

ONR Stakeholder Survey 2019

Report of findings

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Management Summary

This report presents the findings from a survey of ONR stakeholders conducted between Wednesday 23rd October and Friday 22nd November 2019. From 1192 contacts, 364 respondents took for a response rate of 31%. For more detail about the categorisation of stakeholders, please see Section 2. As well as this, 15 qualitative depth interviews were conducted with stakeholders who took part in the survey.

Summary over time

Over two-thirds (71%) say that the ONR pro-actively seeks feedback from them, in line with 2018 (69%) and 2017 (66%) findings. This is indicative of positive movement over time.

Over half (57%) of stakeholders feel confident that the ONR has the resources and capabilities to deliver its functions at the current time. This is also indicative of a positive shift over time, with 52% agreeing in 2018 and 53% in 2017.

There has been an increase in confidence in the ONR to meet the potential requirements of the next 5 to 10 years, from 32% in 2018 to 40% at present.

Additionally, confidence in the ONR over the last 12 months has increased. A third (34%) of stakeholders say that their confidence in the ONR has increased over the past 12 months (up from 26% in 2017; 30% in 2018).

Understanding and relationship

Over two-thirds (70%) of ONR stakeholders say that they feel they understand the ONR's purpose 'a great deal', in line with 2017 findings where 73% reported this.

Nine out of ten (90%) stakeholders feel that they have a very or quite effective professional working relationship with ONR and its staff. This is in keeping with the previous two years (89% in 2018 and 91% in 2017).

Attributes of an effective regulator

'Professional' (93%), 'independent' (89%) and 'trusted' (85%) are the attributes most strongly associated with ONR. Stakeholders are less likely to say that the ONR is 'proportionate' (58%) or 'responsive to change' (52%).

In 2018, the statements most associated with the ONR were 'independent' (87%), 'trusted' (85%) and 'based on evidence' (84%). 'Professional' (89%), 'independent' (82%) and 'in the interests of the public' (82%) were most often associated in 2017.

Licensees are the stakeholder group most likely to say that the ONR is professional (95%).

Influencing

The majority (82%) of stakeholders agree that the ONR influences improvements in nuclear safety and security culture. This is consistent with both 2018 (82%) and 2017 (83%) findings.

A similar proportion (85%) of licensees agree that the ONR influences improvements in their organisation's safety and security culture.

Communication

The majority of stakeholders report that the ONR provides the right amount of information, guidance and advice in both the public domain (67%, 61% in 2017) and in person (68%, 69% in 2017).

A smaller proportion say that the ONR provides too little information, guidance and advice in the public domain (17%, 22% in 2017) and in person (18%, 21% in 2017). Only a very small number feel the ONR provides too much.

The majority of stakeholders find the ONR's information, guidance and advice to be clear (85% - a great deal / to some extent), accessible (82%) and consistent (77%).

Engaging

Four-fifths (82%) of stakeholders feel that the ONR listens to them a great deal or to some extent; this is consistent with 2018 and 2017 findings (82% and 80% respectively).

Indicative of positive movement over time, over two-thirds (71%) say that the ONR proactively seeks feedback from them - 2018 (69%) and 2017 (66%).

A slightly lower proportion (61%) feel that the ONR engages with them about its priorities and plans; this figure was 59% in 2018 and 2017.

Efficiency

Just under half (46%) of ONR stakeholders feel that the ONR avoids imposing unnecessary regulatory burdens, though a small but sizable proportion (22%) disagree. Among licensees, half (49%) agree.

Over a third (36%, 40% in 2018) say that the ONR has efficient ways of working, with 18% disagreeing.

Confidence in ONR

Over half (57%) of stakeholders feel confident that the ONR has the resources and capabilities to deliver its functions at the current time. This is indicative of a positive shift over time, with 52% agreeing in 2018 and 53% in 2017. A similar proportion of licensees are confident (58%).

Overall, stakeholders are more likely to say that they are confident in the ONR delivering its functions at the current time than in the next 5 to 10 years (57% vs. 40%). However, there has been an increase in confidence in the ONR to meet the potential requirements of the next 5 to 10 years, from 32% in 2018 to 40% at present.

Confidence in the ONR over the last 12 months has also increased. A third (34%) of stakeholders say that their confidence in the ONR has increased over the past 12 months (up from 26% in 2017; 30% in 2018). Half (50%) say that their confidence in the ONR over the past 12 months is about the same, though it has decreased for 14%.

ONR's mission

The majority (86%, 83% in 2017) of stakeholders say that they are confident in the ONR to deliver its mission: “to provide efficient and effective regulation of the nuclear industry, holding it to account on behalf of the public.”

Method

Summary

This report presents the findings from a survey of ONR stakeholders conducted between Wednesday 23rd October and Friday 22nd November 2019, along with 15 follow-up qualitative interviews conducted with participants who took part in the survey. From a database of 1192 contacts, 364 respondents took part, constituting a response rate of 31%.

Comparisons at an overall level are made with the 2018 (a shortened version) and 2017 ONR stakeholder surveys. The 2018 survey was conducted between Thursday 11th October and Friday 9th November 2018. From a database of 1,061 contacts, 329 respondents took part, equating to a response rate of 31%. The 2017 survey of ONR stakeholders was conducted between Friday 20th October and Monday 13th November 2017. 351 respondents took part in the survey, from a database of 1,023 contacts, giving a response rate of 34%.

Throughout the report, we highlight interesting differences between sub-groups, and note where these are significantly different than could be expected by chance ($p < 0.05$).

For a sample size of 364 the confidence interval (often called margin of error) where the sample is evenly split (i.e. an overall answer of 50%) is $\pm 5.1\%$ at the 95% confidence level. This means that for an answer of 50%, we can be 95% certain the true answer for the entire population is between 44.9% and 55.1%. Where there is greater conformity, say 90% or 10% share the same view, the confidence level improves to 3.1%.

Whilst there may look to be shifts over time, due to the sample size these are often not significant. When comparing 2019 and 2018 data, with sample sizes of 364 and 329 respectively, for a figure of 70%, a change of $\pm 7\%$ would be needed to signify a significant difference.

Respondent breakdown

The majority of responses (63%) came from licensees alongside many from government, interested groups / individuals and other dutyholders / industry stakeholders.

Figure 1. Stakeholder category

	Number
Academics / Professional Institutes / Trade Bodies	17
Government Departments / Agencies / Public bodies	54
Interested groups / individuals	16
International	2
Licensees	231
Local political including parliamentary	2
Other dutyholders / industry	42
Total	364

ONR developed a grading system to map the status of the stakeholder's relationship. 41 responses classify as category A, 138 (B), 178 (C) and 7 (D).

On some occasions, percentages may not add to 100% due to rounding. Likewise where a "net" percentage is shown (such as net: strongly agree and tend to agree), it is the result of adding together the two underlying numbers then dividing by the number of responses for the question, rather than adding the two percentages seen on the chart.

For the 15 qualitative interviews, the below sample was achieved. The majority were conducted with licensees to reflect their representation in the sample, with a smaller number conducted with other dutyholders and interested groups to allow us to hear their perspective as well.

Figure 2. Stakeholder category

	Number
Academics / Professional Institutes / Trade Bodies	2
Interested groups / individuals	3
Licensees	8
Other dutyholders / industry	2
Total	15

Indicative benchmarking

The table below can be used as a benchmarking tool across some of the measures in this survey. The columns A and B represent other stakeholder surveys.

Figure 3. Indicative benchmarking

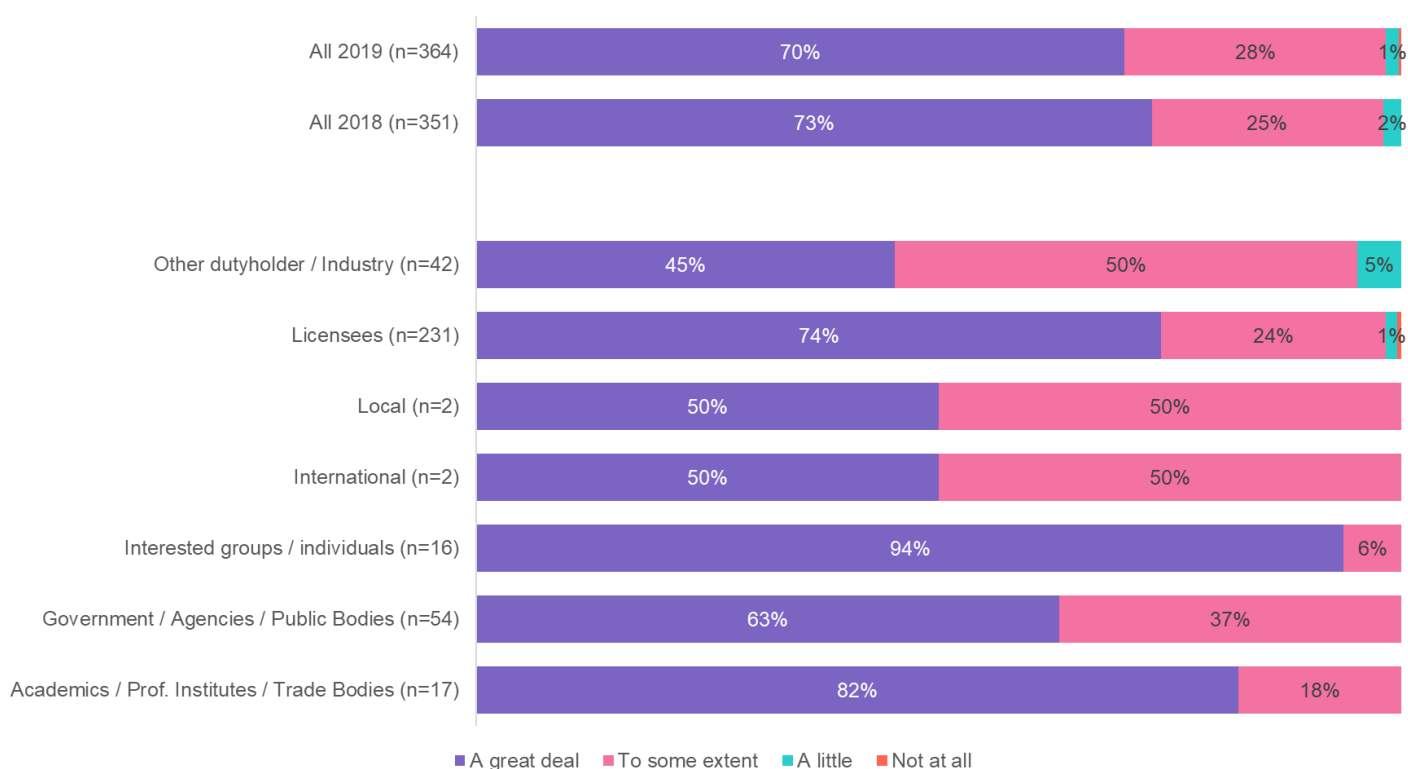
	ONR	A	B
Understanding of purpose or objectives	98%	94%	95%
Working relationship	90%	86%	85%
Clear	85%	82%	70%
Consistent	77%	69%	59%

Key findings

Understanding and relationship

Over two-thirds (70%) of stakeholders say that they feel they understand the ONR's purpose 'a great deal'. This is in line with 2017 findings, where 73% reported this. This is higher among licensees (74%) than for other dutyholder / industry stakeholders (45%).

