



Offshore Wind Turbines, Aberdeen, Scotland. Source: Aberdeen City Council

# ABERDEEN CITIZENS' PERSPECTIVES FOR A CLEAN AND JUST ENERGY TRANSITION

*A report prepared for the Aberdeen Clean and Just Energy Transition project.*

## ABOUT US

### About the Aberdeen City Council

Aberdeen is a city with a population of around 200,000 people and as local authority, Aberdeen City Council is responsible for its planning, infrastructure, and services. The Council recognises the need to reduce emissions to play our part in limiting global emissions, preparing for the impacts of a changing climate, and transitioning towards net zero.

The Council is involved in a Net Zero Leadership and Delivery Unit, which leads on the Net Zero Aberdeen framework, setting a pathway towards becoming a net zero city by 2045. We have also worked with local organisations on Aberdeen Adapts, the associated approach for adapting to changes creating a more climate resilient Aberdeen. At the same time the city, long renowned as an energy hub, looks to lead on a just energy transition through leveraging its unique cluster of assets, resources and supply chain capabilities to advance opportunities in offshore wind, hydrogen production and carbon capture and storage.

### About bp

bp is one of the world's largest energy companies, delivering energy solutions across its operations in Europe, North and South America, Australasia, Asia, and Africa. bp's purpose is reimagining energy for people and our planet, and it aims to be a net zero company by 2050 or sooner and support the world get to net zero. Aberdeen has been home to the company's North Sea operations for more than 50 years.

### About the World Energy Council

The World Energy Council is the world's oldest independent and impartial community of energy leaders and practitioners. Through our Humanising

Energy vision, we are working to involve more people and communities in accelerating clean and just energy transitions in all world regions. Formed in 1923, the Council convenes diverse energy interests, with over 3,000 member organisations in around 90 countries, drawn from governments, private and state corporations, academia and civil society.

We effectively collaborate on breakthrough impact programmes and inform local, regional and global energy agendas in support of our enduring mission: to promote the sustainable use and supply of energy for the benefit of all people. The Council convenes leadership dialogues including the World Energy Congress to enable new collaborations and drive to impact and it provides a range of practical tools and briefings to help its members and wider stakeholders define and better manage energy transitions including the World Energy Trilemma Framework.

| City Views, Aberdeen, Scotland. Source: Aberdeen City Council

## ABOUT THE PROJECT

In May 2022, the Aberdeen Clean and Just Energy Transition project was established in collaboration with the World Energy Council, bp and Aberdeen City Council (ACC). This partnership was set up with the goal of discovering and building upon previous work relating to clean and just energy transition, aligned with the transition principles of the Scottish Government.

Contributing to the knowledge base of energy transition was deemed an important step in extending the ongoing work in the city of Aberdeen. The scope of the project is 1) to provide a knowledge base of outcomes and key learnings around issues of a clean and just energy transition through the rapid evidence research outputs and 2) to explore citizens' perspectives of the clean and just energy transition to inform further action plans into additional work on the clean and just energy transition in Aberdeen, Scotland.

This report focuses on task 2, exploring Aberdeen citizens' perspectives of the clean and just energy transition. It has been prepared in collaboration with the UK research and foresight firm Trajectory. It provides perspectives of 164 Aberdeen residents and a comparative sample of 1,000 UK residents for the quantitative analysis. It also provides perspectives of 36 Aberdeen residents, Aberdeen businesses, and Aberdeen-based opinion formers for the qualitative analysis.

The complete outcomes of the Aberdeen Clean and Just Energy Transition project, including the full and summary reports of task 1 and insights from world-wide place-based clean and just energy transitions can be found [here](#).

Aberdeen Citizens' Perspectives for a Clean and Just Energy Transition, January 2023.

Published by the World Energy Council in collaboration with the UK research and foresight firm Trajectory

Published by the World Energy Council, January 2023

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# INTRODUCTION

## OBJECTIVES

As part of the Aberdeen Clean and Just Energy Transition project, the World Energy Council conducted primary research with the general public in the UK, Aberdeen residents, Aberdeen businesses, and Aberdeen-based opinion formers.

The research sought to identify awareness and understanding of the energy transition and Aberdeen's Clean and Just Energy Transition, specifically:

- Attitudes towards the transition
- The information sources used to gain an understanding of the issues around the energy transition
- Views on progress made to date and impacts so far
- Expectations of future progress towards transition and impacts
- Expectations of individual's roles in helping to achieve the transition
- Expectations of the roles of other stakeholders in achieving the transition
- Policy priorities

## SUMMARY OF RESEARCH METHODOLOGY

The research included a mix of primary qualitative and quantitative research.

The qualitative research included:

- Four focus groups with Aberdeen residents (a mix of face to face and online groups)
- Five in-depth interviews with senior decision makers from Aberdeen-based businesses involved in the oil and gas industry or its supply chain
- Five in-depth interviews with Aberdeen-based opinion formers working on different aspects of the transition
- In total, 36 people participated in the qualitative research

The quantitative research included two online surveys:

- A survey of Aberdeen residents (164 residents responded to the survey)
- And, for comparison purposes, a nationally representative survey of the UK population (with a sample of 1,000)

The research was conducted throughout August 2022.



## EXECUTIVE SUMMARY

Awareness of Aberdeen's clean and just energy transition is high, with 82% of Aberdeen residents having heard of the term and being able to accurately identify its meaning from a list of true and false answers. For the UK the figure was 37%.

Within Aberdeen, awareness of Aberdeen's clean and just energy transition was lower at 57%, with 37% never having heard the term and 6% responding 'Don't know'. The qualitative research suggested that most people were not at all confident about what the phrase means, however.

Within Aberdeen 85% of people regard climate change as the, or one of the, most important issues facing the world (marginally higher than for the UK as a whole).

Aberdeen residents are more likely to have used every source of information on energy transition compared to the rest of the UK. Compared to the rest of the UK, there is a particularly strong uplift in Aberdeen of use of government, local government and academic information sources.

Academic is by far the most trusted information source (with 59% of Aberdeen residents trusting this source, compared to a 45% second place for national government sources). Despite this, the qualitative research suggests that there are high degrees of scepticism about neutral sources of information on this topic, and many suspect that even the views of academics can be swayed depending on the source of funding.

The energy transition enjoys high levels of support with 75% of Aberdeen residents describing themselves as either extremely or very supportive (compared to 69% for the UK as a whole).

By far the most common view is that the speed of the energy transition is not quick enough (especially in Aberdeen where 69% of residents agree with this, compared to 50% in the UK as a whole).

In the qualitative research, it was common for people to prioritise what they saw as more immediate issues such as the cost of living crisis, post-Covid and post-Brexit recovery. However, in the quantitative research Aberdeen residents were much less likely than those elsewhere in the UK to say the energy transition should not be a top priority right now (23% vs 32%).

Though a majority in Aberdeen (59%) said that the energy transition had no impact on their lives so far, this was a much lower figure than for the UK (72%), with Aberdeen residents more likely to report positive impacts on their lives, and marginally more likely to report negative impacts than for the UK as a whole.

A similar pattern of responses relative to the UK emerged when we asked specifically about the impact of the energy transition on jobs so far.

Levels of worry or concern about the impacts of the energy transition were generally lower than levels of positivity about its potential benefits. Of a range of potential benefits tested, there is significantly lower levels of belief in the ability of the energy transition to reduce community inequalities, compared to other benefits such as health and quality of life improvements.

Looking to the future Aberdeen residents are generally more positive than people elsewhere in the UK that a clean and just energy transition can be achieved locally and in Scotland. They are more pessimistic than those elsewhere in the UK that such a transition can be achieved in the UK and globally.

Overall confidence is greatest at achieving the transition locally, and diminishes as the geographic scale increases. For example, only 9% of Aberdeen residents are extremely or very confident that a clean and just energy transition will take place globally, with an equivalent figure of 37% for a local transition.

Among a full range of stakeholders, UK government was thought to have the biggest role to play in delivering the energy transition (91% ascribing a big role) – followed by devolved government (83%), business (64%) and local government (63%).

Aberdeen residents ascribed a bigger role than the rest of the UK for all stakeholders apart from individuals. Compared to the rest of the UK, Aberdeen residents were more likely to see government policy and government investment as obstacles to achieving the energy transition. Persuading oil and gas companies to change behaviour was seen as the biggest obstacle elsewhere in the UK.

Of a range of policy initiatives, the creation of clean, low carbon transport systems was seen as most important in delivering the energy transition – followed by creating green, low carbon jobs, investment in skills and lastly, investment in schemes to improve local community environments.

Compared to the other groups interviewed for this project, the five business interviewees were least supportive of the energy transition.

The opinion formers, whilst very supportive of the energy transition, wanted to see the speed of delivery increase, greater co-operation amongst stakeholders and the evolution of a clearer delivery strategy that created confidence for potential investors.



WORLD ENERGY COUNCIL

Fit like?  
#RediscoverABDN

Open for  
discovery

Aberdeen  
Maritime  
Museum

4 City Centre

100% Electric. 0% Emissions.

Stagecoach

LC71KVE

Electric Bus, Aberdeen, Scotland. Source: Aberdeen City Council

# UNDERSTANDING AND AWARENESS OF ENERGY TRANSITION

## AWARENESS AND UNDERSTANDING OF THE TERM 'ENERGY TRANSITION'

In the Aberdeen residents survey, 82% of the sample said that had heard the term 'energy transition' before and all 82% chose the accurate description of the term from a list that included inaccurate/false descriptions of the term. Therefore, around one in five Aberdeen residents had not heard the term 'energy transition' before.

This compared to 37% who claimed to have heard the term energy transition in the UK wide survey – but only 57% of could accurately define the term (c.20% of the UK population).

The qualitative research also suggested a high degree of awareness of the term among Aberdeen residents and some respondents could offer a confident definition:

*"It is the move away from reliance on fossil fuels to renewable energy sources and everything that entails."*

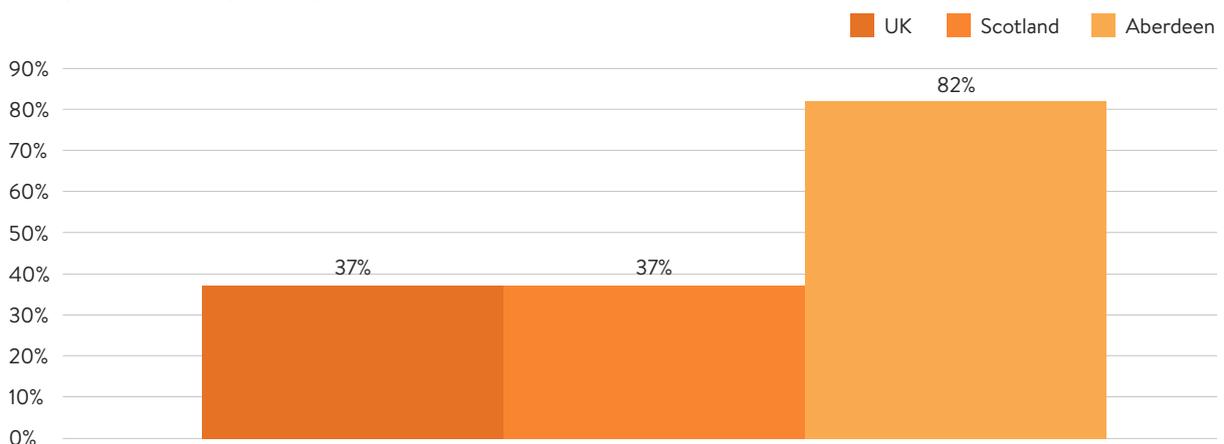
However, many respondents, though aware of the term, were less confident in offering their own definition.

