OEUK OFFSHORE ENERGIES UK

INDUSTRIAL STRATEGY

A modern industrial Britain,
powered by homegrown energy

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Foreword

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OEUK's vision for the UK is clear: a modern industrial nation powered by homegrown and affordable energy. By harnessing the full potential of our domestic energy resources, including oil and gas, we aim to retain the UK's global leadership in energy, driving both innovation and economic opportunity.

Affordable homegrown energy production must be at the heart of an industrial strategy. Prioritising homegrown energy will enable our UK manufacturing sector to survive and thrive. We will retain and create jobs and establish the foundations for long-term energy security.

The North Sea is a strategic national asset that has powered the UK economy and homes through oil and gas for the past 50 years. Currently 75% of the UK energy needs are met by oil and gas, with half of this coming from the UK Continental Shelf (UKCS), supporting 200,000 jobs across the country. In 2023 the sector supported £25bn in economic gross value add (GVA), representing around 1.5% of the total UK economy (over 5 times the contribution of the UK steel industry and twice the contribution of the UK car industry).

For as long as we need oil and gas, we must continue to produce this in the UK where we can deliver this at lower emissions to imported alternatives, contribute billions of pounds to the economy every year and anchor skills that will be needed now and, in the future, here in the UK.

The North Sea is uniquely placed to support our energy future, boasting the second largest offshore wind capacity in the world and the geology to store over 78 gigatons of carbon dioxide in our reservoirs to decarbonise hard to abate sectors in the UK and beyond whilst responsibly producing oil and gas.

With supportive policies, UK offshore energy companies are ready to invest up to £200 billion over the next decade, advancing offshore wind, carbon storage, and the hydrogen economy at a transformative pace, alongside investment in oil and gas, and decommissioning activity.

This journey requires a partnership between government and industry to create an internationally competitive business environment with a predictable fiscal environment, and effective regulatory and project approval processes.

Crucially, the skills and expertise developed within the integrated energy sector are driving the shift towards cleaner energy production. Investing in people and building a skilled, diverse workforce will ensure the success and growth of our energy sector and the broader economy.

Working in partnership, the UK can be a leading green industrial power, building on our industrial strengths and resources, continuing to offer high quality employment for a skilled workforce driving strong economic growth across the entire country.

1 A vision for the future: A modern industrial Britain, powered by secure and affordable energy

The UK's modern manufacturing industries are enabled by sustainable, secure and affordable supplies of homegrown energy. By 2050, the trend of deindustrialisation seen throughout the UK in the early 2010s has been arrested by the transformation of key energy intensive industries.

British steel, paper mills, chemical industries, ceramics and more thrive in a net zero carbon emissions business landscape, enabled by affordable low carbon power and industrial processes developed in the UK, for the UK.

The cornerstones of homegrown skills, energy, and innovation which enabled heritage industries to adapt have cultivated new modern manufacturing in defense, life sciences, energy storage and artificial intelligence.

The benefits of a successful industrial strategy are seen, felt and heard across the United Kingdom. From Lerwick to Lowestoft, Birmingham to Barrow-in-Furness, to Merthyr Tydfil, Dundee and Belfast, industrial regions thrive in new ways, supporting jobs, regional growth as well as culture, arts and community.

The UK's place in the world is more stable, more secure, because of its industrial capabilities. At the heart of this capability is homegrown energy and processes – modern power, fuels and chemicals.

Our plan to realise a modern industrial Britain, powered by homegrown energy:

- **Put affordable homegrown energy production at the heart of industrial strategy**. The UK depends on imports for nearly 40% of its total energy demand, and UK energy prices are higher than our counterparts. An energy strategy that recognises the UK energy mix today and maps a clear path that focuses on homegrown production will drive down cost and enhance UK security.
- **Build a strong domestic industrial base: leveraging strengths, enabling ambition and innovation.** The offshore energy sector is a high growth sector that can deliver £200 billion investment in this decade alone to accelerate UK economic growth engine building on existing industrial strengths.
- **Government and Industry partnership for a pro-business environment:** Through partnership across Governments and Industry, the UK can create an internationally competitive business environment with stable and predictable fiscal regime and best practice embedded across industry.
- **Efficient, effective, and co-ordinated regulatory and project approval processes:** The regulatory landscape is complex for energy investment and must be streamlined.
- **International collaboration is a critical pillar of success**
- **Deliver a skills revolution - Creating valuable jobs for skilled and talented people**
- **Implementation should be driven through an Offshore Energy Mission Control**: Given the complexity and interdependencies within the offshore energy system, achieving the vision will require an integrated approach – one that cuts through the different regulatory bodies and connects the various government initiatives to deliver results on all fronts.

