21	**31**
Information and communications	-	12	7	**19**
Transport & distribution	-	7	8	**16**
Total	**336**	**234**	**228**	**797**

Source: PwC analysis based on NDA data and statistics from the ONS

NRS

Employment contribution by sector

Table 20: Total national employment contributions for NRS sites only, by aggregated sectors, ordered by highest to lowest totals, FY25

	Jobs (FTEs)			
Site name	**Direct**	**Indirect**	**Induced**	**Total**
Other services	4,473	113	646	**5,231**
Administrative and support	-	1,237	268	**1,505**
Wholesale & retail trade	-	251	679	**930**
Government, health and education	-	163	397	**560**
Professional, scientific and technical activities	-	384	109	**492**
Manufacturing	-	268	177	**445**
Construction	-	390	48	**438**
Production & utilities	-	249	96	**345**
Financial, law & real estate	-	137	198	**335**
Transport & distribution	-	143	155	**298**
Information and communications	-	115	75	**190**
Total	**4,473**	**3,450**	**2,848**	**10,771**

Source: PwC analysis based on NDA data and statistics from the ONS

NWS

Summary of key results

Total UK GVA contribution:

£0.1bn

Total UK employment contribution:

~2,000

FTEs

Largest single site contribution:
LLWR

£0.1bn

of GVA; ~2,000 FTEs

Largest single sector contribution:
Other services

<£0.1bn

of GVA; ~1,000 FTEs

GVA contribution by sector

Table 21: Total national GVA contributions for all NWS sites only, by aggregated sectors, ordered by highest to lowest totals, FY25

	GVA (£m)			
Site name	**Direct**	**Indirect**	**Induced**	**Total**
Other services	45	4	4	**54**
Financial, law & real estate	-	6	14	**19**
Professional, scientific and technical activities	-	12	1	**13**
Administrative and support	-	10	2	**11**
Production & utilities	-	8	2	**10**
Wholesale & retail trade	-	2	6	**8**
Government, health and education	-	3	4	**6**
Information and communications	-	5	1	**6**
Manufacturing	-	3	2	**5**
Construction	-	3	1	**4**
Transport & distribution	-	2	1	**3**
Total	**45**	**56**	**38**	**139**

Source: PwC analysis based on NDA data and statistics from the ONS

NWS

Employment contribution by sector

Table 22: Total national employment contributions for NWS sites only, by aggregated sectors, ordered by highest to lowest totals, FY25

	Jobs (FTEs)			
Site name	**Direct**	**Indirect**	**Induced**	**Total**
Other services	554	65	107	**726**
Administrative and support	-	210	44	**254**
Professional, scientific and technical activities	-	195	18	**213**
Wholesale & retail trade	-	31	112	**144**
Government, health and education	-	49	66	**115**
Financial, law & real estate	-	48	33	**81**
Production & utilities	-	62	16	**78**
Manufacturing	-	30	29	**60**
Information and communications	-	46	12	**58**
Transport & distribution	-	29	26	**55**
Construction	-	37	8	**45**
Total	**554**	**803**	**471**	**1,828**

Source: PwC analysis based on NDA data and statistics from the ONS

Sellafield

Summary of key results

Total UK GVA contribution:

£3.2bn

Total UK employment contribution:

~43,000

FTEs

Largest single site contribution:
Sellafield-Cumbria

£3.1bn

of GVA; ~41,000 FTEs

Largest single sector contribution:
Other services

£1.1bn

of GVA; ~15,000 FTEs

GVA contribution by sector

Table 23: Total national GVA contributions for Sellafields sites only, by aggregated sectors, ordered by highest to lowest totals, FY25

	GVA (£m)			
Site name	**Direct**	**Indirect**	**Induced**	**Total**
Other services	967	14	96	**1,076**
Financial, law & real estate	-	117	313	**430**
Professional, scientific and technical activities	-	287	27	**314**
Administrative and support	-	213	43	**256**
Construction	-	225	16	**241**
Wholesale & retail trade	-	81	131	**212**
Manufacturing	-	129	56	**185**
Production & utilities	-	122	47	**169**
Government, health and education	-	55	81	**136**
Information and communications	-	99	29	**128**
Transport & distribution	-	32	32	**63**
Total	**967**	**1,375**	**870**	**3,211**

Source: PwC analysis based on NDA data and statistics from the ONS

Sellafield

Employment contribution by sector

Table 24: Total national employment contributions for Sellafields sites only, by aggregated sectors, ordered by highest to lowest totals, FY25

	Jobs (FTEs)			
Site name	**Direct**	**Indirect**	**Induced**	**Total**
Other services	11,989	372	2,466	**14,827**
Professional, scientific and technical activities	-	5,466	415	**5,881**
Administrative and support	-	4,731	1,025	**5,756**
Wholesale & retail trade	-	1,210	2,595	**3,805**
Construction	-	2,569	182	**2,751**
Government, health and education	-	823	1,518	**2,341**
Manufacturing	-	1,480	676	**2,156**
Financial, law & real estate	-	920	756	**1,677**
Production & utilities	-	944	368	**1,312**
Information and communications	-	997	286	**1,284**
Transport & distribution	-	618	591	**1,210**
Total	**11,989**	**20,130**	**10,880**	**42,999**

Source: PwC analysis based on NDA data and statistics from the ONS

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