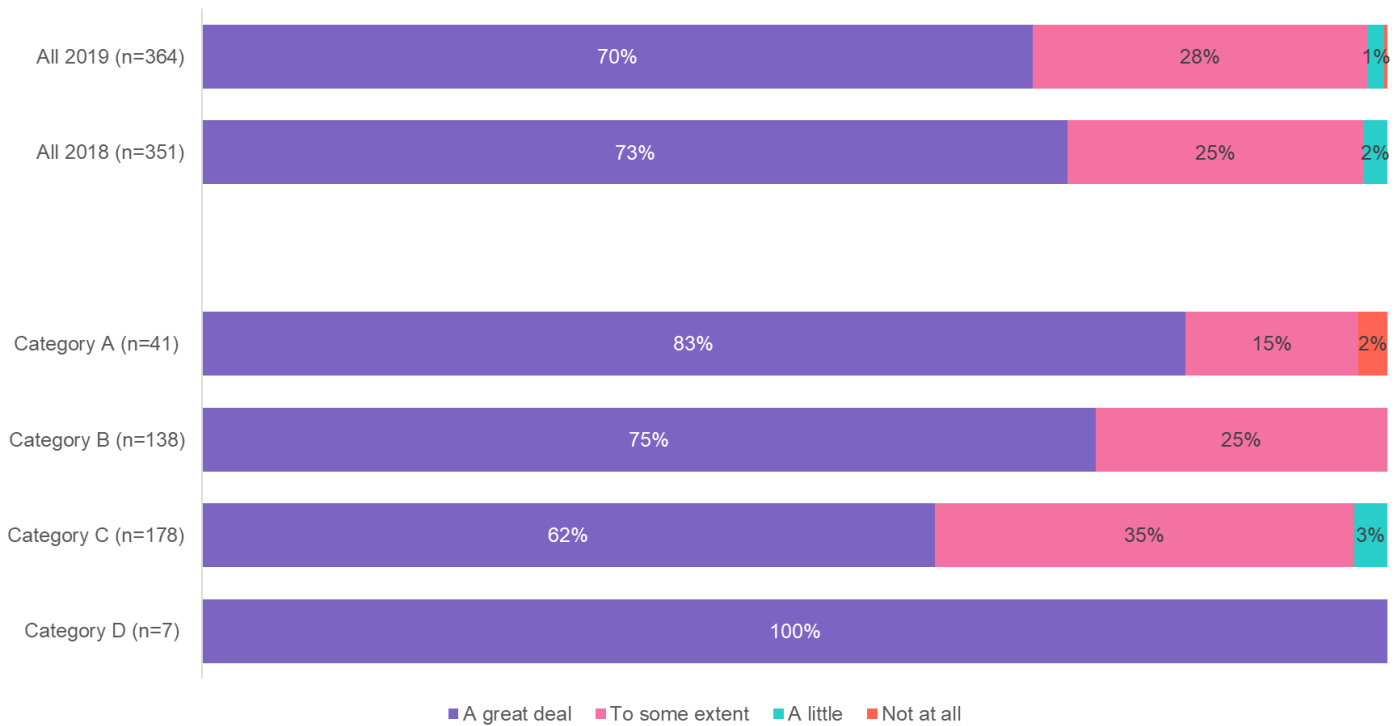
Figure 4. To what extent do you feel you understand ONR's purpose? By stakeholder group



Base: all, as indicated

Those felt to be closest to ONR and marked as Category A have the strongest confidence in their understanding of the ONR's purpose, with 83% saying that they feel they understand it 'a great deal'. Category B stakeholders are also confident in this (75%), more so than those in Category C (62%).

Figure 5. To what extent do you feel you understand ONR's purpose? By stakeholder category

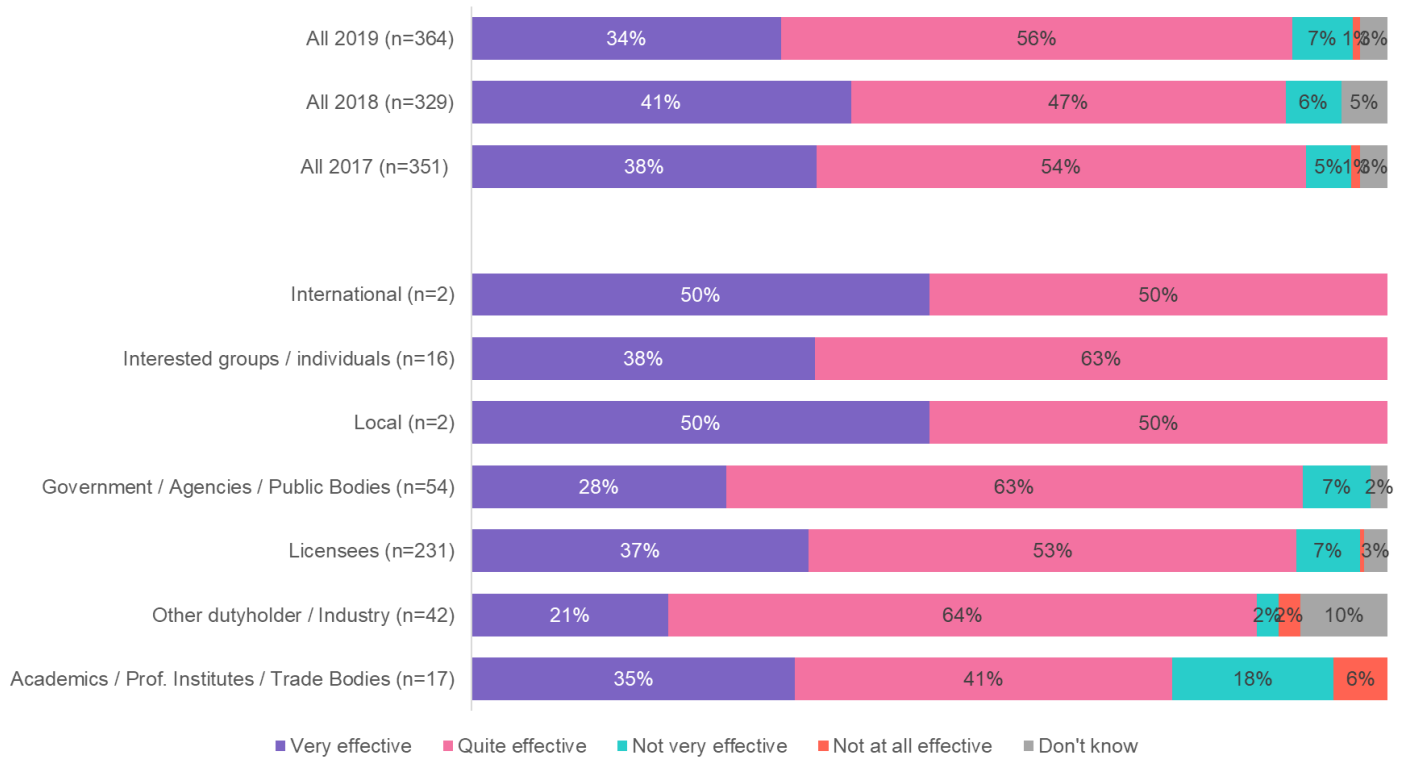


Base: all, as indicated

Nine in ten stakeholders (90%) feel they have a very or quite effective professional working relationship with the ONR and its staff, in line with a similar proportion in 2018 (89%) and 2017 (91%). Only 7% feel that their relationship is either not very or not at all effective.

In line with the average, 90% of licensees report that they have an effective relationship with ONR and its staff.

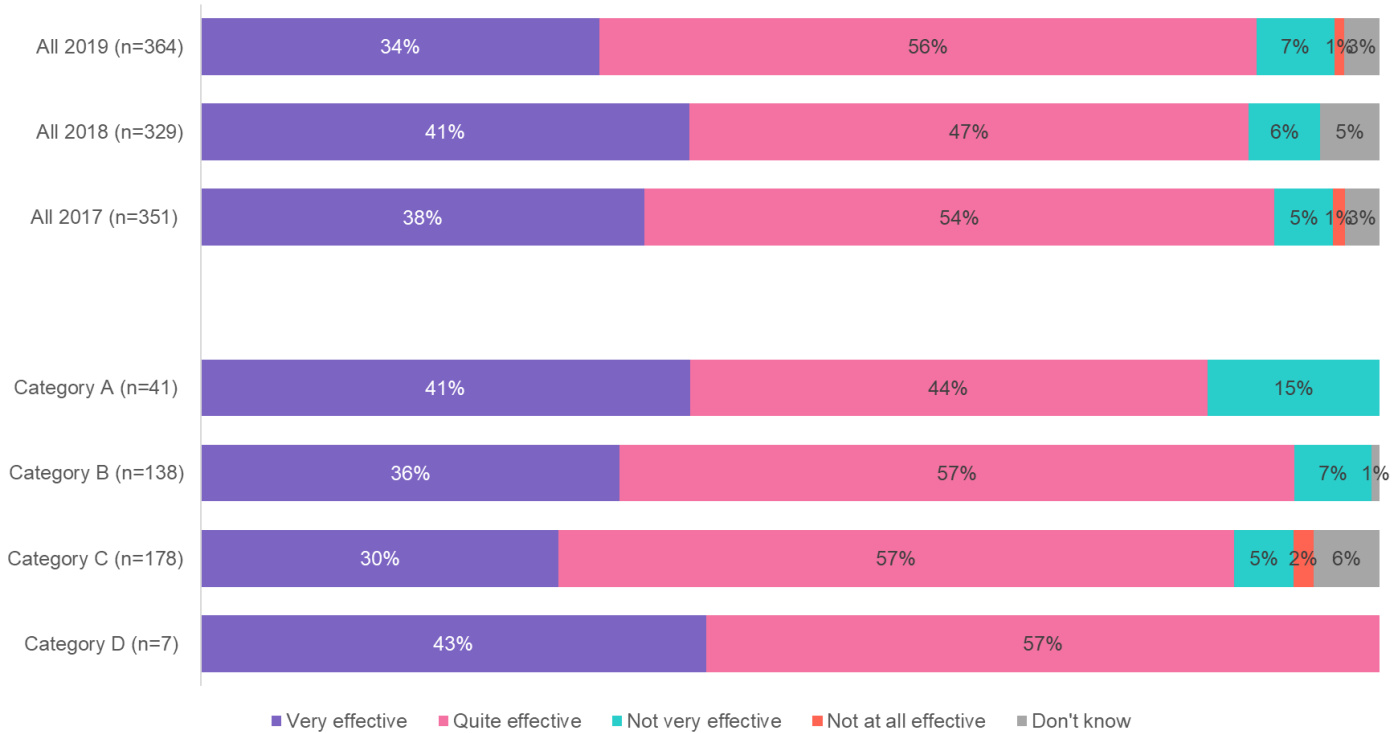
Figure 6. How effective or not is your professional working relationship with ONR and its staff? By stakeholder group



Base: all, as indicated

This is fairly consistent across stakeholder categories, with 93% of Category B stakeholders reporting this.

Figure 7. How effective or not is your professional working relationship with ONR and its staff? By stakeholder category



Base: all, as indicated

The qualitative interviews, predominantly conducted with licensees, speak broadly of a very good working relationship with the ONR. For most, this is built on mutual trust and respect – those being regulated felt that they had a good professional partnership with the organisation which helped them to feel that they were not on the ‘receiving end’ of regulation, instead that they were much more involved in the process. As we saw in 2018, this is the continuation of a direction of travel away from the more prescriptive regulation in the past, to a more enabling model.

“The working relationship has changed significantly for the better. I believe that we’ve got a very good relationship in the engagements we do have. We are very much trying to do the right thing, and I think that’s recognised by the regulators and so therefore they’re very supportive of what we’re trying to achieve. I find them to be extremely fair, so we’re able to have a very open and honest discussion. You feel as though there’s mutual respect in that engagement. I’ve dealt with the regulators for around 20 years, it was certainly far more confrontational previously.” (Licensee)

For most, and particularly the larger licensees, this successful working relationship was usually based on an interaction with one individual, usually an inspector, with the opportunity to establish a rapport and mutual understanding. For smaller sites, including other dutyholders, a more infrequent and inconsistent interaction made them less positive.

