UK Atomic Energy Authority

FUSION FUTURES INDUSTRY CAPABILITY IMPACT REPORT

FY24/25

Content

01

STATEMENT FROM OUR SRO – STEPHEN WHEELER, EXECUTIVE DIRECTOR, UKAEA

The Industry Capability programme is an investment to prepare the UK supply chain for the future opportunities with international fusion programmes and developers. The response to this programme from UK companies has been amazing, from small start-ups with a handful of technologists to the UK offices of multi-national engineering consultancies. We are very grateful for the engagement of the community in shaping the programme and delivering so many quality projects.

Introduction

REPORT PURPOSE

This document establishes the inaugural Fusion Futures Industry Capability Annual Impact Report (AIR), encompassing the period from April 2024 to March 2025. The primary objective of this report is to provide our stakeholders with essential insights regarding the progress achieved in fulfilling our commitments. Additionally, it offers comprehensive information pertaining to the benefits, objectives, performance metrics, and financial data associated with our initiatives.

PROGRAMME BACKGROUND

Fusion Futures is UKAEA's innovative fusion programme designed to strategically replace our previous membership in the Euratom Research and Training framework following the Brexit agreement. Considering this transition, the government announced a significant £650 million package in October 2023, outlining our commitment to advancing fusion technology in the UK. Fusion Futures encompasses three key sub-programmes:

IRIS (International, Research, Investment and Skills) – Package of activities to access new International collaborations in fusion, undertake essential Research in partnership with European labs and facilities, unlock Investment into fusion tech and the UK fusion cluster, and boost Skills growth at all levels

Industry Capability – Industry capacity and capability development that secures economic value in the UK.

LIBRTI (Lithium Breeding Tritium Innovation) – aims to create a world leading facility to demonstrate the feasibility of powerplant relevant fusion fuel technology.

For the **Industry Capability Programme**, formerly known as ITER & Dependencies, the Fusion Futures Outline Business Case (March 2024) approved a holistic strategy for this industrial capacity and capability development within the UK fusion sector.

Our primary objective within the **Industry Capability Programme** is to **stimulate and sustain the growth of fusion capabilities and capacities within UK industry**. We aim to achieve this by facilitating large-scale, fusion-specific programmes of work through commercial contracts, enabling UK industry to take the lead in this groundbreaking sector. Additionally, we are committed to fostering collaboration both nationally and internationally, aligning with broader strategic goals for fusion-related technology development.

The programme pro-actively engaged with ITER and F4E across the course of the 2024 to seek a collaboration agreement to facilitate scope from ITER to UK industry as preferred option set up in the OBC. After several months of negotiations and technical engagement, UKAEA was unsuccessful to finalise an agreement and in January 2025, DESNZ agreed that UKAEA should implement the approved alternative non-ITER approach.

In Year one, we've achieved our ambition to contract at least 75% of technical project activities to industry and launch multiple secondments and placements with key international partners. By closely monitoring and advising on these projects, we have aimed to maximise the value delivered while ensuring alignment with the program's overarching benefits.

We've been incredibly privileged to embark on this journey and look forward to building a robust foundation for the future of fusion in the UK over the next 3 years.

AIMS & OUTCOMES

FFIC Objectives

OVERALL PROGRAMME GOAL	
To create a strong UK industrial sector that leads the world in operationalising and commercialising future energy.	
PROGRAMME OBJECTIVES	
PROGRAMME OBJECTIVES AS DEFINED IN OBC	**WHAT HAS BEEN DELIVERED TO DATE?**
Stimulate industry capacity growth through access to large value work packages, ensuring companies are of sufficient size to support future fusion powerplant development.	£9.4M of work awarded to industry representing >75% of technical spend. A new design and build framework has been designed and developed to ensure a better fit to the programmes needs
Prompt industry capability growth in areas which have been identified as significant for future fusion powerplant development, through work packages including workforce upskilling.	In FY24/25, the programme launched 36 projects (~£11M value) with industry across multiple strategic areas for the future fusion powerplant development: • Remote Handling • Tritium Fuel Cycle Technology • Plasma and Microwaves • Fusion Diagnostics • Plasma Control Systems • Magneto Hydro Dynamics • Active Waste Management • Materials Testing and Development
FUSION FUTURES INDUSTRY CAPABILITY PROGRAMME	
Industry In-kind Contracts (Workstream 2) Facilitating work packages into industry to develop capacity and capability. Achieved by supporting the development of high-level capabilities which the UK industry will need to deploy at scale in order for fusion power plants to be developed, built, operated and exported around the world.	

