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Scotland Manifesto 2026

Back a modern industrial Scotland.
Secured by homegrown energy.



œUK OFFSHORE
ENERGIES UK

1. Foreword

David Whitehouse,
Chief Executive Officer, Offshore Energies UK



Scotland's offshore energy sector is the backbone of our economy, our communities, and our future. This manifesto is the result of genuine collaboration with our members, the companies and people that deliver the energy that powers Scotland every day, who are committed to building a future that is secure, prosperous, and sustainable.

Our sector is adding to our existing strengths. 'And', not 'or': supporting good jobs, driving economic growth and delivering on our climate goals. We believe Scotland's energy future is not a choice between prosperity, security, or sustainability – it is about achieving all three, together.

The facts speak for themselves. In 2024, the UK's offshore energy industry contributed over

£36 billion to the economy and supported more than 240,000 jobs nationwide, including 128,400 in Scotland. These are not just numbers - they represent livelihoods, families, and the vibrancy of towns and cities across our country.

Our members and our people are at the heart of this story. Throughout our manifesto we bring to life their projects, people, places, and the policies required to support them. Through working together across industry, governments, regulators and trade unions, we believe a truly collaborative approach remains essential to the viability of Scotland's industrial present and future. Industry must have agency over its future.

The North Sea remains a strategic economic asset, underpinning Scotland's industrial strength and providing homegrown energy to make us more resilient in an increasingly volatile world. Oil and gas will remain essential for decades to come; powering homes, transport, and industry, and providing the expertise, infrastructure, and revenues necessary to accelerate home-produced renewables and low carbon technologies.

Our members are leading on carbon capture and storage (CCS) and hydrogen. Projects like Acorn CCS are essential to decarbonise heavy industry and protect vital jobs, while others drive innovation across Scotland. These initiatives are about more than emissions - they secure the future of our industrial heartlands and cement Scotland's role as an energy leader.

Yet too much of this industry's potential is being held back by government policy. The Energy Profits Levy (EPL) on domestic oil and gas production has caused an accelerated decline in activity, resulting in job losses and work being lost unnecessarily – the Oil & Gas Pricing Mechanism (OGPM) must be brought forward urgently from 2030 to help stabilise investment and sustain good, highly skilled energy jobs. We need pragmatic, ongoing licensing of oil and gas – including strategically important developments like Rosebank and Jackdaw – to protect critical pipelines,

terminals and industrial sites alongside the build out of renewables. To unlock Scotland's full potential in offshore wind, there must be reform of transmission network charges before 2029.

In recent months we have seen the closure of the refinery at Grangemouth and the chemical site at Mossmorran, and with these closures, the loss of skilled jobs, vital parts of the Scottish economy. This is deindustrialisation masquerading as decarbonisation. It does not have to be this way. With an integrated approach that builds on our strengths, Scotland's industrial future can be anchored for decades to come. Decarbonisation must deliver reindustrialisation.

A modern industrial Scotland, secured by homegrown energy, requires pragmatism over polarisation.

From the Highlands to the Borders, industry sustains communities, powers innovation, and underpins secure energy supplies. Today, we face a choice: seize the opportunity to build on our strengths or allow decline to ripple through our economy.

We know what can be achieved with a supportive political backdrop and a business environment that welcomes investment. Norway shares the same North Sea, and its offshore energy sector is thriving across oil, gas, wind, carbon storage.

There is no trade-off between economic growth, energy security, and climate responsibility. We are determined to deliver all three. That is why we call on all parties to work with us to shape policies that keep Scotland at the forefront of global energy, that we build on our existing industrial and supply chain strengths, ensure our communities thrive, and secure a prosperous future for generations to come.

This manifesto is not just a set of proposals. It is a call to action, rooted in the experience and ambition of our members.

Let's back homegrown energy.

Let's back our workers.

Let's back our future.