There was wide agreement that wind, solar and tidal energy should be included in the low carbon alternatives to oil and gas. There was lower awareness of hydrogen as a low carbon alternative and disagreement about whether nuclear energy should be included in the low carbon mix.

*"A green nuclear tariff is a contradiction in terms....nuclear is not green."*

**Figure 1: A larger percentage of respondents in Aberdeen knew the phrase 'energy transition' compared to those in the UK**

*In this survey we would like to ask you some questions about the energy transition. Have you heard the phrase 'energy transition' before? (%yes)*

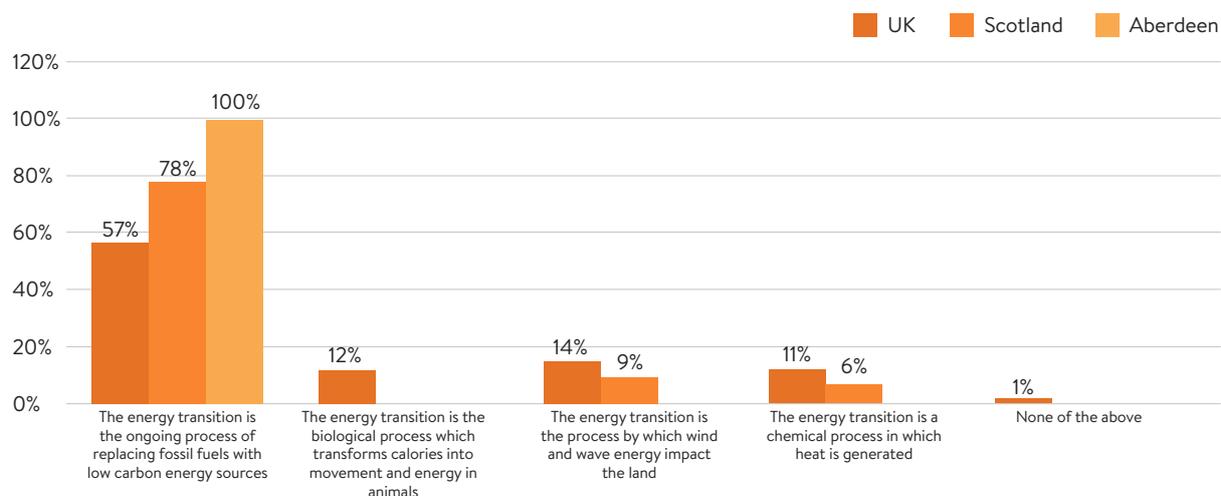


Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)



**Figure 2: All respondents in Aberdeen know what the energy transition is**

Which of the following best describes your understanding of what the energy transition is?



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## ATTITUDES TOWARDS CLIMATE CHANGE

We also tested people’s attitudes towards climate change, in the context of the energy transition being a response to climate change.

The results from the quantitative surveys are presented on Figure 3 and reveal high levels of concern nationally and even higher levels of concern in Aberdeen where 85% of the sample described climate change as either ‘the most’ or ‘one of the most’ important issues facing the world.

This level of concern about climate change was also reflected in the qualitative research. However, the qualitative research shed greater light on the trade-offs and time horizons people have in mind in relation to climate change.

In particular, it revealed how even those people who are concerned about climate change might place a greater priority on more immediate issues such as the cost of living crisis (and rising energy bills in particular) and post-Covid economic recovery (such as the impact of Covid on the retail landscape of Aberdeen). The quotes below are typical of how many people place a greater priority on what they see as more immediately pressing problems:

*“My major concern is what they are going to announce on Friday (ref. the energy cap statement on 26th August) about my energy bills.”*

*“By the end of the year people will be in their worst financial situation ever and yet they want everyone to have electric cars.”*

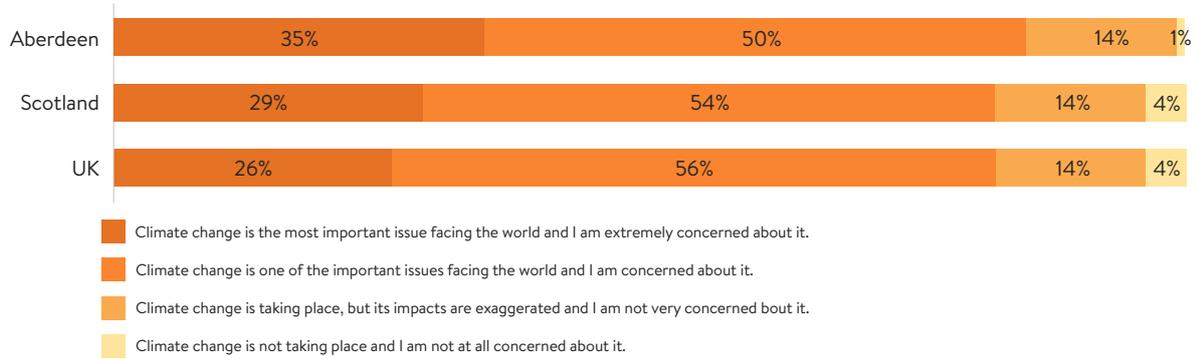
*“They are going to stop cars going into Union Street. It is dead already. There’s nothing left. This will finally kill it off.”*

*“They are trying to get folk to stop using their cars...but First Bus recently cancelled 164 buses due to a lack of drivers, which is largely due to Brexit.”*

*“I worry about the future for my children ... what costs are going to be involved to make these changes?”*

**Figure 3: Aberdeen residents have slightly higher levels of concern about climate change than those in rest of Scotland and UK as a whole**

*The energy transition is taking place because of climate change. Which of the following statements best reflects your personal view of climate change?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)



| Hydrogen bus refuelling, Aberdeen, Scotland. Source: Aberdeen City Council



## BUSINESS AND OPINION FORMER PERSPECTIVES

### Business

The business interviews provided some of the most challenging opinions in relation to energy transition:

*“How big is Scotland in the world? We can make everything electric here, but on the world stage, so what? We’re not big enough to make much difference.”*

Some of the business interviewees were both remarkably unaware and unconcerned about the energy transition – even those working in the oil and gas sector.

This was often because they saw a role for their skill or area of expertise lasting through and beyond the transition (e.g. those who inspect rigs or involved in decommissioning):

*“There’s enough work to keep us going for at least another 20 years. Not many people can say that. And this industry has always been under threat. 20 years ago I didn’t think we would still be going now.”*

Overall, business and opinion formers were no better informed than the general public:

*“What does energy transition mean?”*

*“I don’t really know”*

*“I’m not that interested, if it’s not something that affects me in the next 10 minutes or next year, so what?”*

### Opinion Formers

By definition – the opinion formers were incredibly well informed and were often experts on different aspects of the energy transition:

*“Transition is THE key word. It takes time and it needs to be managed.”*

Most offered a mix of optimism and impatience:

*“There is an opportunity to create a buzz about Aberdeen. Aberdeen has been a bit down on itself - seen as based on a declining industry. The opportunity is to make Aberdeen about the future.”*

*“Aberdeen is in a good place. It has a good strategy. It is doing the right things. But could we speed it up and have a more coordinated effort – of course we could. We all need to do more to hit our targets for 2030/35.”*

*“My concern is that we will lose investment to countries that are moving faster like Germany and Scandinavia. And the Middle East who can just decide what to do and get on with it (without public consultation).”*



| Hydrogen Waste Truck, Aberdeen, Scotland. Source: Aberdeen City Council



# UNDERSTANDING OF ABERDEEN'S CLEAN AND JUST ENERGY TRANSITION

## AWARENESS AND UNDERSTANDING OF 'CLEAN AND JUST ENERGY TRANSITION'

In the Aberdeen residents survey, 57% of the sample said that had heard the term 'clean and just energy transition' before. 37% had not heard the term before, with 6% responding 'Don't know'.

This compared to 28% who claimed to have heard the term before on the UK survey, and 64% who had not heard the term and 9% 'Don't know'.

The qualitative research also suggested much lower confidence in what the term meant - even amongst those who had heard it - compared to the energy transition generally.

'Clean' was much better understood than 'just'.

Once the concept was defined for them, most people in the focus groups thought a clean and just transition to be a very important and attractive idea:

*"It is the right thing to do. You shouldn't just abandon the people who have helped to make you money."*

However, there was less confidence that it could be achieved (a theme we return to in section 6 below).

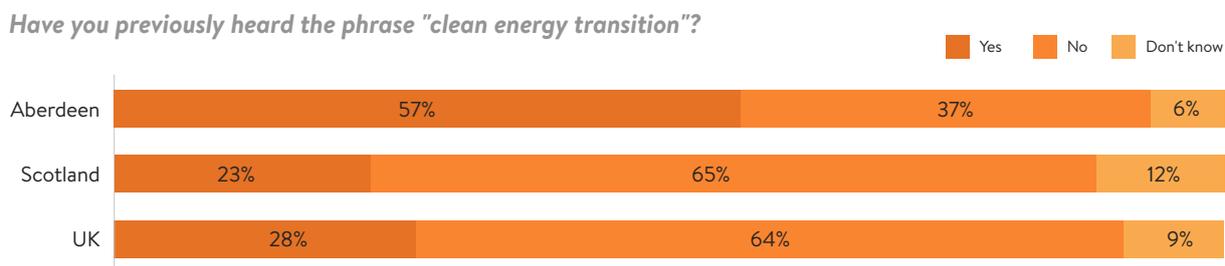
*"All this will cost. Who is going to pay for it?"*

*"Fair and just is not going to be feasible for a lot of people."*

A few remain stubbornly unimpressed and cynical about the concept...

*"It's just marketing bullshit designed to make us feel guilty..."*

**Figure 4: Respondents in Aberdeen were more likely to have heard of the term 'clean and just energy transition' compared to the rest of the UK**



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## BUSINESS AND OPINION FORMER PERSPECTIVES

### Business

Business interviewees were generally no better or no worse informed about the clean and just energy transition than the general public.

