

Energy Workers Survey - Your Job in a Net Zero Scotland

Initial analysis



Survey background

Scotland has a legal commitment to reduce greenhouse gas emissions to net zero by 2045. The actions needed to meet this ambition will transform all sectors of the economy and society, including the way Scotland produces and uses energy. Hearing from those most likely to be impacted by the transition is vital to achieve a truly just and fair transition.

The aim of this exploratory survey was to provide the Scottish Government with initial insights on what the transition to net zero might mean for some people currently working in different parts of Scotland's energy sector.

The survey does not provide a comprehensive or representative assessment of the attitudes or experiences of all people working in the energy sector in Scotland. The views expressed by the survey respondents will be used to identify potential issues to address and requirements for further engagement and research on just transition policy.

This survey formed one element of the Scottish Government's programme of stakeholder engagement informing the development of the Energy Strategy and Just Transition Plan (ESJTP). Responses from the survey will contribute to the evidence base for the ESJTP and the subsequent consultation and engagement.

Survey design and distribution

56 questions were included in the survey, divided into **five sections**: ‘Your job’; ‘The net zero transition and your future employment’; ‘Your experiences of transitioning to a green job’; ‘Just transition’; ‘About you’. The majority were ‘closed’ questions (i.e. a list of response options was provided), but several open questions were also included to allow participants to express their response in their own words, for example, on the type of support they required.

The survey was **conducted online** via Microsoft Forms and was open for four weeks from 1st August until 26th August 2022. An online survey was selected as the most appropriate mode for reaching a large number of people working in different parts of the energy sector across Scotland within the timeframe and resources available. However, this administration method has limitations, such as excluding those who do not have access to the internet

The population of ‘all energy workers in Scotland’ is not bounded and there is no straightforward way to identify and reach all workers. Therefore, it was not feasible within the time and resource constraints to collect a probability sample. Instead, a convenience sampling method was used. Screening questions were used to ensure those completing the survey were currently employed in the energy sector in Scotland.

The link to complete **the survey was distributed via 24 partner stakeholders** (listed in the table on the following slides) as well as via the Scottish Government Net Zero social media channels and the Scottish Government Just Transition consultation page. Due to the sampling method, we are not able to say with any certainty how many people the survey was distributed to, however, the table provides an indication of the reach or membership of each partner organisation.

Survey distribution channels

ORGANISATION	NETWORK REACH
NECCUS	50 member organisations
BP	Employ 66,000 people
Equinor	Over 650 UK employees
EnergySys	26 employees
ETZ - Energy Transition Zone	4 Major partners; Opportunity North East, Aberdeen Harbour, Scottish Enterprise, Aberdeen City council
OEUK - Offshore Energies UK	440 member organisations
Global Underwater hub	24,000 followers on Linked In
Decom North Sea	200 member organisations
X-Academy	80 employees
Scottish Renewables	Represent 280 renewable energy companies in Scotland
SSE Renewables	1000 + employees
EDF - Nuclear	Over 5000 employees
Nuclear Decommissioning Authority (NDA)	15,000 employees across 17 sites, and 11 businesses
STUC (Scottish Trade Union Congress)	540,000 trade unionists, the members of 39 affiliated trade unions and 20 Trades Union Councils
Skills Development Scotland (SDS)	1400 employees work closely with many organisations in energy sector
CBI (Confederation of British Industry)	190,000 members
Scottish Enterprise	20 Partner organisations
HIE (Highlands & Islands Enterprise)	Over 20 partner organisations
IoD (Institute of Directors)	Over 20,000 directors
National insulation Association	Represents the organisations active in the insulation industry across Scotland and rest of UK
Global Energy Group	4000 employees -Huge organisational membership across Scotland's energy sector
Scottish Hydrogen and Fuel cell association	175 member companies and 35 associate members
Proterra Energy	Small scale energy company installing hydroelectric energy generators
Solar Energy Scotland/UK	Specialist trade association of over 300 leading businesses and 1,200 affiliate rooftop installers.

About the data

926 individual responses to the survey were received.

After data cleaning, 10 responses were removed as invalid:

- 1 respondent did not consent (no data was received); 2 respondents do not work in the energy sector; 7 respondents neither live nor work in Scotland

This analysis therefore uses a dataset of **916 valid responses**.

The data provides insights into the respondents' perspectives and experiences of their job, the net zero transition, and future employment plans and opportunities.

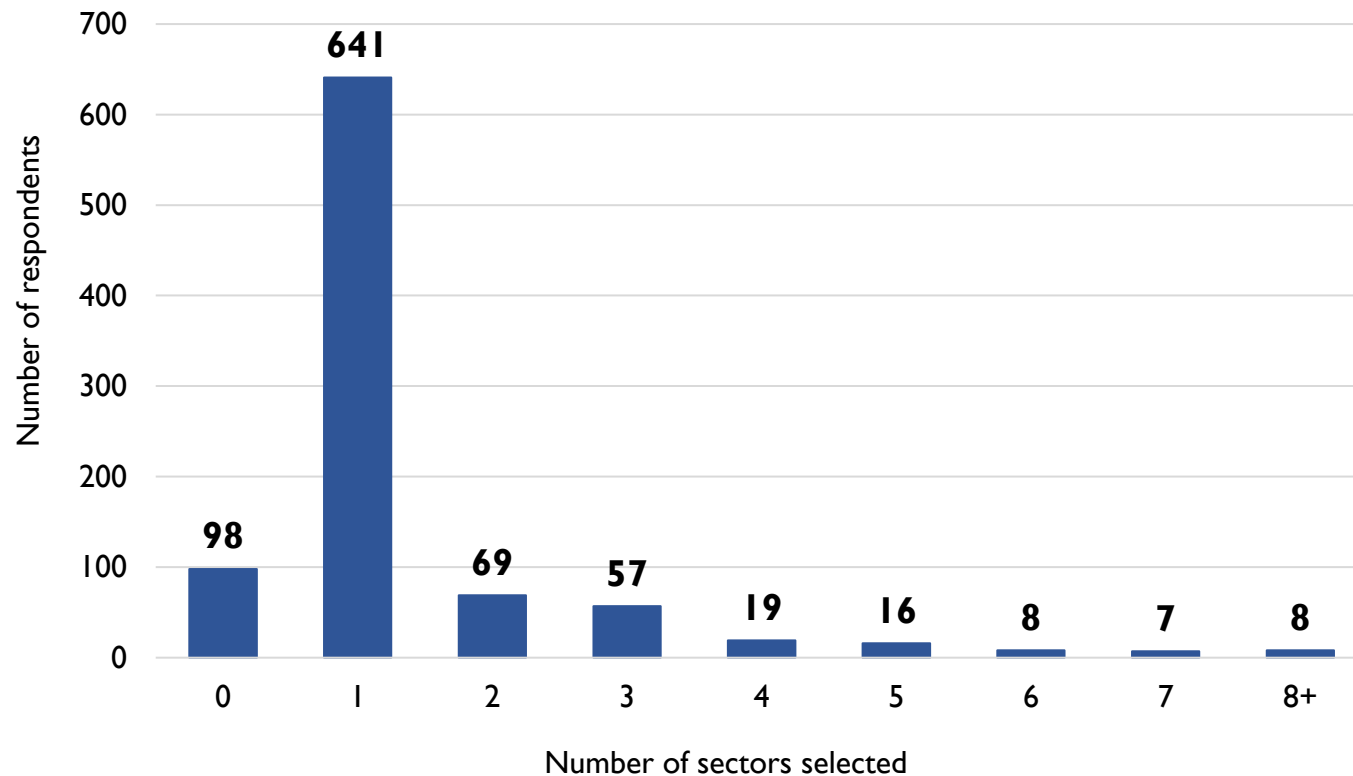
As a convenience sampling method was used, the data cannot be used to draw generalisations about all energy workers in Scotland. **The findings are valid for the respondents of this survey only.**

The following slides provide some headline results from some of the initial analysis of the data collected. Some of the sub-sample breakdowns are very small (under 100 responses) and are indicative only. These are highlighted on the slides.

Further data analysis is ongoing and will be used to inform the Scottish Government's approach to stakeholder engagement and policy development for the ESJTP.

SECTOR

- Respondents were asked what energy sector they work in.
- 31 options were provided in the survey and respondents could select as many as appropriate.
- Respondents could also select 'other' and were given a text box write their own response.



- **Most respondents (69%) selected only one of the sector options provided.**
- About 1 in 10 respondents (11%) did not select any of the sectors options provided, but wrote in their own response.
- 1 in 5 respondents (20%) selected more than one of the sector options provided.

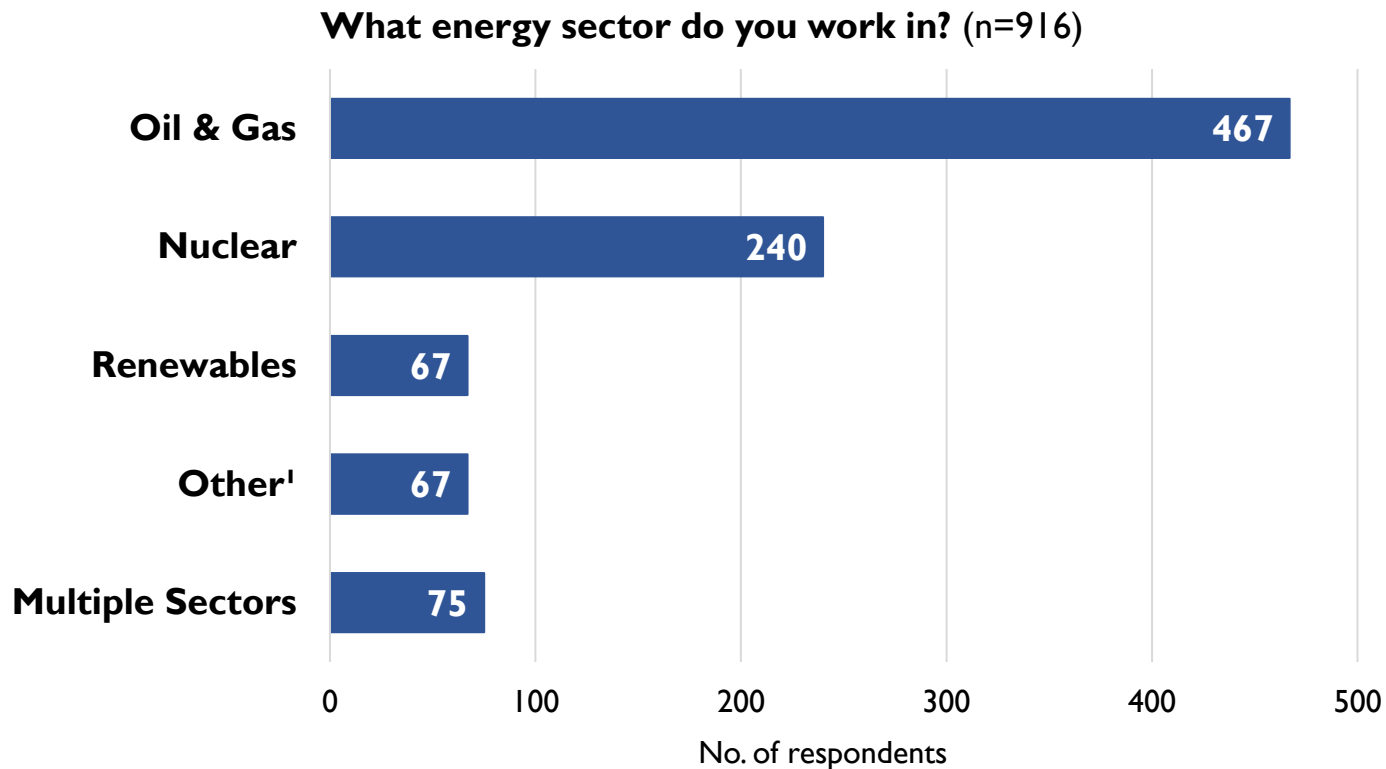
SECTOR

All text responses provided by participants selecting ‘Other’ in response to ‘What sector do you work in?’

...	Energy Services	Oil & Gas - Onshore operations	Onshore - Well Integrity
Clean energy (all technologies) finance	Energy storage	Oil & Gas - Onshore Production Support	Onshore Electricity Transmission
Diesel power station	energy strategy	Oil & Gas - Onshore Support for Offshore Assets	Operational thermal power station
Distribution	Energy Transition (all Sectors) - Skills Development	Oil & Gas - Onshore	Power Distribution
Distribution Network Operator	Energy Transition	Oil & Gas - Projects / Subsea	Power transmission
Distribution Networks	Energy Transmission	Oil & Gas - Software	Power transmission
Distribution	Finance	Oil & Gas - Subsurface	Renewable and energy efficiency consultancy
District Heating	IT Supporting energy business	Oil & Gas- Health, Safety and Environment	Renewable
Electricity - Thermal Power Generation	Multi Energy Company (O&G + renewables)	Oil & Gas Offshore Operations Planning	Renewables - Transmission
Electricity Distribution	Networks	Oil & Gas Onshore Engineering	Retail
Electricity Distribution	New energy consultancy	Oil & Gas onshore support	Security
electricity distribution	New Energy Safety Training	OIL & GAS ONSHORE	Supply: Transmission Network Operator
Electricity generation, distribution & transmission	Oil & Gas - Consultancy	Oil & Gas/Renewables - Service Provider	thermal generation
Electricity Networks - Transmission	Oil & Gas - Digital	Oil and Gas - Engineering	Thermal power generation (CCGT, CCS, H2)
Electricity Networks	Oil & Gas - Drilling	Oil and Gas - IT	Transitional Energy Consultant
Electricity Transmission / Network	Oil & Gas - Emergency Response	Oil and Gas - Onshore technical Support	Transmission Network Operator
Electricity Transmission	Oil & Gas - Engineering	oil and gas - onshore	Transmission Network
Electricity Transmission	Oil & Gas - Finance	Oil and Gas - Subsurface (Development Geologist)	Transmission Networks
Electricity Transmission	Oil & Gas - Finance	Oil and Gas - support functions	transmission
Electricity Transmission	Oil & Gas - Finance	Oil and gas -onshore (HR)	Transmission
Electricity Transmission	Oil & Gas - Gas Storage	oil and gas onshore	Utility company - finance
Electricity Transmission	Oil & Gas - General	Oil and Gas Operator Finance	Whole Energy System
Electricity Transmission	Oil & Gas - Onshore employee	Oil and gas projects	
Energy - Wider supply chain (IT)	Oil & Gas - Onshore Engineering	Oil and Gas support functions	

SECTOR

- For the purpose of analysis, responses to ‘What energy sector do you work in?’ (including text responses) were grouped into the five sector categories shown in the graph.