2 Affordable homegrown energy: the beating heart of industrial strategy

In an increasingly challenging international context, the need to protect and grow our sovereign industrial and manufacturing capability requires a holistic strategy that delivers secure, affordable, and sustainable energy.

UK is dependent for almost 40% of total energy demand on imported energy. Energy production in the UK is at historic lows. Energy prices in the UK are over twice the equivalent of the US, and now higher than many of our European counterparts. Our existing manufacturing base and future industries cannot thrive in a high energy price environment. This must be addressed as a fundamental part of the industrial strategy.

The growing gap between what we produce ourselves and what we import must be addressed. The UK was a net exporter of energy until the early 2000's. Now the country is reliant on imported energy for over 40% of the country's needs.

Protecting heavy industries needs lower-carbon fuels such as hydrogen or gas paired with CCS to meet our emissions targets. Power CCUS will also play a key role.

A long-term UK energy strategy should outline the Government's plan for how the UK will produce, distribute and consume energy affordably, efficiently and sustainably, while reducing dependence on imports.

Our plan to put affordable homegrown energy production at the heart of industrial strategy:

- **Governments and industry must work in partnership to develop a coordinated energy strategy** that recognises the reality of today's energy mix, avoids further de-industrialisation, drives affordability and energy security, alongside emissions reduction.
    - **It is critical that energy policy maps out a clear path to internationally competitive electricity and gas prices.** The system design of our future electricity should be transparently focused on reducing future costs. Self-sufficiency in gas production consistently results in lower costs, as evidenced by international examples.
- **Accelerating renewable energy to deliver Clean Power 2030 is important but must prioritise growth in the UK supply chain.** Electricity makes up 30% of total energy demand in the UK. Accelerating the build-out of renewable energy is an economic opportunity, the focus must be to increase the opportunities for the UK supply chain alongside a focus on reducing the overall system costs.
- **Production of homegrown oil and gas must be prioritized over imports.** Oil and gas today provide approximately 75% of the UK energy needs, and approximately half of that demand is met by homegrown oil and gas production. If we do not produce it here in the North Sea, we will simply import it – without the benefits to the UK economy, support for both jobs and supply chain companies, paying less tax to the Treasury and with a higher carbon footprint.
    - **We still have significant oil and gas reserves around in our offshore waters, with many of these near existing platforms.** UK energy production hit a record low in 2024, and the recent forecast from the North Sea Transition Authority predicts the UK is on track to meet less than a third of UK oil and gas demand. We must reverse this decline - unlocking an

additional 3 billion barrels adds over £150 billion to our economy, supports our jobs, and supports our world class supply chain.

- **Gas will continue to be a critical component of the energy mix for decades, providing a bridge to a decarbonised system.** The UK is reliant for over 50% of its gas requirements on imports with a growing focus on LNG as a fuel source. The North Sea contains significant gas reserves, and unlocking these reserves to meet domestic demand while minimizing the need for LNG imports is a crucial part of the UK energy strategy.

- **Prioritise ready INTOG projects** to support a UK floating offshore wind supply chain and realise cost effective decarbonisation of offshore infrastructure. By coupling floating offshore wind with oil and gas production, the energy industry can substantially reduce its carbon footprint while safeguarding economic opportunities.

- **Geothermal energy provides an alternative to solely relying on electrification** – the UK's geothermal opportunity could provide a significant contribution to national CO2 reductions and is estimated to have a 10GW potential for heating via renewable energy.

- **Clean energy hubs are key to improving energy efficiency and sustainability**. They bring together governments, energy suppliers, and industries to expand decarbonisation efforts and connect technologies for better results.

