

# Research into the supply chain for the construction of nuclear power plants in Zeeland





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# Management summary

This is the summary of the outcomes of a study on the supply chain for nuclear new-build in Zeeland. The study was commissioned by the Province of Zeeland, Impuls Zeeland and VNO-NCW Brabant-Zeeland and was conducted by Tractebel Engineering and Technopolis during the period July 2025 to January 2026.

This study examines opportunities for Zeeland's regional businesses in the context of the Dutch government's plan to construct a large two-unit nuclear power plant, likely in Zeeland. While the focus is on large nuclear power plants, the study also considers Small Modular Reactors (SMRs) and explores potential business opportunities from the operational life extension of the existing Borssele nuclear power plant (KCB).

This report provides insights into the supply chain, supplier requirements, potential economic benefits, and lessons from international experience, and we present a roadmap for Zeeland to realise this potential. This information was gathered based on desk research, data analysis, case studies, interviews, and a workshop with regional stakeholders.

# The Nuclear Supply Chain

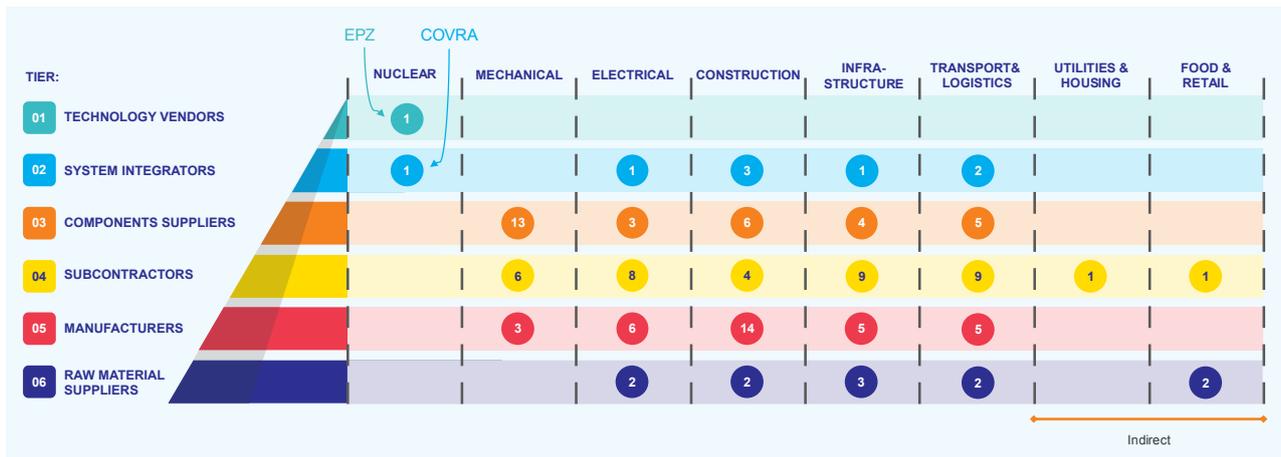
**Many Zeeland businesses without nuclear qualifications can still supply non-nuclear parts of a nuclear power station.** The nuclear supply chain can be visualised as a pyramid. At the top is the main contractor, usually a single company (the owner or technology vendor). Lower tiers supply directly or indirectly to the main contractor, with higher tiers involving more complex, integrated products and systems. Local companies can contribute to supporting activities such as transport, heavy lifting, site installation, and HSE support, sometimes under pre-qualification or vendor/owner supervision.



The supply chain as a pyramid

## Opportunities for Companies in Zeeland

**We identified 130 Zeeland businesses that could potentially supply nuclear projects, mostly fitting into tiers 3-4 of the supply chain and spread across sectors.** Opportunities are strongest in Construction, Infrastructure, and Transport & Logistics, and during early construction phases and site clearance/landscaping. Some components of new nuclear power plants cannot be sourced from Zeeland, due to complexity of the components and the special requirements and competencies needed to construct nuclear grade components.