Some had literally no idea about the concept:

*“is it just clean air or justified clean air or...not really?  
“I’ve never heard the phrase before.”*

Like the general public they tended to support the objective of a clean and just transition - and were particularly keen on protecting jobs. However, there was a degree of scepticism about the changes of it happening. Often for the reasons identified in the previous section – the ability of Aberdeen to attract investment in renewables and for renewables to provide the number and quality of jobs to replace oil and gas.

### Opinion Formers

As before, opinion formers were well informed about Aberdeen’s clean and just energy transition.

*“Just means collaboration and everyone benefiting from the transition journey – both in terms of a cleaner climate and the economic benefits for all.”*

Some expressed the view that a just transition depends on a successful transition:

*“The key is how you replace the scale of oil and gas with the transition. If we don’t see the billions of pounds come in there won’t be a just transition.”*

Others pointed that with the just transition, we need to keep in mind that we are not starting from a just place:

*“There is great expectation that we can right the wrongs of the past.”*



| Offshore Wind Turbines, Aberdeen, Scotland. Source: Aberdeen City Council

# INFORMATION SOURCES: USE AND TRUST

## INFORMATION SOURCES USED TO INFORM VIEWS AROUND ENERGY TRANSITION

The survey findings suggest that a greater proportion of people in Aberdeen use every listed information source, compared to the rest of Scotland and the UK.

In particular, Aberdeen residents are much more likely than those in the rest of Scotland and the UK to have looked at government sources, local government sources and information provided by academics and universities.

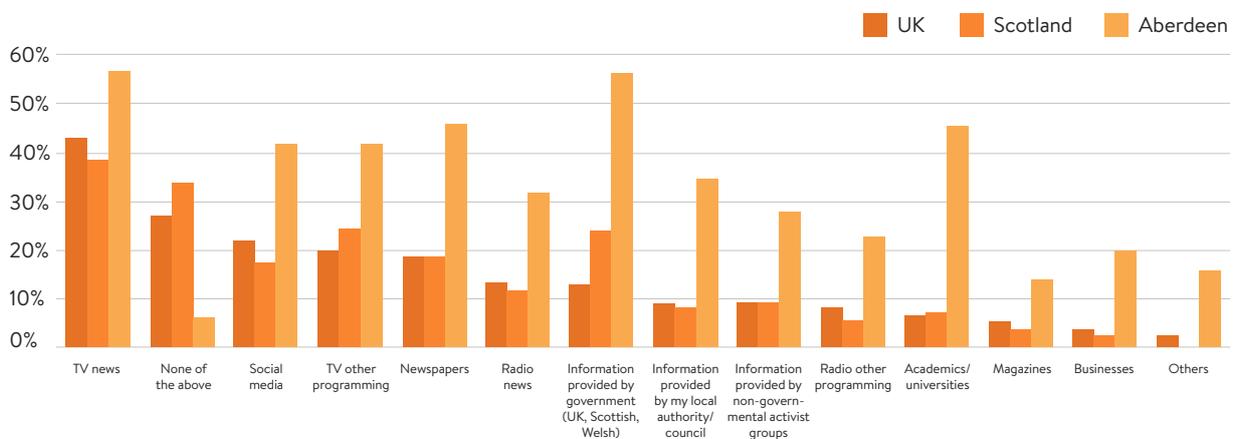
However, the qualitative research suggests that whilst there is an awareness of different information sources among Aberdeen residents, many have not consulted them very deeply and the survey findings should be interpreted in this light.

Most people in the focus groups were not seeking out detailed information about the energy transition in general or Aberdeen’s clean and just energy transition, specifically. The survey findings reflect more the information sources that people had come across or were aware, rather than a thirst for knowledge on the topic.

**Figure 5: Aberdeen residents much more likely to have used all available information sources compared to those elsewhere in Scotland and the UK**

*Which of the following best describes your understanding of what the energy transition is?*

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Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## WHICH INFORMATION SOURCES ARE TRUSTED?

In all elements of the research we asked about which information sources are trusted.

The survey results show that Aberdeen residents regard academics, government, local government and TV news as the most trusted sources of information.

They are also much more likely to trust academic, government and local government sources than people in the rest of Scotland and the UK.



The qualitative research revealed high levels of cynicism about most information sources:

*“You want someone who is neutral. It is very hard to get truly neutral information. Everyone has an axe to grind.”*

Social media and energy businesses were particularly singled out in the focus groups as not being reliable sources of information.

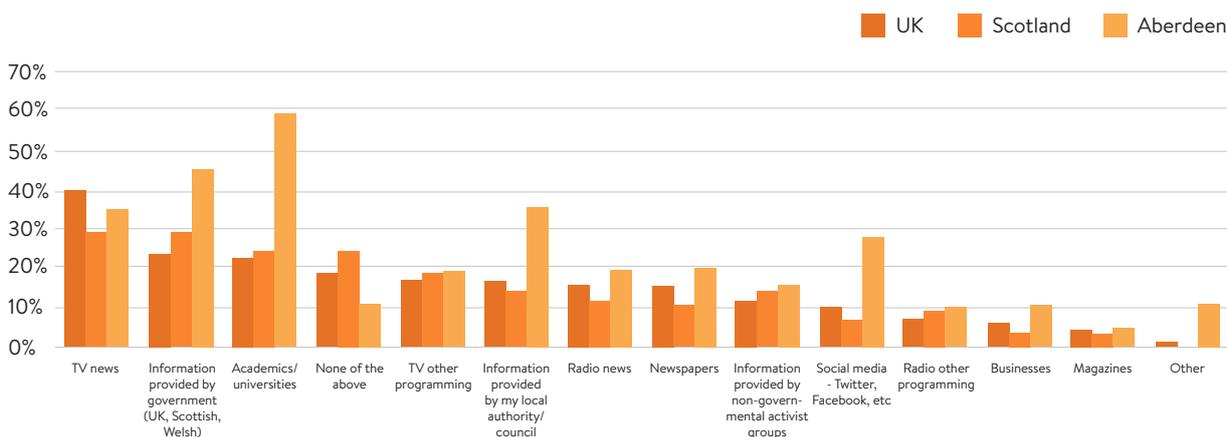
Even those sources that were regarded as the most trusted in the survey, could be subject to scepticism when exposed to lengthier discussion in the focus groups:

*“You say you trust the professors and universities, but you even have to be careful with them. They are being paid by someone. The university here takes funding from the oil industry”*

*“The only person I would trust is David Attenborough!”*

**Figure 6: Aberdeen residents are much more likely to trust academic/university, government and local government sources compared to those in the rest of Scotland and the UK**

*Which, if any of the following sources do you trust to provide information about energy transition?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## BUSINESS AND OPINION FORMER PERSPECTIVES

### Business

Businesses tended to share similar views to the general public on information sources.

In addition, the local chamber of commerce was seen as being a useful source for business-related information.

### Opinion Formers

Many of the opinion formers interviewed responsible for generating information in their roles.

This group was clearly the best informed with access to the widest range and most up to date information.

Noticeably, they were particularly on top of the latest research, government and official information.



| Archimedes Water Turbine, Aberdeen, Scotland. Source: Aberdeen City Council



# VIEWS ON AND EXPERIENCE OF ENERGY TRANSITION

## STRONG SUPPORT FOR THE ENERGY TRANSITION

In both the qualitative and quantitative research, there was strong support for a clean energy transition.

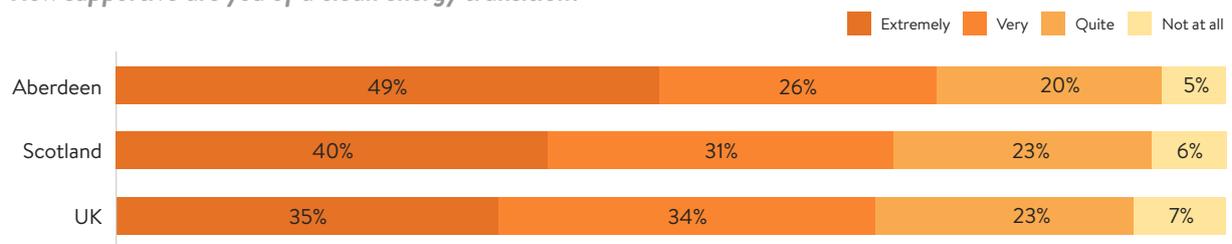
Support is stronger in Aberdeen than in the rest of the UK – almost half of the people in the residents’ survey describe themselves as ‘extremely supportive’ compared to around a third for the UK as a whole.

In the focus groups, the recent UK heatwave and other extreme weather events were cited as the need for change.

Younger research participants regarded the energy transition as essential for their futures, but even older research participants who thought that they may not live long enough to experience the benefits wanted the transition to happen for their children and grandchildren’s sake.

**Figure 7: Strong support for the energy transition**

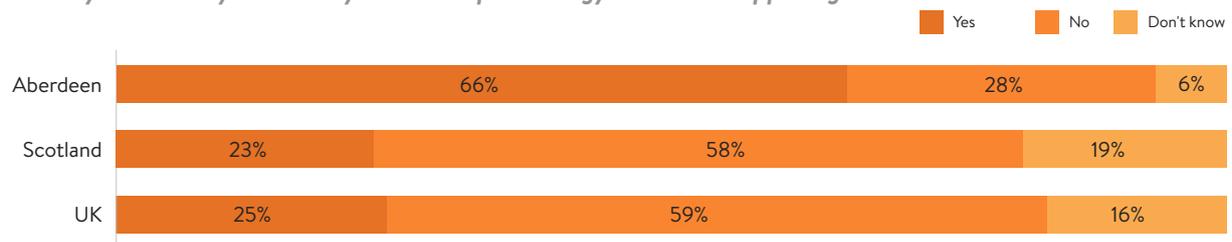
*How supportive are you of a clean energy transition?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

**Figure 8: Two thirds of Aberdeen residents have seen evidence of the energy transition happening where they live. This compares to only a quarter for the UK as a whole, and just under a quarter for Scotland**

*Where you live can you see any evidence of the energy transition happening?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## VIEWS ON THE SPEED OF ENERGY TRANSITION

As Figure 9 illustrates, the clear majority of people in Aberdeen feel that the energy transition is happening too slowly (the people of Aberdeen are more likely to feel this way than those in the rest of the UK).

However, by a very narrow margin, people in Aberdeen are more likely to think that the energy transition is happening too quickly compared to the rest of the UK (9% vs 6%). This is possible because

people in Aberdeen are less likely than those in the rest of the UK to feel the transition is happening at the right speed, and are less likely to give 'Don't know' answer.

In the focus groups, residents gave a variety of views on why they believe the transition is happening too slowly – most prominent was a lack of investment in infrastructure. For example, there were many complaints about the lack of charging points for electric vehicles in the city.