- **Support regional growth engines,** like the Great Southwest or Inverness – they are key to supporting the UK and devolved Governments' ambitions for national renewal and reducing inequality. Many lack a Mayoral Combined Authority, or Freeport status; the UK and devolved Governments must establish alternative mechanisms to partner with these regions efficiently.

3 Building a strong domestic industrial offshore energy supply chain: leveraging strengths, enabling ambition and innovation

Leveraging the experience of the offshore energy sector is the path to build the industries of the future. There is a technology-rich supply chain in the UK which underpins the domestic oil and gas industry and supports the jobs of up to 200,000 people. The highly relevant solutions developed for the oil and gas sector will enable us to make faster progress towards the UK's clean energy ambition. Equally important is the proven credibility of this industrial strength in globally competitive markets. Growth of UK companies competitively equipped to lead the energy transition cannot be taken for granted and must be supported.

Our plan to build a strong domestic industrial offshore energy supply chain:

- **Government must champion the UK energy supply chain, recognise the integrated nature of the companies operating in this area.**
  - Investment in the UK domestic oil and gas sector supports over 400 supply chain companies across the UK. These companies rely on income from oil and gas to fund investment in the wider energy transition opportunities.
  - The UK will continue to use oil and gas on the path to net zero by 2050, Government policy should prioritise the production of domestic oil and gas over imports to support the UK supply chain.
  - To enhance competitiveness, the government must promote UK energy supply chain exportability and focus on high-value areas such as our expert role and global leadership in floating offshore wind and decommissioning, where the UK has significant strengths.

- **Unlock private sector investment in carbon storage and capture, offshore fixed bottom wind, offshore floating wind and hydrogen.** To do this, a clear long term funding envelope to deliver the potential of these technologies must be announced as part of the Government's Clean Power 2030 goals.
  - To build investor confidence, the government must provide clear market signals supported by Sector Delivery Plans. Supply chain companies need certainty on the work to come to develop their own growth strategies and make anticipatory investment to position themselves competitively for future opportunities.
  - Deploy the previously announced funding for Track-1 Carbon Capture and Storage projects and announce a clear funding envelope for Track-2 and beyond.
  - Deploy £5.1 to £7.5 billion in Contracts for Difference (CfDs) to underpin the growth of offshore wind over the next three auction rounds (AR7 – AR9).
  - Deploy the previously announced Hydrogen Allocation Round funding to support 125 MW, accelerate CCUS-enabled hydrogen pipeline and develop affordable, long-term funding mechanisms for electrolytic hydrogen.
- **Price support mechanisms must promote domestic capability**. Policies must support UK supply chains to avoid importing the technologies and skills. To support the industry's 50% UK

content and 30% local technology commitment as outlined in the North Sea Transition Deal, mechanisms such as the offshore wind Clean Industry Bonus must boost domestic capability, while still preserving the flexibility to take commercial risks.

- **To develop and maintain strong business relationships, purchasing organisations including operators, developers and major contractors should adhere to good procurement practice across the economy.**
  - Purchasing organisations should embrace OEUK's comprehensive procurement framework by implementing Supply Chain Principles (ensuring fair risk allocation and timely payments), participating in the 2025 Working as One survey, adopting LOGIC's standardized contracts, and supporting collaborative initiatives like alliance contracting and inventory sharing to create an attractive and efficient commercial environment.
- **To build supply chain confidence to invest and retain resources in the UK, purchasing organisations must provide more visibility of confirmed upcoming work scopes.**
  - Industry should continue to strengthen its commitment to driving earlier, more open, strategic engagement between operators, developers and major contractors with the supply chain.
- **Technology development, adoption and diffusion will be central to long term success for the UK.** Adopting new technology will drive transformative change in the supply chain, boosting productivity and increasing competitiveness. Despite a highly dynamic entrepreneurial and innovation terrain, commercialisation of emerging technologies in the UK has been a recurrent problem.
  - **Demonstrator projects play a crucial role in de-risking** by acting as a bridge between research and full-scale implementation, accelerating innovation while minimizing potential downsides. Demonstrator projects should continue to be supported by both industry and government.
  - **Support for UK specialist technology hubs to drive the technology and innovation required for a successful homegrown energy transition.** Specialist hubs in R&D with energy expertise should continue to benefit from targeted investment to foster growth.
  - **We need an R&D regime which helps push UK investment to the top of OECD investment league**.