KPI'S AS PER OBC

Set of Key Performance indicators were identified at the OBC stage and have been used to monitor successful progress of the programme and can be found below:

FFIC Key Performance Indicators

ID	KPI DESCRIPTION	RAG	PERFORMANCE	
KPI1	4 Supply chain engagement events to be held, at least 2 to be located regionally	Green	4	A total of four supply chain events were held during the year. Two of these were in person events held on the Culham Campus. Two were virtual events, allowing people to join from across the UK. These four events attracted over 470 unique organisations and more that 1000 unique individuals. Many of these were attending their first ever Fusion event.
KPI2	10 contracts to be placed with industry	Green	300	A total of 300 separate contracts were placed with UK industry within the year.
KPI3	>75% of technical delivery spend to be external	Green	75.9%	75.9% of the total delivery was spent within UK industry. A total of £8.4M was delivered by industry on an overall spend of £11.1M.
KPI4	70% (by value) of 25/26 programme to have written technical specifications in place by Aug 24.	Red	N/A	Delays caused by a lengthy negotiation with F4E/IO and then a subsequent pivot, meant that it was not possible to achieve this KPI.
KPI5	65 individuals involved in new fusion work delivered by industry	Green	82	A total of 82 separate individuals, working within the UK supply chain, were involved in technical work across the 36 new projects launched by the programme.
KPI6	10 tier 2-3 organisations & SMEs engaged by the principal contractors	Amber	7	A total of seven unique Tier 2 organisations were engaged by the principal contractors within the year. However, 40 unique SMEs were contracted directly by UKAEA within the Programme.
KPI7	Number of contracts and £ value of industry engagement	Green	£9,472,841.50	As stated in KPI2, 300 contracts were placed with industry. The total value of these contracts was £9,472,841.50. The value realised within the financial year was £8.4M.

02 Benefits

The programme applied the UKAEA Benefits Management Framework, which provides an organisation-wide framework for identifying, managing and realising benefits, in a consistent and comprehensive manner.

In tracking benefits through the year, the programme utilised Programme and Project Managers to complete the reporting as a formal part of their responsibilities. Benefits progress and forecasts were regularly reviewed and reported through the programme's governance structure, firstly within the Workstream Boards, then the Programme Board before being rolled up to the Corporate Portfolio Board. The capturing of benefit metrics via the supply chain delivery partners were included in contractual terms, and surveys were used at the end of the programme to assess the benefits to suppliers and UK industry. In the latter part of the year, the programme recruited a Benefits Manager to lead and drive this activity going forwards.

FFIC High Level Benefits

- Access to key design and build contract opportunities for UK industry, enabling the UK fusion supply chain to grow its capability in powerplant build.
- Enhancing the UK innovation ecosystem through fusion challenges, thought leadership, generation of intellectual property and technology transfer. For example, via marketable spin-off technologies such as robotics/advanced materials/hydrogen technologies.
- UK leading the commercialisation of fusion energy technologies, prompting the UK to lead in emerging markets, including increasing UK export potential.
- New enhanced industrial processes and increased private sector research and development, is required for the future fusion supply chain.
- Foster a fusion ecosystem to attract and retain domestic and international fusion workforce thus increasing human capital though growth of fusion skills workforce.
- Increased investment and investor confidence in fusion technology firms and their supply chain.