David St John

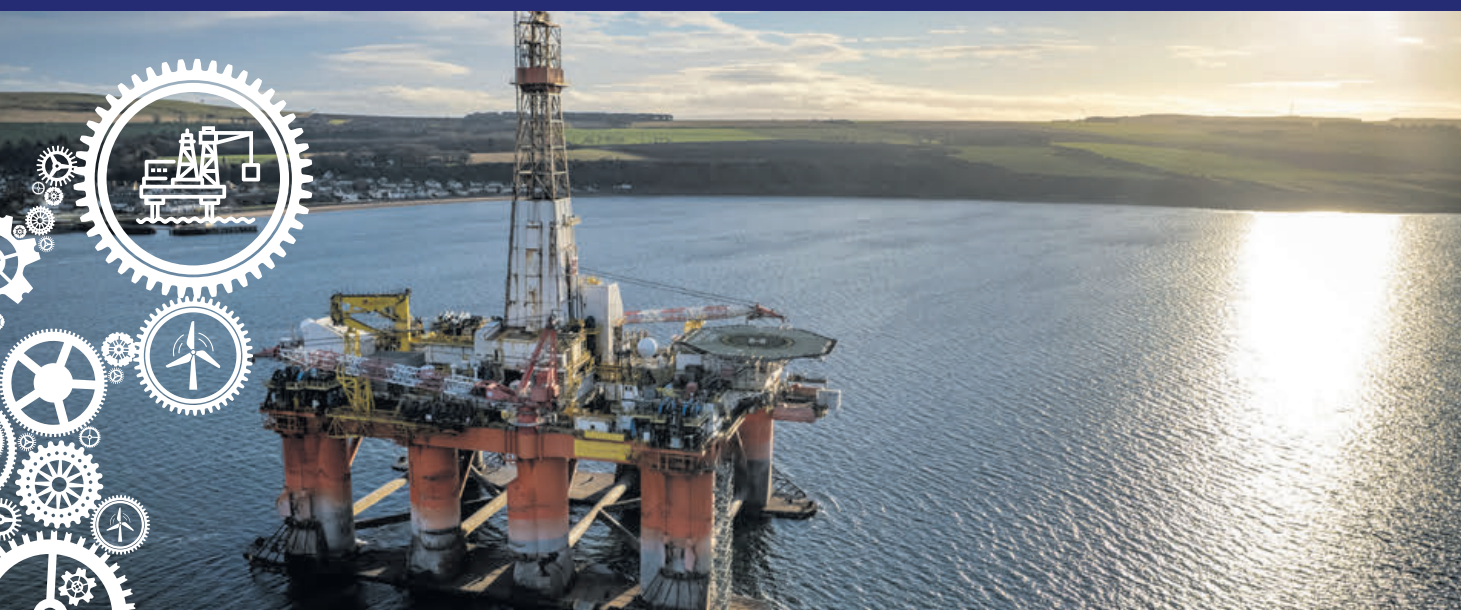


2. The case for homegrown energy: Scotland's growth, sustainability and security.

Scotland's offshore energy sector is a cornerstone of our national prosperity, security, and ambition. For over half a century, our industry has powered homes, supported communities, and created good and highly skilled jobs across the country. Today, as Scotland stands at a crossroads, the value of our sector has never been clearer or more vital.

The North Sea is a strategic economic asset for Scotland and the UK. In 2024, the UK's offshore energy industry contributed over £36 billion to the economy and sustained more than 240,000 jobs nationwide, including 128,400 in Scotland. These are not just statistics, they represent livelihoods, families, and the vibrancy of towns and cities across our nation. Our sector's expertise, developed over 60 years, has made Scotland and the UK global leaders in offshore energy, with technical knowledge, infrastructure, and supply chains that underpin our industrial strength and support sectors from manufacturing to construction.

Our members are at the heart of this story. Equinor's Hywind Scotland put Scotland at the forefront of floating offshore wind. Shell and Harbour Energy's role in the Acorn CCS project at St Fergus will be essential to cut emissions while reusing existing Scottish infrastructure and skills. At the same site, Shell and Equinor's Acorn Hydrogen will produce low-carbon hydrogen to support industry and energy security in the north-east. TotalEnergies' partnership in Seagreen, Scotland's largest offshore wind farm, has driven investment through Scottish ports, vessels, and supply chains. GreenVolt, the future largest floating wind farm in the world is progressing to a final investment decision (FID). It will both kick-start the floating wind industry at scale in Scotland and decarbonise oil and gas production.





We use energy to provide electricity, heat and vital chemicals to our homes, businesses, transport and the manufacture of goods. While Scotland and the UK have abundant natural resources to produce the oil, gas, wind, hydrogen, and climate technologies needed to help meet these demands safely, securely and sustainably, official figures show a sharp rise in our reliance on imported energy.

According to the Department for Energy Security and Net Zero (DESNZ), UK energy import dependency has grown significantly over the past two decades. In 2000, imports were about 10%; by 2010 it had risen to 28%; and by 2013 nearly 48%. After easing to 35% in the late 2010s, dependency surged again, hitting 43.8% in 2024 - the highest in over a decade. This recent increase is faster than expected and driven by policy choices, not geology, as domestic production declines while investment signals remain uncertain.

Only by choosing energy produced here over energy that is increasingly imported can we reap the homegrown dividend for our economy and society. This means supporting oil and gas alongside renewables on the journey to our energy future.

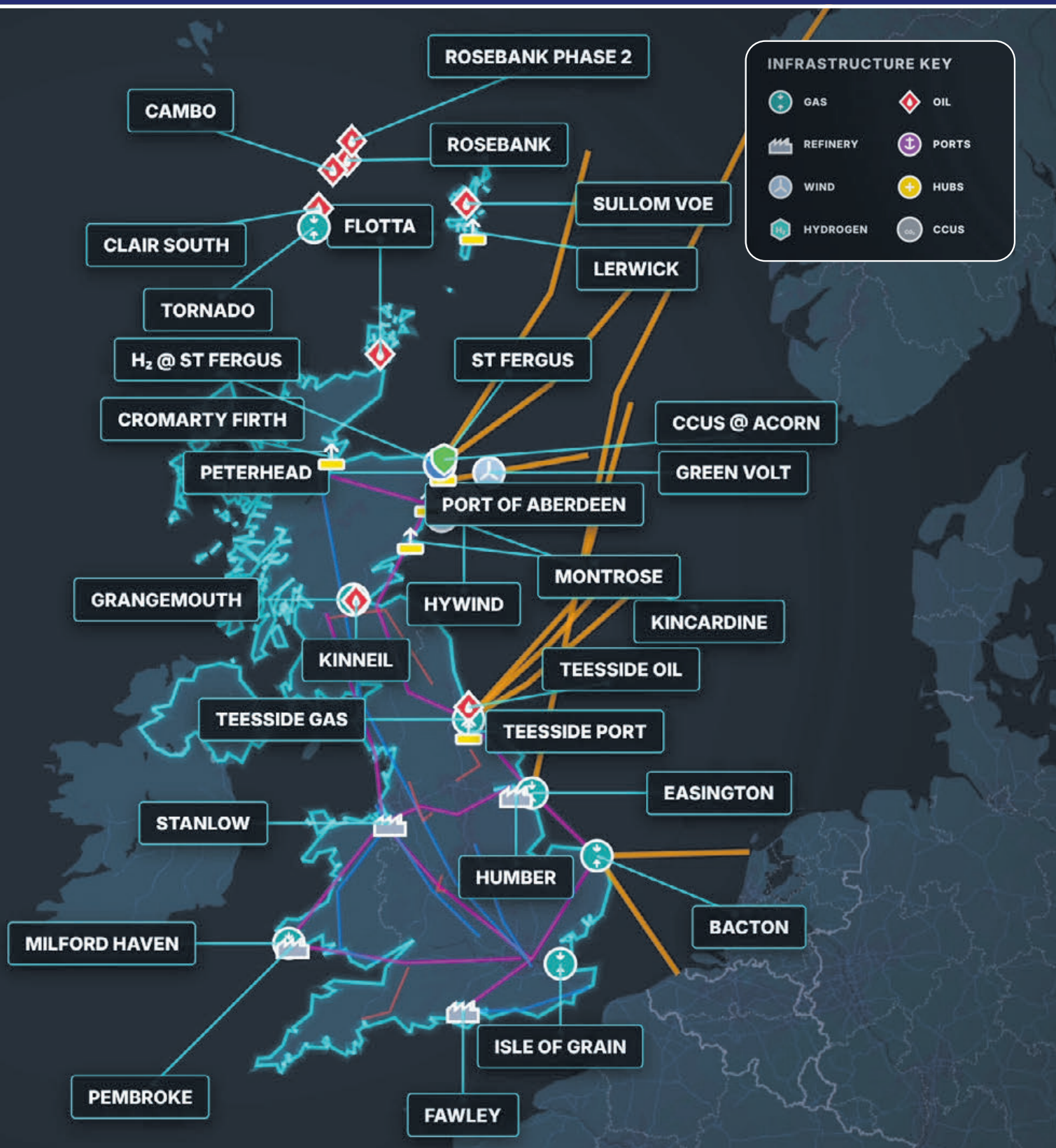
The North Sea remains a vital source of oil and gas, yet government policy in the last decade has seen an accelerated decline.