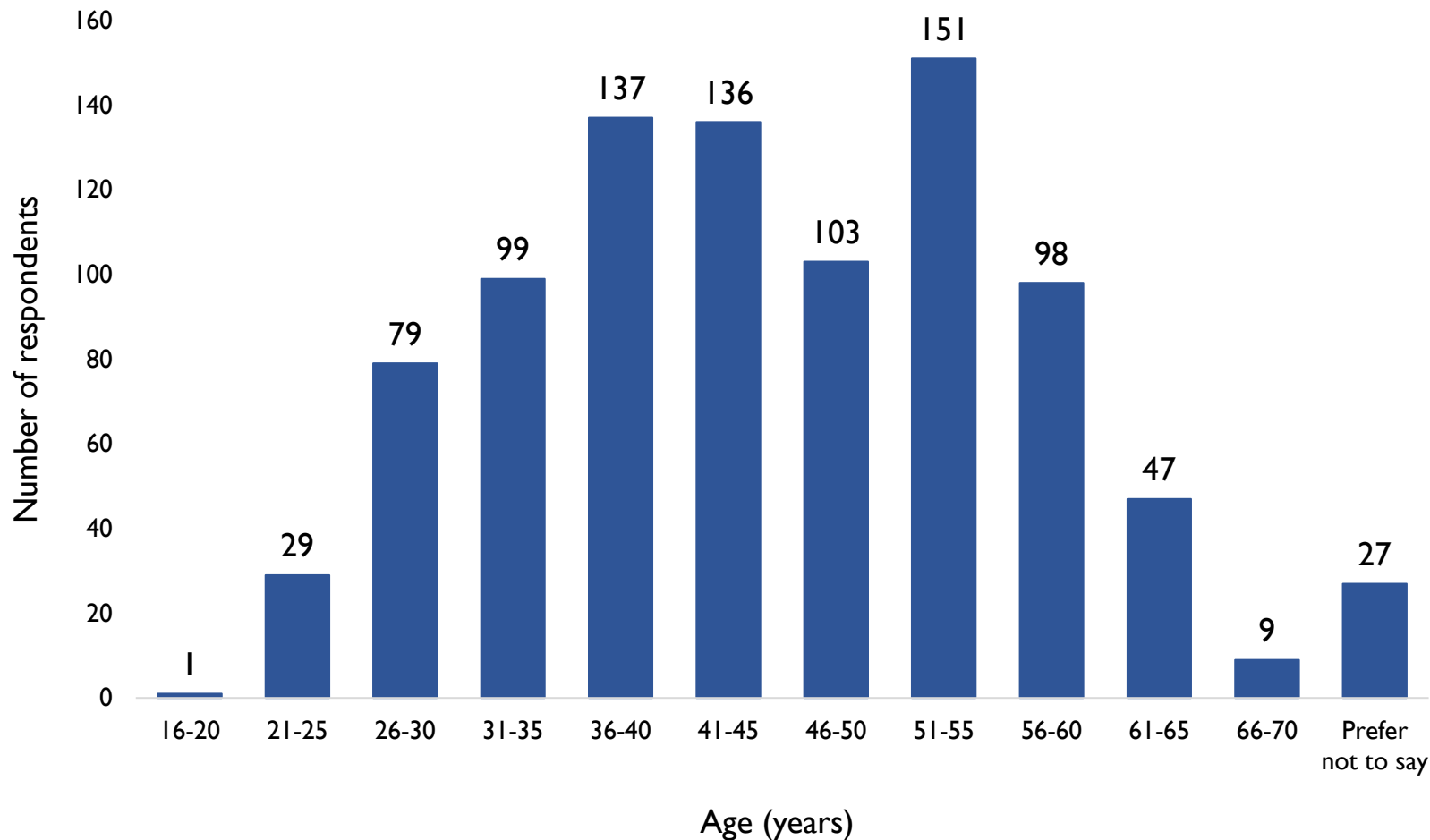


- Approximately **half of all 916 survey respondents (51%) work in the oil and gas sector** and around a quarter (26%) in nuclear energy. 67 respondents (7%) work in renewable energy.
- 67 respondents (7%) work in a single sector that could not be categorised as oil and gas, nuclear or renewables, and have been classified as ‘Other’¹.
- 75 respondents (8%) work across multiple energy sector categories**, for example, nuclear *and* renewables.

¹ ‘Other’ category is comprised of: Networks & Storage (32); Energy Support Services (15), CCUS (6), Heat & Energy Efficiency, Hydrogen (4), Thermal power (4).

AGE

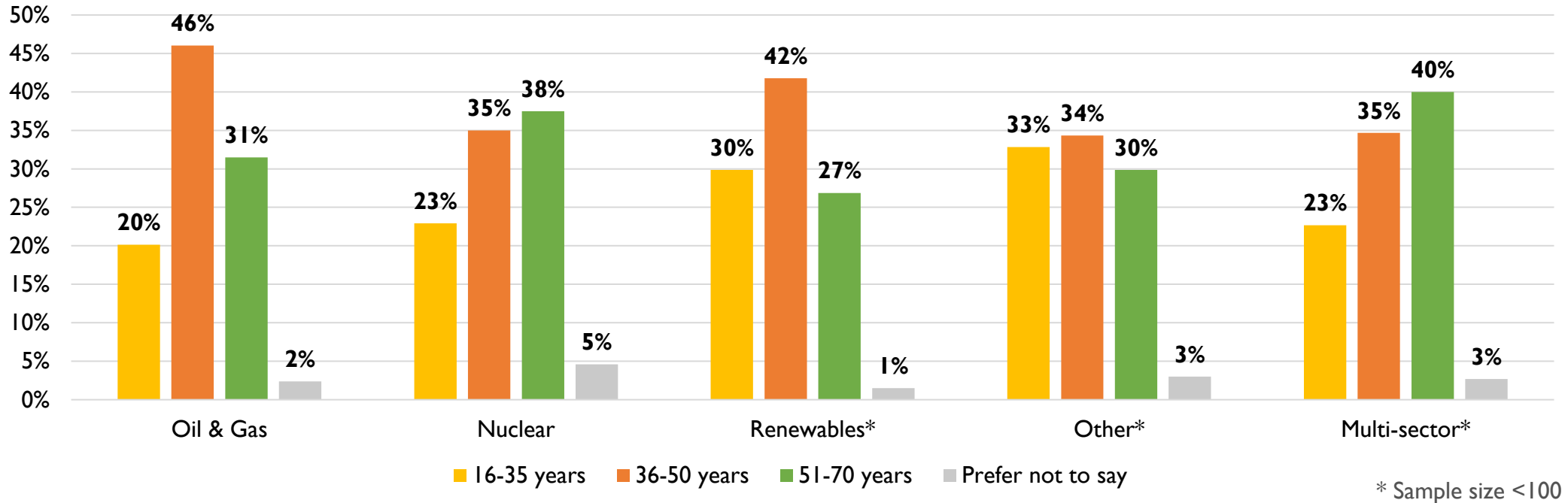
**Age distribution of all survey respondents
(n=916)**



- Responses were received from people of a range of ages.
- The most commonly selected age group was 51-55 years (17% of responses), followed by 36-40 years and 41-45 years (both 15% each). Together, these three age groups make up almost half (47%) of all responses.
- Only 3% of responses were from people aged 25 years or under and 6% from those aged over 60 years.

AGE

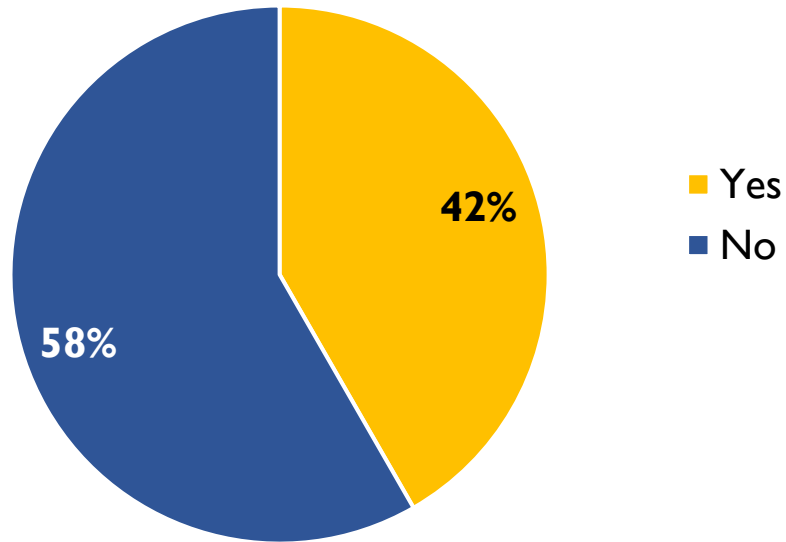
Age distribution of respondents by sector
(n=916)



- The age bands were grouped into three broader categories for the purpose of further analysis: 16-35 years (early career); 36-50 years (mid-career); and 51-70 years (late career).
- Comparison across sectors shows that 30% of respondents in the Renewables sector and 33% in Other sectors were early career, compared to just 20% in the Oil and Gas and Other sectors. The Oil & Gas sector had the greatest proportion of mid-career respondents (46%), and those working across multiple sectors had the greatest proportion at a late career stage (40%).

GREEN JOBS

Do you consider your current job to be a green job? (n = 916)



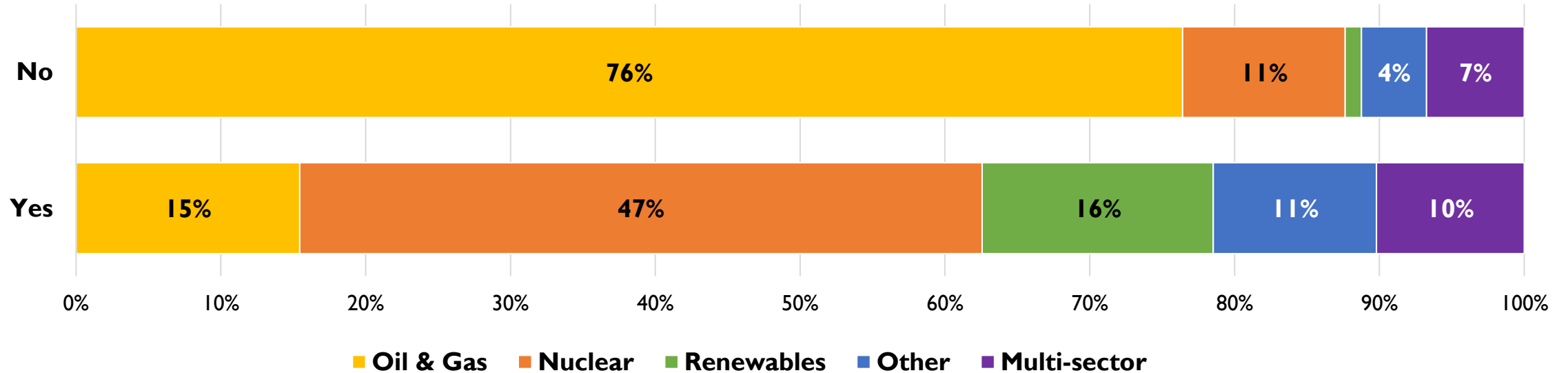
- Respondents were given the definition of ‘green jobs’ shown in the box below and asked whether they would classify their current job as a green job.
- **A majority of respondents (58%) said that they do not consider their current job to be a green job.**

In this survey, "green / low carbon jobs" in the energy sector refers to jobs that are likely to help to generate lower emissions of greenhouse gases, e.g. carbon dioxide. This is broken into 3 working categories:

- New & emerging green occupations that relate directly to the transition to net zero e.g. hydrogen cell technicians, carbon monitoring technicians, Nuclear decommissioning & waste disposal and urban miners
- Green enhanced skills occupations - not new but existing jobs that have had significant changes to work and worker requirements e.g. Design engineers enhancing skills related to reducing emissions such as increased knowledge on heat efficiency materials or installing green technology
- Existing green occupations that will be needed in greater numbers as the result of the transition to net zero e.g. insulation installers, energy assessors and designers and multi-skilled on-site operatives.