WORKSTREAM 2 BENEFITS REALISED

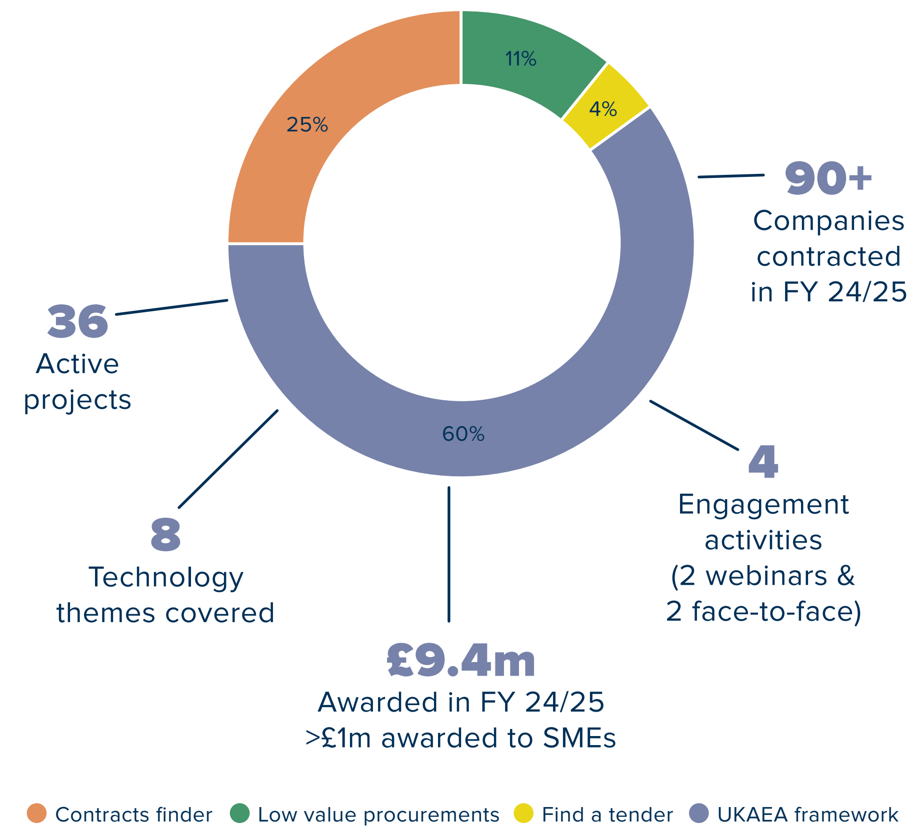
W/S 2 Benefit Realisation Report

BENEFIT NAME	RAG FOR FY24/25	FY24/25 REALISATION	NARRATIVE
Enabling the UK to lead in emerging fusion energy markets, including increasing UK export potential.	G	92	92 different UK companies including subcontractors engaged through contract awards.
Readiness of supply chain across key fusion powerplant technologies.	G	Qualitative	See list of 36 projects funded in FY24/25 and success stories captured by projects.
Supply Chain Knowledge gained for design and build of UK fusion powerplants.	G	£9,472,841.50	£9.4M of contracts awarded to industry in FY24/25 including COTS. Tritium Fuel Cycle = £3.5M, Remote Handling = £2.6M, Plasma = £1.4M, Fusion Technology = £1.1M, others = £0.9M
Increased private sector research and development enhances the future UK fusion supply chain.	G	£8,691,451.37	£8.7M of contracts awarded to industry excluding COTS.
Support learning relevant to fusion through on the job experience.	G	68,033 hours	Number of people-hours extracted from internal timesheet bookings for UKAEA staff and ASWs, timesheet booking for resource frameworks and synthetic calculation for EDS contracts
Foster a fusion ecosystem to attract and retain domestic and international fusion workforce.	G	84 skilled jobs	84 internal (UKAEA) skilled jobs identified (assumed minimum number of hours worked). Skilled jobs have been defined as not including project professional and support functions but only technical divisions within UKAEA. *Note: value needs to be updated with supply chain data.*
Create a diverse supply chain including new businesses and entrepreneurs, start-ups, SMEs, VCSEs and mutuals.	G	55	55 contracts awarded to SMEs either directly by UKAEA or subcontracted by supply chain.
		£1,074,277.46	£1M of contracts awarded to SMEs either directly by UKAEA or subcontracted by supply chain.
		11%	Summation of £ value of all contracts to SME's / total programme supply chain spend. Includes subcontracted
Establish collaboration throughout the supply chain, including fair and responsible terms passing to subcontractors.	R	1.1	Ratio of number of companies involved in delivery (from above measures) / total number of primary UK contracts awarded.
Enable the UK fusion supply chain to grow its capacity and capability in powerplant build.	G	470	Over 470 different external organisations attended FFIC supply chain webinar/event and specific commercial engagement events.