“Actual inspectors have changed over the last few years, and their skillsets - this is mainly done by ONR for their training purposes etc. and because of what the decommissioning site needs... Since the reactor was defueled we probably had a change in safety inspector every 12-18 months, which is a bit more frequent than we would like because they have to get up to speed, you have to get used to them” (Licensee)

For others, though the experience of working with the ONR was overwhelmingly positive, there was a sense that they often exhibit a drive for perfection that is not grounded in reality, and often stems from a lack of experience.

“The working relationship... is as good as it ever has been and I can't think of where it can improve. In both directions there is mutual trust and respect, we challenge each other openly on matters of detail and principle. We exhibit the right kind of professional relationship. Can't think of a time where a regulatory decision has caused me any specific angst. Not to say they are perfect... generally if you get a contentious issue to the superintendent inspector or director level it tends to get resolved in a pragmatic way, sometimes it is difficult to that level. There are still individuals who lack the experience... are more transactional and tend to apply guidance as a checklist. They need to understand there is no such thing as absolute safety... if we don't get permission it's usually because some specialist assessor is digging down in the weeds - they just want certainty. Until you've got a little bit more experience and use that to inform your judgement, you don't really have anywhere else to go other than adopting a mechanistic approach.” (Licensee)

Attributes of an effective regulator

Participants in the qualitative interviews were asked to describe the ONR in three words or phrases. All the words used are shown below in a visualisation.



Generally, participants used cautiously positive words or phrases to describe the organisation. Many described the distance that the organisation has come – even in just a few years – to be more transparent, accountable and better at stakeholder outreach. Some participants singled out the ONR’s CEO, Adrienne Kelbie, in particular, for opening up the organisation and successfully deploying a new management approach.

“Three words: trusted, conservative (maybe that’s the right thing for a regulator) and enquiring (inquisitive, they are looking for new approaches and there is an understanding that the way the industry has been over the last 40 years is slow to react, monolithic, and probably unsustainable in long term).” (Licensee)

For one of the ‘interested individuals’ in the sample, despite overall positivity towards the organisation, there were some concerns about its impartiality, particularly amongst some of the longer serving staff.

“Professional, technical, pro-nuclear. As a regulator, it tends to imply a neutral position, but perhaps a lot of the ONR personnel have been around because they joined the industry because it was a good thing to do/support nuclear power. Don't mind that voice as long as it's balanced by a more sceptical voice balancing this voice and perspective. Would like to see more scepticism in the organisation on some issues relating to nuclear power and its benefits/drawbacks.” (Interested individual)

From another participant there was a concern around inspectors applying a certain amount of subjectivity in terms of how they do their job, and this leading to some inconsistencies.

“The regulations are quite goal-orientated and performance based, and so it allows interpretation by each individual assessor, so we would get different views on the topics from different assessors. Because of the room for interpretation and the personality of some assessors that, caused in my view, some unfairness.” (Other dutyholder)

Despite this there was, and particularly among licensees, a great deal of positivity applied to the organisation and how it engages and communicates with them.

“Professional, respectful, fair. In my view, the regulators are proportionate, and we work within those boundaries and have a good understanding of the expectations. When we have formal engagement, the regulators give good communication of what they're doing, why, and what they hope to get out of it, and when they have their findings, there's an opportunity to address or challenge them. There may be an occasional level of disagreement, but that's life. I certainly think they're transparent” (Licensee)

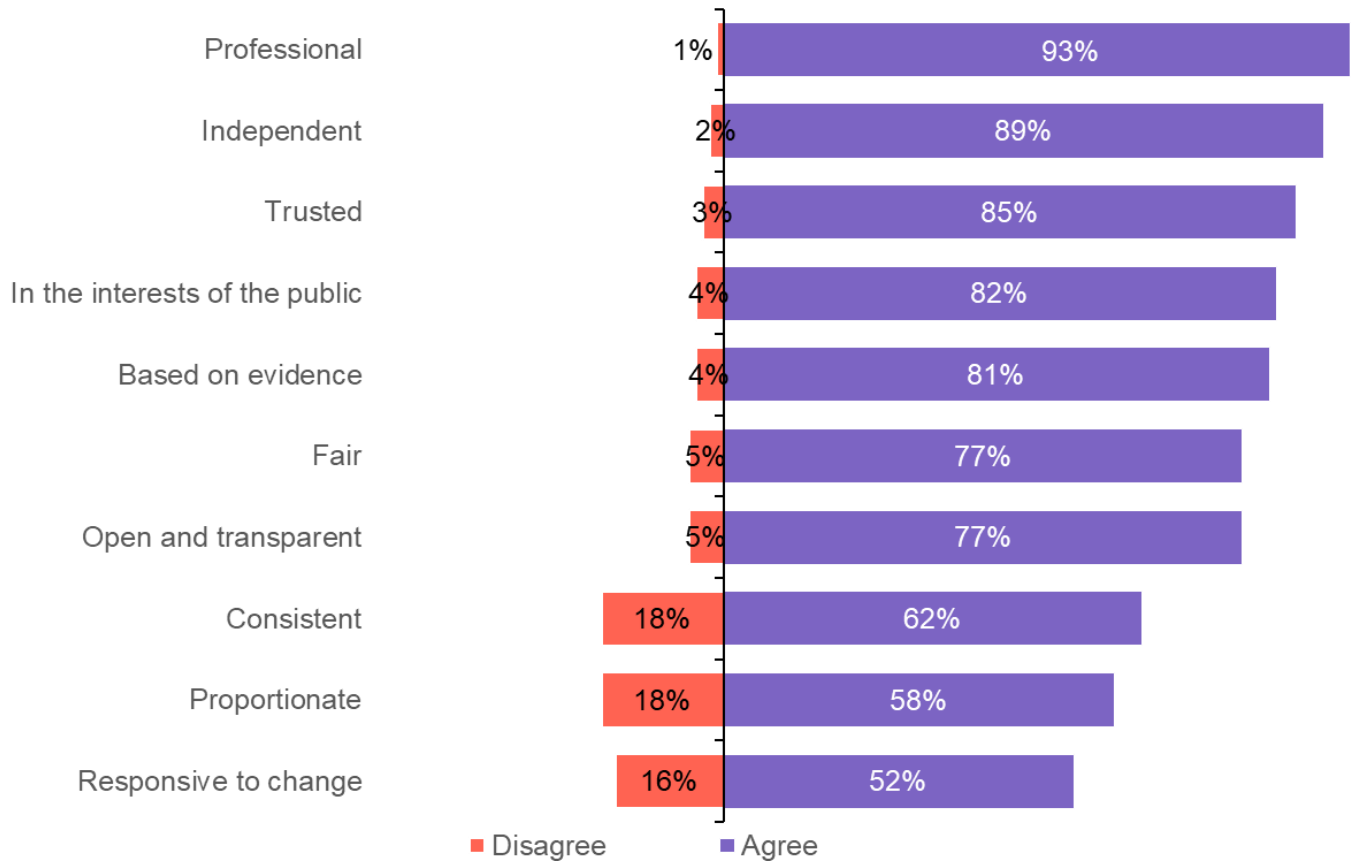
“[It is] absolutely transparent. Has got better. It is general; we've seen some changes in inspector approach but I couldn't say one individual has led that change. The head of ONR has helped with equality, diversion and inclusion. Broadly speaking what we have seen, is a more flexible organisation that wants to work with operators.” (Licensee)

“Considered, proportionate, respectable. They are able to read the information. I get a strong impression they sit back and think about what they are receiving. They reflect on what they do generally before they act. It does strike me as proportionate and well thought out.” (Licensee)

From the survey, the attributes most recognised in ONR are ‘professional’ (93%), ‘independent’ (89%) and ‘trusted’ (85%). Stakeholders are less likely to say that the ONR is ‘proportionate’ (58%) or ‘responsive to change’ (52%). Licensees are the stakeholder

group most likely to say that the ONR is ‘professional’ (95%). They are also more likely to associate the ONR with being ‘independent’, with over nine in ten (94%) reporting this.

Figure 8. To what extent do you agree or disagree that ONR operates in a way that is...



Base: all

The qualitative interviews further emphasise the strong relationship that the ONR has built up with those in the industry and the concept of enabling regulation, though not always mentioned by name, was a recurring theme across the discussions.

“I think if there's one aspect that has improved immensely, that is the ONR encouraging [SITE] to do work. There was a time when interactions were broadly enforcements. They are certainly more flexible now, and in transport, we have moved away from a binary process of we can or can't into very interactive discussions. That's certainly a positive step.” (Licensee)

Another aspect of the relationship where licensees feel that the ONR is moving in a positive direction is providing a better understanding of the organisation and its internal hierarchy. Though many have little interest in, or little need to understand the hierarchy, for

others it helps, as it adds to a view that one particular inspector is not acting unilaterally. By understanding who else works in the ONR ‘chain of command’, it is easier to understand how decisions are made.

“Providing constructive and supportive advice within the constraints of the regulators remit which allows us to move forward in a positive manner and making sure what we're doing is responsible. It's not transactional, it's an open dialogue to discuss. I think ONR does, inevitably there's an element of personality, but generally they do a good job of managing that. You don't feel like you're getting an opinion of an individual, but what you tend to be getting more now is a far more consistent message from the organisational perspective, rather than an individual's biased view”. (Licensee)

For others, and especially where the interaction was only temporary, the relationship improved over time. Again, there are hints that where the relationship had shortcomings, this could be attributed to one particular individual.

“Seems like there was a lack of appreciation of the amount of effort that the requesting parties and their consultancies would take to respond to them. So that was disappointing, especially early on. It got better towards the end, and from what I understand it's become a lot better more recently. [Before] could have been down to an individual, but for me, if there was an appropriate check and review process, those kinds of things would have been picked up. A lot of [the improving relationship] also came from my understanding developing of how the ONR worked but I think they also learned a lot through the process.”
(Other dutyholder)

Figure 9. To what extent do you agree or disagree that ONR operates in a way that is... By year

	2017	2018	2019
Independent	82%	87%	89%
Trusted	78%	85%	85%
In the interests of the public	82%	82%	82%
Based on evidence	79%	84%	81%
Fair	74%	83%	77%
Open and transparent	75%	79%	77%

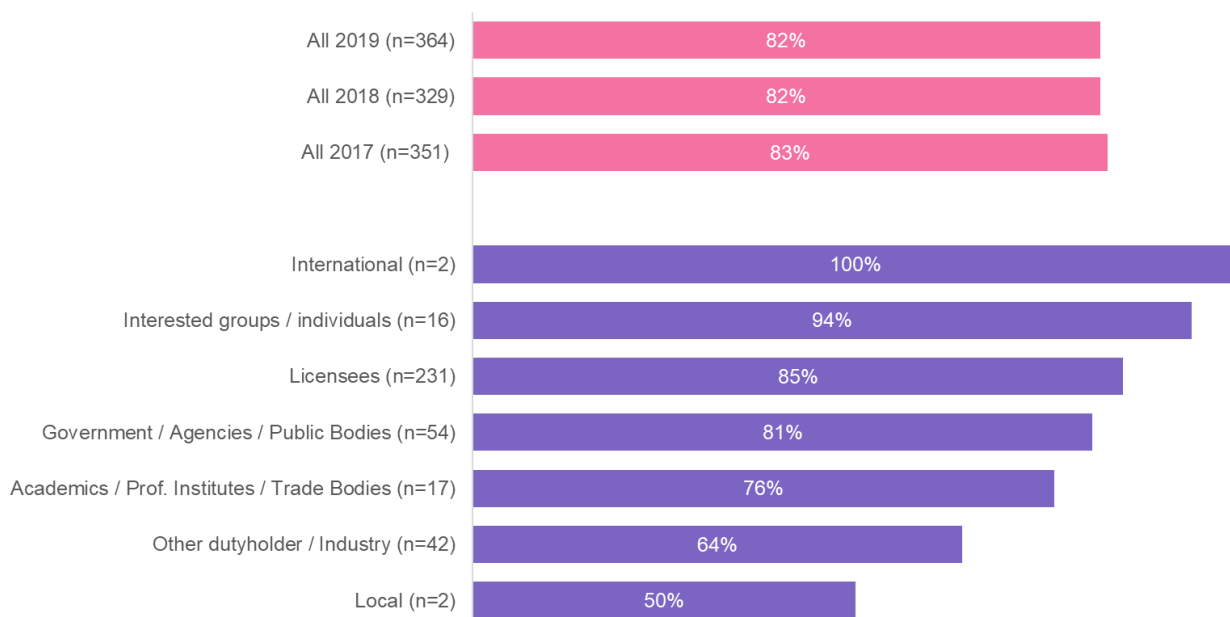
Consistent	56%	64%	62%
Proportionate	60%	68%	58%
Responsive to change	50%	57%	52%

Influencing

Four fifths (82%) of stakeholders agree that the ONR influences improvements in nuclear safety and security culture. This is consistent with 2018 (82%) and 2017 (83%) findings.