GREEN JOBS

Do you consider your current job to be a green job?
(n=916)

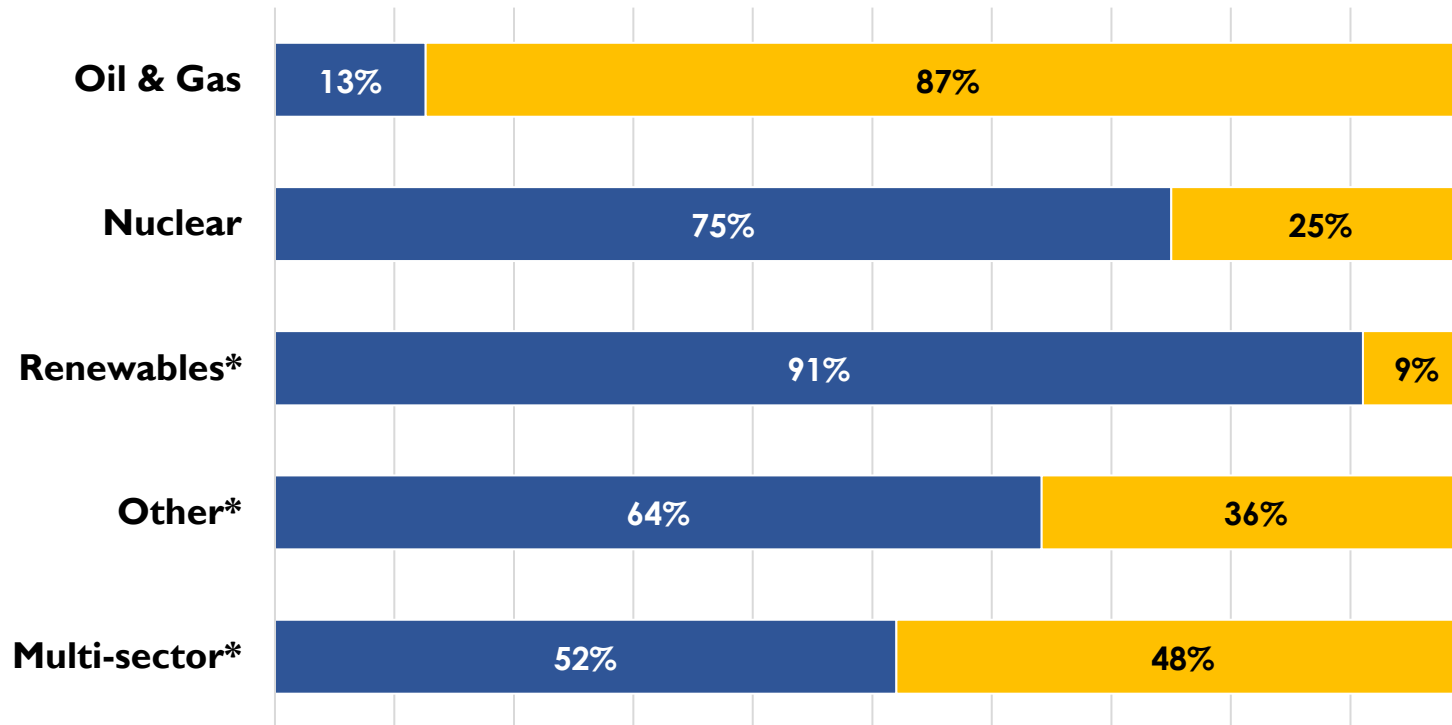


- Almost half (47%) of all 382 respondents who consider their current job to be a green job work in the Nuclear sector. 16% work in Renewables, 15% in Oil and Gas, and 10% across multiple sectors.
- Over three quarters (76%) of the 534 respondents who do not consider their job to be a green job currently work in the Oil and Gas sector. 11% work in the Nuclear sector and 7% across multiple sectors.

GREEN JOBS

Do you consider your current job to be a green job? – By sector
(n=916)

■ Yes ■ No

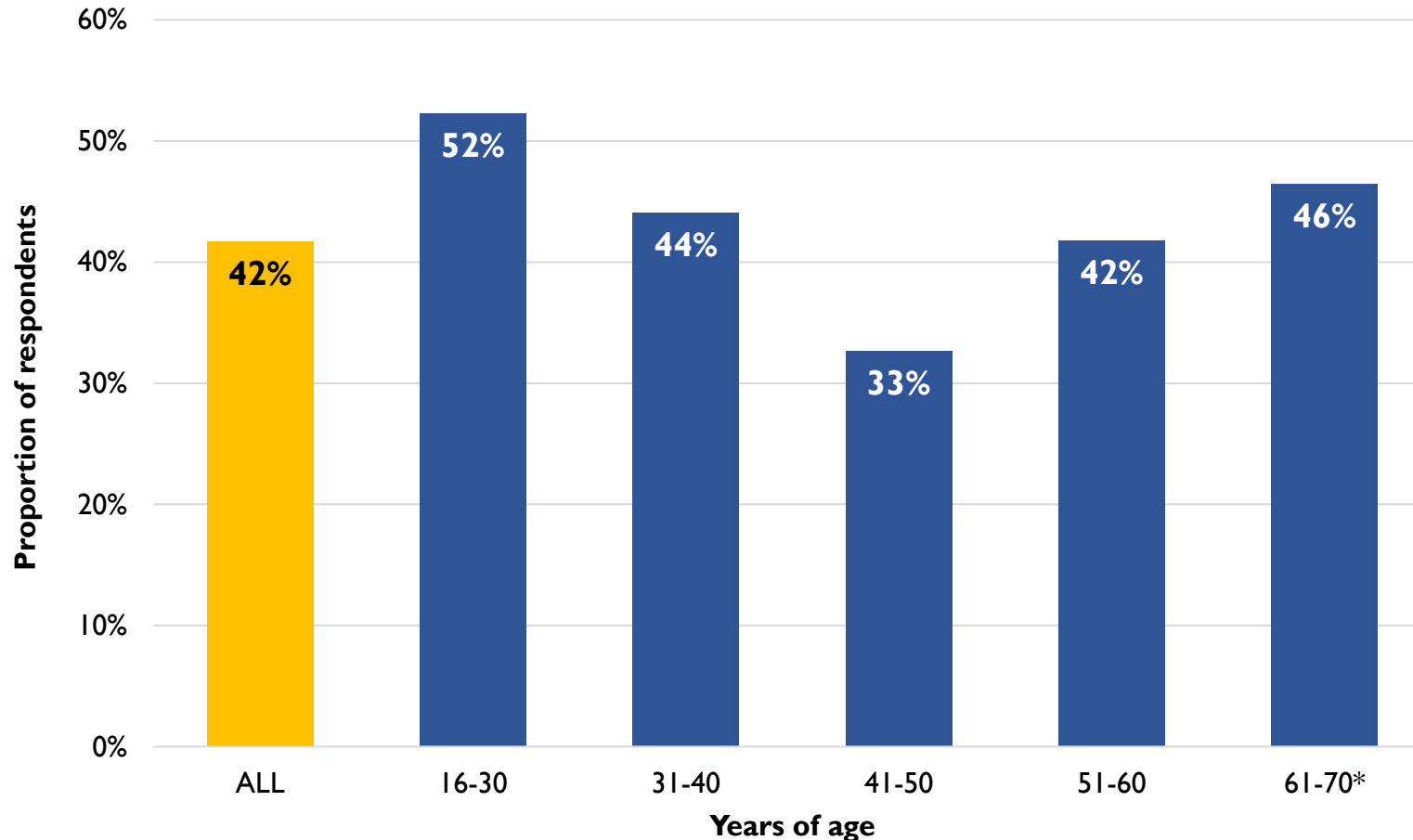


* Sample size <100

- A large majority (87%) of respondents working in the Oil & Gas sector do not consider their current job to be a green job,
- **However, 13% (more than 1 in ten) of those working in the Oil & Gas sector do consider their current job to be a green job. Around a quarter (24%) of these respondents stated that they work in oil and gas decommissioning.**
- Most of those working in all other sectors considered their job to be a green job, particularly those working in Renewables (91%) and Nuclear (75%).

GREEN JOBS

Proportion of respondents that consider their current job to be a green job - By age group
(n= 916)

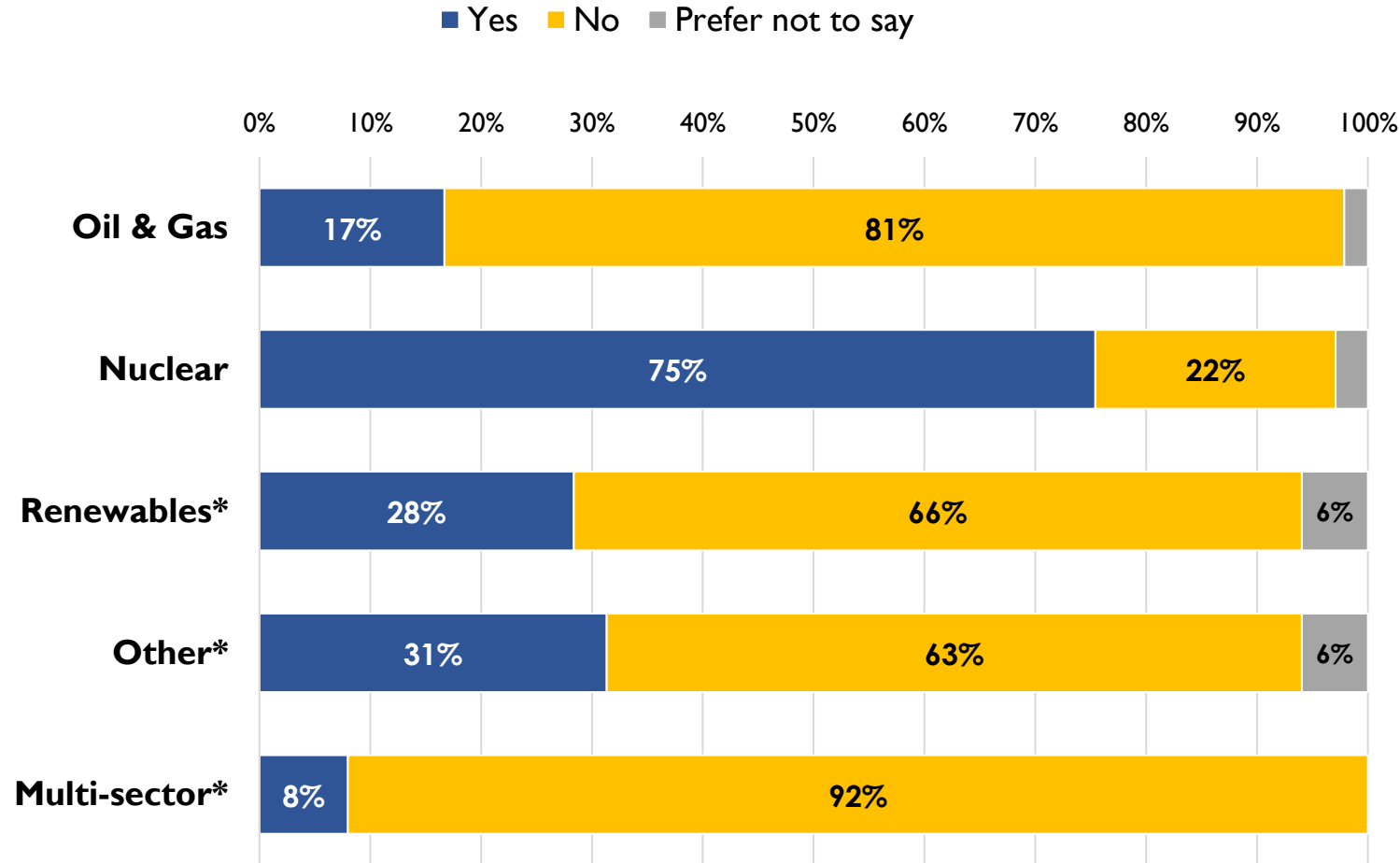


- Participants in the **youngest age category** were most likely to consider their job to be a green job. Over half (52%) of 16-30 year olds considered their job to be a green. This is the only age group where more participants considered their job to be a green job than not.
- By comparison, only a third (33%) of 41-50 year olds said they considered their current job to be a green job. This is the lowest proportion of any age group.