We are proud of our record on climate progress. Since 2018, our industry has cut oil and gas production emissions by 34% and more than halved methane emissions. UK offshore wind has helped decarbonise UK electricity supplies and been complemented by lower carbon-intensive gas production in UK waters. Since 2010, offshore wind has generated 418TWh of electricity. Prioritising gas produced here for heating and electricity generation comes at a third of the emissions of liquefied natural gas shipped from overseas. OEUK members are developing 15GW of offshore wind capacity in projects from concept to construction, requiring £37 billion of capital investment. Over the next five years, nearly £60 billion could be invested in offshore wind, hydrogen, and CCS. This is real action, delivered by real companies, creating real opportunities for workers and communities across Scotland.

Our vision is clear: Scotland's energy future is not a choice between prosperity, security, or sustainability. It is about achieving all three, together. By backing homegrown energy, investing in people and skills, and supporting innovation, we can ensure Scotland remains a global leader in offshore energy and that our communities continue to thrive for generations to come.

OEUK's manifesto sets out how, through homegrown energy and reindustrialisation, national prosperity and security can be sustainably and safely achieved.

3. The opportunity: Integrated industrial future



Scotland's industrial backbone: A proud past to build a future on

For generations, Scotland has led the world in energy and industry. From oil shale in West Lothian to the Clyde shipyards, our industrial clusters have powered prosperity and innovation. Today, that same interconnected system - pipelines, ports, grids, and fabrication yards- remains vital to our economy and communities.

Historic and strategic sites

- Grangemouth:
Scotland's largest industrial site and the UK's oldest refinery, supplying fuels and chemicals for nearly a century.
- Mossmorran:
A cornerstone of Scotland's petrochemical economy, processing North Sea gas into essential feedstocks.
- St Fergus:
Handles 25-50% of UK gas supplies dependent on demand patterns.
- Sullom Voe & Flotta Terminals:
Strategic hubs for oil exports and gas imports, transforming Shetland and Orkney economies.
- West Lothian oil shale belt:
Scotland's pioneering energy industry of the 19th century.
- Clyde Shipyards:
Once the "workshop of the world," now evolving into advanced manufacturing hubs.

With partnership, we can prevent the loss of sites and stop the creation of stranded assets.

4. Policy Priorities for Scotland's Next Government

1. Champion an all-energy approach to Scotland's industrial future. Advocate for policies that do not divide Scotland's workforce and industries into "clean" and "dirty" but instead recognises and champions Scotland's globally respected energy sector as the shoulders on which to build our industries of the future.
2. Favour pragmatic, ongoing access to homegrown oil and gas. The sector needs a functioning regulatory regime. The first step is timely approval of Rosebank and Jackdaw environmental consents (Scope 3 assessments). Building on this, give industry line of sight to future opportunities by providing regulatory clarity for an infrastructure-led approach to protect critical pipelines, terminals and industrial sites.

3. Address Address Transmission Network Use of System (TNUoS) charges

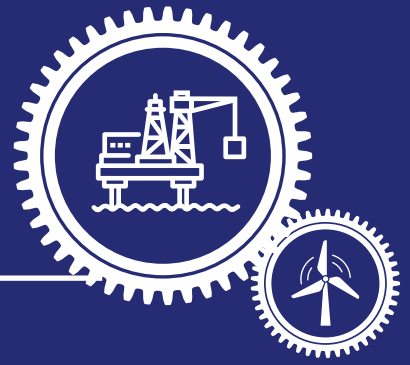
which disadvantage Scottish offshore wind and integrated projects. Champion accelerated transmission charging reforms to provide greater stability, and secure investment to deliver and operate critical generation assets.

4. Accelerate implementation of the Oil and Gas Price Mechanism (OGPM) before 2030.

Advocate for an oil and gas fiscal regime that supports investment, balances risk and reward and supports energy security through representations to UK government, providing evidence and support to appropriate industry forums. We need a predictable, fair fiscal regime and a regulatory framework that is conducive to investment.

5. Recognise and support the offshore energy supply chain as a strategic industrial asset. Formally designate the supply chain as a national priority, with targeted support for manufacturing, fabrication, and export capability.