Also cited as reasons for slow progress were overall cost, a lack of political will, systemic issues (e.g. 4 or 5 year political cycles, not being conducive to long term planning) and a lack of coordination among stakeholders.

*“They don’t invest enough and they invest in the wrong things. We have no EV chargers but we have shiny new signposts.”*

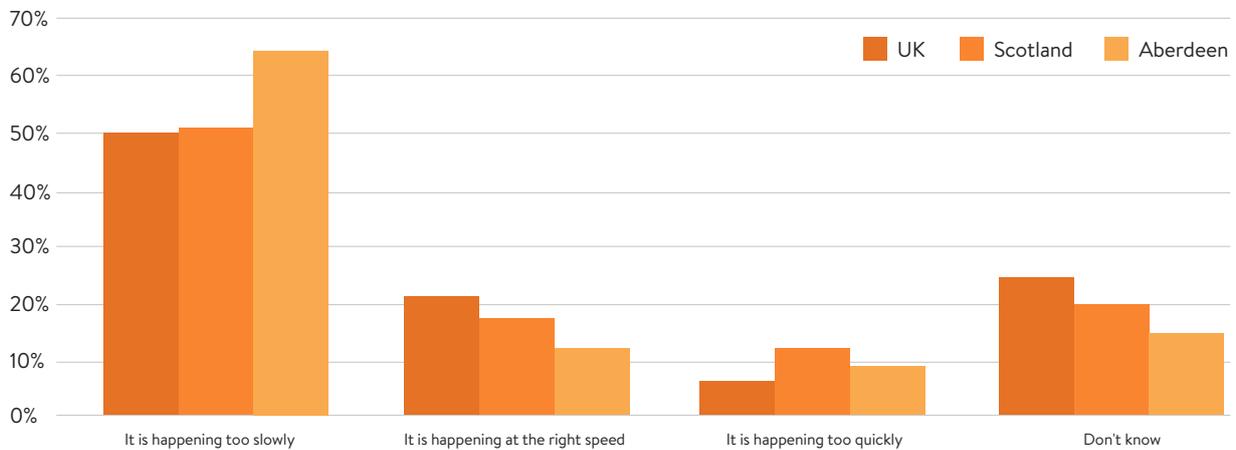
*“The council don’t have any foresight.”*

*“We need both governments [Westminster & Holyrood] to lead the way ... they speak about saving the planet but the infrastructure isn’t there.”*

*“There’s no urgency. Politicians know they will be gone by the time these things have an impact.”*

**Figure 9: Almost two thirds of people in Aberdeen feel the energy transition is happening too slowly, compared to half in the rest of the UK.**

*Which of the following best reflects your view on how quickly the energy transition is happening?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

As mentioned above, in the focus groups we found that peoples’ concerns about other issues (such as the cost of living crisis, the fall out from Covid and Brexit) could lead them to downplay the energy transition as an immediate priority.

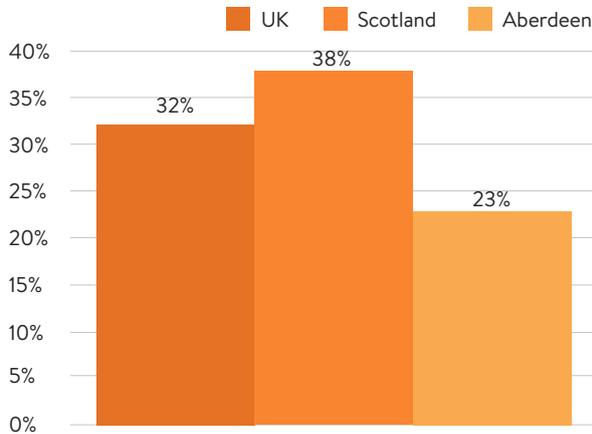
Despite this, when compared to the rest of the UK, Aberdeen residents are much less likely to say that the energy transition should not be a top priority at the moment.

Less than a quarter of Aberdeen residents agree with this statement, compared to almost a third for the UK and more than a third for Scotland.



**Figure 10: Aberdeen residents less likely to say energy transition should not be a top priority at the moment**

*Energy transition should not be a top priority at the moment. Total agreement*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

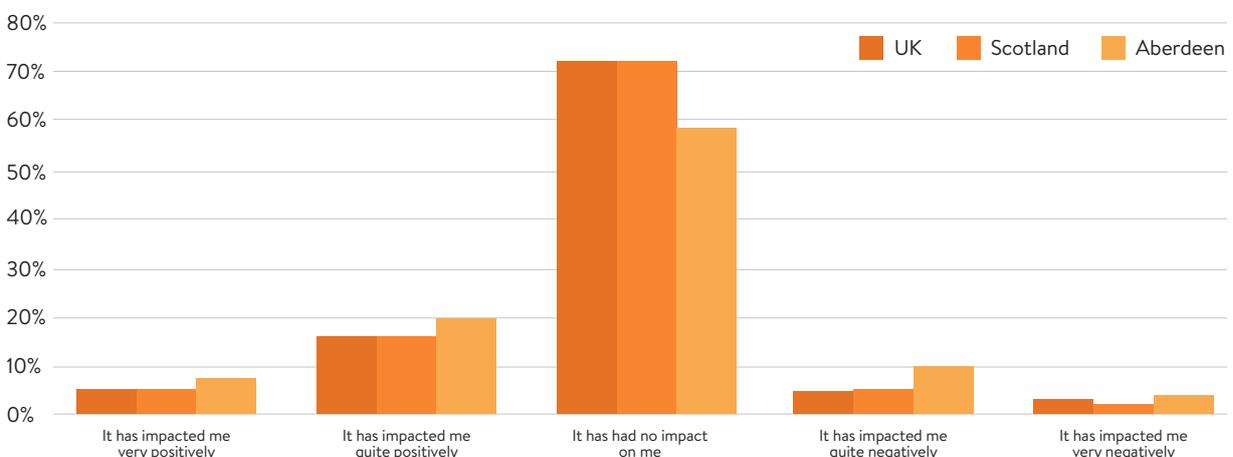
opportunities for some focus group participants, the work on renewables was perceived to be cleaner and healthier:

*“When I’m inspecting an oil platform I have to wear breathing apparatus and you are covered in oil residue at the end. Neither is true if I inspect a wind turbine.”*

The hydrogen bus scheme and the Low Emission Zone (LEZ) in Aberdeen City Centre are the most visible and commented upon initiatives in the city.

**Figure 11: Though most Aberdeen residents feel that the energy transition has had no impact on them so far, they are still more likely than those elsewhere in the UK to claim both positive and negative impacts**

*Which of the following best describes the impact that the energy transition has had on you so far?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## IMPACTS OF THE ENERGY TRANSITION SO FAR

The key finding from the survey, supported by the focus group discussions, is that most people do not feel that the energy transition has impacted them so far.

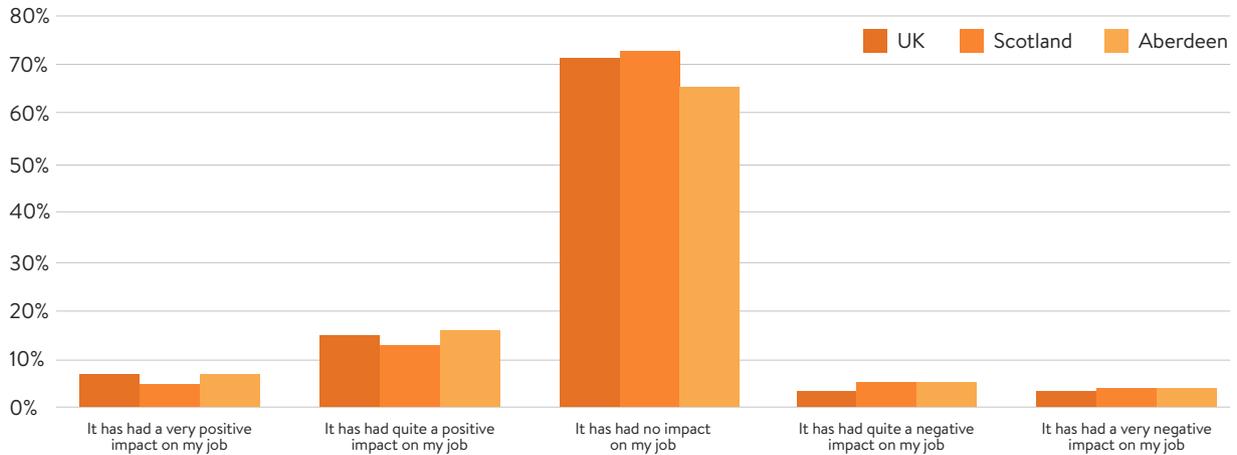
Despite this, the survey suggests that Aberdeen are more likely than those in the rest of the UK to have been impacted by the energy transition so far:

- 27% of Aberdeen residents report positive impacts (compared to 21% for the UK)
- 14% report negative impacts (compared to 7% for the UK)
- the stronger sentiment in terms of both positive and negative impact suggests that Aberdeen is more at the forefront of the transition than other parts of the UK

A few of the focus group participants pointed to some changes of direction at work so that they had more skills and opportunities in relation to renewables. As well as offering new revenue earning

**Figure 12: The clean energy transition has had no impact on the majority of respondents jobs – though respondents in Aberdeen are more likely to have been affected than those elsewhere in the UK**

*Which of the following best describes the impact that the energy transition has had on your job so far?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## WORRIES ABOUT, AND BENEFITS OF, THE ENERGY TRANSITION

In the surveys we asked about a range of possible worries and possible benefits from the energy transition. The views of the Aberdeen residents for these questions are generally more aligned with those in the rest of the UK, compared to most other questions.

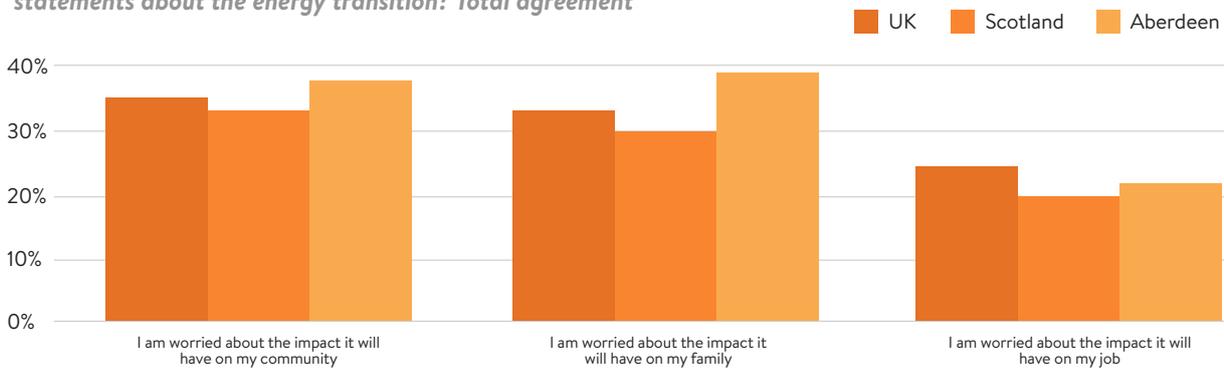
Overall, there was a higher level of response to the benefits questions, compared to the concern questions – for example 64% of people in Aberdeen feel the energy transition will improve the quality of people’s lives, compared to 38% that worry about its impact on their community.