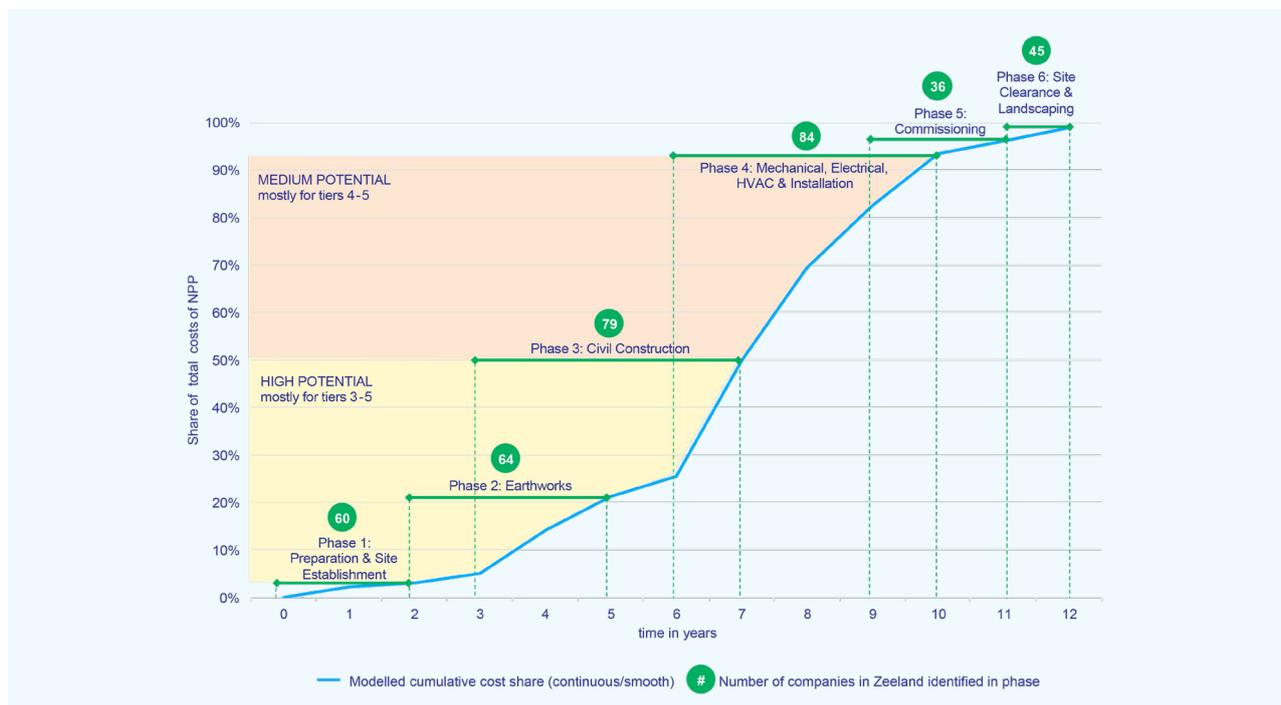


Number of Zeeland companies per sector and tier

**As a first estimate, local involvement could account for roughly 15% of total plant costs.** Potential local involvement varies per phase ranging from 2% in the commissioning phase to 48% in the earthworks and site clearance-phase. Actual localisation will depend on vendor selection, contracting models, and Zeeland businesses' capacity to handle large contracts. Further opportunities exist in spin-offs, including future SMRs, existing nuclear power plants in or near Zeeland and their decommissioning and long-term operations.

**The direct economic potential for the business sector in Zeeland is roughly estimated to be between €3.1 and €4.6 billion over a 12-year construction period.** Direct economic benefits emerge from the direct supply to nuclear power plants, be it in construction or operation. This is comparable to the value of regional contracts at Hinkley Point C considering regional economic differences. The actual order size that can land in Zeeland will strongly depend on various factors, including the technology vendor chosen. This estimate should therefore be considered a first estimate based on best available data and assumptions at this stage of the nuclear new-build project in the Netherlands.

**The indirect economic potential for the business sector in Zeeland is roughly estimated to be in the order of €1 billion.** This is a result of the regional spending of businesses directly involved in the supply chain and of on-site workers (living in Zeeland) or visitors. The estimate is based on comparison with nuclear new-build projects elsewhere and should be considered a first estimate.



Phasing and costs

# Tendering Process and Requirements for Suppliers

**An important barrier for Zeeland businesses entering the nuclear supply chain is the certification readiness.** Minimum requirements often include ISO 9001, with nuclear enhancements for items related to nuclear safety such as ISO 19443 or ASME NQA-1 alignment. Equipment related to nuclear safety requires nuclear design codes (ASME Section III, RCC-M/RCC-E) and Class 1E qualifications for electrical/I&C systems, depending on the technology vendor. Civil/structural works may require nuclear-specific codes and national variants may also apply. Businesses must also demonstrate strong safety culture, traceability, and successful audits, especially near safety-significant systems. Other important barriers include uncertainty surrounding the timeline of the nuclear power plants, and limited knowledge, experience, access to information, and investment capacity.