* Sample size <100

TRADE UNION MEMBERSHIP

Are you currently a member of a trade union – by sector

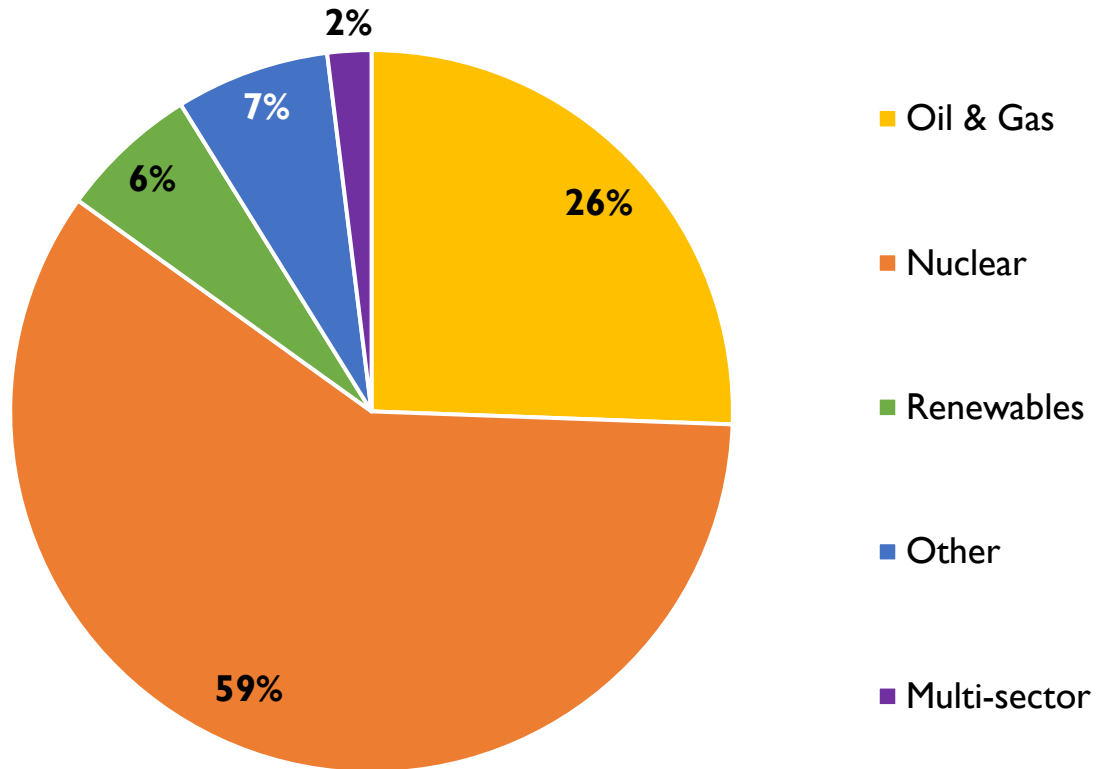


* Sample size <100

- A third (33%) of all 916 respondents said that they are currently a member of a trade union.
- There are large differences between respondents working in different sectors.
- **A large majority (75%) of respondents working in the Nuclear sector said they were a member of trade union.** This was significantly higher than respondents from any other sector group.
- **Just 17% of respondents working in the Oil and Gas sector said they were trade union members,** the lowest of all sector groups.

TRADE UNION MEMBERSHIP

Sector breakdown of trade union members
(n=305*)

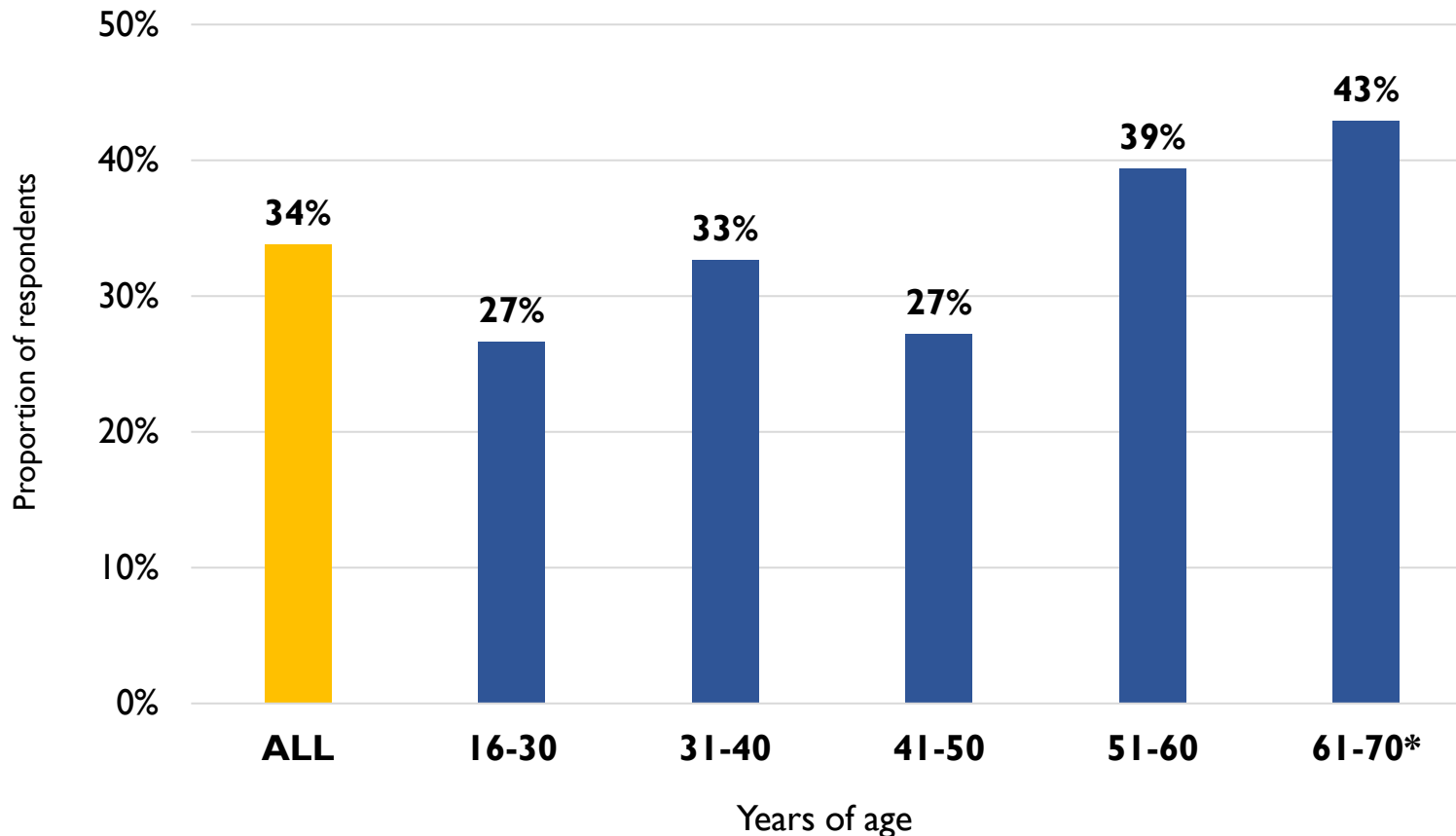


- The majority (59%) of the 305 respondents that stated that they are in a trade union are currently working in the Nuclear sector. Just over a quarter (26%) are working in Oil & Gas.

* Only includes respondents that stated they are trade union members

TRADE UNION MEMBERSHIP

Proportion of respondents that are members of a trade union – By age group
(n=916)

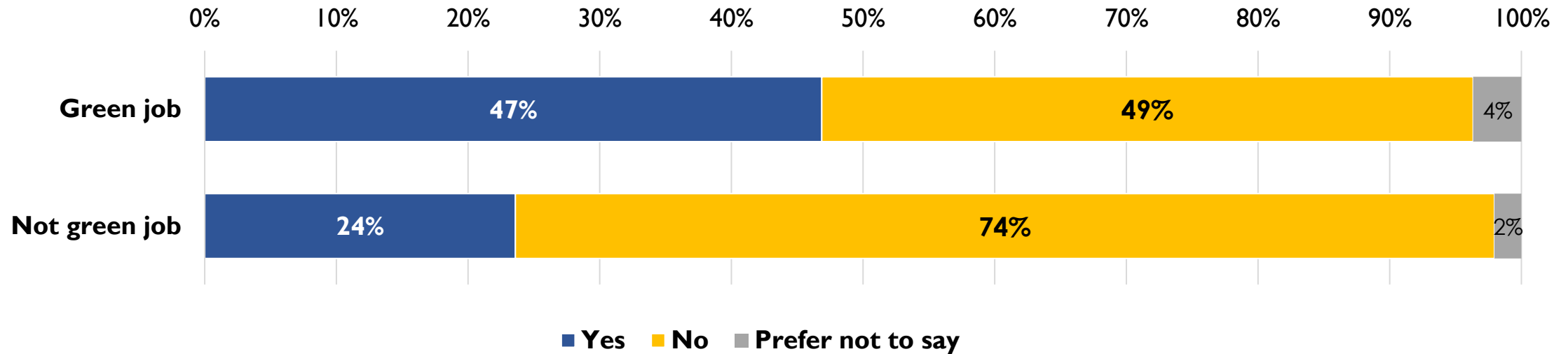


* Sample size <100

- Participants in the oldest two age groups (51-60 and 61-70) had the highest proportion of trade union membership (39% and 43%).
- By comparison, only 27% - 33% of participants in the younger three age groups said they were trade union members.
- Overall, 29% of respondents aged 50 years or younger said they were a member of a trade union, compared to 40% of respondents who are over 50 years old.

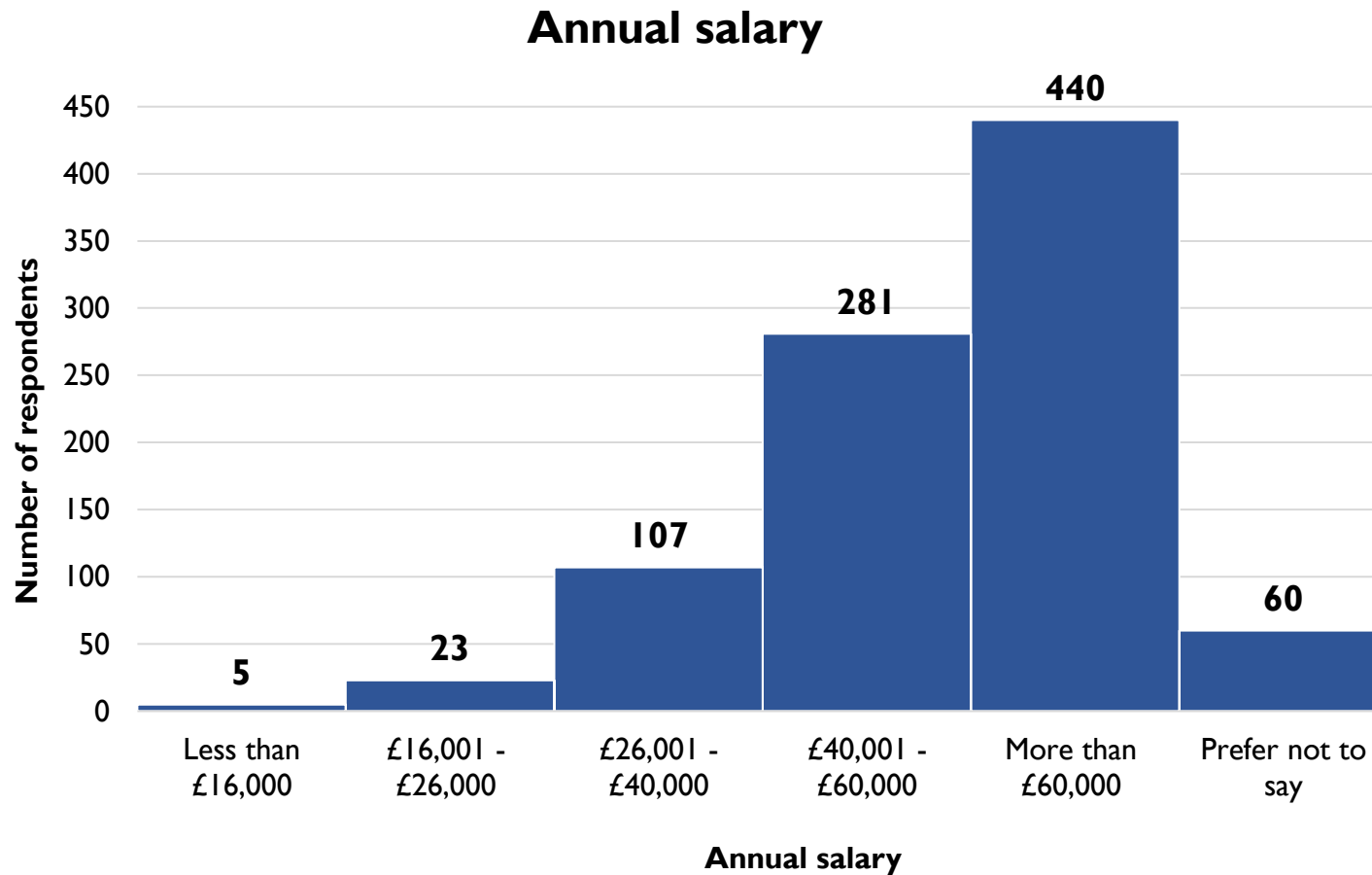
TRADE UNION MEMBERSHIP

Proportion of respondents that are a member of a trade union – By green job



- Trade union membership was higher amongst participants who considered their current job to be a green job than those who did not.
- Almost half (47%) of participants in who said that they that they considered their current job to be a green job said that they were a member of a trade union, compared to less than a quarter (24%) of those who did not consider their current job to be a green job.