Licensees are more likely than other dutyholder / industry stakeholders to agree with the statement (85% vs. 64%).

Figure 10. To what extent do you agree or disagree that ONR influences improvements in your organisation's safety and security culture? By stakeholder group



Base: all, as indicated

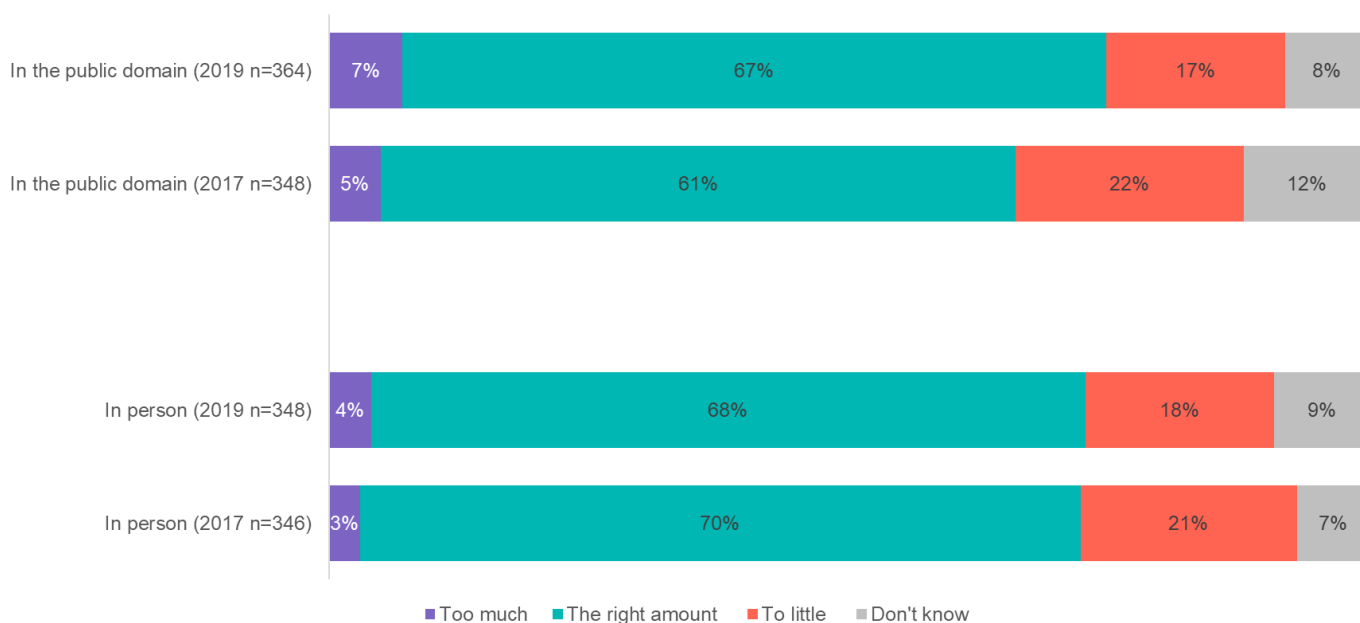
In line with 2018, a similar proportion (81%) of licensees agree that the ONR influences improvements in their organisation's safety and security culture. In 2019, twenty-nine percent strongly agreed and a further 56% agreed. Just 3% disagreed with the statement.

This is highest among category C stakeholders (83%), with 78% of Category B stakeholders and 77% of Category A stakeholders reporting this.

Communication

The majority of stakeholders think that the ONR provides the right amount of information, guidance and advice in both the public domain (67%, 61% in 2017) and in person (68%, 69% in 2017). A small but significant proportion say that the ONR provides too little information, guidance and advice in the public domain (17%, 22% in 2017) and in person (18%, 21% in 2017), whilst only a very small number say that the ONR provides too much.

Figure 11. Do you think ONR provides, too much, too little or the right amount of information, guidance and advice...?



Base: all excluding not applicable, as indicated

Thirteen percent of licensees think that the ONR provides too little information, guidance and advice in the public domain and 16% think the same for in person. Category C stakeholders (25%) are more likely than categories A (2%) and B (12%) to say that the ONR provides too little in the public domain. However they are as likely to report that the ONR provides too little information, guidance and advice in person.

The majority find ONR’s information, guidance and advice to be clear (85% - a great deal / to some extent), accessible (82%) and consistent (77%). Licensees are more likely than other dutyholder / industry stakeholders to say that the ONR provides information, guidance and advice that is clear (87% vs. 69%), and they are also more likely to report that it is accessible (86% vs. 71%) and consistent (79% vs. 64%).

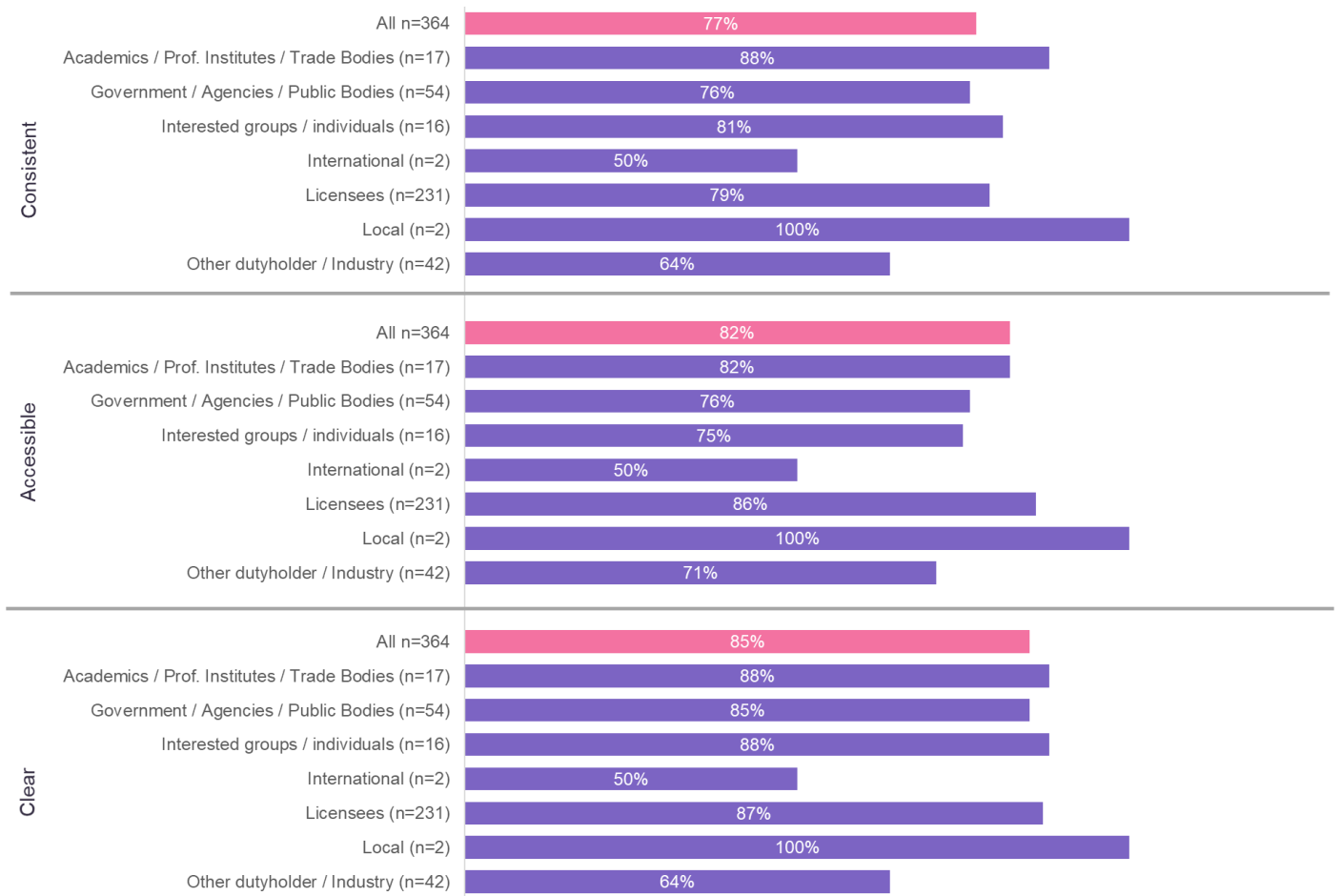
In the qualitative interviews, there was broad agreement that the information that ONR provides is detailed and accessible, though there were some concerns (as with 2017) that it sometimes struggles to simplify complex technical language for the general public.

“Accessible, yes. Comprehensive; it is as comprehensive as it needs to be. I think their challenge is clarity. To be able to communicate to all population groups in a consistent manner is an enormous challenge - I don't think the ONR has yet learnt how to communicate with their many audiences in a manner that those audiences can consume it - 'it's not one size fits all'. When you're trying to speak to the public, it's difficult to explain our industry, our performance, and explain why it's safe enough, to people who don't genuinely understand what we do. I think [ONR] could do more.” (Licensee)

This often led to a discussion about the public profile of the ONR – though most agreed that it broadly has an appropriately low public profile, some did call for this bar to be raised slightly higher.

“I always felt it was odd that there wasn't as much information publically available in the public domain about the process that the ONR was going through with the individual reviews. Certain things were certainly published on the ONR website but I thought there would have been much more public engagement e.g. quarterly meetings where the public could come to meetings... and potentially participate in those meetings. It could have a stronger [public] profile. They need to own up to their impact on how new nuclear is implemented in the UK. The public interaction will also make ONR more self-aware.”
(Other dutyholder)

Figure 12. And to what extent is the information, guidance and advice provided...? By stakeholder group



Base: all, as indicated

For some other dutyholder / industry stakeholders, the information, guidance and advice provided is not perceived to be clear, with three in ten (29%) saying that it is only a little or not at all clear. They are also the stakeholder group most likely to say that the ONR is only a little or not at all accessible (26%).