Aberdeen residents are marginally more concerned about the impacts of energy transition on both their communities and families than people elsewhere in the UK, however they are marginally less concerned about its impact on their jobs.

In terms of the benefits of energy transition, Aberdeen residents’ views are mixed compared to those in the rest of the UK. For example, they are more optimistic around impacts on their own health, but less optimistic about the impact of energy transition on the health of others.

**Figure 13: Aberdeen residents share broadly similar views to the rest of the UK in terms of worries about the energy transition – with perhaps slightly more concern about family impacts**

*Given the description of the energy transition above, to what extent do you agree or disagree with the following statements about the energy transition? Total agreement*

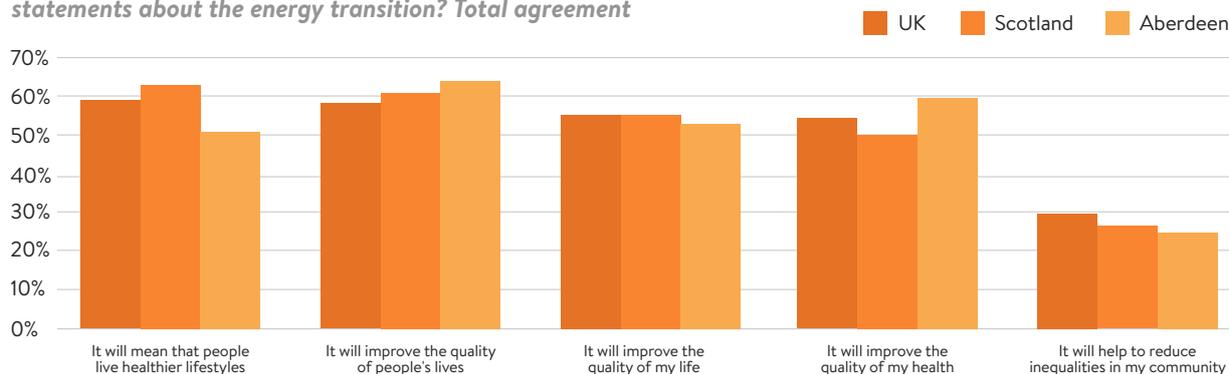


Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)



**Figure 14: The benefits of energy transition are more apparent than the worries – reducing community inequality is by far the least expected benefit of transition**

Given the description of the energy transition above, to what extent do you agree or disagree with the following statements about the energy transition? Total agreement



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## BUSINESS AND OPINION FORMER PERSPECTIVES

### Business

The most striking finding was how relatively little interest businesses were taking in the energy transition – lots of confidence that there was still life left in the oil and gas sector in one form or another – either because the transition would be slow or offer opportunities (e.g. in decommissioning).

Renewables were not thought to be as profitable for businesses as oil and gas – and do not require the same size or scale of supply chain.

There was some business resistance to the idea of energy transition:

*“I think there’s a lot of lip service paid to it (reducing carbon) in Aberdeen. If we go carbon neutral here, that’s us finished...we’re an oil town. It’s carbon. That’s it.”*

*“There is lost confidence in the area (Aberdeen). There is real uncertainty in the town now. Oil and gas has become a dirty word. People want stability. We cannot recruit graduates if the jobs are not secure.”*

*“The decisions of the Scottish and UK governments do not reflect the realities of Aberdeen. Within 18 months oil and gas went from being a key industry to a pariah industry.”*

### Opinion Formers

Opinion formers showed strong support for the transition – the expert view is that this simply has to happen.

The key is to do it in a way that is least damaging/most beneficial to Aberdeen as possible.

They pointed to a need to define Aberdeen’s specific role within the global scope of energy transition:

*“We need to pin down a specific role for Aberdeen. I mean we are not going to be a wind turbine manufacturer. We need to identify our strongest offer and sell it to the world.”*

Opinion formers have a sense that the big companies will be fine – it is smaller companies in the supply chain that will need most help through the transition.

Some worry about a perception in the city that the transition will only benefit big business (some truth in this from the focus groups).



| Hydrogen Waste Trucks & Vans. Source: Aberdeen City Council



# VIEWS ON THE FUTURE OF ENERGY TRANSITION

## CONFIDENCE THAT A CLEAN AND JUST ENERGY TRANSITION WILL TAKE PLACE

In all elements of the research we asked a range of questions about expectations of the future of the energy transition.

First we started by asking how confident people felt about a clean and just transition being achieved globally, within the UK, within Scotland and in the local area.

Aberdeen residents are generally more positive than people elsewhere in the UK that a clean and just energy transition can be achieved locally and in Scotland. However, they are more pessimistic than those elsewhere in the UK that such a transition can be achieved in the UK and globally.

Overall confidence is greatest at achieving the transition locally, and diminishes as the geographic scale increases. For example, only 9% of Aberdeen residents are extremely or very confident that a clean and just energy transition will take place globally, with an equivalent figure of 33% for the UK and 37% for a local transition.

The focus group participants expressed a mix of views, though few were confident that the transition would take place in time to prevent further climate change. The most common view was that we would only act decisively when absolutely forced to by the consequences of climate change.

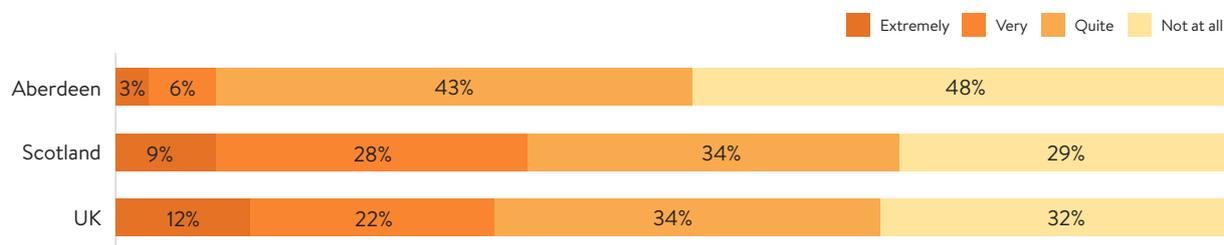
Of course, this is consistent with the widely held view, reported earlier, that the pace of transition is happening too slowly:

*“There’s no real forward thinking. We are only taking little steps.”*

*“Covid shows that we can learn to behave differently and bring people on board. We need to learn from that.”*

**Figure 15: Aberdeen residents are particularly pessimistic about achieving a clean and just energy transition globally**

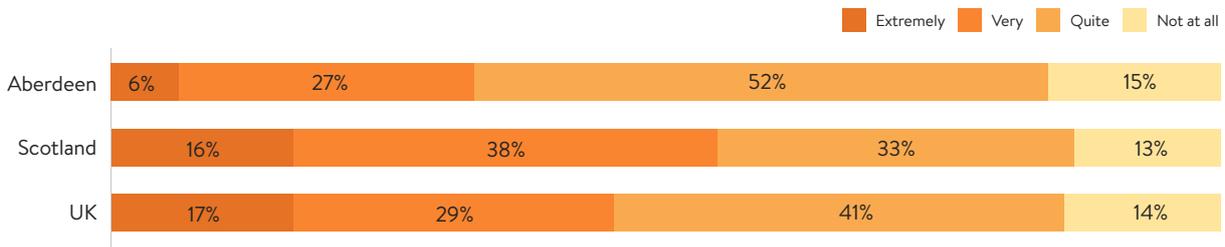
*How likely do you think it is that a clean and just energy transition will take place globally?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

**Figure 16: Aberdeen residents are relatively pessimistic about achieving a clean and just energy transition in the UK**

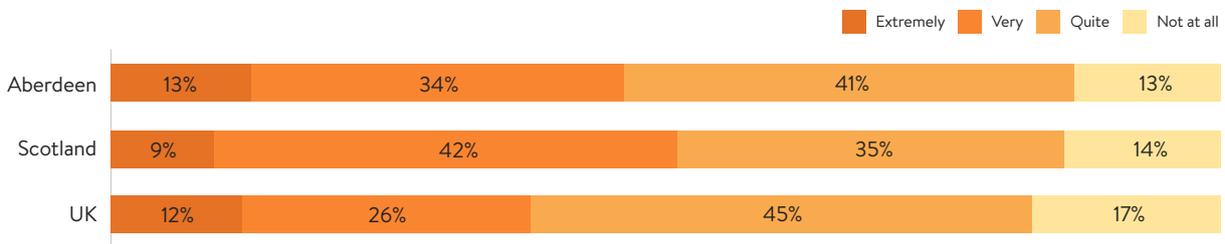
*How likely do you think it is that a clean and just energy transition will take place in the UK?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

**Figure 17: Aberdeen residents are marginally more optimistic about achieving a clean and just energy transition in the local area**

*How likely do you think it is that a clean and just energy transition will take place in your local area?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## EXPECTED IMPACTS OF ENERGY TRANSITION IN FUTURE

As can be seen in Figure 18, across both surveys a majority of people expect the impacts of energy transition to be positive for them as individuals.

The results among Aberdeen residents are particularly interesting, however. In Aberdeen, very few people expect the energy transition to have no impact on them (12% vs 32% for the UK).

This means there is a polarisation in responses in Aberdeen with more people expecting very positive impacts (21% vs 13% for the UK) and quite/very negative impacts (21% vs 10%).

A similar pattern of responses emerged when we asked specifically about future impacts of energy transition on peoples' jobs.

More people expect the energy transition to have no impact on their jobs (including 43% of Aberdeen residents). Again results in Aberdeen were more polarised than for the UK as a whole with more people expecting both positive (40% vs 31% for the UK) and negative (17% vs 8% for the UK) impacts.

Focus group participants reflected this spread. Those who were positive felt that there were opportunities for them in renewables and/or that the decommissioning of oil and gas would present them with opportunities for years to come.