4 Government and Industry partnership for a pro-business environment

The resilience of the offshore energy sector stems from continually adapting and improving to strengthen competitiveness world-wide and sustain employment. At the heart of this is a continual drive to sustain our world class supply chain, ensuring the UK is a good place to do business and invest.

However, we cannot do this alone – we need Government support to create a pro-business environment. Partnership between UK and devolved Governments remains important. Through partnership across Governments and Industry, the UK can create an internationally competitive business environment with a competitive and predictable fiscal regime.

In the right investment environment, the UK offshore energy sector could invest £200 billion in the next decade to develop at pace offshore fixed bottom and floating wind, develop carbon storage at scale, unlocking the hydrogen economy, alongside investment in domestic oil and gas and addressing decommissioning obligations.

Our plan to create a pro-business industrial strategy for offshore energy:

- **Internationally competitive business environment.** A competitive and predictable environment to invest in the UK underpins a successful Industrial Strategy.
  - The UK tax regime must be internationally competitive to attract and anchor businesses in the UK for the long term.
- **Announce a clear long term funding envelope to unlock private sector investment:** With the right investment environment, UK offshore energy companies could invest £200 billion to support the UK to reach 50GW of wind, 10GW of hydrogen, contribute to UK oil and gas demand, and deliver at least 4 CCS clusters by 2030.
- **Long term Business Models for Emerging Sectors.** Delivering a self-sustaining low carbon energy sector at scale and pace will rely on clear business models that allow an appropriate balance of risk and reward.
  - **Price support mechanisms, such as contracts for difference have a crucial role to play in scaling offshore wind, carbon storage, and hydrogen**. Investors need long term clarity on the availability of price support mechanisms.
  - **For emerging sectors to develop at pace, a path that moves from a price support to market led mechanisms is important.** The long-term objective should be to grow emerging sectors that deliver enduring economic value.
  - **Strike a successful balance between regulation and market-driven incentives**. The UK is uniquely positioned to become a global leader in CCUS, however complex overregulation reduces the attractiveness of the UK market. To foster a thriving CCUS sector, the government must embrace proportional regulation and encourage market dynamics that reward efficiency and innovation.
  - The UK Government has a mission to deliver clean power by 2030. The establishment of Mission Control working alongside NESO to deliver a clear pathway to this goal is an important step to provide market confidence to investors.
- **Carbon pricing and carbon markets have a vital role to play** in developing a self-sustaining CCUS market. Facilitate imports of CO2 and improve liquidity between markets through mutual

recognition or alignment between the UK and EU emissions trading schemes and Carbon Border Adjustment Mechanisms.

- **Public funding through GB Energy, the National Wealth Fund** and **Scottish National Investment Bank have an important role to play in crowding in private capital investment in high-value strategic areas**. Focussed investment in proven and highly relevant solutions would ensure more efficient use of funding and further de-risks renewable energy projects.
- **Encourage greater collaboration between public institutions and industry.** Research centres around the country bring together academia and industry -- this collaboration ensures research fits the market's needs and can be instrumental in providing the industry with innovative solutions and scaling up technology innovation.

5 Regulatory processes must be streamlined

The regulatory landscape for clean energy investment is complex with multiple bodies having oversight of project approvals and consents. It is critical that Government ensure that existing regulators have aligned goals, are adequately resourced and have aligned processes to ensure robust, efficient, and predictable regulation.

Actions to release network capacity by assessing the grid queue from legacy projects are welcome, as is the approach to a more strategic grid connection process as alluded to in the conclusions of the Holistic Network Design. These must be progressed quickly.