03 WS2 Industry In-kind Projects

The FY24/25 programme for Workstream 2 launched, from a standing start, 36 projects with a total expenditure of £11.1 million within the FY. The list of projects funded in Year 1 can be found in Annex of this report. These projects were selected from an initial list of 86 potential initiatives based on their strategic importance and alignment with the programme objectives. £9.4 million worth of work was placed into industry (£8.4M of which were spent in year), involving over 90 unique suppliers (including sub-contractors), which included 40 unique small and medium-sized enterprises (SMEs). Extract form the suppliers involved in Year 1 can be found in Annex.

Breakdown of contracts awarded



> **Standing up the workstream has been a major challenge in year 1 with the Programme designing the governance and creating new reporting procedures. We stood up 36 individual projects across 7 divisions within UKAEA who between them have engaged with a wide range of different suppliers, many SMEs including some who are new to the fusion market. The feedback from the industrial partners we have worked with has been universally positive. I am most pleased with a number of SME organisations we have introduced to each other who are now collaborating on tenders for further work outside of our programme. The programme has enabled the projects to create deliverables that are of benefit to UKAEA as well as developing the capabilities and capacities for fusion within the supply chain."**
>
> David Clapton | Programme Manager | Fusion Futures WS2

Below are some overall comments from different suppliers that were involved across several different projects:

- **AtkinsRéalis are one of the larger companies within the supply chain that the Fusion Futures Programme engaged with.**

AtkinsRéalis' ambition in fusion is as high as ever. We recognise the importance of the sector for energy security and working towards net zero with both being core to our values... the projects secured through Fusion Futures Programme funding are significant to our growing ambitions in the sector. They have provided opportunities for skill growth, gaining fusion experience and gaining insight into the developing sector. Our UK fusion portfolio has become a hub for fusion knowledge and expertise, with foreign clients increasingly interested in investing in our capabilities... The work we do in fusion now is key to our strategic growth in the sector and is putting us in a good position to be able to support future potential opportunities both nationally and internationally

Jason Dreisbach, Portfolio Director for Advanced Technologies

- **M5tec are one of the SME companies within the supply chain who also worked on several projects.**

Participating in the Fusion Future Programme has been an incredibly successful experience for M5tec during its first year. We have had the opportunity to work on 8 projects in total. These projects have given at least 12 of our employee's direct exposure to fusion-related work, including some who are experiencing it for the first time. Among these 12 individuals, 2 are graduates, and 1 is an apprentice. Furthermore, we've successfully engaged our local supply chain in the manufacturing process, allowing several suppliers to enter the fusion sector for the first time. This initiative has not only expanded local industry capabilities but has also strengthened regional expertise in high-precision component manufacturing.

Carl Jones, M5tec, Operations Director

ENGAGEMENT ACTIVITIES DURING THE YEAR

The following gives examples of the engagement activities undertaken throughout the year: 12. These events were attended by over 470 different organisations and more than 1000 individuals.

Examples of engagement activities

SUPPLY CHAIN ENGAGEMENT EVENT	DATE OF EVENT	LOCATION OF EVENT
Event 1 - Webinar	21/02/2024	Virtual
Event 2 - UKAEA 12th Supplier event	25/04/2024	Culham Campus
Event 3 - Webinar	10/07/2024	Virtual
Event 4 - UKAEA 13th Supplier event	28/11/2024	Culham Campus
Pin Webinars held - 7	Various 2024/25	Virtual

These events were attended by over 470 different organisations and more than 1000 individuals.