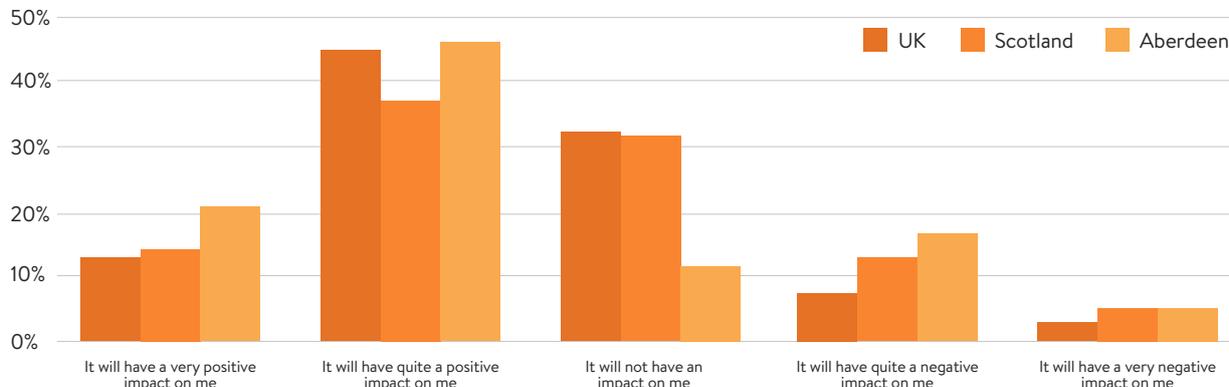
Those who were negative echoed some of the sentiments of business and opinion formers that renewable energy does not offer the volume of jobs or have the high margins to sustain jobs.

Older workers were particularly confident that there would be enough work in fossil fuels to see out their careers.

That said, more than a quarter of Aberdeen residents expect to retrain or acquire new skills because of the energy transition (compared to a fifth for the UK).

**Figure 18: Across both surveys a clear majority expect the energy transition to have positive impacts for them. The results in Aberdeen are much more polarised than for the UK, with relatively few Aberdeen residents expecting no impacts**

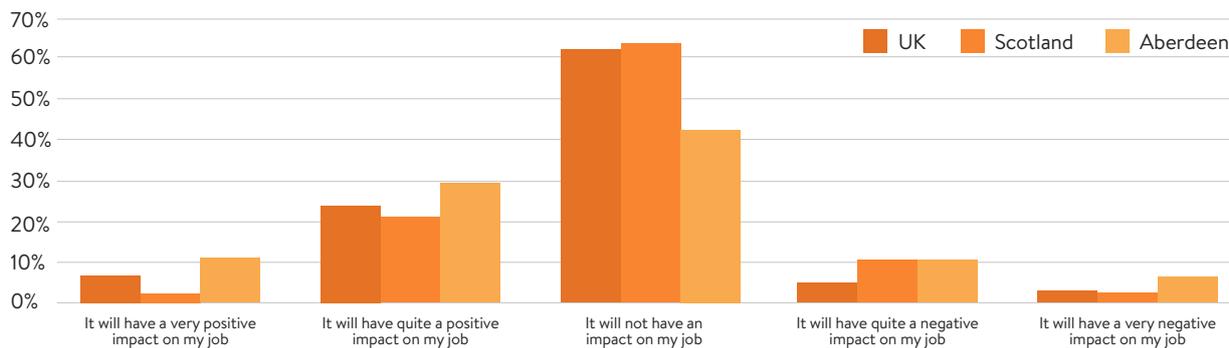
*Which of the following best describes the impact you expect the energy transition to have on you in future?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

**Figure 19: Most people in the UK do not expect energy transition to impact their jobs in future. Views of Aberdeen residents more polarised, with more expecting both positive and negative impacts on their jobs relative to the UK**

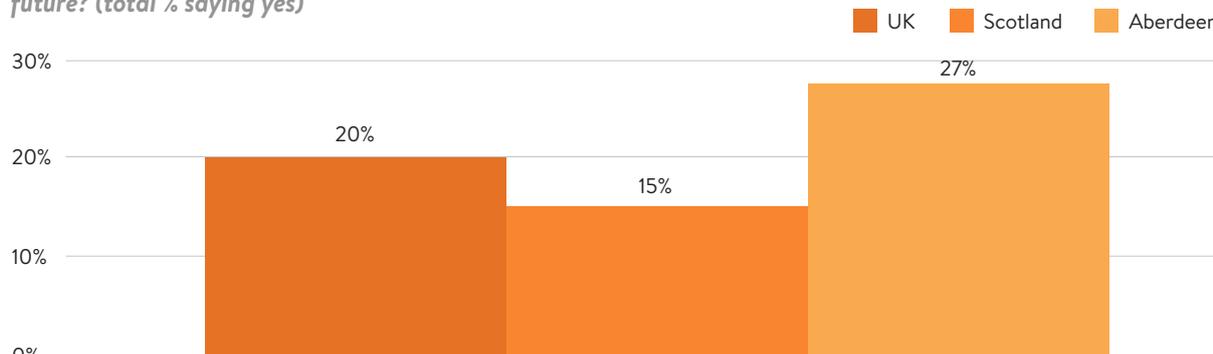
*Which of the following best describes the impact you expect the energy transition to have on your job in future?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

**Figure 20: A fifth of respondents from the UK expect to have to retrain or acquire new skills at work in the future due to the energy transition – this rises to over a quarter in Aberdeen**

*Which of the following best describes the impact you expect the energy transition to have on your work skills in future? (total % saying yes)*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## BUSINESS AND OPINION FORMER PERSPECTIVES

### Business

Many business representatives expect there to be work in oil and gas for a long time to come:

*“There’s dozens of platforms in the North Sea. Even if we close the oil field tomorrow, you’ve got five to ten years work taking it all down.”*

*“It will take 25 years to decommission every well in the North Sea.”*

Some anticipate downsizing, closing or relocating their Aberdeen operation if local trading conditions deteriorate.

There was also some business pessimism on renewables capacity to replace oil and gas jobs:

*“I don’t see it coming to Aberdeen. Aberdeen doesn’t have any heavy engineering...I think you are limited in what you can do here.”*

*“Renewables will happen in the place it is economically right for them to happen. That isn’t necessarily here in Aberdeen.”*

And even if renewables do come to Aberdeen, some showed scepticism that they will support the same number or quality of jobs (e.g., because wind turbines do not need the same level of servicing as oil/gas platforms)

Some highlighted the need of stability from government:

*“The government should decide on the energy mix it wants long term and then stick to it. That is the only way to get investment.”*

*“Lots of people in Aberdeen feel their future is out of Aberdeen.”*

### Opinion Formers

Opinion formers brought a view that we need to pick up the pace in terms of speeding up the energy transition:

*“If this is an emergency, act like it!”*

Renewables were thought to offer lower margins than oil and gas, therefore more difficult to get the private sector to invest in it.

Most opinion formers would like more co-ordination and co-operation:

*“We all know what the target is. We need to agree on the best way of getting there.”*



City Views, Aberdeen, Scotland. Source: Aberdeen City Council

# THE ROLE OF DIFFERENT STAKEHOLDERS IN ACHIEVING THE ENERGY TRANSITION

## OVERVIEW

We asked about the role that a wide range of stakeholders might have in delivering the energy transition including UK government, devolved governments, local government, businesses, education institutions, activist groups and individuals.

Among all groups the UK government was seen as having the biggest role to play. Devolved government and local government were seen as the next most important stakeholders in delivering the energy transition.

Aberdeen residents ascribed a bigger role than the rest of the UK for all stakeholders apart from individuals. Throughout both surveys activist groups and individuals were seen as the stakeholders with the least role to play in achieving the energy transition.

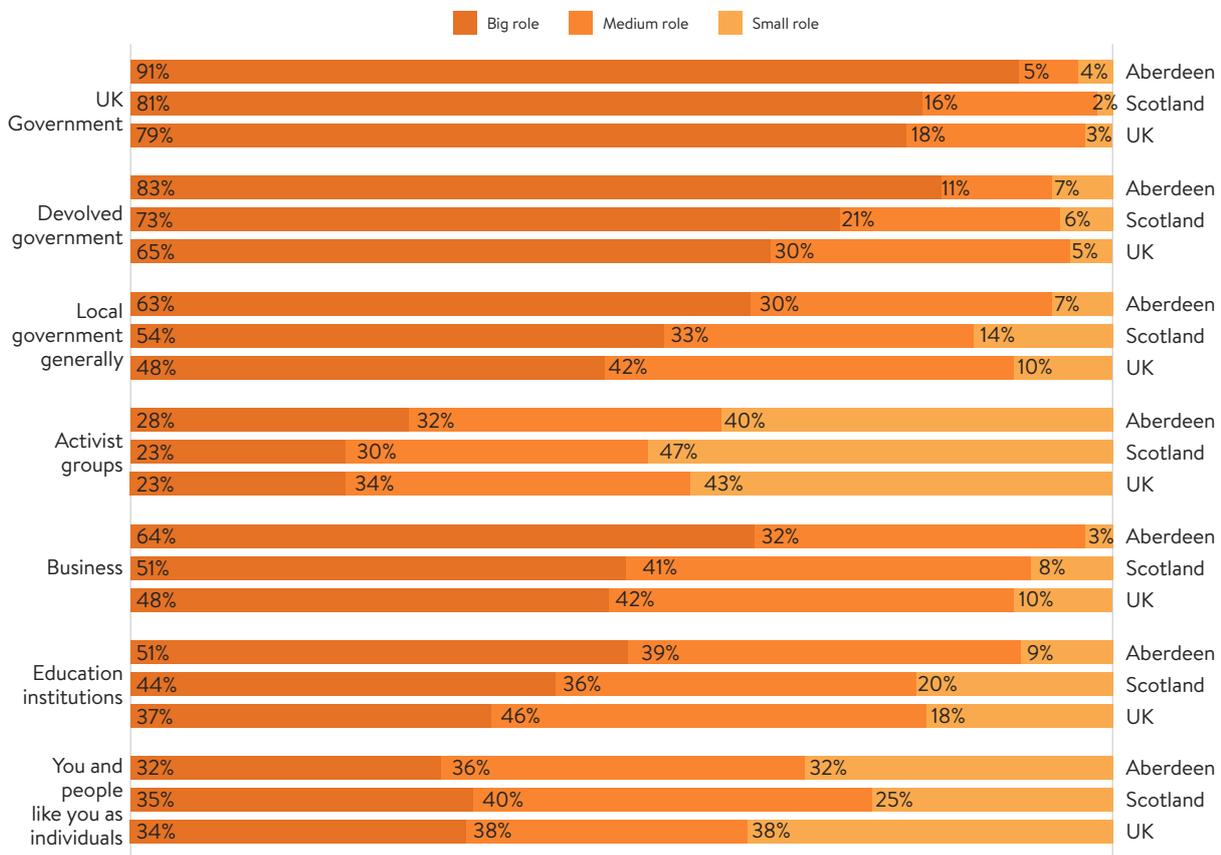
This was supported by evidence from the focus groups which also tended to think that government and business could have the biggest impact on the challenge.