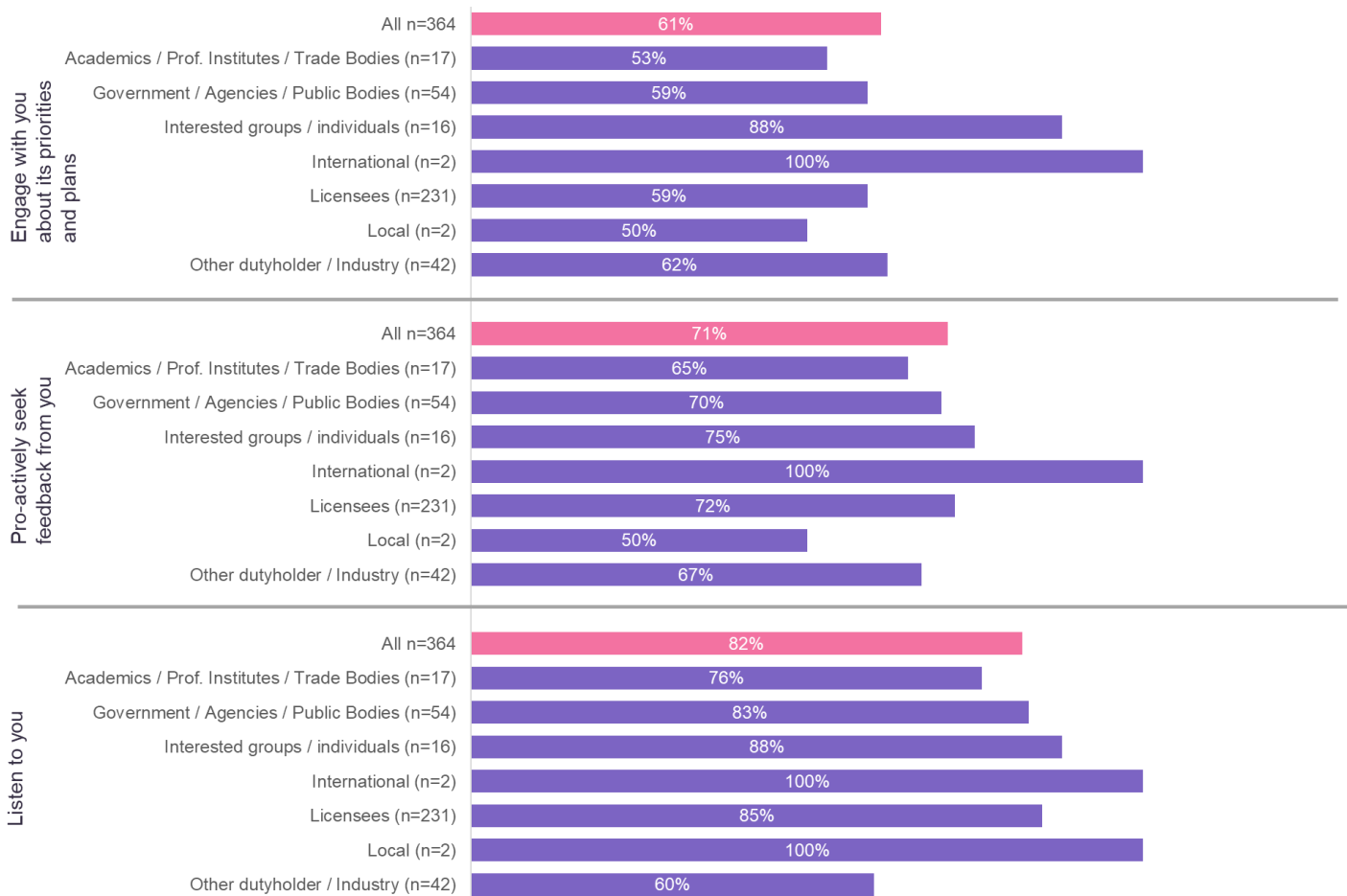
Engaging

Four in five (82%) feel that the ONR listens to them, either a great deal or to some extent. This is in keeping with 2018 and 2017 findings, where the same proportion (82% and 80% respectively) reported feeling that the ONR listens to them.

Indicative of positive movement over time, over two-thirds (71%) say that the ONR proactively seeks feedback from them - 2018 (69%) and 2017 (66%).

There is less agreement about the ONR’s engagement about its priorities and plans, with 61% reporting this – 59% in 2018 and 2017.

Figure 13. To what extent does ONR...? By stakeholder group

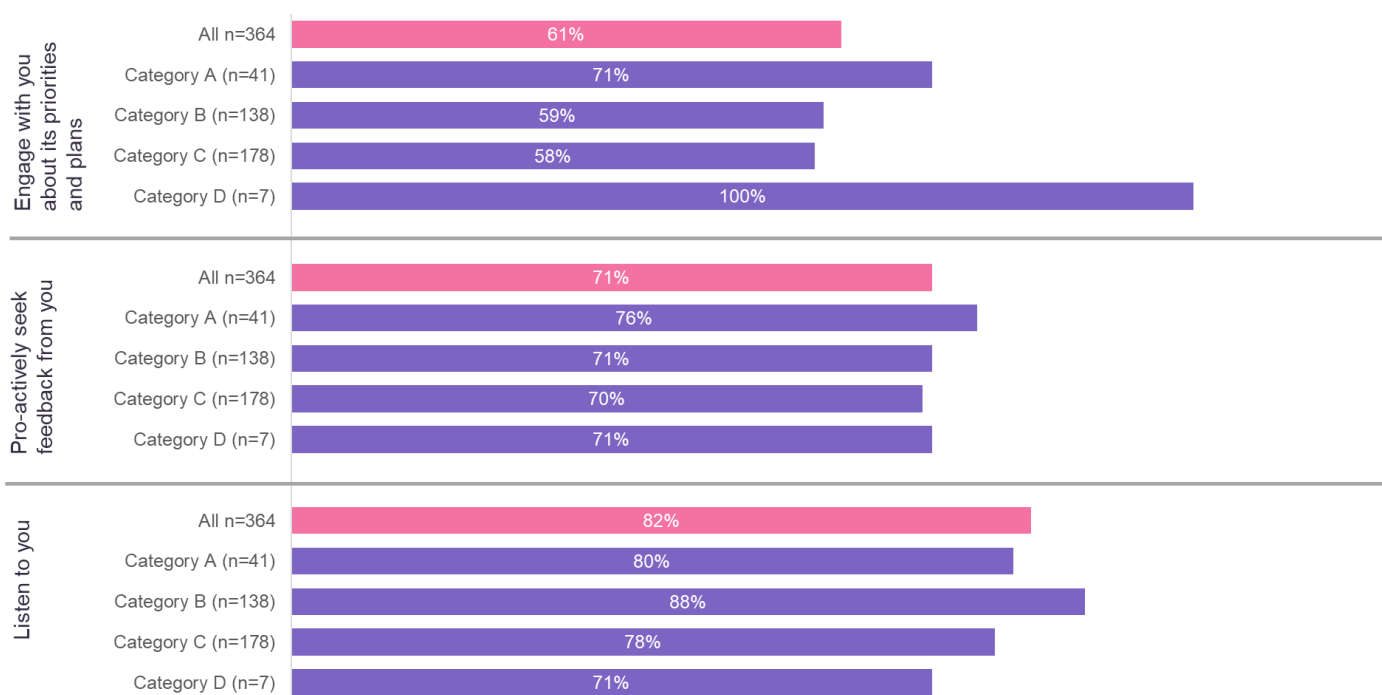


Base: all, as indicated

Licensees (85%) and Government / Agencies / Public Bodies (83%) are more likely than other dutyholder / industry stakeholders (60%) to feel that the ONR listens to them a great deal or to some extent, whilst 7% of other dutyholder / industry stakeholders say that the ONR does not listen to them at all.

Category B stakeholders are more likely than category C stakeholders to feel that the ONR listens to them (88% vs. 78%).

Figure 14. To what extent does ONR...? By stakeholder category

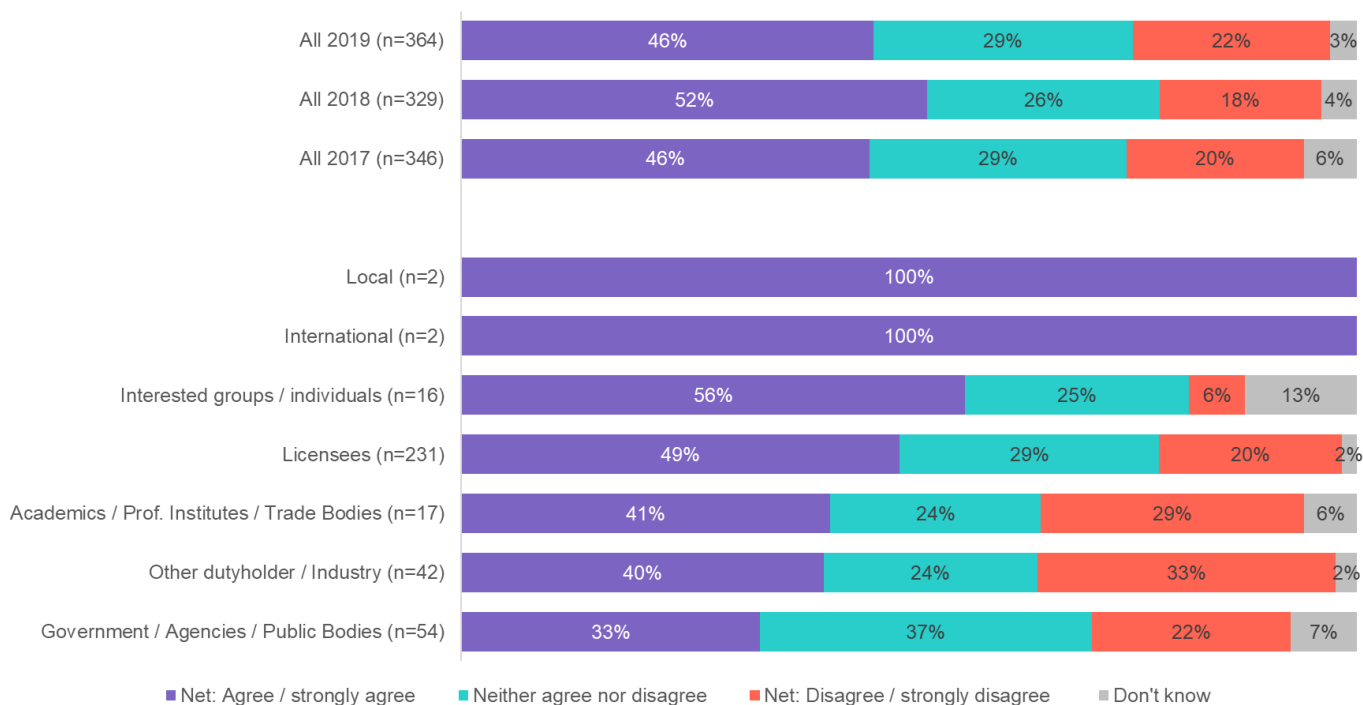


Base: all, as indicated

Efficiency

Just under half (46%) feel that the ONR avoids imposing unnecessary regulatory burdens, though a sizable proportion (22%) disagree. Among licensees, half (49%) agree.