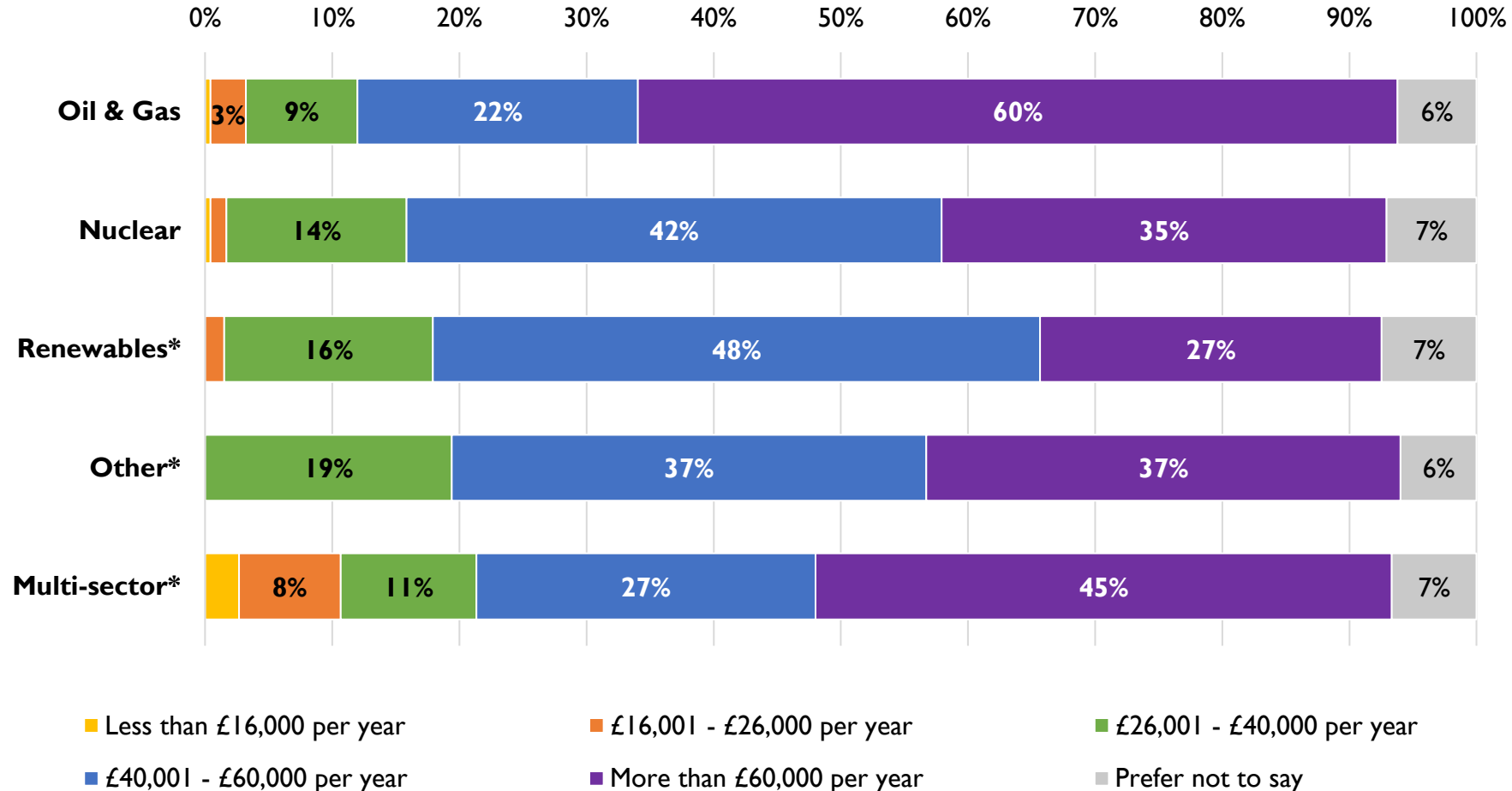
SALARY / FAIR PAY



- Almost half (48%, 440) of participants said that they have a salary of more than £60,000 per year.
- Only 15% of participants (135) said that they earn £40,000 or less.

SALARY / FAIR PAY

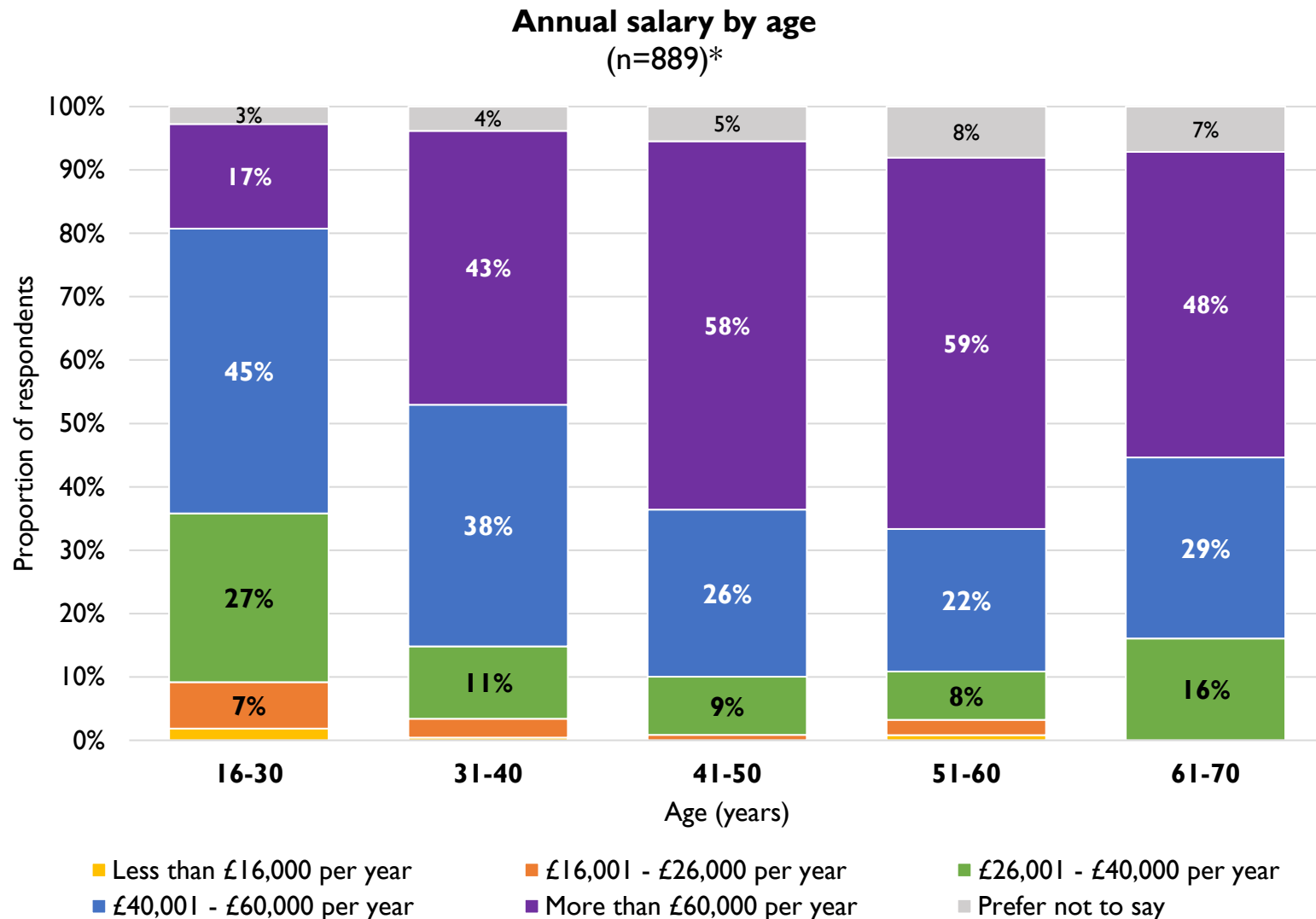
Annual salary range – By sector
(n= 916)



- 60% of participants working in the Oil & Gas sector reported an annual salary of over **£60,000**, a significantly higher proportion than any other sector.
- By comparison, only 27% of participants the Renewables sector reported a salary over **£60,000**.
- More than one in 10 (11%) participants working across multiple sectors reported a salary of **£26,000** or less, the highest proportion of all sectors.

* Sample size <100

SALARY / FAIR PAY

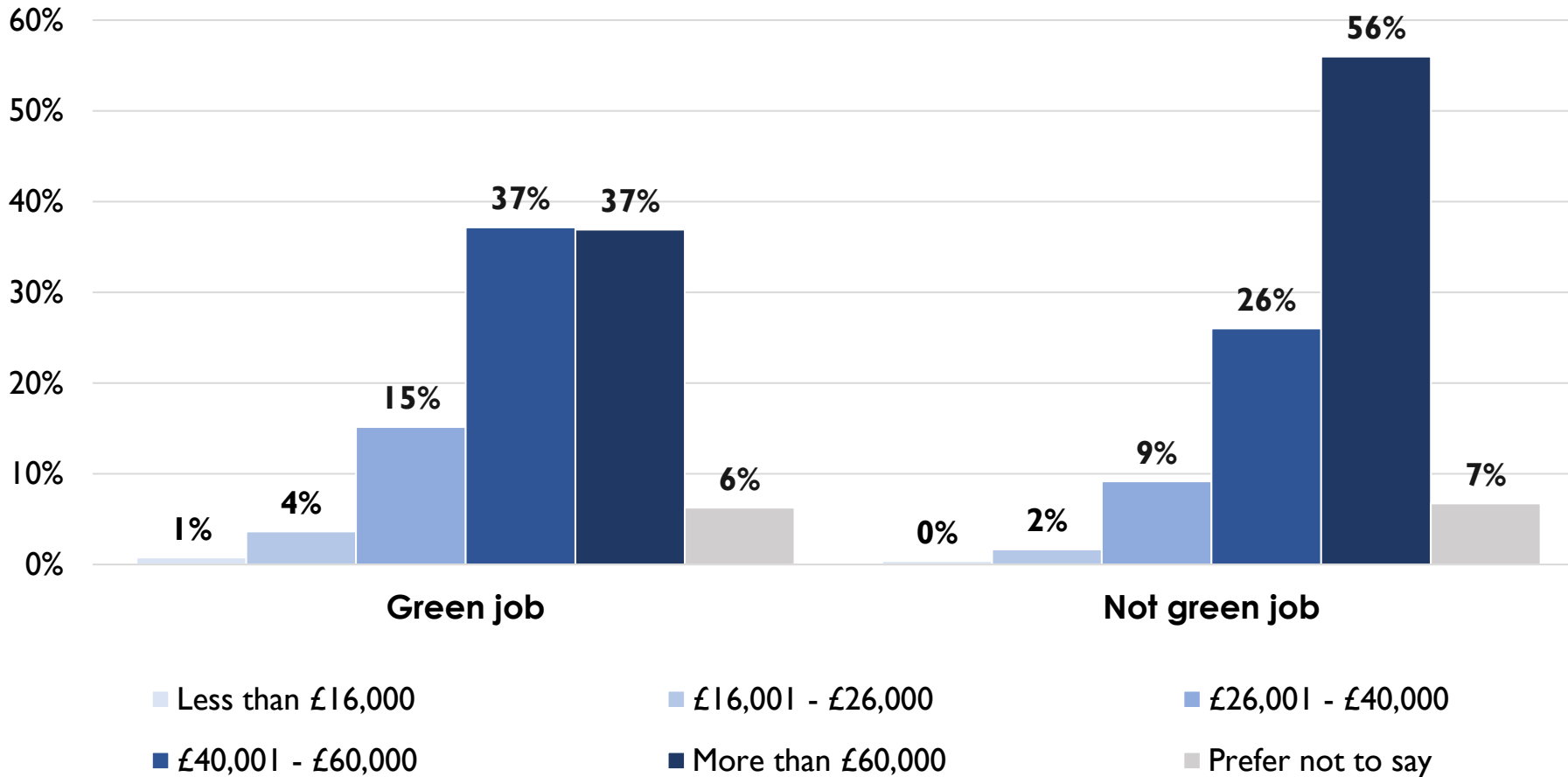


* Excludes 27 respondents that did not disclose their age

- There was variation in the annual salary report by respondents in different age groups.
- 9% of respondents in the youngest age group (16-30) reported an annual salary of £26,000 or less, compared to 3% or less across all the other age groups.
- Almost half (48%) of respondents the oldest age group (61-70) reported a salary of more than £60,000 or more, however, this was a lower proportion than those aged 51-60 (59%) or 41-50 (58%).

SALARY / FAIR PAY

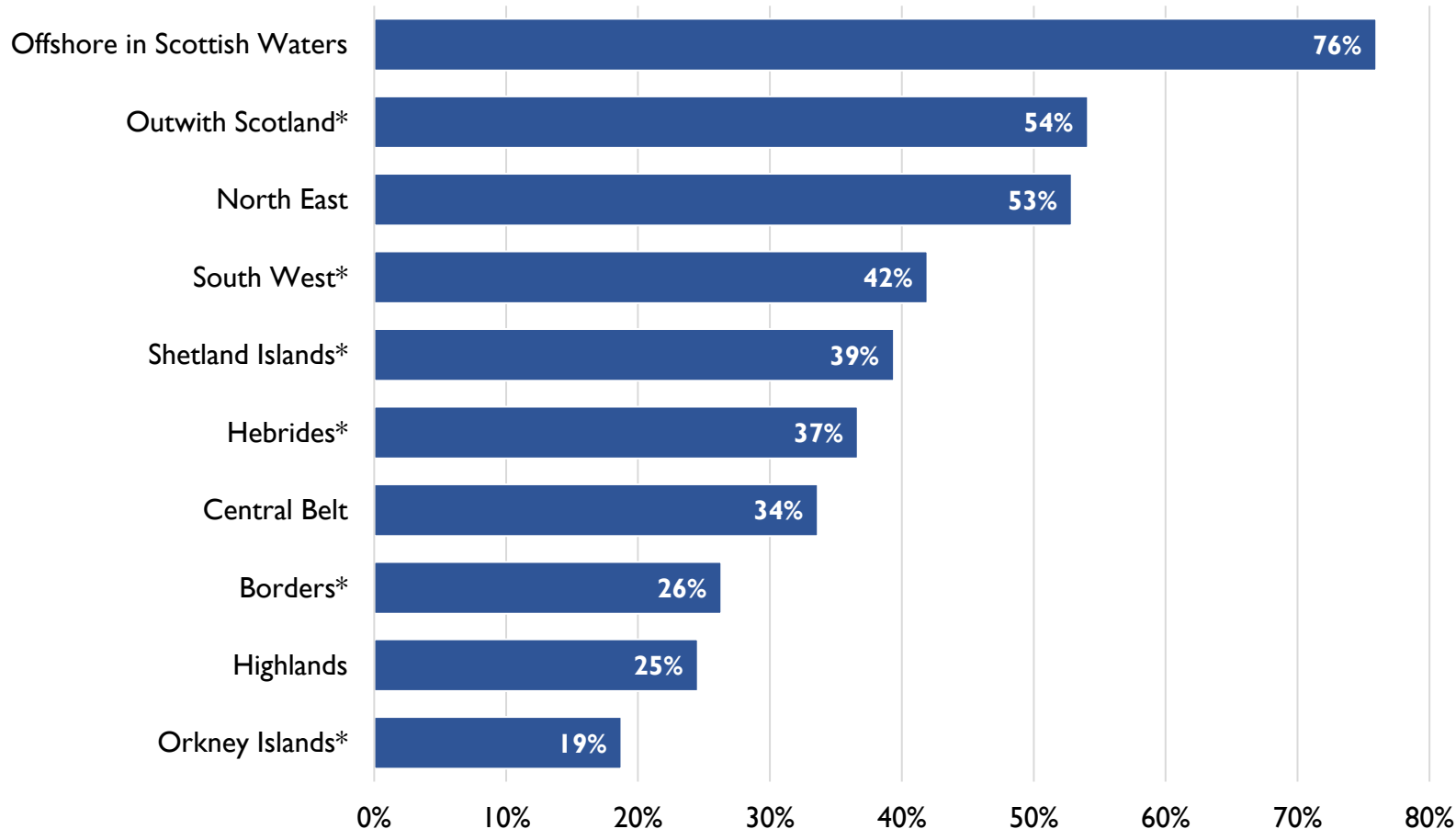
Annual salary for those currently in a green job vs those not in green job
(n= 916)