Our recommendations to speed up deployment of low-carbon projects in the UK:

- **Planning processes must be streamlined**. The Government is planning significant reforms to the planning system aimed at accelerating projects and associated investment for growth sectors. Access to the electricity grid is a clear focus and planning reform is essential if upgrades are to be delivered in a timely manner.
- **Enhance inter-regulator coordination**, embedding a shared set of objectives across all regulators in line with the UK energy, ensuring integration across regulators.
- **Ensure efficiently resourced departments and efficient regulators to progress opportunities and activity at pace.**
    - To deliver secure homegrown energy, the government must provide a stable regulatory and fiscal framework which provides the supply chain with a predictable and attractive environment to continue investing in supporting the UK's energy future.
    - Any allocations for new machineries of Government including NWF, GBE and mission control should avoid duplicating or competing for resource with other departments.
- **Encourage transparent data sharing between regulators**. Multiple regulators share common data requirements on planning, consenting and project specific technical data. There are efficiency gains for industry and regulators through the creation of centralized documentation and data collection systems.

6 International collaboration is a critical pillar of success

Transforming the North Sea into an integrated hub that produces **low-cost**, **high-value energy for consumers, the UK** and its neighbours by capitalising on the existing resources, supply chains, skills and expertise built up over decades serving as an offshore energy powerhouse. This will **drive economic growth** and **technological development**, making the UK a world leader in the energy transition.

With Europe's largest CO2 storage capacity (78 GT, equivalent to 200 years of UK emissions), the UK can develop international storage services for European countries lacking capacity, creating a £6.9bn market by 2040, while also becoming a leader in low-carbon hydrogen production (both blue and green) for export to countries with limited production capacity like Germany.

Our plan for creating an integrated North Sea:

- **Co-operation with North Sea countries and wider Europe.** The North Sea is a shared asset with Europe. Connectivity and integration across the North Sea have been impacted since the UK left the European Union.
  - The UK membership of the North Seas Energy Cooperation is an important step, but further opportunities to reduce market friction for goods and services across the North Sea should be sought.
  - Interconnection with Europe with policies that allow for the seamless transfer of carbon dioxide, hydrogen and electricity will play an important role in the UK's energy future especially as an international network of storage sites accessible to all European countries would de-risk CCS by providing secure and scalable storage capacity for developers.
- **Unlock £6 billion opportunity for CO2 transport and storage market for the UK supply chain**
  - **Government must enable non-pipeline transportation for cross border transportation of CO2.** Access to non-pipeline transportation is crucial for decarbonising emitters in dispersed locations and maximising the volume of CO2 entering the network.
  - **Government must remove the regulatory barriers** for cross-border transportation of CO2. The UK supply chain is to generate at least £7 billion in revenue if CO2 imports are enabled by 2030, and some UK storage sites are only viable if they receive imports.

7 Deliver a skills revolution - Creating valuable jobs for skilled and talented people

The skills and expertise of the integrated energy sector are driving innovation in cleaner energy production. We can help the UK go faster and further with driving economic growth by protecting these high value jobs whilst growing the skilled and diverse workforce of the future.

The transition to net zero won't automatically maximize well-paid employment in the UK. Sustained economic growth depends on investment in high-growth sectors creating well-paid, high-skilled jobs. Managing the transition effectively means expanding the talent pipeline, preserving skills, aligning job shifts with project timelines, and linking workforce demand models to clean energy plans.

Our plan to put people at the heart of energy in industrial strategy:

- **Recognise that the integrated energy workforce is fundamental to achieving a successful homegrown energy future**. The energy transition must be managed in a way that preserves skills and transitions jobs in line with project commitment timelines. Communities and individuals must be supported to realise job opportunities and minimise job losses.
    - **Support a joined-up approach:** Skills efforts are fragmented and overlapping, and the landscape is complex and hard to navigate. The UK and devolved governments, as well as regional governments, must work together with industry to maximise development, retention, and deployment of skills on a national and regional level. The Joint Ministerial Committee should consider the findings of OEUK's Skills Landscape Mapping study.
    - **Link Workforce demand modelling to the clean energies delivery plans:** Governments must work with industry to support existing integrated energy Workforce demand modelling and its linkage to clean energies delivery plans.
    - **A centralized skills framework, supported by an integrated energy workforce planning model, is needed.**
- **The correct processes and pathways must be in place to support workers moving into new areas:** The UK can create a more mobile and valuable workforce, and competitive international advantage, through mutual recognition of skills in various energy sectors. The integrated energy sector supports ECITB's contractor-led Connected Competence programme.
    - **Expand the Energy Skills Passport to cover broader energy skills** as part of the Industrial Strategy in partnership with the Office for Clean Energy Jobs.
    - **Governments should support sector agnostic technical and safety training**.
- **Ensure the highest standards of workforce health, safety, and environment, honed in the oil and gas sector, are championed in the new energy industries**.
    - The integrated energy sector places real value and emphasis on workforce engagement, and the importance of working in partnership with the Trade Unions. The sector's Energy Services Agreement promotes a safe, stable, and fair operating environment as our industry navigates the energy transition.
    - The sector Workforce Engagement Charter outlines our commitment to providing quality employment by implementing fair, inclusive, and sustainable workforce relationship practices.