In the focus groups it also reflected some scepticism about the willingness of most people to change their behaviour voluntarily – reinforcing the role of government in terms of regulation:

*“We will only change if they make us change.”*

**Figure 21: Respondents across all three groups see UK Government as playing a big role in the clean energy transition**

*How big a role do each of the following have to play in achieving a clean and just energy transition?*

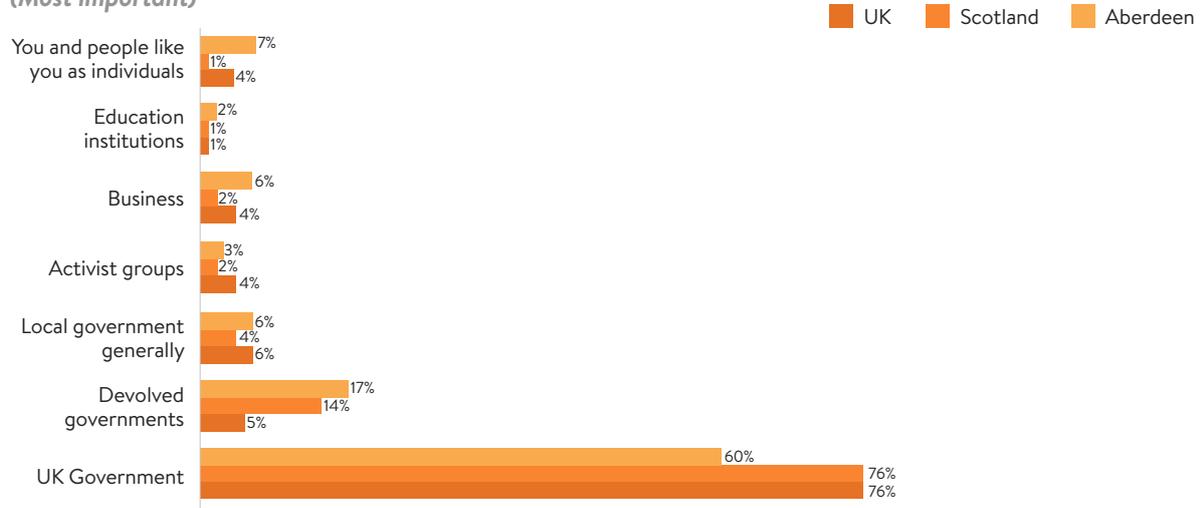


Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)



**Figure 22: Respondents see the UK Government as the most important in order to achieve the clean energy transition**

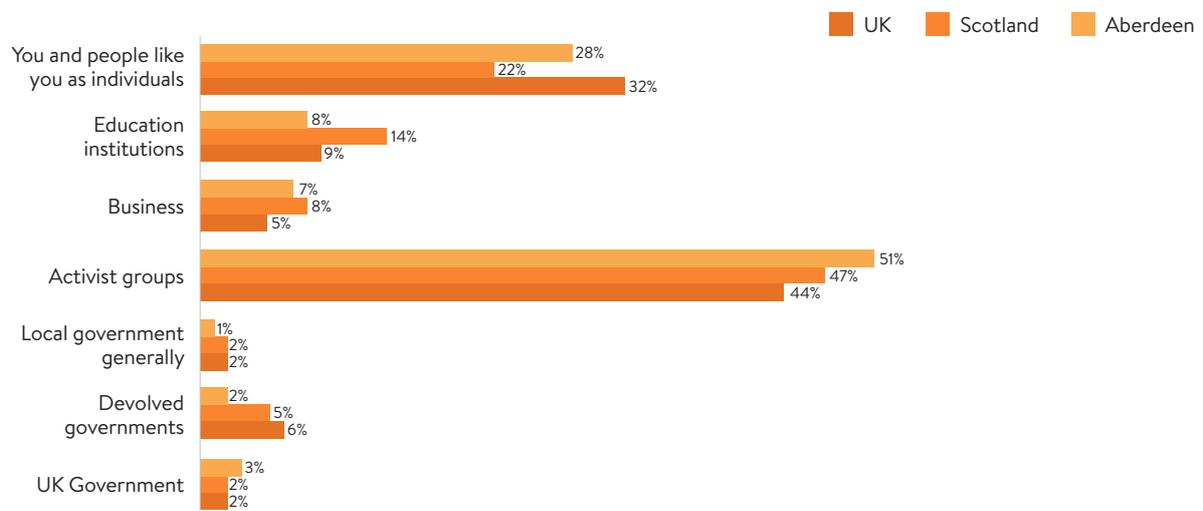
Please rank each of these in order of the importance they have in achieving a clean and just energy transition (Most important)



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

**Figure 23: All groups see activist groups as the least important in achieving a clean energy transition**

Please rank each of these in order of the importance they have in achieving a clean and just energy transition (Least important)



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

**STAKEHOLDERS AND OBSTACLES TO ACHIEVING ENERGY TRANSITION**

In our surveys we asked people to select the biggest three obstacles to achieving energy transition from a list of eight.

Again responses to this question reinforced the important role of business and identified different perceptions in Aberdeen compared to elsewhere in the UK.

In the UK as a whole, ‘persuading oil and gas businesses to change their behaviour’ was seen as the biggest obstacle.

Residents of Aberdeen put this obstacle in third place behind two obstacles relating to government action – ‘Government investment in the transition’ and Government having the right policies to support the transition’.

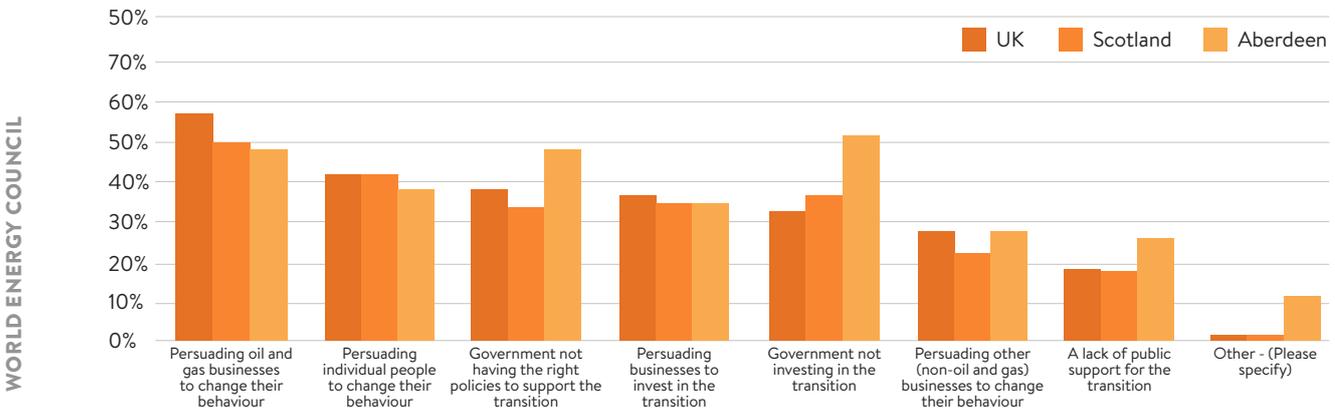
Aberdeen residents were also more likely to see ‘a lack of public support’ for the transition, compared to the rest of the UK.

This largely reflected views expressed in the focus groups – in particular the view that government and business were better placed than individuals to act a scale to have an impact:

*“What difference does it make if I do a bit of recycling or buy an electric car? It is the governments and big business that can make a real difference.”*

**Figure 24: Respondents in the UK and Scotland think the biggest challenge in achieving a clean and just energy transition will be persuading oil and gas businesses to change their behaviour. In Aberdeen, there is greater concern over government actions – both around policy and investment**

*Which of the following to you see as being the biggest challenges to achieving a clean and just energy transition in your area?*



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## THE ROLE OF INDIVIDUALS IN ACHIEVING ENERGY TRANSITION

Despite individuals generally being seen as having less influence compared to other stakeholders in achieving the energy transition, many people did recognise that they would have to change their behaviours. This was particular true of Aberdeen residents, 79% of whom believe that they will have to change their own behaviour if the energy transition is to be achieved (compared to 59% for the UK as a whole). In the focus groups people were quick to identify barriers to their own behaviour change – often emphasising more immediate concerns such as personal finances as reasons not to adopt low carbon behaviours:

*“I know its more environmentally friendly to use the train for travel, but its so expensive. It is usually cheaper to fly than it is to go by train.”*

*“It’s so expensive, there are no grants...”*

*“We just got a boiler fitted ... I looked at an air pump but they are too expensive.”*

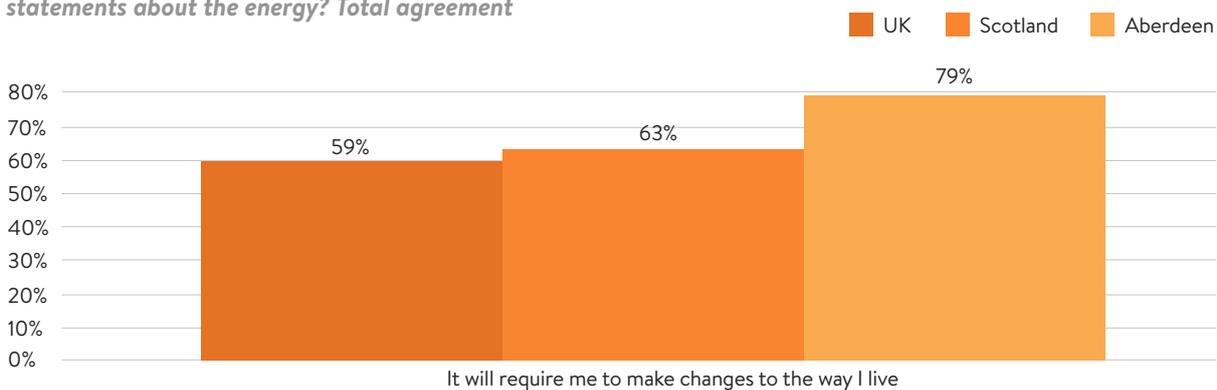


Some also point to a perceived lack of infrastructure in Aberdeen that prevents the adoption of lower carbon behaviours:

*“The cycle lanes in Aberdeen are rubbish. I’d cycle more if they were improved. There are no charging points if you buy an electric car. We are behind the curve on this stuff.”*

### Figure 25: Aberdeen residents are particularly aware of how energy transition will require them to change they way they live

Given the description of the energy transition above, to what extent do you agree or disagree with the following statements about the energy? Total agreement



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## BUSINESS AND OPINION FORMER PERSPECTIVES

### Business

Business generally saw a big role for government in taking the lead in making the transition happen:

*“If the British government is serious about transition, they are going to have to railroad it through, as opposed to asking people their opinions. They are going to have to push it through.”*

Some do not necessarily see a big role for their own businesses in instigating change to lower carbon energy:

*“I’m sorry but I have 25 years experience of doing what I do. I have absolutely zero interest in learning something new. I think there’s enough work for me to see out my career here. If there isn’t, we’ll go somewhere else.”*

*“Going into renewables would be as different as me retraining as an accountant.” (works as a well examiner)*

Several have the option of investing and locating elsewhere if there is no work for them in Aberdeen.