6. Secure measurable Scottish supply chain participation in the full offshore energy value chain including ScotWind, Innovation and Targeted Oil and Gas (INTOG), and future offshore projects. This requires a mix of policy, financial, and infrastructure levers including championing price support mechanism and planning prioritisation.
7. Champion Scotland as global leader in responsible decommissioning. Support a £2 billion per year industrial opportunity to anchor new capabilities in Scottish ports, yards and supply chain by positioning Scotland as the centre for decommissioning expertise - supporting jobs, the circular economy, and environmental leadership.
8. Foster strong collaboration between industry, trade unions, regulators, community groups, and government to deliver agreed outcomes which give industry agency over its future, building on Scotland's existing partnership frameworks. Promote balanced, evidence-based energy insight to inform decision-making. Support confident, informed choices by decisions makers and civil service that strengthen an integrated, homegrown energy system.
9. Change the narrative on the inevitability of job losses. Plan for a future where oil and gas jobs remain essential for energy security and the skills they provide. New roles in offshore wind, hydrogen, and carbon capture are created alongside - not instead of - existing jobs. Reform apprenticeship funding so Scotland matches UK flexibility and supports advanced and higher-level pathways.
- 10. Devolve powers and funding to Regional Economic Partnerships (REPs) with priority application in energy clusters.**

5. Energy security and supply

Scotland's energy sector underpins jobs, investment, and national security. The waters around Scotland's coast, from the wild Atlantic to the mighty North Sea, remain a strategic asset, providing secure, affordable, lower-carbon domestic energy while enabling investment in renewables, hydrogen, and carbon capture. Politicians and policy must move beyond divisive narratives of “clean” versus “traditional” energy. Instead, we must recognise oil and gas, wind, CCS, and hydrogen all have complementary roles. Integration is key.

Scotland already has a well-established network of investment enablers - including the Scottish National Investment Bank (SNIB), Opportunity North East (ONE), and GB Energy - as well as proven partnership forums like the Scottish Energy Advisory Board (SEAB). These bodies bring together government, industry, unions, and academia to deliver agreed outcomes. Rather than creating new layers of bureaucracy, Scotland should make the most of these existing partnerships and funding mechanisms, giving them clear mandates and resources to accelerate offshore wind, hydrogen, and carbon capture projects. This approach ensures cost efficiency, faster delivery, and investor confidence, while avoiding duplication and confusion in an already busy policy landscape. By prioritising homegrown production and accelerating new technologies as part of an integrated energy system, we can stem the tide of a rapid over-reliance on imports, safeguard jobs, and deliver resilience.

Key facts

- Homegrown energy - including oil, gas, and renewables - meets over half of UK energy demand, but import dependency has surged to 44%, the highest in over a decade. Without action, this trend is set to continue despite there being available domestic resources.
- Offshore energies contributed £36 billion to the UK economy in 2024, underpinning jobs, tax revenues and investment.
- Domestic oil and gas have cut production emissions by 34% since 2018, while offshore wind has helped decarbonise electricity production, generating 418TWh since 2010.
- INTOG offshore wind projects deliver a double benefit: they cut emissions from oil and gas operations by powering platforms with clean electricity, while scaling floating wind to 5GW - positioning Scotland as a global leader in this technology. Industry is key to the success of Scotland's Hydrogen Action Plan targeting 5GW of low-carbon hydrogen by 2030, with offshore production powered by floating wind expected to play a major role.
- Scotland hosts the UK's most advanced carbon capture and storage project at Acorn, leveraging existing North Sea pipelines and reservoirs to store up to 20 million tonnes of CO₂ annually. This infrastructure makes Scotland essential to meeting UK climate targets and securing industrial decarbonisation.
- Thousands of miles of subsea cables and pipelines connect Scotland's offshore hubs to the UK energy system - an invisible backbone of national energy security.

Policy asks

- Champion pragmatic, ongoing licensing of oil and gas – including strategically important developments like Rosebank and Jackdaw – and support infrastructure-led approaches to protect critical pipelines, terminals – and industrial sites.
- Address Transmission Network Use of System (TNUoS) charges, which disadvantage Scottish offshore wind and integrated projects. Champion accelerated transmission charging reforms to provide greater stability, and secure investment to deliver and operate critical generation assets.
- Advocate for an oil and gas fiscal regime that supports investment, balances risk and reward – and supports energy security, including urgently bringing forward the implementation of the agreed Oil and Gas Price Mechanism before 2030 through representations to UK Government, providing evidence and support to appropriate industry forums.
- Provide stable, predictable frameworks that enable investment in offshore wind, hydrogen, and CCS through streamlined planning, a clear National Marine Plan (NMP2), and coordinated grid reform. These frameworks must leverage Scotland’s decades of oil and gas expertise in engineering, project delivery, and supply chain capability to drive down costs and accelerate deployment of renewables. This approach will give investors confidence in Scotland’s low-carbon project pipeline and ensure competitive, efficient delivery.
- Strong marine spatial planning should balance the growth of offshore wind and CCS with the continued role of domestic oil and gas, including late-life operations, pipelines, terminals and planned decommissioning campaigns, ensuring energy security and supply chain continuity.
- Prioritise enabling policy with agreed outcomes to encourage innovation and investment and avoid regulatory “treacle”. Champion policy supportive of a goal setting regulatory regime to ensure that investment is approved against the backdrop of a policy environment that is not overly bureaucratic and generates mutual supportive fiscal and regulatory regimes.
- Support integrated planning through endorsement of a collaborative approach to energy policy across industry, government, regulators and trade unions. Actively advocate for Scotland’s interests through UK-wide forums such as the North Sea Future Board where regulatory and industry performance are measured equally to ensure positive outcomes for Scotland.
- Refresh the Scottish Energy Advisory Board (SEAB) to embed industrial capability and economic growth as a core principle. SEAB should champion and advise on a pragmatic, integrated energy strategy for Scotland - one that delivers economic growth, security, affordability, and decarbonisation while safeguarding jobs and industrial strength.
- Maintain stable, pragmatic regulation - avoid adding new layers that create duplication and delay, while increasing the pace of effective pragmatic regulatory decision-making. Ensure and champion policy coherence across licensing, fiscal, and planning regimes in Scotland and across the UK for the benefit of companies and jobs anchored in Scotland:
 - o Support an integrated Climate Change Plan, Just Transition Plan and Energy Strategy which supports a presumption in favour of home-produced energy to manage an increasing reliance on imports and ensure decarbonisation does not have unintended consequences including deindustrialisation.
 - o Consenting should be streamlined through a single front door, coordinated pathways, and clear critical path milestones to cut duplicative processes and accelerate delivery. National digital data tools should provide single, regularly updated map layers for assets, constraints, cables, and transmission networks, with transparent rules for overlap, leveraging SSEP/Whole of Seabed modelling as the base.