- **Deliver an effective Growth & Skills Levy and embed Multiple Pathways into the energy sector**.
    - Meeting the rising demand for skilled technical trades will require a different approach to promoting vocational pathways. The Energy Sector Apprenticeships programme – APTUS – has trained more than 2,000 apprentices since its launch over 20 years ago.
    - The workers and communities can benefit from future opportunities and growth in new sectors. This requires honesty and pragmatism about the workforce transition and requires full engagement with industry, the workforce and trade unions. Industry and government must work together to turn targets into delivery plans, that build confidence to enable the anticipatory investment in supply chain capability and skills.

8 Implementation should be driven through an Offshore Energy Mission Control

An integrated energy system, combining oil, gas, hydrogen, wind, and carbon capture, will be central to delivering low-cost, high-value energy and maintaining global competitiveness. Having a diverse energy mix will help us be more flexible to the UK's needs throughout the transition. Given the complexity and interdependencies within the offshore energy system, achieving the vision will require an integrated approach – one that cuts through the different regulatory bodies and connects the various government initiatives to deliver results on all fronts. This integrated approach should be driven through an Offshore Energy Mission Control.

Offshore Energy Mission Control should bring together the governance structures of the North Sea Transition Forum and OWIC to work collaboratively with other agencies to draw up an overarching plan for the North Sea transition to which governments and industry can be held to account.

Our plan to develop an integrated delivery strategy for Offshore Energy:

The Offshore Energy Mission Control should develop an integrated delivery strategy that prioritises the supply of low-cost, high-value energy. The strategy should:

- Create an attractive investment environment that incentivises private investment by focusing on bankable opportunities that generate predictable revenue streams and have a proven track record in the energy transition.
- Strategically allocate government funding to accelerate commercialisation of emerging technologies and alleviate bottlenecks in the development of a balanced energy system.
- Enable coordinated investment in energy projects by financial institutions, identifying and removing barriers to private investment.
- Incorporate an integrated infrastructure plan that oversees seabed allocation for the entire energy system as well as the different sectors that occupy the UK marine environment and the required onshore infrastructure that enables the transition.

Streamlining processes

The Offshore Energy Mission Control should bring together various administrations, industry bodies, and regulators involved in planning, permitting, and licensing to streamline decision-making, establish a consistent process across energy infrastructure projects, and accelerate deployment.

Coordination with Europe

The Offshore Energy Mission Control should facilitate collaboration with Europe to achieve higher levels of cross-border electricity trading and hydrogen transport. This would enable the UK to exploit different generation profiles across the North Sea. Coordinating infrastructure design and build – for example, through hybrid assets – can offer significant CAPEX and OPEX savings. Major benefits are anticipated in offshore wind development and coordination with cross-border interconnectors, with potential wider value from cross-technology coordination with hydrogen production and oil and gas electrification.

The Offshore Energy Mission Control should also coordinate with Europe to develop a unified carbon market that ensures mutual recognition of the UK and EU emissions trading schemes, while implementing an effective carbon border adjustment that enhances the attractiveness of CCS services to other countries.

Role of OEUK and our Members

For the past five decades, Offshore Energies UK has played a crucial role partnering with the UK government on numerous projects, work groups and advisory councils. The on-going work delivering on the North Sea Transition Deal is a prime example of this long-standing collaboration. Our expertise in the integrated energy sector and our track record of convening diverse voices is instrumental to the success of the UK energy transition.

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.

Join us today and help strengthen the UK offshore energy industry and your business.

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