### Opinion Formers

There was some belief among opinion formers that there is too much focus on big businesses to solve the problem. Instead, they see a need to focus on what the community will look like post-transition:

*“The real opportunity is if we all ‘own’ our own carbon footprint.”*

They also showed strong views on the role of government:

*“Whilst government alone cannot solve the problem. It can create an environment which encourages people to invest. Government needs to create clarity for the investment case”*



City Views, Aberdeen, Scotland. Source: Aberdeen City Council



# POLICY PRIORITIES

In the surveys, we asked the research participants for their views on four alternative policy areas – the creation of low carbon transport systems; creation of jobs in the green, low carbon economy; investment in skills development and investment in community initiatives to improve local environments.

In both Aberdeen and the wider UK, investment in low carbon transport came out as the top priority.

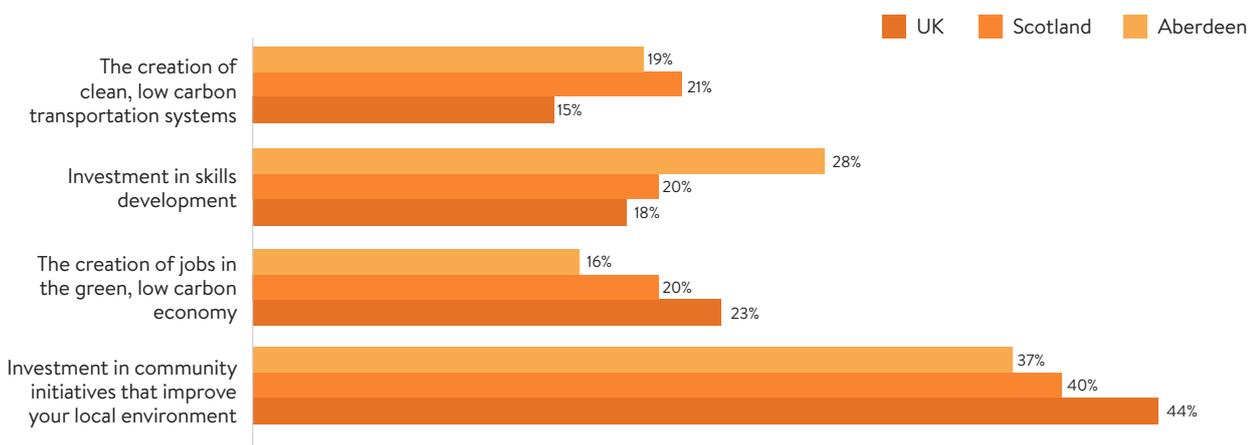
This was reflective of many comments made in the focus groups where research participants wanted to see greater investment in cycle lanes, electric vehicle charging points, e-bike and e-scooter schemes.

Though in second place, Aberdeen did place a greater emphasis on the creation of green jobs than the rest of the UK.

Investment in skills was the lowest ranking policy in Aberdeen, in the wider UK it was investment in community initiatives to improve local environments.

**Figure 26: Both the UK as a whole and respondents in Scotland and Aberdeen believe that the creation of clean low carbon transportation systems is the most important initiative. The creation of jobs also ranks particularly strongly in Aberdeen**

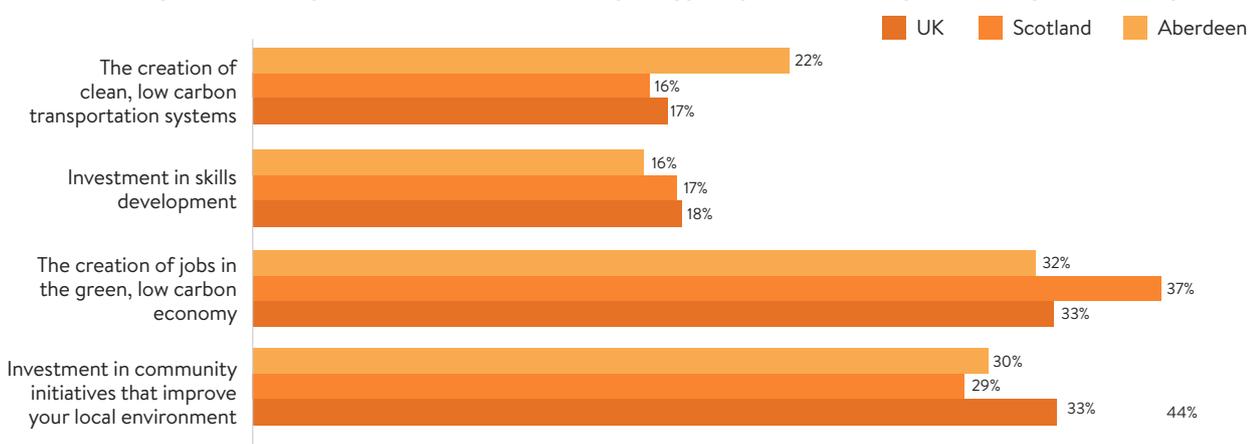
Listed below are four types of initiative that government, local government, and businesses could invest in as part of the energy transition in future. Please rank the same four types of initiative in importance to you (Most important)



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

**Figure 27: Respondents in Scotland and Aberdeen think the community initiatives are the least important – whilst in the UK both investment in community initiatives and in skills development were the least likely picks**

Listed below are four types of initiative that government, local government, and businesses could invest in as part of the energy transition in future. Please rank the same four types of initiative in importance to you (Least important)



Source: World Energy Council, NatRep Survey (n=1000), Scotland (n=86), Aberdeen (n=164)

## BUSINESS AND OPINION FORMER PERSPECTIVES

### Business

There is concern among businesses about the perceived antagonistic relationship between the UK and Scottish government – this might prevent coherent policy development:

*“It’s hard to get coherent policy when you have the two governments at loggerheads. If Boris says black, Nicola says white.”*

There is also a concern that renewables are presented as a false panacea:

*“People actually telling the truth about how it’s going to work, not kidding everybody on about transferrable offshore skills being transferred to renewable energy because they have zero in common ... I have to say to the politicians; ‘behave yourselves.’ Tell us the truth, tell us it’s done [oil & gas] and we need to be doing something different.”*

### Opinion Formers

Some focus on the need to be more strategic:

*“We need to think big picture. We need to think globally about where Aberdeen’s capabilities can have most impact”*

*“We need to articulate a clear strategy, rather than do too many disparate activities.”*

Many see a big role for government:

*“You need a carrot and stick approach. Carrot in terms of tax breaks and financial incentives. Stick in terms of regulation.”*

There is a similar concern about the relationship between the UK and Scottish governments.

Attracting talent to both Aberdeen and to the energy sector as currently configured is also seen as a policy challenge:

*“We need to convince the most talented graduates that joining the energy sector makes you part of the solution, not part of the problem.”*



| Offshore Wind Turbines, Aberdeen, Scotland. Source: Aberdeen City Council

# CONCLUSIONS AND IMPLICATIONS

## ENERGY TRANSITION: ABERDEEN RESIDENTS' PERSPECTIVE

The survey research with Aberdeen residents provides ample evidence of a greater awareness of the energy transition and the issues involved in Aberdeen compared to the rest of the UK.

The survey research also suggests that this greater awareness leads to some different priorities and views in Aberdeen compared to the rest of the UK – for example, Aberdeen putting a greater emphasis on both government policy and investment as a potential obstacle to a successful transition compared to the rest of the UK.

Awareness and understanding of Aberdeen's clean and just energy transition is significantly lower than the awareness of energy transition per se – but when the idea is explained to people it is widely well received. Residents are largely on board with the idea – those who view it positively are more numerous than those who worry about it.

The main area of scepticism is about whether a 'Just' transition is possible and what the mechanism is for bringing it about.

## ENERGY TRANSITION: BUSINESS AND INFLUENCER PERSPECTIVE

The focus group research suggests that the business community in Aberdeen are the least on board with the energy transition agenda – they are either ignoring it because they believe there is enough work in oil and gas to keep them going or are concerned about the impact on their business. The latter are considering investing outside of Aberdeen.

Big business and government are seen as the key stakeholders.

The key calls are for:

- Co-ordination and co-operation among key stakeholders (especially the UK and Scottish governments)
- Definition of a clear strategy for achieving the energy transition
- That strategy should create certainty for business that gives them confidence to invest

In addition to the above, the opinion formers highlight a range of other issues:

- For Aberdeen to identify its unique selling point in the context of the energy transition – and then focus on selling this to the world
- The importance of there being something in this agenda for everyone, and a concern that there is a perception that only big business will benefit
- The sector and Aberdeen are in a battle for talent and need to create a compelling case for the most able employees



## APPENDIX

# DETAILED RESEARCH METHOD

## FOCUS GROUP METHODOLOGY

One focus group took place face to face in Aberdeen. Three took place online.

Each session lasted 90 minutes and included between 6-8 participants.

The participant specification for all the groups was as follows:

- Mix of gender (no fewer than 2 men or women)
- Include as wide a range of ages as possible (in the event we achieved early 20s to early 70s)
- Two participants to have a low income or to be unemployed/rely on state benefits for their income
- All the participants who are employed should work either within the energy sector or 'adjacent' to it (i.e. their job is somehow dependent on the energy sector)
- All participants to have lived in Aberdeen for at least 5 years

The groups took place between 2<sup>nd</sup> and 24<sup>th</sup> August 2022.

## IN-DEPTH INTERVIEW METHODOLOGY

We conducted 5 business in-depth interviews in total, each lasting c. 45 minutes.

One in-depth interview took place face to face in Aberdeen. The other four took place online.

The participant specification for the business in-depth interviews was as follows:

- People who are senior decision makers within a local business – they should describe themselves as having at least partial responsibility for major decision making within their business
- Ideally, they would have a directorial or senior management role/title
- They should all either work directly in the energy sector or in the energy sector supply chain

Interviews took place between 2<sup>nd</sup> and 24<sup>th</sup> August 2022.

We used similar methods to interview five opinion formers based in Aberdeen. These were senior people from organisations and agencies involved in different aspects of the energy transition.

Opinion former interviews took place between 4<sup>th</sup> and 16<sup>th</sup> August 2022.

## SURVEY METHODOLOGIES

We conducted two online surveys.

- One was a nationally representative survey of 1,000 UK adults aged 18+.
- Participants were drawn for UK-wide research panels sourced from Alligator Digital
- Fieldwork ran from 15<sup>th</sup> to 22<sup>nd</sup> August.

The second survey was administered online by Trajectory using the Smart Survey Platform.

- The survey link was publicised via an article in Aberdeen's local newspaper.
- 164 Aberdeen residents completed the survey.
- Fieldwork ran from 17<sup>th</sup> to 24<sup>th</sup> August.

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