Outcomes if we get it right

- Scotland becomes a global leader in integrated energy systems - connecting production, transmission, and feedstock into one resilient network. This approach reduces import dependency by securing domestic supply chains and proactively managing resources, while increasing export capability through advanced manufacturing and low-carbon technologies.
- Scotland achieves a self-sustaining domestic energy market that does not rely on long-term state subsidy. Through this the sector secures investor confidence, accelerates deployment, and builds an energy system that funds itself through market returns rather than ongoing public support.
- Secure, affordable energy supply for homes and businesses.
- Investment confidence drives billions into renewables, CCS, and hydrogen projects.

Further reading:

- DESNZ Energy Trends – UK energy import dependency and production statistics <https://www.gov.uk/government/collections/energy-trends>
- OEUK Economic Report (2025) – Scotland's offshore energy contribution to UK GDP and energy security: <https://oeuk.org.uk/economic-report>
- Scottish Government: Energy Strategy & Just Transition Plan (2024) – Framework for integrated energy systems and security priorities <https://www.gov.scot/publications/energy-strategy-and-just-transition-plan>
- Rystad Energy: “UK O&G supply chain opportunities in the energy transition” (2024)
- Scottish National Planning Framework (NPF4) Delivery Programme Update (2026) – Infrastructure priorities for ports, grids, and industrial clusters <https://www.gov.scot/publications/national-planning-framework-4-delivery-programme>
- OEUK/Arup 2025: Carbon Capture & Storage in the UK: Accelerating towards the merchant model: <https://oeuk.org.uk/product/carbon-capture-storage-in-the-uk-accelerating-towards-the-merchant-model/>
- Licensing and Infrastructure Report 2025 | Offshore Energies UK (OEUK) <https://oeuk.org.uk/product/licensing-and-infrastructure-report-2025/>



Norway is Winning. Why aren't we?

Norway's advantage isn't geology – its political consensus and policy predictability.

The signals to investors are long-standing and stable: rules are certain and projects that work before tax still work after tax. That stability sustains positive investor sentiment, which in turn underpins production output, public spending, and returns for investors.

The results are visible: In 2025 Norway produced its highest levels of oil since 2009 (106 million standard cubic metres) coupled with gas sales of around 120 billion cubic meters. Strong exploration underpinned by steady licensing, delivering record investment.

The first month of 2026 heralded Norway's announcement to award 57 new oil and gas production licenses to 19 companies; a reflection of the Labour Prime Minister's commitment to "develop, not phase-out" oil and gas and supported by around four-fifths of Norway's MPs.

The UK's story has been the opposite. Zero exploration wells in 2025 for the first time since 1964 – a stark indicator of the shaken sentiment amid fiscal and licensing turbulence; a grim reality depressing supply-chains, jobs and skills, and the revenues needed for the transition.

If we want investment to flow into Scotland's integrated offshore system, world-class supply chain and foundation industries – and the low-carbon projects that depend on this – then we must build consensus and lock-in predictability.

Parties, leaders and prospective candidates can commit to stable and fair frameworks across hydrocarbon and renewable technologies (including offshore wind, hydrogen and CCS) and align regional powers (through REPs) to speed-up planning, consent, and delivery.

Do that and Scotland can start winning like Norway.



6. Industrial & supply chain strength

Scotland's energy sector is deeply interconnected. Pipelines, ports, grids, and industrial clusters like St Fergus, Grangemouth, and Mossmorran power our economy. Policy decisions in one area can trigger a domino effect across jobs, supply chains, and communities. By creating a competitive environment and streamlining regulation, Scotland can anchor capability at home, capture global market share, and avoid deindustrialisation.

Key facts

- Scotland's energy supply chain is widely recognised as among the most advanced and adaptable in Europe. Without a clear, continuous, and certain pipeline of projects across all energy types, the supply chain risks fragmentation and loss of capability, undermining Scotland's industrial resilience and global competitiveness.
- OEUK's risked project pipeline - real projects with a credible chance of proceeding under stable frameworks - highlights that approximately £73 billion in planned investment in offshore energy – oil, gas, wind, hydrogen and CCS – is likely to be spent by 2030.

Policy asks

- Formal recognition of the offshore energy supply chain as a strategic national asset in Scottish industrial policy, with support for the industry's voluntary local content targets. Through Regional Economic Partnership (REPs) and Community Wealth Building policies, legislation, and levers, ensure public incentives encourage demonstrable anchoring of operations and workforce in Scotland, helping the supply chain to remain competitive, retain jobs, and drive local economic growth.
- Secure measurable Scottish supply-chain participation in the full offshore energy value chain, including ScotWind, Innovation and Targeted Oil and Gas (INTOG), and future offshore projects. This requires a mix of policy, financial, and infrastructure levers, including:
 - o Financial de-risking: Use the Scottish National Investment Bank and targeted grants to support investment in manufacturing, fabrication, and port upgrades.
 - o Planning and infrastructure prioritisation: Embed FLOW-related ports, grid upgrades, and industrial clusters in the National Planning Framework and accelerate consenting.
 - o Local content and supply chain plans: Strengthen requirements in ScotWind and INTOG leasing rounds to guarantee measurable Scottish participation.
 - o Skills and capability building: Expand regional skills hubs and apprenticeships aligned to offshore wind technologies.
 - o Strategic industrial policy: Formally recognise the offshore energy supply chain as a national asset and integrate it into Scotland's economic strategy.
 - o Champion price support mechanisms - such as Contracts for Difference (CfD) and the Clean Industry Bonus - to actively promote domestic supply chain capability and prioritise energy communities at the heart of UK energy, industrial, and economic policy.