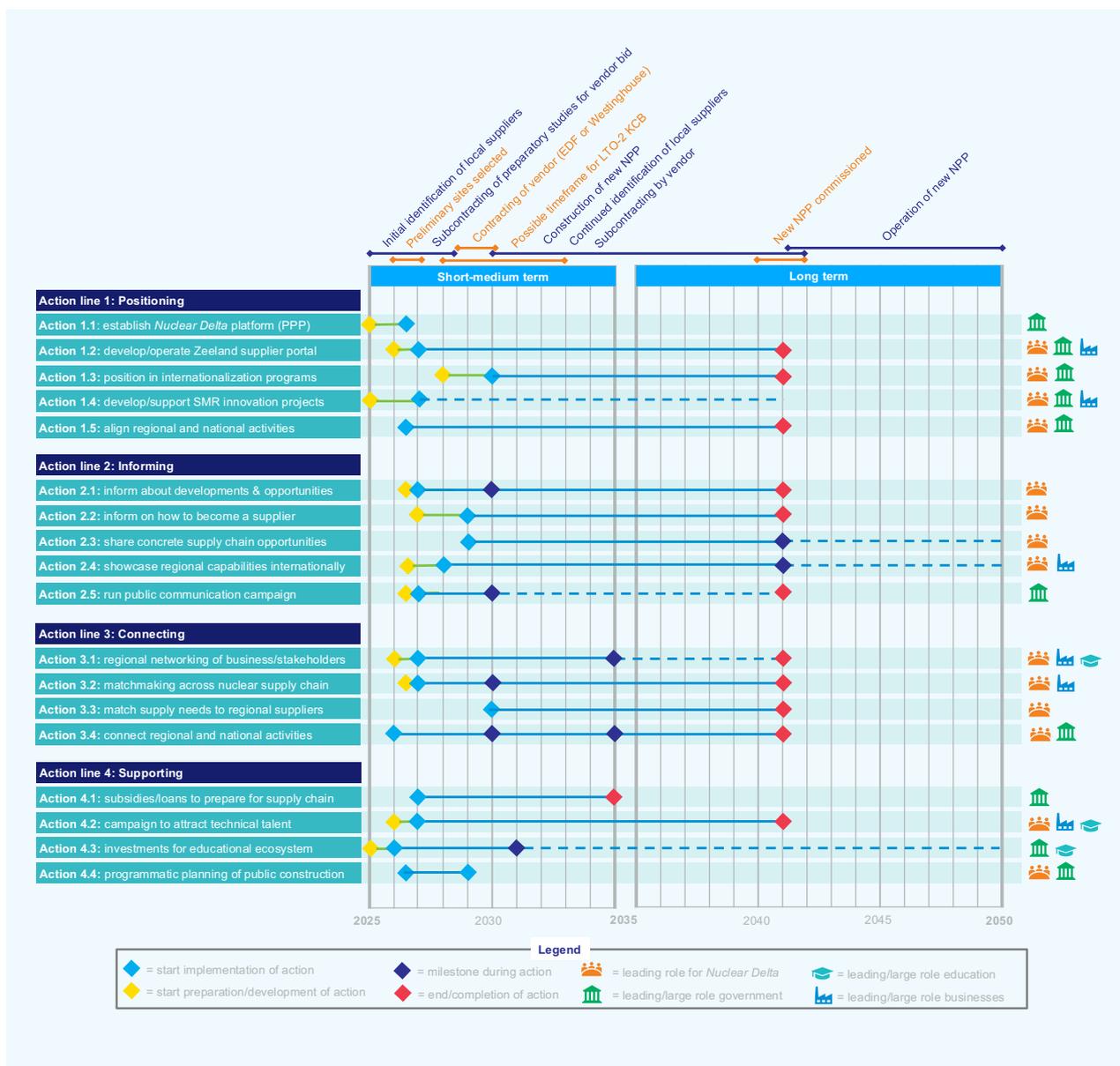
**Higher localisation in the Dutch nuclear new-build program can be achieved by setting stricter tender requirements.** The programme is divided into an owner scope, covering site preparation and infrastructure, and a vendor scope, managed by technology vendors through tier-1 contractors. The owner scope is supervised by NEO NL, initially 100% state-owned, and all tenders must be carefully aligned to national and European procurement laws.