- The proportion of participants that reported an annual salary of over £60,000 was significantly lower for those who consider their current job to be a 'green job' (37%) than those who do not consider their job to be green (56%).
- The proportion of participants reporting a salary of £26,000 or less was also greater for those working in green jobs (5%) than those not in green jobs (2%).

SALARY / FAIR PAY

Proportion of participants earning over £60,000 per year
by work location
(n=916)

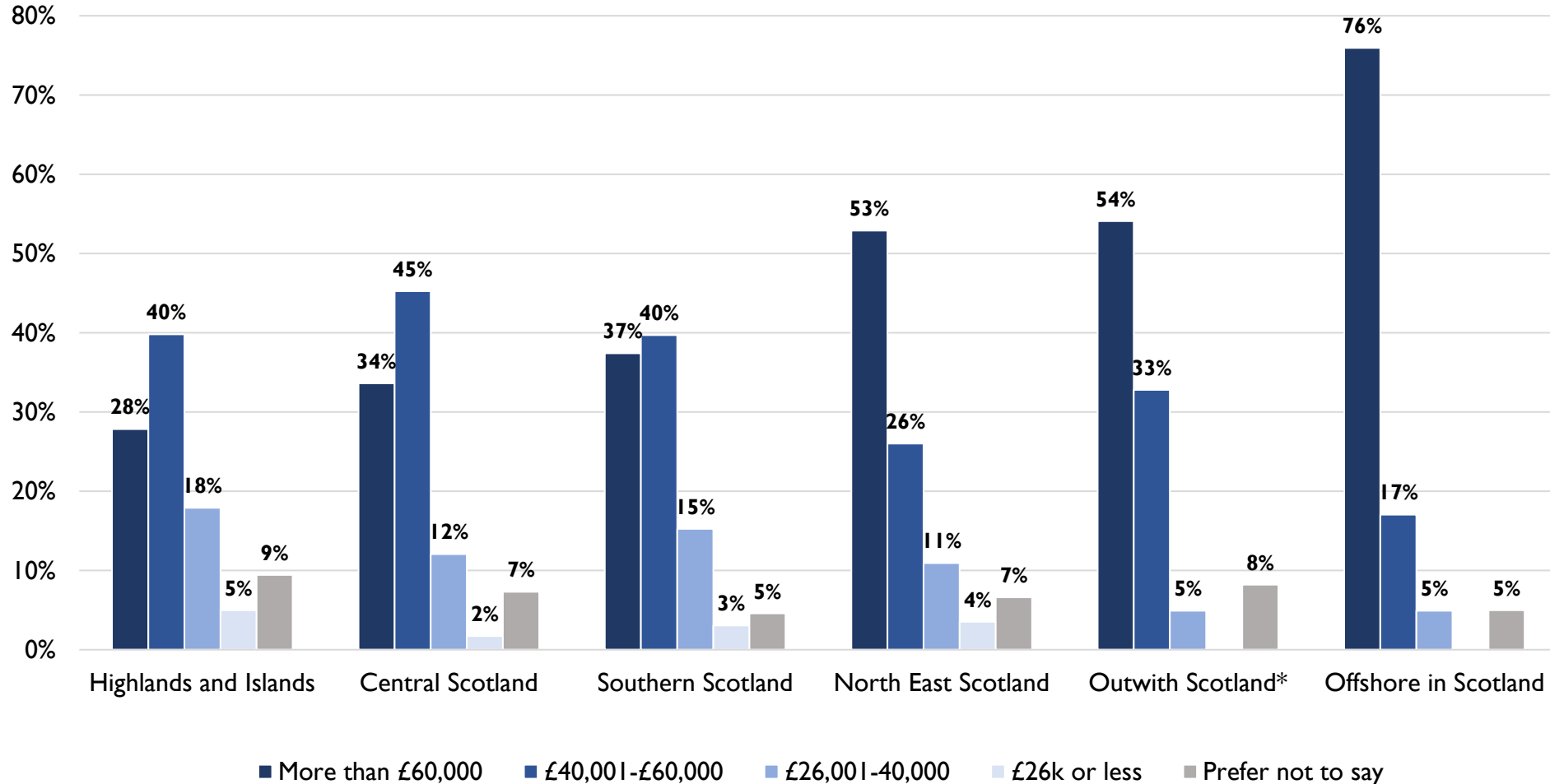


* Sample size <100

- More than three quarters (76%) of participants working offshore in Scottish waters said that they earn a median annual salary over £60,000, the largest proportion of any location category.
- More than half of those working outwith Scotland (54%) or in the North East of Scotland (53%) said they earned more than £60,000.
- By comparison, only around a quarter of those working in the Borders (26%) and the Highlands (25%) said they earn more than £60,000 per year, and less than a fifth (19%) of those working in the Orkney Islands.

SALARY / FAIR PAY

Annual salary distribution by region**
(n=916)



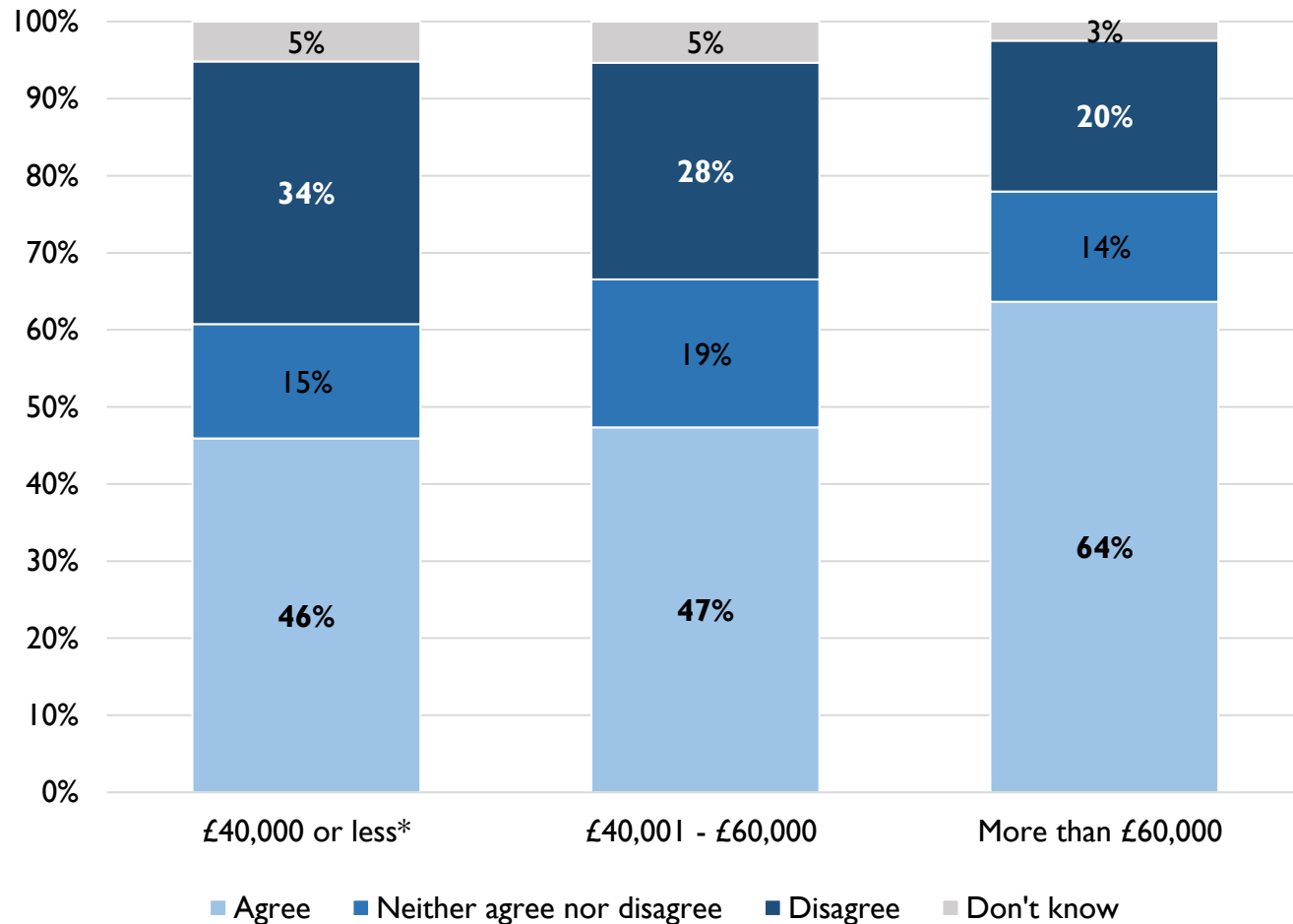
- None of the participants working Offshore or Outwith Scotland said they had an annual salary of £26,000 or less, and only 5% earn £40,000 or less.
- Almost a quarter (23%) of those working in the Highland and Islands said they earned £40,000 or less, with 5% earning £26,000 or less.
- The most common salary band in H&I, Central Scotland and Southern Scotland was £40,001 to £60,000.

* Sample size <100

** Some regions combined due to low sample size (Borders + South West = "Southern Scotland"; Shetland + Orkney + Highlands = "Highlands and Islands")

SALARY / FAIR PAY

I am paid fairly compared to similar jobs in the energy sector (n=856)**



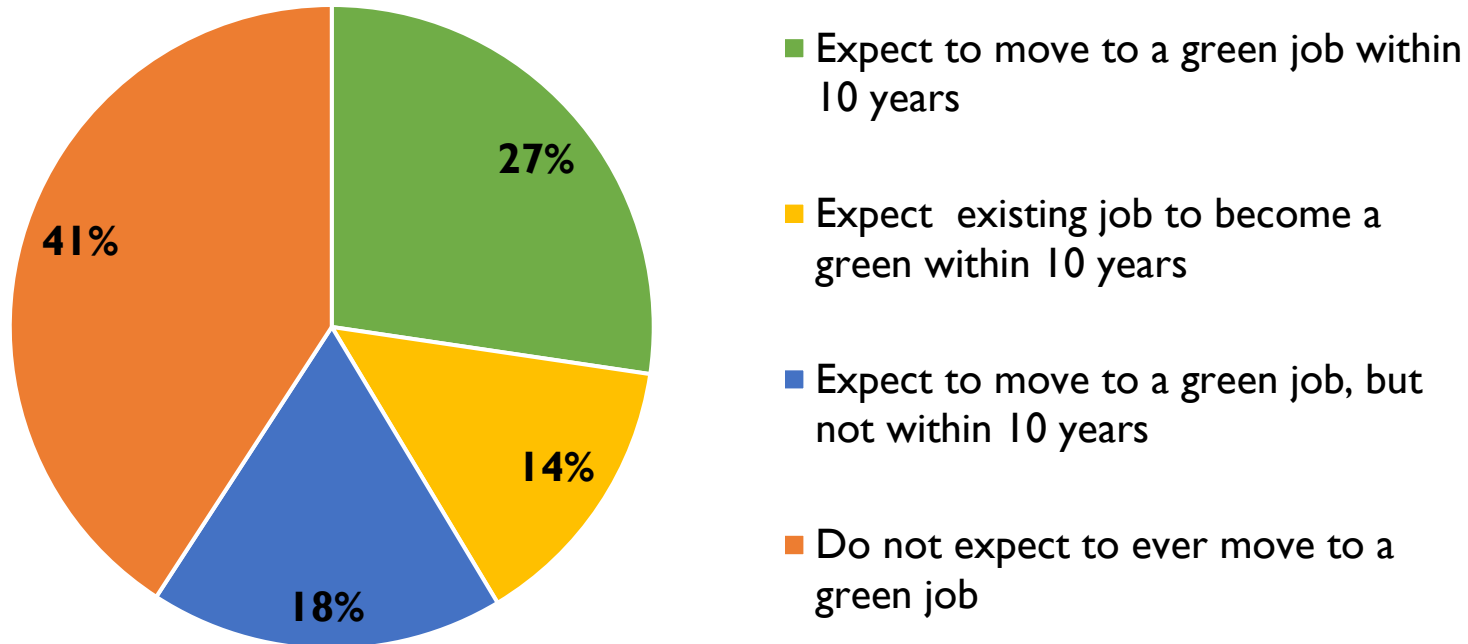
- More than a third (34%) of participants earning £40,000 a year or less stated they (strongly or somewhat) **disagreed** that they are paid fairly compared to similar jobs in the energy sector.
- This proportion decreased to one in five (20%) of participants earning more than £60,000 a year.
- Almost two thirds (64%) of participants earning over £60,000 a year (strongly or somewhat) **agreed** they are paid fairly, compared to less than half (46-47%) of participants earning £60,000 or less.