These regions, which have powered the UK for decades, risk economic decline if support is not targeted. Candidates and parties should advocate that these areas automatically qualify under the Clean Industry Bonus “UK deprived area” criteria, ensuring national preference for places best equipped with skills, infrastructure, and industrial capacity to deliver the energy transition.

- Champion Scotland as global leader in responsible decommissioning. Support a £2 billion per year industrial opportunity to anchor new capabilities in Scottish ports, yards and supply chain by positioning Scotland as the centre for decommissioning expertise - supporting jobs, the circular economy, and environmental leadership.
- Enable investment in ports, fabrication yards and multi-energy hubs, anchoring modern industrial capability in Scotland. Position Scotland as a hub for manufacturing, fabrication, well engineering (including subsea) and export across all energy sectors.
- Embed energy infrastructure priorities in the National Planning Framework (NPF): Expand national development designations to include integrated industrial clusters (St Fergus, Grangemouth), multi-energy ports, grid upgrades, and a UK national CO₂ transport network. This should be reflected in the next NPF Delivery Programme update (due early 2027) and positioned as critical to Scotland’s energy strategy and economic resilience.
- A reversal of the Scottish Government’s 2021 policy ending routine overseas trade-promotion support for purely oil and gas projects would allow Scottish Enterprise and its international arm, SDI, to broaden access to trade missions and market services. Updating the approach could help ensure a level playing field for Scotland’s 128,400 offshore-energy workers.
- Develop a national CO₂ transport network to unlock decarbonised industrial processes.
- Develop an integrated sustainable fuels strategy for Scotland that builds on strengths in renewable power, hydrogen production capability, and petrochemicals expertise.

Outcomes if we get it right

- Scotland secures Tier 1–3 supply chain participation in global projects.
- Thriving industrial clusters drive regional prosperity and innovation.
- The UK’s world-class supply chain remains anchored here with strong roots in Scotland.
- Scotland secures jobs and accelerates growth by putting energy communities at the heart of relevant UK policy decisions. By ensuring CfD and the Clean Industry Bonus prioritise domestic supply chains and automatically qualify these regions, we direct investment to places with the skills, infrastructure, and industrial capacity to deliver homegrown energy.
- Scotland becomes a world-class export base for energy technology.

Further reading:

- Rystad Energy, “UK O&G supply chain opportunities in the energy transition” (2024)
- OEUK Supply Chain Report (2025)
- Scottish Government, “Energy Strategy and Just Transition Plan” (2024)
- OEUK Decommissioning Insight Report (2025) – Strategic opportunities for jobs and circular economy benefit <https://oeuk.org.uk/decommissioning-insight>

7. Jobs & skills

A strong industrial strategy depends on a skilled, adaptable workforce. Scotland's offshore energy sector supports 128,400 good jobs, including 111,800 in oil and gas, many highly skilled and well-paid, and unions play a vital role in ensuring standards, representation, and workforce development. The expansion to a diverse energy mix demands new skills and lifelong learning. By reforming apprenticeship funding, simplifying the skills landscape, and enabling cross-sector mobility, we can grow and retain talent.

Key facts

- Nearly half of UK offshore energy workers live in Scotland.
- The sector invests millions annually in apprenticeships and upskilling. In 2025, excluding the nuclear sector, the Engineering Construction Industry Training Board (ECITB) spent £2.4m in Scotland, supporting apprenticeships.
- Foundation Apprenticeship pilots in Aberdeenshire such as the one launched in partnership with OEUK and Carjon-NRG at Portlethen Academy are already delivering results. Early results show strong learner engagement and highlight the importance of recruiting qualified technical educators to support programme delivery.

Policy asks

- Foster strong collaboration between industry, trade unions, academia, community groups, and government to deliver agreed outcomes which give industry agency over its future, building on Scotland's existing partnership frameworks.
This means strengthening and resourcing proven models such as the Scottish Energy Advisory Board (SEAB), the North Sea Transition Forum, and the North Sea Future Board, which already bring together government and industry to deliver agreed outcomes. Rather than creating new structures, we should embed these partnerships in legislation and policy delivery, ensuring they have clear mandates, accountability, and the ability to coordinate across sectors. This approach maintains continuity, avoids duplication, and accelerates outcomes by leveraging trusted relationships and Scotland's track record of collaborative working.
- Reject the assumption that job losses are inevitable, and instead plan for a future where:
 - o Oil and gas jobs remain essential for energy security and the skills they provide.
 - o New roles in offshore wind, hydrogen, and carbon capture are created alongside - not instead of - existing jobs.
 - o Skills mobility and retraining are funded and simplified so workers can move between sectors without leaving the workforce.
 - o Public investment and planning frameworks prioritise projects that retain and redeploy talent rather than displace it.