OVERVIEW OF SUCCESS STORIES FROM Y1 PROJECTS

Below is a selection of stories from the projects delivered in FY24/25, highlighting the successes achieved by WS2 Industry In-Kind Projects:

PROJECT TITLE	TECHNICAL THEME	WHAT WAS ACHIEVED	KEY TAKEAWAYS / IMPACT	TESTIMONIAL
Palladium Membrane Reactor and Permeable Membrane Studies (P07)	Tritium Fuel Cycle	Suppliers have been reluctant to customize palladium membrane separators and reactors, as the expertise and IP needed to design and operate them is held by a few commercial and research organisations. To advance development, the team recommissioned an existing test rig to gather data for validating design models. They also partnered with a UK supplier to integrate a micro gas chromatography system and steam generator, boosting performance of palladium membrane reactor systems for fusion applications	• Conducting **experiments within the test rig** to validate design models, **generating the intellectual property** required to size and specify this technology for **pilot to power plant scale fusion devices**. • **Identifying components and technologies from within the UK supply chain** that can accurately dose steam into the system and analysing the effectiveness of the reaction to enable a future design to be **developed for a robust, operable, safe, scalable** and well controlled Tokamak Exhaust Processing system. • **Engineering and hands-on knowledge development** in fusion fuel cycle that is relevant for future fusion power plant.	Niamh Holland was internally seconded to the project as graduate engineer to develop her career within UKAEA. Niamh took on responsibility for several procurements, including steam generator, cryogenic equipment for the new MicroGC, gas sensors and other ancillary equipment. These have led to Niamh gaining knowledge in fusion relevant technologies to enable her to make informed decisions on the procurements and this is aiding her progression towards next grade. Jake Emmerson, from Amentum, was seconded onto the project to lead on various engineering tasks. This has given him exposure to the hydrogen, deuterium and tritium research and the unique technical challenges of engineering these test rigs. This has greatly enhanced Amentum's knowledge in this space, especially around palladium membrane reactors, the fusion fuel cycle, flammable gas calculations and other technical elements.

Niamh Holland next to the Palladium membrane reactor system

Jake Emmerson with the P07 Test Rig.

PROJECT TITLE	TECHNICAL THEME	WHAT WAS ACHIEVED	KEY TAKEAWAYS / IMPACT	TESTIMONIAL
Robotic In-Situ Repair of Fusion Vessel Components (P17)	Robotics	Confirming the commercial status of UK businesses for technologies to **undertake robotic in-situ repairs for the fusion environment** as allowing to potentially dramatically reduce plant downtime. This was delivered by bringing external engineers to conduct and report on a market survey into each field of technology as well as place four separate contracts with three UK businesses (SME's) and one university, to do initial trials on the relevant technologies. The results of these will be used to determine further development needs of these technologies in close collaboration with these businesses.	• Technological progress to **reduce operational downtime** by avoiding full component replacements. • Strengthened the business case for **robotic in-situ repair technologies** in the fusion sector. • Confirmed the **technical and commercial readiness** of UK suppliers in this emerging niche. • **Capability development** with UK SMEs in robotics for fusion and more specifically in-situ • Enabling **collaboration between SMEs** to continue developing their respective capabilities and **allow entering wider fusion market.**	The companies involved were Atkins Realis, M5Tec, University of Birmingham, Forg3d, StirLight (Baclor Ltd) and Laser Additive Solutions Ltd. Atkins Realis Mechanical Engineer: *"The Fusion Futures Programme has provided a brilliant opportunity to collaborate with UKAEA, experts in fusion, to gain firsthand experience in this cutting-edge technology. It has also facilitated wider industry engagement, allowing us to explore how existing skills and expertise within the supply chain can be adapted/expanded for fusion applications. Prior to this work, my knowledge was limited, particularly around robotics. I now have an improved understanding and appreciation of the challenges faced within remote maintenance operations. Undertaking trials in collaboration with industry has been very rewarding, and it has been an exciting opportunity to be able to contribute to the wider vision of commercialising fusion power to help tackle climate change. I am eager to apply what I have learnt to future projects, continue to build on this knowledge, and share my experiences wherever possible."*