Figure 15. To what extent do you agree or disagree that ONR avoids imposing unnecessary regulatory burdens? By stakeholder group

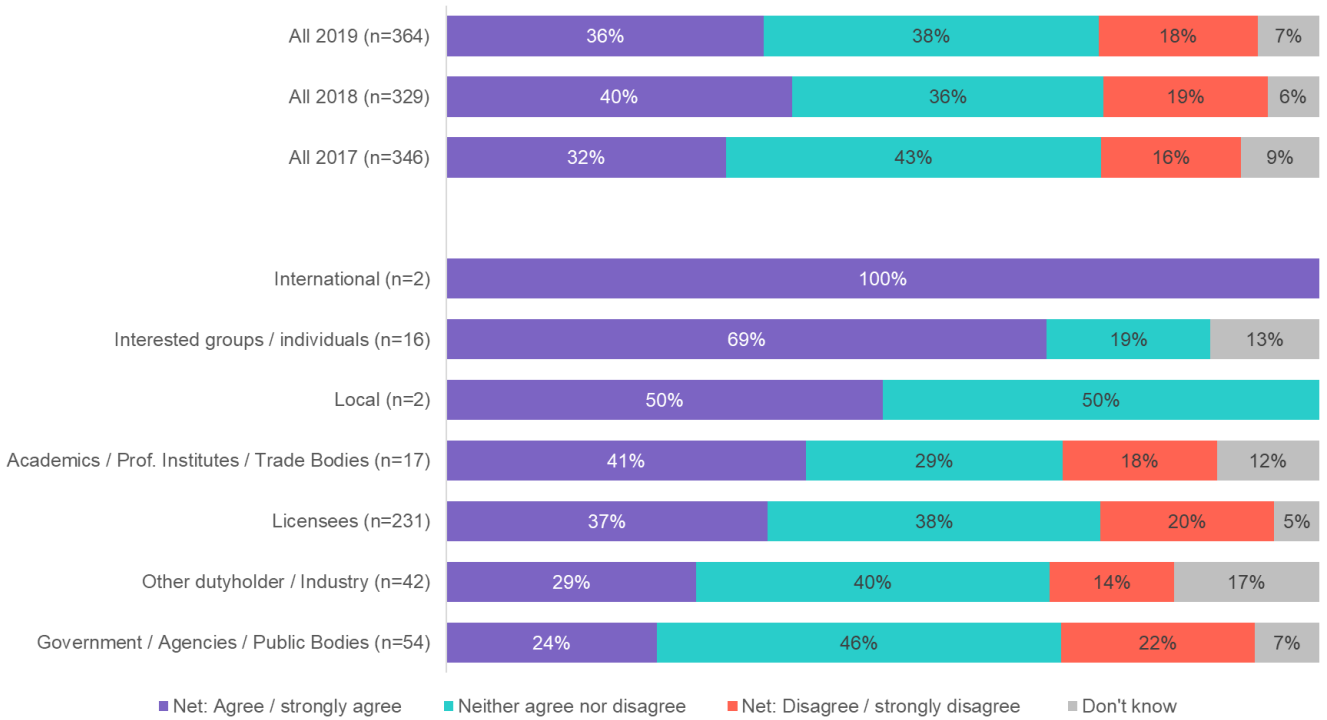


Base: all, as indicated

Category C stakeholders are more likely than category B to agree that the ONR avoids imposing unnecessary regulatory burdens (52% vs. 38%).

Over a third (36%, 40% in 2018) say that the ONR has efficient ways of working, with 18% disagreeing. This is in line with the agreement levels among licensees, with 37% agreeing.

Figure 16. To what extent do you agree or disagree that ONR has efficient ways of working? By stakeholder group

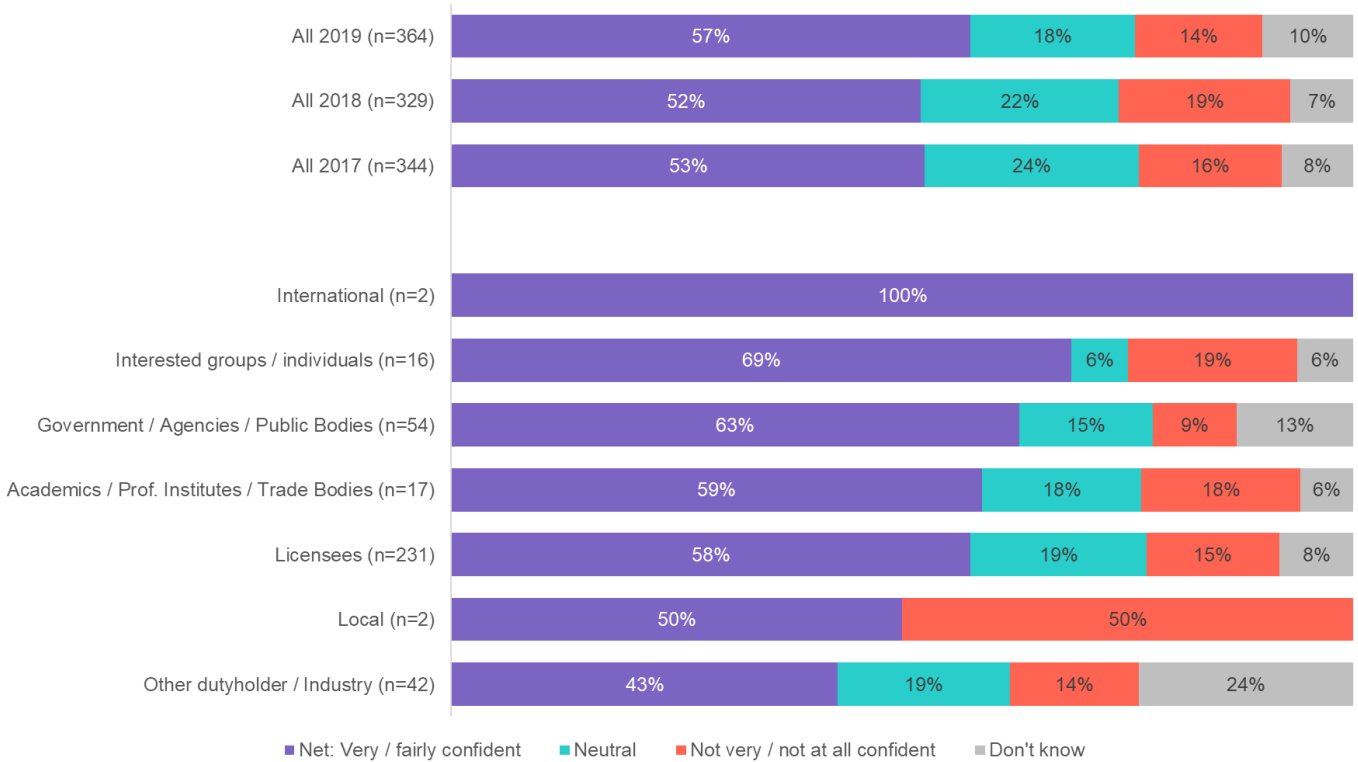


Base: all, as indicated

Confidence in ONR

Over half (57%) of stakeholders feel confident that the ONR has the resources and capabilities to deliver its functions at the current time. This is higher, though not significantly, than in 2018 when 52% were in agreement (53% in 2017). A similar proportion of licensees are confident (58%).

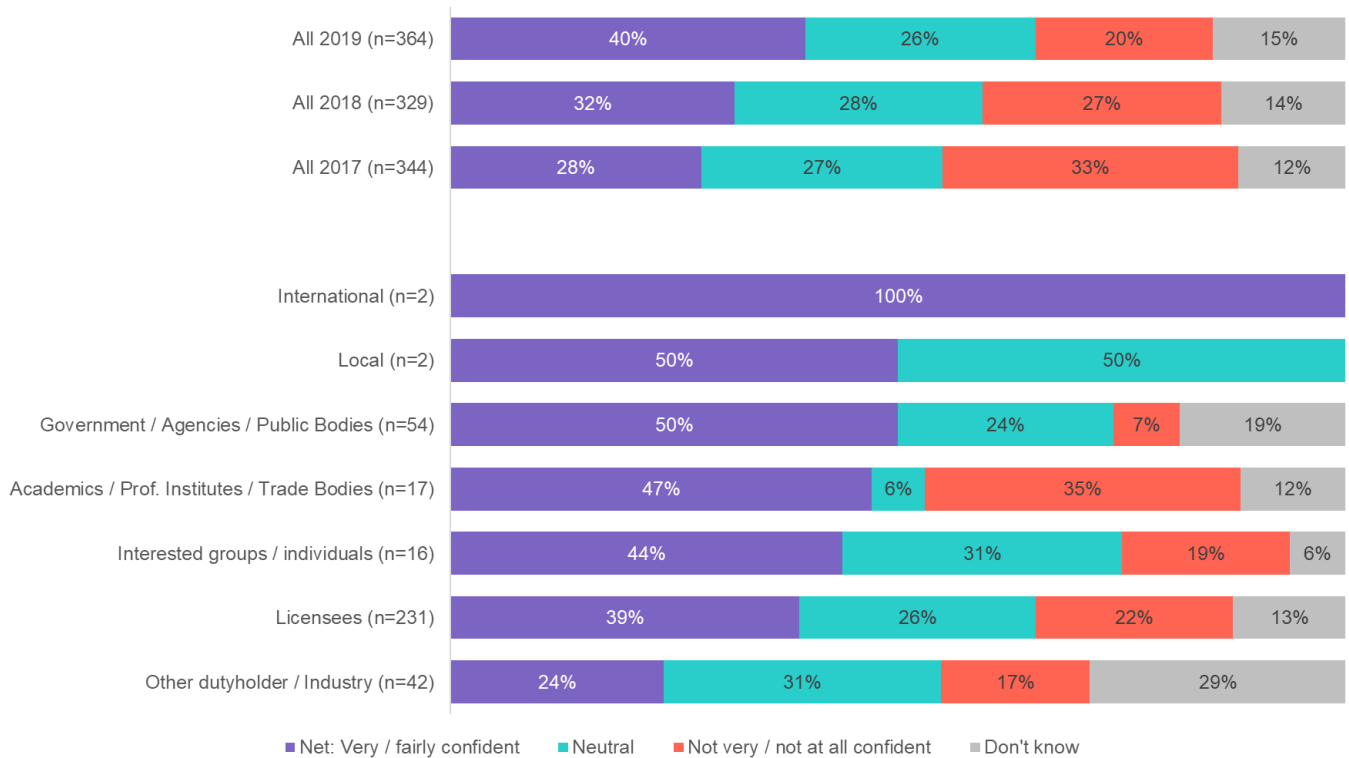
Figure 17. How confident or not are you that ONR has the resources and capabilities to deliver its functions at the current time? By stakeholder group



Base: all, as indicated

Overall, stakeholders are more likely to be confident in the ONR delivering its functions at the current time than in the next 5 to 10 years (57% vs. 40%). However, there has been an increase in confidence in the ONR to meet the potential requirements of the next 5 to 10 years, from 32% in 2018 to 40% at present. Government / Agencies / Public Bodies are more likely than other dutyholder / industry stakeholders to say that they are confident in the ONR to meet the potential requirements of the next 5 to 10 years, whilst licensees are more likely than Government / Agencies / Public Bodies to not be confident (22% vs. 7%).