- Reform apprenticeship funding so Scotland matches the flexibility and scale available elsewhere in the UK. Currently, Scottish employers face stricter limits on how apprenticeship levy funds can be used compared to England and Wales. Reform could include:
 - Allowing levy funds to cover a wider range of training costs, including short courses and upskilling for experienced workers.
 - Simplifying the funding model so employers can access support quickly without complex eligibility rules.
 - Introducing parity in funding rates and scope for advanced and higher-level apprenticeships, ensuring Scottish workers and businesses aren't disadvantaged.
- Expand regional skills hubs beyond Aberdeen to Fife, the Highlands, and Central Belt.
- Support rollout of the Energy Skills Passport for cross-sector mobility.
- Align training with project pipelines, ensuring workers can move across offshore wind, hydrogen, CCS, and new industrial sectors while maintaining core oil and gas capability.

Outcomes if we get it right

- A diverse, flexible, and integrated workforce ready for oil, gas, renewables, CCS, and hydrogen.
- Scotland grows a diverse energy mix without sacrificing jobs - protecting 128,400, including 111,800 in oil and gas, existing roles and creating thousands more in renewables and low-carbon industries.
- Increased apprenticeship uptake and regional job creation.
- Scotland positioned as a global leader in energy expertise.
- Employers retain and retrain talent for offshore wind, hydrogen, CCS, and oil and gas roles – keeping Scotland competitive and avoiding skills gaps.



8. Local value and community benefit

Scotland's energy sector is rooted in its communities. From Aberdeen to Grangemouth, Mossmorran, and beyond, energy investment sustains local economies and public services. By connecting projects with local supply chains, skills programmes, and infrastructure, Scotland can deliver visible, place-based growth across every region.

Key facts

- 128,400 jobs in Scotland supported by the sector in 2024.
- £24 billion value added to the Scottish economy in 2024.
- Scotland has benefited from oil and gas production which has paid £450 billion in production taxes since 1970, funding public services.

Policy asks

- Devolve powers and funding to Regional Economic Partnerships (REPs), with priority application in energy clusters. Embed statutory powers over skills, planning, and economic development, alongside multi-year, flexible funding envelopes aligned to Scotland's energy and industrial clusters. This ensures REPs can drive place-based growth, accelerate a homegrown energy future, and deliver community wealth-building through public-private partnerships.
- Promote balanced, evidence-based energy insight to inform decision-making and support confident, informed choices that strengthen an integrated, homegrown energy system.
- Support community wealth-building models linked to energy clusters. This means leveraging the oil and gas industry's decades-long experience in collaboration and local investment. For example, energy clusters around Grangemouth, Aberdeen, or Falkirk could align with local authorities and anchor institutions to deliver jobs, skills development, and shared infrastructure, while enabling collaboration between domestic industry, local firms, and social enterprises to maximise investment in local skills, infrastructure, and innovation. This partnership model ensures that the benefits of Scotland's integrated energy system flow directly into communities, supporting jobs and accelerating outcomes.



Outcomes if we get it right

- Visible benefits across Scotland.
- Stronger local economies and public services.
- Communities empowered to shape Scotland's energy future.

Further reading:

- OEUK Workforce Insight Report (2025) Analysis of job creation, skills pathways, and regional employment trends in Scotland's energy sector.
<https://oeuk.org.uk/workforce-insight>
- Scottish Government – Just Transition Commission Reports Recommendations on fair distribution of benefits and community engagement in energy policy.
<https://www.gov.scot/groups/just-transition-commission>



9. Meet our members

Oil & Gas: Sustaining UK production

Harbour Energy plays a significant role in sustaining economic activity on the United Kingdom Continental Shelf. Its focus is on maximising value from existing fields and delivering short-cycle, high-return projects as part of the wider industry effort to maintain the North Sea as a strategic economic asset. Harbour contributes to energy security and tax revenues while operating safely and responsibly.

Supply chain: Enabling growth

The Port of Aberdeen has become a critical hub for offshore energy, supporting both oil and gas and renewables. A recent £420 million expansion has enabled the port to service major offshore wind projects, creating local jobs and opportunities for Scottish engineering and logistics firms. This investment in infrastructure is a model for how supply chain growth can drive regional prosperity and industrial strategy.

Technology: Utilising a homegrown advantage

Acteon / Claxton Engineering adapted its oil and gas expertise to offshore wind by developing a monopile cleaning technology for grouting operations. The result? A process that takes 1.5 hours instead of a full day with two divers in the water - improving safety, cutting costs, and showcasing Scottish engineering at its best. This homegrown technology is now exportable to offshore wind farms worldwide.

Places: Grangemouth – industrial heartland at risk

The closure of the Grangemouth oil refinery highlights the risks and realities of policy-driven deindustrialisation leading to a permanent loss of capabilities. As a major employer and anchor for Scotland's industrial supply chain and the Forties pipeline system (FPS), Grangemouth's future is critical for regional prosperity. The offshore energy sector's investment in CCS, hydrogen, wind, and new oil and gas projects offers a pathway to retain jobs, repurpose infrastructure, and ensure that Scotland's industrial communities are not left behind in our energy future.



10. Asks on a page: Back homegrown energy to power Scotland's growth, sustainability, and security.

Our vision

Scotland's offshore energy sector is the first domino in a chain that supports our entire industrial base. If we weaken it, the impact cascades. Jobs are lost, supply chains fractured, communities left behind, and energy resilience decreased. But if we strengthen these capabilities, the domino works in our favour: investment flows, jobs grow, supply chains expand, and communities thrive.

This is Scotland's choice.

Let's deliver growth, security, and sustainability together.