PROJECT TITLE	TECHNICAL THEME	WHAT WAS ACHIEVED	KEY TAKEAWAYS / IMPACT	TESTIMONIAL
				Forg3D stated: *"The projects with UKAEA have improved our ability to, and understanding of welding in more challenging environments, and our knowledge of processing highly technical materials, such as tungsten.* *With regards to the fusion industry, the long-term ambition for this process is to use it to repair fusion reactors, where the repair and replacement of shielding panels currently presents a significant challenge due to the harsh nature of the repair environment.* *In terms of other industry sectors, the ability to create complex structures on challenging substrates has potential applications in many industries outside of fusionincluding the repair of hardware in Aerospace, large scale manufacturing processes, and many others."*
Radiation-Hardened Actuator for Remote Maintenance (P10)	Robotics	Development of a prototype **radiation-tolerant actuation set by UK industry** which is forming core technology required to enable remote maintenance in future fusion power plant. This project successfully developed a working prototype actuator including all relevant technical reports, manufacturing drawings and supporting substantiation and operation manual.	• Delivered the **foundational tech** for dexterous robotic maintenance tools. • Created **reusable IP and design collateral** for future fusion machines. • **Expand assembly capability of SME** that can be used for fusion or ither industries.	Companies involved were Amentum and M5Tec. M5Tec stated: *"As a result of this project, our assembly capabilities have expanded with the addition of a lab oven, initially acquired for bonding the motor into a housing sleeve. This new capability not only supports the current project but can also be utilized for future projects and applied across various industries.* *Additionally, many of our engineers have gained insight into the unique environmental challenges and constraints associated with a tokamak, further enhancing their expertise in this specialized field."*

Picture from the welding trialsperformed by Forg3D

PROJECT TITLE	TECHNICAL THEME	WHAT WAS ACHIEVED	KEY TAKEAWAYS / IMPACT	TESTIMONIAL
Electroforming-Enabled HIP for Complex Component Manufacturing (P34)	Material Testing and Development	Established a **UK-based capability** to produce net-shaped fusion components using **electroforming-enabled Hot Isostatic Pressing (HIP)**—a method ideal for complex geometries and curved surfaces.	• Created a **new domestic manufacturing technique** for fusion components. • Enabled **future scaling of this capability** for larger or more numerous parts. • Opened **pathways to embed functional layers** (e.g. tritium barriers) directly into component structures. • Enable **collaboration across UK companies** to develop solution suitable for future fusion power plant.	Companies involved were Ultima Forma, Acantecs and AML. Acantecs declared: *"Acantecs' involvement in the FFIC programme can be used to develop the Acantecs brand and increase exposure to large OEMs and businesses who require the manufacturing of near-net-shape complex components. The UKAEA and the FFIC's involvement of Acantecs in development programmes such as this one helps a start-up SME develop its capabilities and grow within the local area and supply chain. The UKAEA and FFIC's assistance in the growth and development of Acantecs is invaluable.* *The FFIC programme is crucial for advancing fusion energy by addressing key manufacturing challenges and enabling the production of complex, high-performance components needed for fusion reactors."*
Fusionics Components Development (P21)	Plasma Control Systems	Creation of a high-performance real-time control network test rig. This initial work had started the simplification of the fusion control system to allow reduced costs and risks and enable scale up to wider fusion ecosystem.	• **Knowledge transfer** from UK national lab to **UK industry** on plasma control technologies. • Simplification of existing technology to allow **commercial utilisation** in fusion plants. • **Enhanced UK SMEs technical understanding** and **capability development** of real-time analysis applicable beyond fusion.	Companies involved were IDOM UK and Cosylab. Cosylab stated: *"Cosylab has enhanced its understanding of how plasma control technologies can be transformed into various classes of well defined components, that together with initial implementation can be made ready for commercial actors to either use in fusion machines or enhance into their own commercial offerings."*

Picture from the Ultima Forma components formed during trailing and optimisation phase of the Electroforming-Enabled HIP for Complex Component Manufacturing