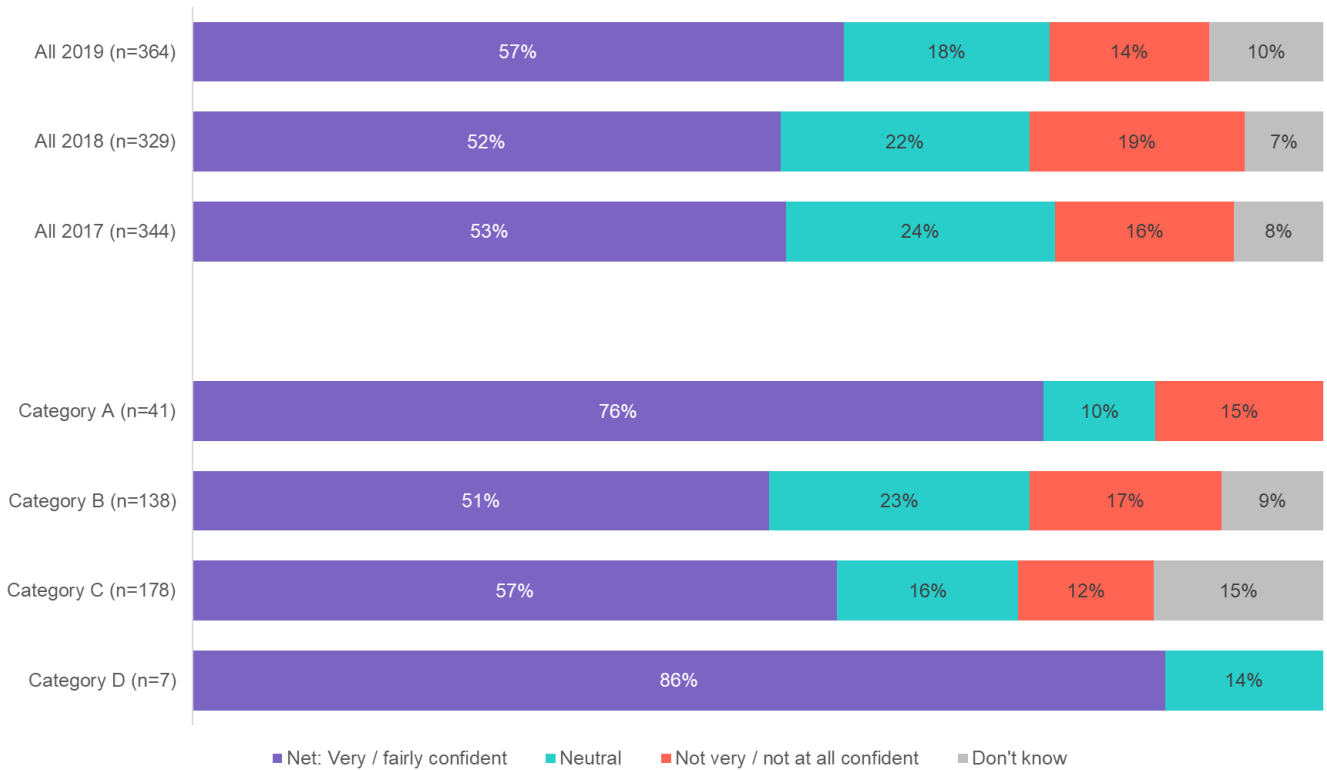
Figure 18. How confident or not are you that ONR has the resources and capabilities to deliver its functions in the next 5 to 10 years? By stakeholder group



Base: all, as indicated

Category A (76%) stakeholders are more likely than category B (51%) and C (57%) to say that they are confident that the ONR has the resources and capabilities to deliver its functions at the current time.

Figure 19. How confident or not are you that ONR has the resources and capabilities to deliver its functions at the current time? By stakeholder category



Base: all, as indicated

In the qualitative interviews, there was broad agreement that the ONR will continue with its positive direction of travel, and that this will lead to even better relationships with stakeholders and better regulation.

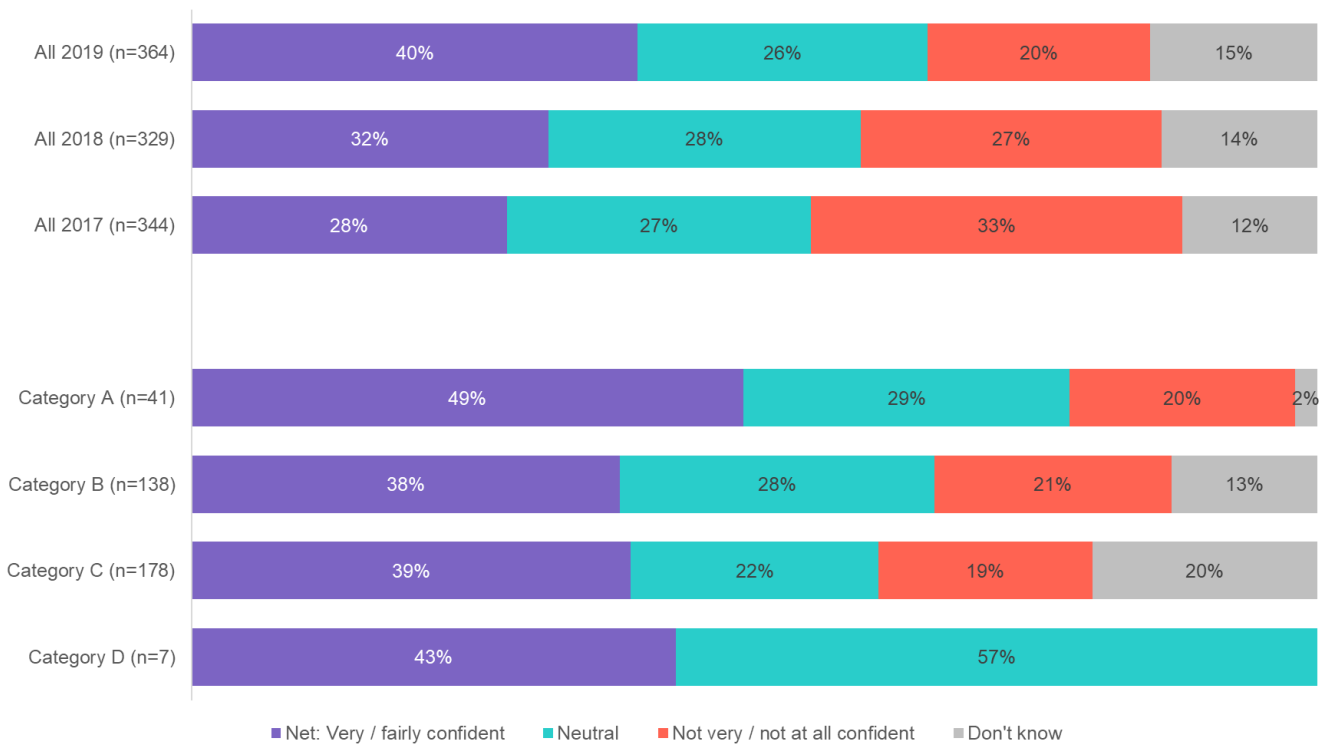
One issue that did emerge, which also came up in the previous qualitative research, was the composition of the ONR workforce. Though it was less prominent an issue in this wave of research, there were still some concerns about the workforce being a certain type of individual – and this was seen both as an issue of demographic diversity as well as a concern that a recruitment drive will be needed to replace them and not lose their accumulated knowledge.

“The staffing profile within the organisation, and how to reflect diversity, has been recognised, work is being done to address that as an issue. The perception I have of ONR, 10 years ago, the workforce is predominantly male, from an engineering and technical background, in the older age of the workforce age. Not necessarily the case anymore, and some areas where there are a high number of female workers which is good. But more

could be done to get diversity of thought. There is a need to have expertise in those fields, but also value in having other background/perspective/insight. ONR needs to be aware of this, and where there are roles to put people who have different skills/experience profiles. Would put ONR in a better position, avoiding pitfalls, understanding potential challenges.

Would make it easier for ONR to engage with stakeholders if people could deal with 'people like them' so to speak.” (Licensee)

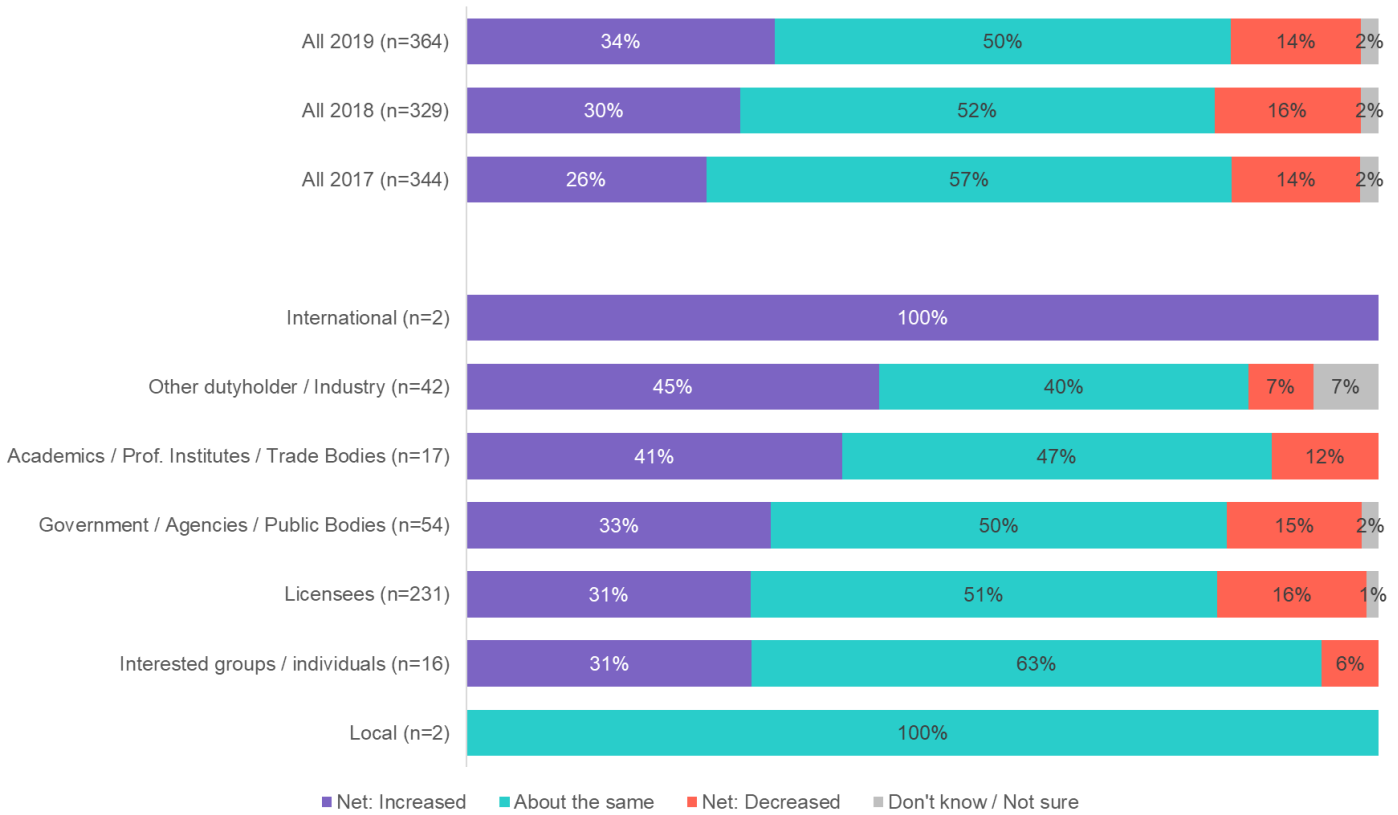
Figure 20. How confident or not are you that ONR has the resources and capabilities to deliver its functions in the next 5 to 10 years? By stakeholder category



Base: all, as indicated

Confidence in the ONR over the past 12 months is increasing, with a third (34%) of stakeholders saying that their confidence in the ONR has increased over the past 12 months. This is a significant upwards shift since 2017 in which a quarter (26%) said the same. Thirty percent reported an increase in their confidence in the ONR in 2018. Half (50%) say that their confidence in the ONR over the past 12 months is about the same, whilst for 14% their confidence has decreased.