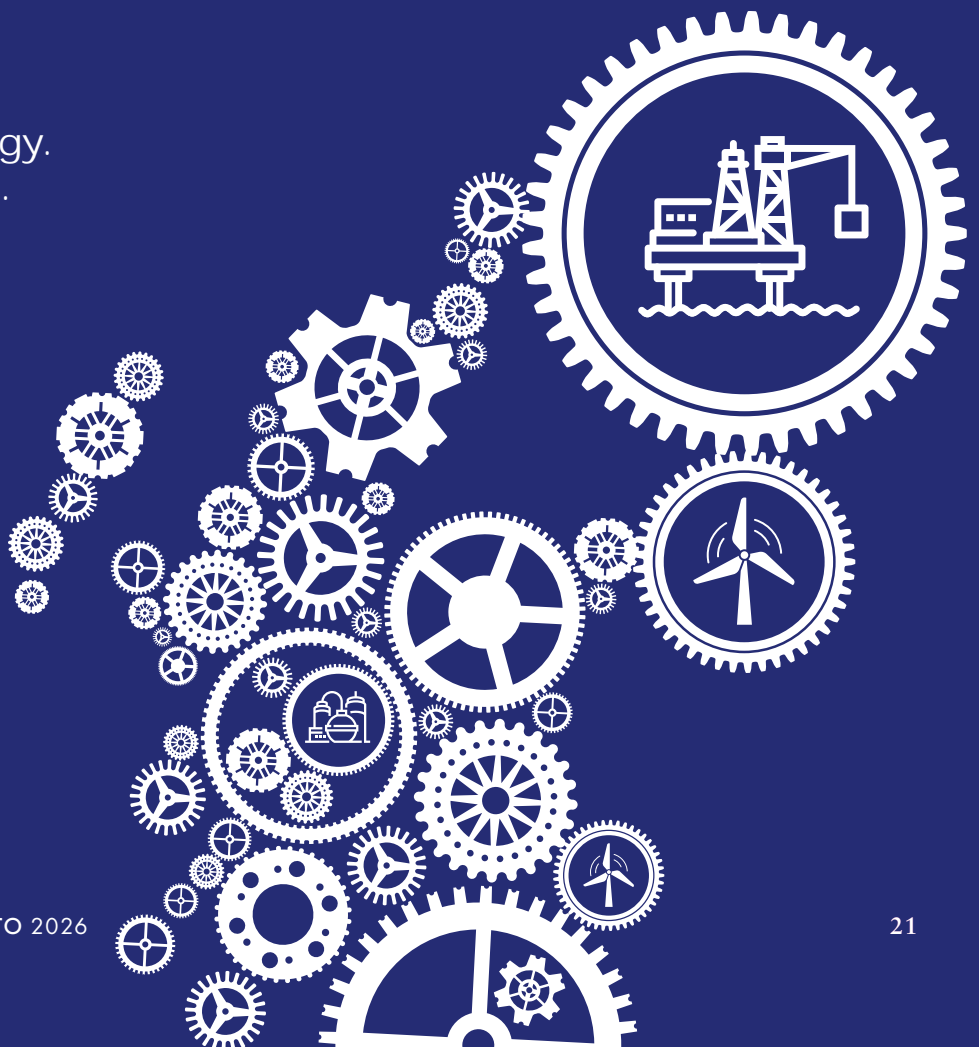
What success looks like

- Secure, affordable energy for homes and businesses.
- Thriving industrial clusters and global export leadership.
- A skilled, homegrown workforce ready for the future.
- Stronger communities and place-based growth across Scotland.

Join us.

Back homegrown energy.

Back Scotland's future.



11. Working together: **UK and Scottish Government** collaboration

Scotland's energy future depends on effective partnership between the UK and Scottish governments. While many powers over energy policy, licensing, and fiscal regimes are reserved to Westminster, the Scottish Government holds significant influence through planning, consenting, skills, climate targets, and local economic development. The interplay between reserved and devolved powers means that collaboration is not just desirable; it is essential.

We call for a joined-up approach where both governments work together alongside industry and regulators to deliver a modern, integrated energy system. This means:

- **Aligning strategic priorities:** Both governments should set clear, ambitious targets for renewables, hydrogen, carbon capture, and industrial decarbonisation, ensuring policy coherence and investment certainty across the UK and Scotland.
- **Streamlining planning and consenting:** The Scottish Government should lead on reforming planning and consenting processes, while the UK Government supports infrastructure investment and regulatory alignment so projects move from concept to delivery without unnecessary delay.
- **Championing the supply chain:** Recognise and support Scotland's energy supply chain as a strategic asset, with targeted investment and export support from both governments.



- **Skills and workforce development:** Joint action to reform apprenticeship funding, expand regional skills hubs, and roll out the Energy Skills Passport, ensuring a homegrown, flexible workforce ready for the energy transition.
- **Balanced energy narrative:** Work together to shift public and political discourse, using data and storytelling to promote the benefits of an integrated energy system - oil and gas, renewables, hydrogen, and CCS - while ending divisive “clean vs traditional” debates.
- **Enabling regulation:** Move towards outcome-based, enabling regulation that encourages innovation and investment, avoiding duplication and regulatory “treacle.”
- **Tripartite governance:** Establish and strengthen forums like the North Sea Transition Forum (NSTF) and Offshore Wind Industry Council (OWIC), with active participation from both governments, industry, and regulators.
- **Responsible decommissioning:** Invest in infrastructure and innovation to make Scotland a global leader in decommissioning, with both governments supporting circular economy approaches and skills transition.
- **Industrial strategy and export growth:** Position Scotland and the UK as global leaders in energy technology and industrial decarbonisation, supporting cluster development and export opportunities.

By working together, the UK and Scottish governments can unlock investment, accelerate the energy transition, and ensure Scotland's energy future is secure, sustainable, and prosperous for generations to come. Collaboration is the key to success.



Back a modern industrial Scotland. Secured by homegrown energy.

Find out more about how we can help build
a modern industrial Scotland:

Speak with Mark McClelland, Head of Public Affairs at
mmclelland@oeuk.org.uk

View the campaign webpages at

OEUK.org.uk



An integrating offshore energy
industry which safely provides
cleaner fuel, power and products
for everyone in the UK.

Working together, we are a
driving force of the UK's energy
security and net zero ambitions.
Our innovative companies,
people and communities add
value to the UK economy.