* Lower salary bands combined due to low sample size

** Excludes 60 participants who chose not to disclose their salary

FUTURE EMPLOYMENT

Expectations about moving into a green job
for participants who are not currently in a green job
(n=534)*

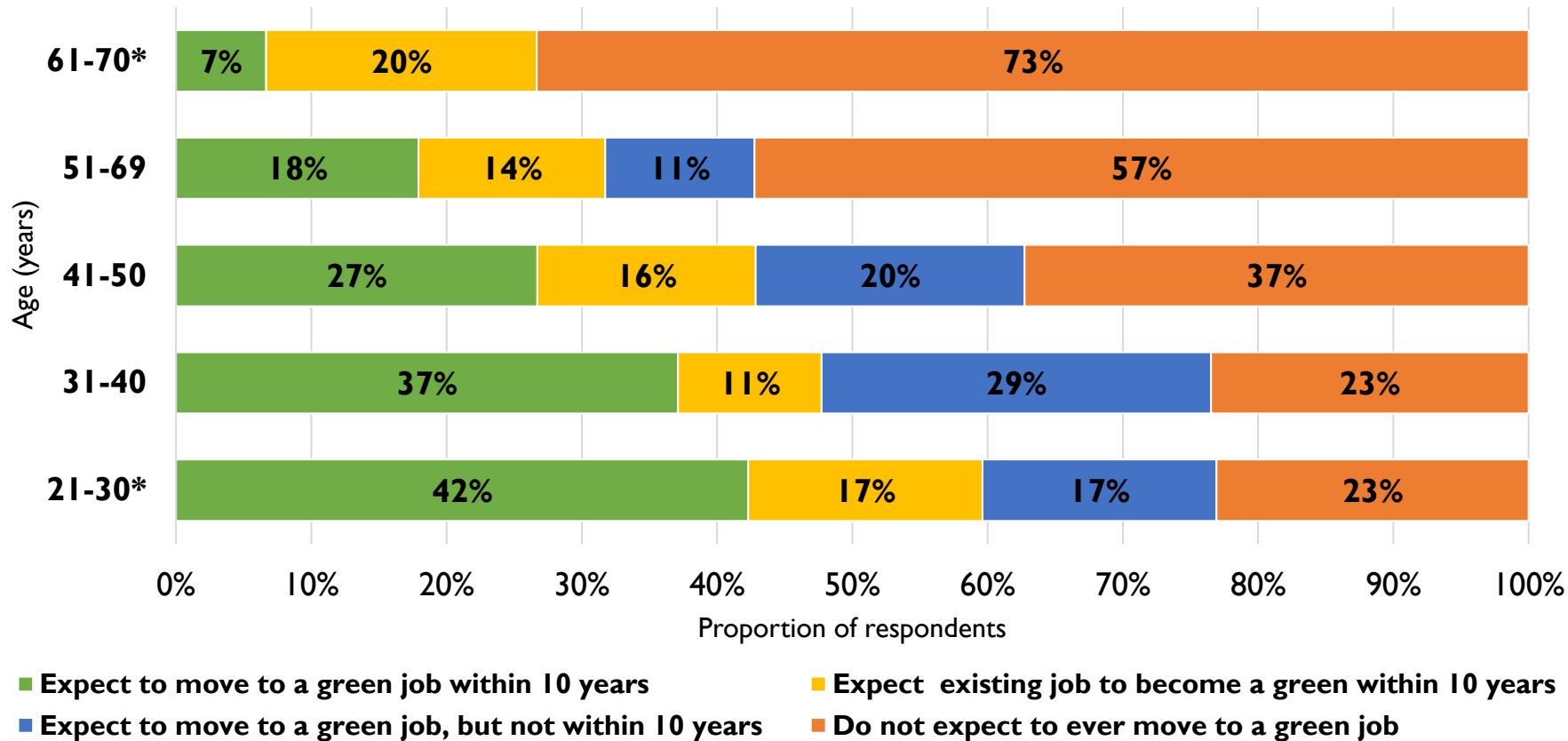


- There was a range of future employments expectations amongst participants.
- More than a quarter (27%) of all participants expect to move to a green job within 10 years.
- A further 14% expect their current job to become a green job within 10 years.
- Almost a fifth (18%) expect to move into a green job eventually, but not within the next ten years.
- However, 41% of participants said that they do not expect to ever move into a green job.

* Excludes participants who stated they are currently in a green job

FUTURE EMPLOYMENT

Expectations about moving into a green job – by Age
for participants who are not currently in a green job
(N=520)**



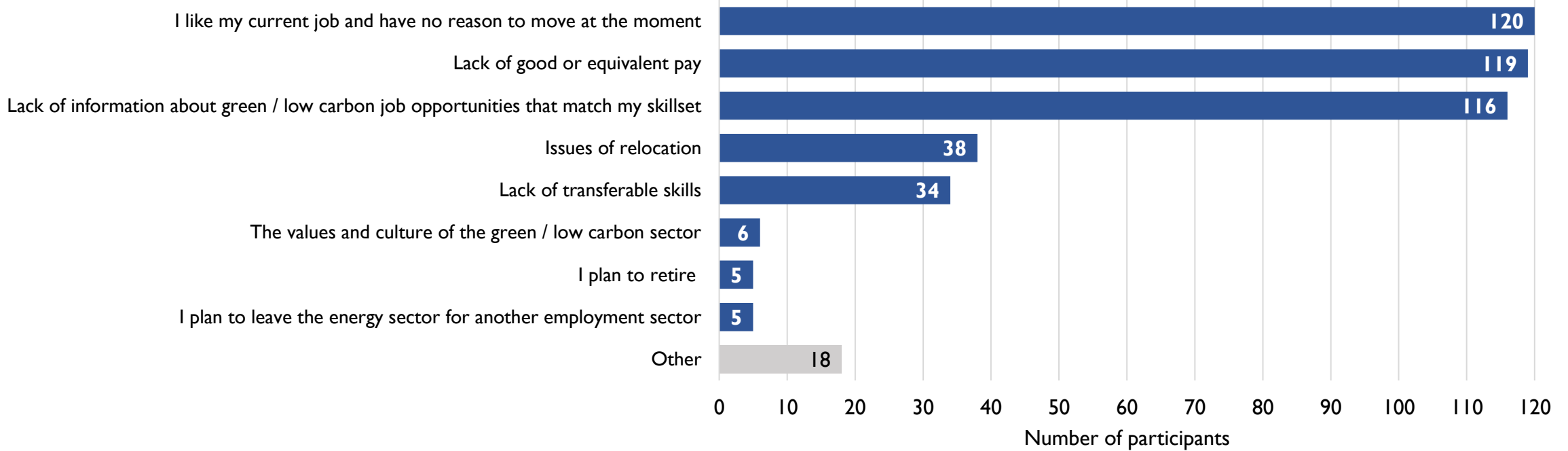
* Sample size <100

** Excludes those currently in and green job plus 14 participants who chose not to disclose their age

- There is a clear correlation between participants' age and their expectations about moving into a green job.
- 42% of 21-30 year olds said that they expect to move to a green job within 10 years, compared to just 7% of those aged 61-70.
- Similarly, 73% of those aged 61-70 said they do not expect to ever move to a green job, compares to 23% of 21-30 and 31-40 year olds.

FUTURE EMPLOYMENT

Current barriers to moving to a green job for those who expect to move to a green job in the future (n=211*; multiple response)

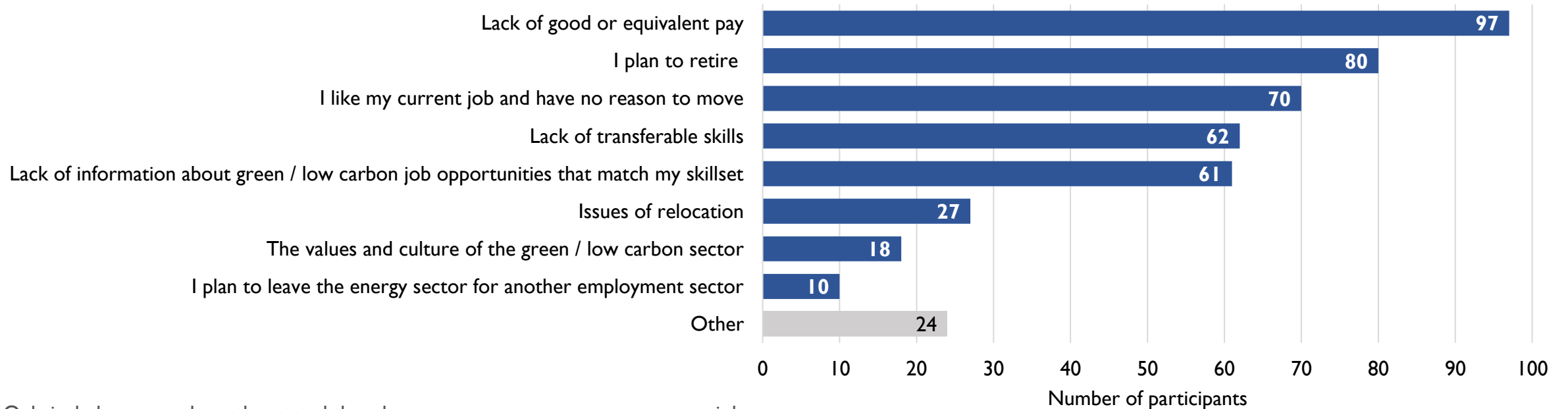


* Excludes respondents that are already in a green job, are currently looking for a green job or do not ever expect to move to a green job

- For participants that are not currently looking for a green job but are expecting to move to a green job in the future, the **three most commonly cited barriers** to transitioning at the moment are (i) satisfaction with current job; (ii) lack of good or equivalent pay and (iii) lack of information about job opportunities, all selected by more than half of all participants.
- For those selecting “Other”, reasons included (i) an expectation that their current job will be part of the energy transition; (ii) a perceived bias against oil and gas workers; (iii) a lack of green jobs; and (iv) the cost of retraining.

FUTURE EMPLOYMENT

Reasons given by participants who do not ever expect to move to a green job (n=218; multiple response)



* Only includes respondents that stated they do not ever expect to move to a green job

- For participants who said that they do not ever expect to move into a green job, the most commonly cited reason was a **perceived lack of good or equivalent pay**, selected by 44% of participants. However, a range of other reasons were also provided: **37% of participants plan to retire**; approximately a third (32%) said they were happy with their current job; and over a quarter (28%) cited a lack of transferable skills and/or a lack of information about opportunities.
- For those selecting “Other”, similar reasons were given to those on the previous slide. In addition, some participants cited a lack of support for, or faith in, the transition to net zero.

JOB FACTORS

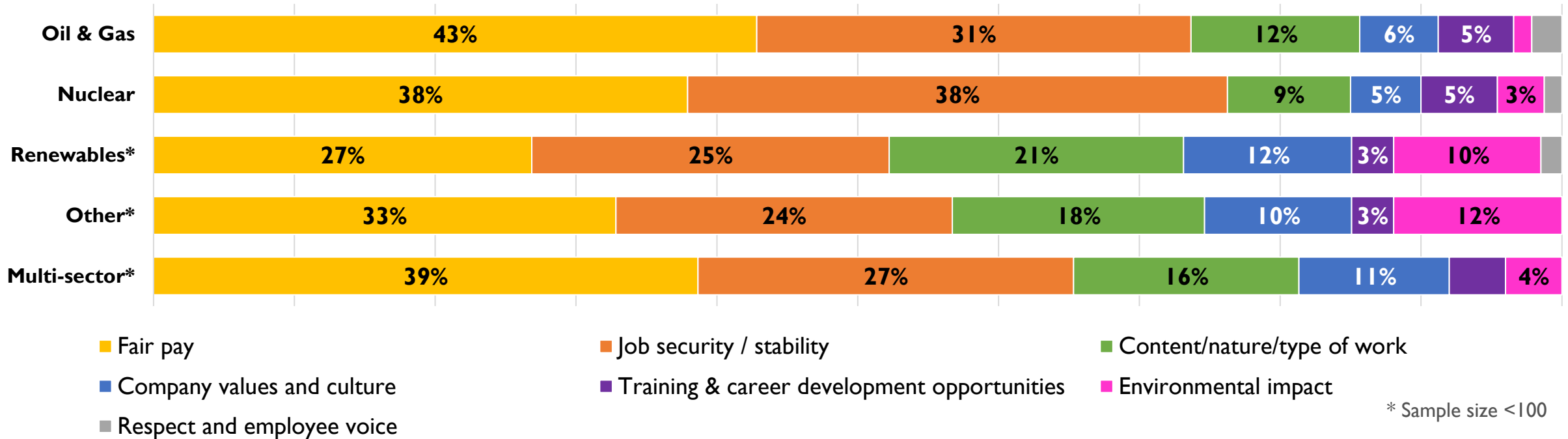
Number of participants selecting job factor in top 3 most important for their current job (n=916)



- The factors most commonly cited in the top 3 most important factors for participants' current job were (i) 'Fair pay' and (ii) 'Job security / stability'. These were selected in the top three by 82% and 77% percent of all participants respectively.
- Fair pay (39%) and Job security / stability (32%) were also most commonly cited as the single most important factor.
- 'Environmental impact' (17%) and 'Respect and employee voice' (19%) were selected in the top three factors by the fewest number of participants.