Fusionics team (including key suppliers Cosylab and IDOM UK) presenting output of year 1 work at the UKAEA Computing Division Showcase

EXTRACT OF SUPPLIERS USED IN YEAR 1 FOR WORKSTREAM 2 – INDUSTRY IN-KIND CONTRACTS

FORG3D
LUCIDEON
analytix
m5tec
NUVIA
PyrOptik
University of Huddersfield
University of Nottingham
University of Birmingham
Siemens Energy
Wittenstein cyber motor
Thales
Kyoto Fusioneering
IDOM
severn thermal solutions
Kinectrics
AtkinsRéalis
Bilfinger
Innerspec
LAS Laser Additive Solutions
Ampegon
VSM Instruments
Ultima Forma
mpp Microwave Power Products
Demcon
Magics
Frazer-Nash Consultancy
Cosylab
amentum

LIST OF PROJECTS FUNDED IN YEAR 1 UNDER WORKSTREAM 2 – INDUSTRY IN-KIND CONTRACTS

THEME	PROJECT NAME
Tritium Fuel Cycle	Development of High Integrity Tritium Ionisation Chambers
Tritium Fuel Cycle	Tritium Process Area and Stack detritiation
Tritium Fuel Cycle	Redevelop the JET AGHS
Tritium Fuel Cycle	DELPHI
Tritium Fuel Cycle	Tritium Plant Virtual Control Room
Tritium Fuel Cycle	DT Extruder and Pump Verification Rig (AGHS)
Tritium Fuel Cycle	PMR and PM Studies
Tritium Fuel Cycle	Enhanced waste pyrolyser
Tritium Fuel Cycle	Development of Commercially Off The Shelf Tritium Compatible Pumps
Remote Handling	Radiation Hardened Actuators
Remote Handling	Radiation Hardened Multiplexing
Remote Handling	Reliable Remote Operability of Fasteners
Remote Handling	Remote Techniques for Large Vacuum Joint Lip Weld
Remote Handling	Remote techniques for Metallic Seal Replacement
Remote Handling	Inspection system of in-service and in-vessel fusion components
Remote Handling	Remote Non-destructive examination of service pipes
Remote Handling	Remote, in-situ, repair of damaged or eroded component
Remote Handling	Vision Systems for Automated Positioning
Remote Handling	Key Design Considerations in Distributed Fusion Control Systems
Microwave	Integrated microwave system launcher design
Plasma Control	Fusionics components development
Plasma Control	Extending real-time plasma control frameworks with uncertainty quantification (UQ) to increase resilience.
Plasma	STEP-Like Launcher for ITER EC System
Plasma	HCD Grid Protection System from Plasma Disruptions
Plasma	Fusion Gamma Ray Spectrometer (FUGAS)
Plasma	200GHz, 1MW gyrotron
Plasma	HCD Microwave Test Facility for High Power/Frequency Sources
Fusion Technology	SMART Pipe: embedded fibres for in-situ tokamak health monitoring
Fusion Technology	Materials Testing to Support ITER TBM Qualification
Fusion Technology	Development of Liquid Metal Capability in UK Industry to Accelerate Fusion Delivery
Fusion Technology	Tungsten Deposition Using FORG3D STAR Technology - for use in In-Situ Repair and Near Net Shape Manufacture
Fusion Technology	Environmentally-assisted cracking of EUROFER-97 under relevant WCBB environment
Fusion Technology	Electroformed Enabled Net-Shaped HIP for Nuclear Fusion Applications
Plasma Control	Development of virtual qualification demonstrator
Fusion Materials	Industrialisation of interphase coatings for silicon carbide fibre composites for flow channel inserts
Fusion Materials	Testing novel materials

NOTES

The UK Atomic Energy Authority's mission is to lead the delivery of sustainable fusion energy and maximise scientific and economic benefit

UK Atomic Energy Authority

Find out more
www.gov.uk/ukaea

United Kingdom Atomic Energy Authority
Culham Campus
Abingdon
Oxfordshire
OX14 3DB

e: enquiries@fusionfutures.ukaea.uk

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