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# Roadmap

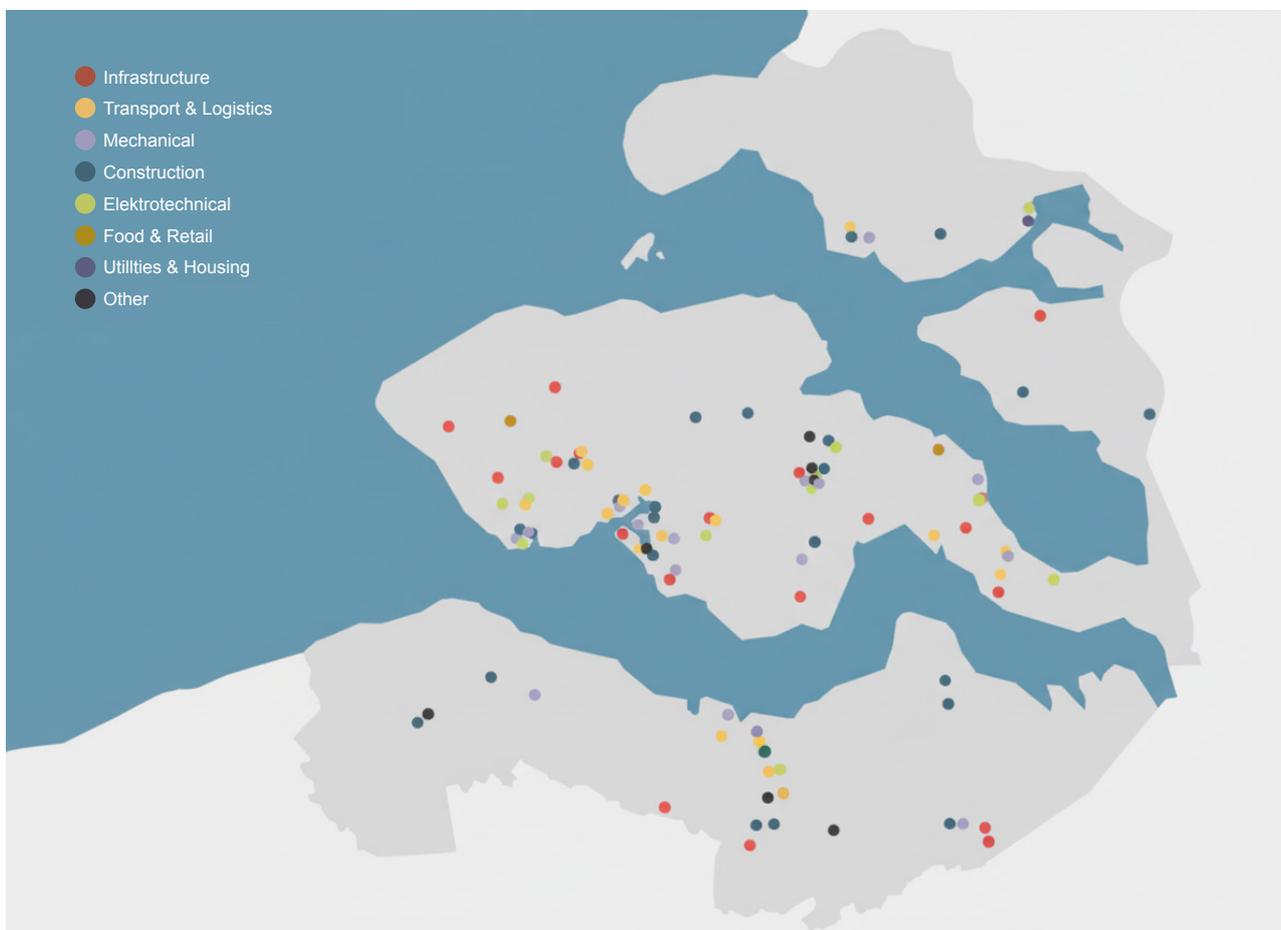
Based on the findings of the study, a localisation roadmap was developed. The roadmap has 4 action lines: Positioning, Informing, Connecting and Supporting. Each action line consists of 4-5 specific actions that we recommend implementing. This includes the establishment of a Nuclear Delta platform, sharing supply chain opportunities, matchmaking across the nuclear supply chain and subsidies or loans to help companies prepare to enter the supply chain.



Localisation Roadmap

# Recommendations

Given the opportunities for Zeeland businesses in the nuclear supply chain, we recommend positioning Zeeland as a hotspot for nuclear energy and actively promoting its businesses in new-build projects. Stakeholders should be informed about nuclear developments, supply opportunities, and requirements, while businesses should be connected regionally, nationally, and internationally, and regional and national governments should align business support activities. Support should be provided to establish the right ecosystem for Zeeland companies to enter the nuclear domain, including further developing and implementing the proposed roadmap, backed by public and private investments. To facilitate this, we recommend establishing the Nuclear Delta platform, a public-private initiative bringing together businesses, government, and education institutions. The Province of Zeeland, Impuls Zeeland and VNO-NCW Brabant-Zeeland can play a part in this as well. Additionally, clear agreements with the national government should be made on conditions for hosting a new nuclear power plant, ensuring maximum economic benefit for regional businesses and reinforcing Zeeland's ambitions as a nuclear energy hotspot.



Locations of identified Zeeland companies