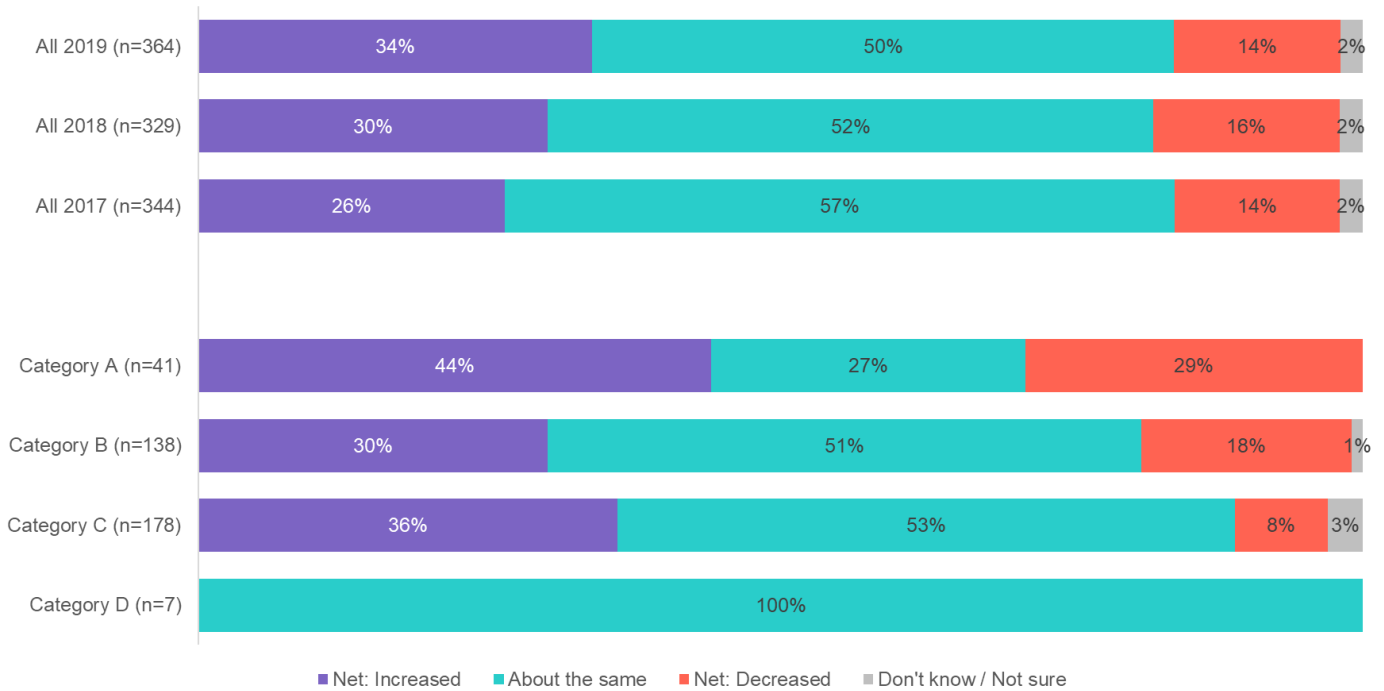
Figure 21. Has your confidence in ONR increased or decreased...? By stakeholder group



Base: all, as indicated

Over two in five (44%) category A stakeholders say that their confidence in the ONR has increased over the past 12 months. Category B and C stakeholders are more likely than category A stakeholders to say that their confidence in the ONR has stayed the same over the past 12 months (51% and 53% vs. 27%).

Figure 22. Has your confidence in ONR increased or decreased...? By stakeholder category



Base: all, as indicated

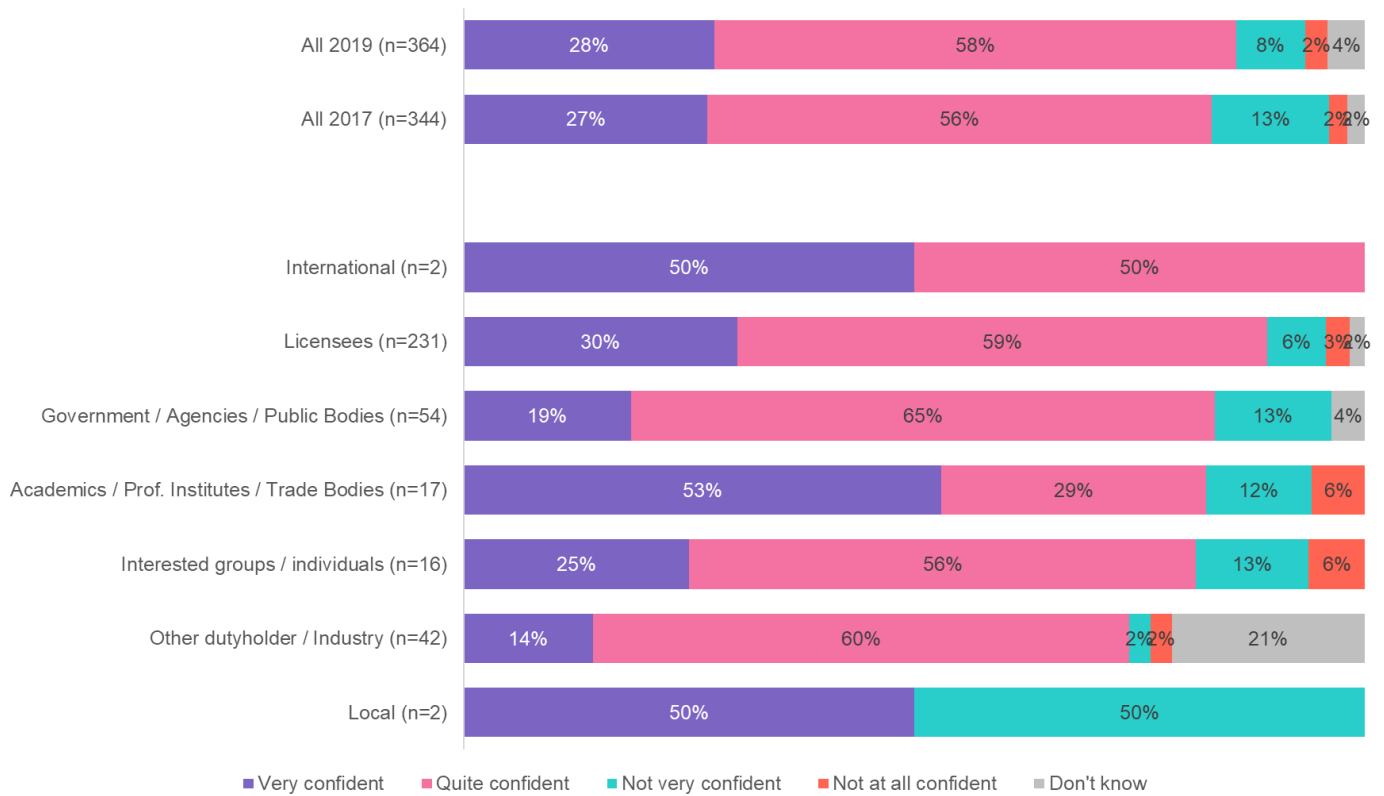
ONR’s mission

The ONR’s mission is:

“To provide efficient and effective regulation of the nuclear industry, holding it to account on behalf of the public.”

The vast majority (86%, 83% in 2017) say they are confident in the ONR to deliver this. Licensees are more likely than other dutyholder / industry stakeholders to feel confident in the ONR to deliver its mission (89% vs. 74%). They are also more likely to say that they are ‘very confident’ in this (30% vs. 14%).

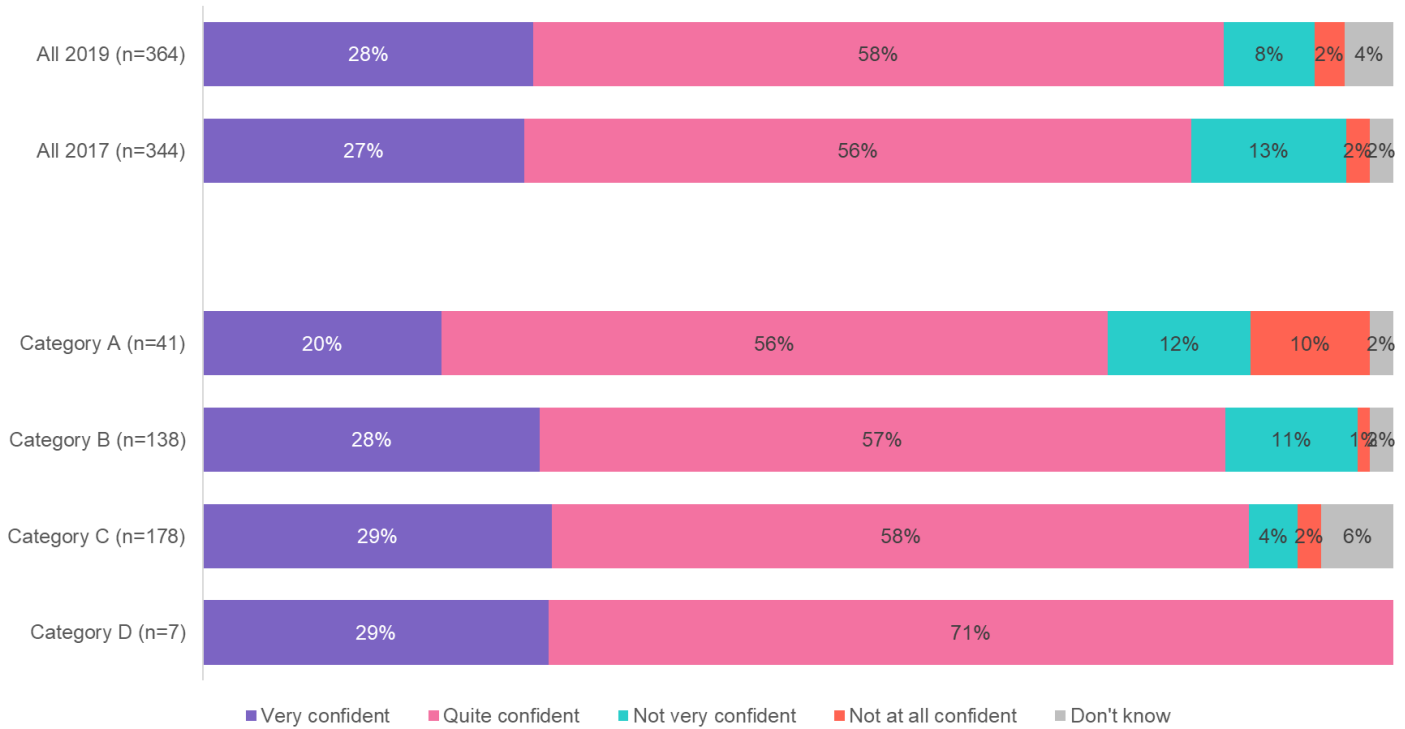
Figure 23. How confident or not are you that ONR is delivering this? By stakeholder group



Base: all, as indicated

There is a general sense of confidence among the different stakeholder categories, though category A stakeholders are more likely than category C stakeholders say that are not confident in the ONR to deliver its mission (22% vs. 6%).

Figure 24. How confident or not are you that ONR is delivering this? By stakeholder category



Base: all, as indicated

One of the themes of many of the qualitative discussions was the extent to which the ONR effectively deters non-compliant behaviour. Most felt that it does, by striking the right balance between an arms-length, professional relationship which clearly establishes its ability to enforce, with a more collegial approach.

“We’ve actually had training from them about their job and expectations. They want to maintain their professional distance. I think we’re at that point already. ‘Friendly but not friends’. I think it’s a good relationship.” (Licensee)

One participant saw it a slightly different way – that enabling regulation actually establishes compliance within the licensee’s culture.

“I don’t think ONR see it as their job for deterring non-compliant behaviour, that’s the licensee’s job. They establish the framework in which the industry has to comply so if the industry chooses to develop a compliant culture, it’s our job to make sure our employees comply. You don’t enforce compliance into an org in the same way you don’t inspect quality into a product; you bring it in by the way you operate. Regulator should be testing our compliance. One problem we still do encounter is ‘how does this look for me’ and this

has become a little worse as they've grown and have people with less experience. They are more in the public eye and accountable as ONR, whereas before they were a bit lost within HSE. They are an authoritative voice on nuclear safety. They publish the only nationwide reports on nuclear safety and performance. They have the level of profile that is appropriate for the moment. If their profile was increased, it might encourage 'how does it look for us?' I.e. would they be making the right decision or a socially desirable decision so that they aren't challenged?" (Licensee)