JOB FACTORS

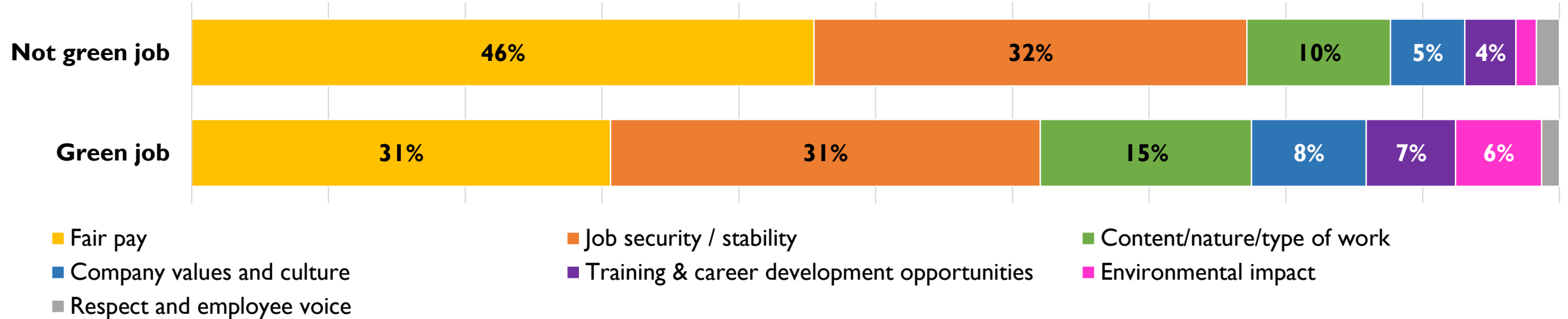
What is the most important factor in your current job? – by Sector
(n=916)



- For almost all sectors (except “Other”), ‘Fair pay’ was most commonly selected as the most important factor in participants’ current job, followed by ‘Job security / stability’. However, the total proportion of participants selecting these two options was much lower for those working in Renewables (52%) than those in Nuclear (76%) or Oil and Gas (74%).
- More than a fifth (21%) of participants working in Renewables selected “Content/nature/type of work” as the most important factor compared to just 9% in Nuclear and 12% in Oil and Gas.

JOB FACTORS

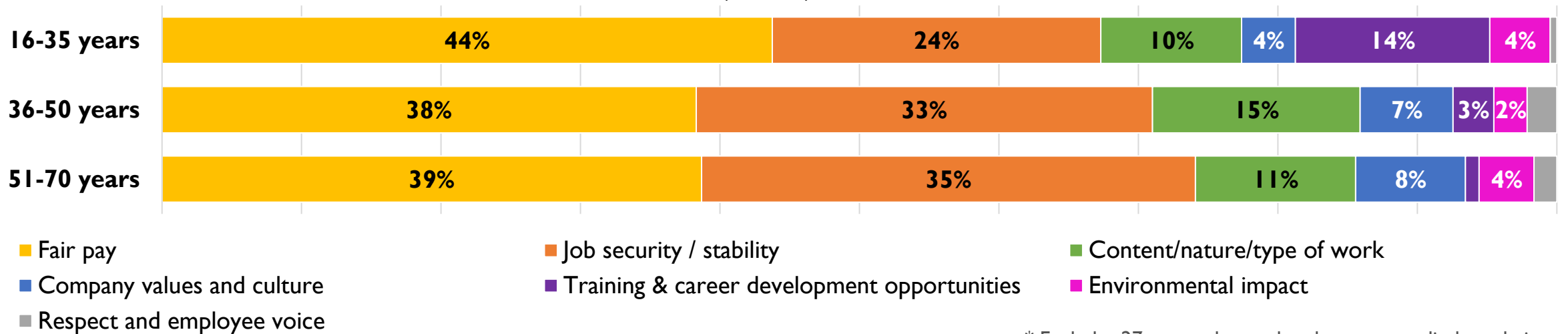
What is the most important factor in for you in your current job?
– In ‘green jobs’ v not in ‘green jobs’
(n=916)



- For those who stated that they would not describe their current job as a green job, ‘Fair pay’ was most commonly selected as the most important factor in their current job (46% of respondents), followed by ‘Job security/stability’ (32%).
- By comparison, for those that do describe their current job as a green job, equal proportions of respondents (31%) selected ‘Job security/stability’ and ‘Fair pay’ as the most important factor in their current job.
- Each of the remaining factors was selected as the most important by a higher proportion of respondents in a green job than those not in a green job, particularly ‘Content/nature/type of work’ (15% v 10%) and ‘Environmental impact’ (6% v 1%).

JOB FACTORS

What is the most important factor in for you in your current job?
 – by Age Group
 (n=889*)



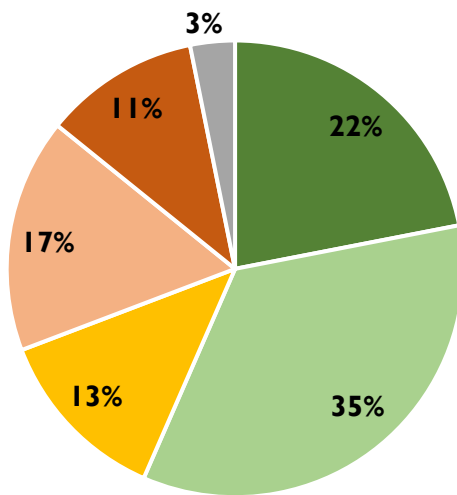
* Excludes 27 respondents who chose not to disclose their age

- There was a similar distribution of responses amongst participants in the higher two age categories (36-50 years and 51-70 years), with ‘Fair pay’ most commonly cited as the most important factor (38-39% of respondents) followed by ‘Job security/stability’ (33-35%). A slightly greater proportion of respondents aged 36-50 selected ‘Content/nature/type of work’ as the most important factor (15%) compared to those aged 51-70 years (11%).
- A higher proportion of the youngest age group (16-35 years) selected ‘Fair pay’ as the most important factor (44%) than the other two age groups. In addition, **a greater proportion of 16-35 year olds selected ‘Training & career development opportunities as the most important factor (14%), making it the third most common option within this age group.** By comparison, ‘Training & career development’ was selected by just 3% of 36-50 year olds and 1% of 51-70 year olds.

THE ENERGY TRANSITION

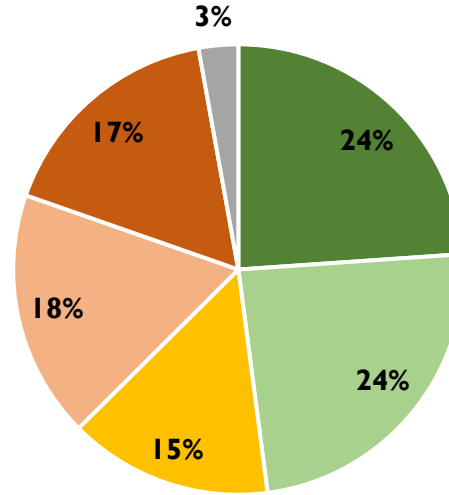
The transition to net zero will create new job opportunities in the energy sector in Scotland

(n=916)



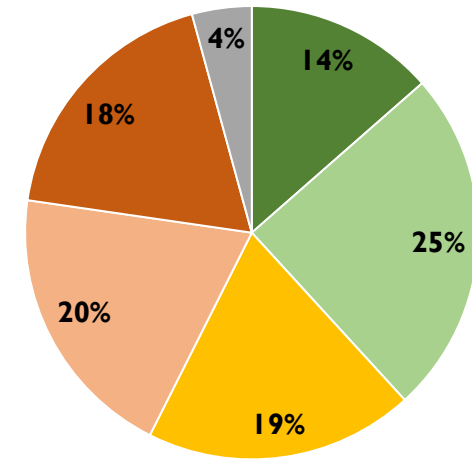
The transition to net zero will weaken energy security in Scotland

(n=916)



The transition to net zero will contribute to a strong and prosperous Scottish economy

(n=916)

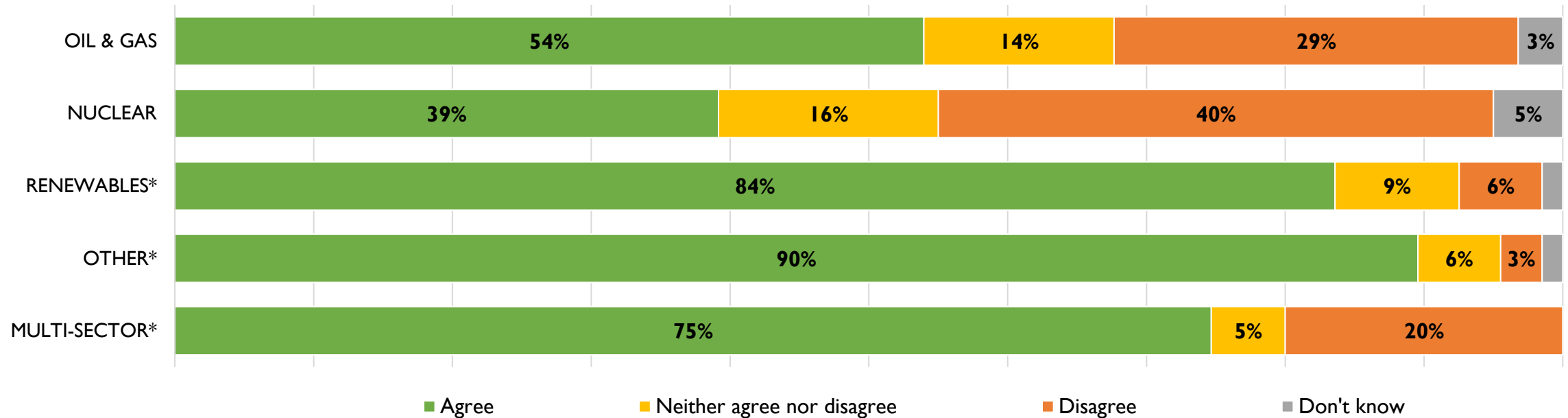


■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

- The majority of respondents (57%) agreed that the transition to net zero will create new job opportunities in the energy sector in Scotland, with over a fifth (22%) strongly agreeing. 28% disagreed, with just over 1 in ten (1%) strongly disagreeing.
- Almost half (48%) of all respondents agreed that the transition to net zero will weaken energy security in Scotland, with almost a quarter (24%) strongly agreeing. Over a third (35%) disagreed, with 17% strongly disagreeing.
- There were mixed views on whether the transition to net zero will contribute to a strong and prosperous Scottish economy. 39% agreed with this statement and 38% disagreed. Almost a fifth (19%) neither agreed nor disagreed.

THE ENERGY TRANSITION

The transition to net zero will create new job opportunities in the energy sector in Scotland - by Sector
(n=916)

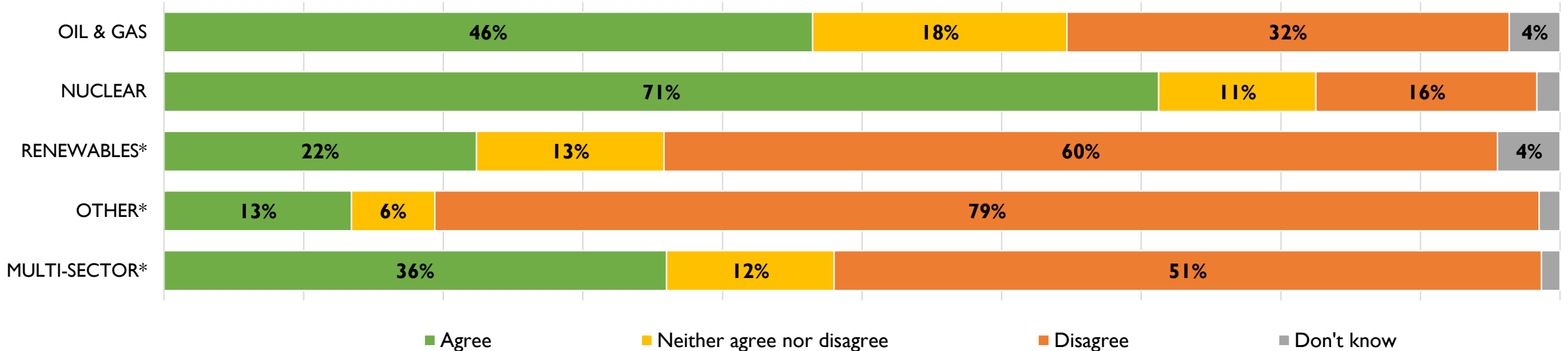


* Sample size <100

- For all sectors except Nuclear, the majority of respondents (strongly or somewhat) agreed that the transition to net zero will create new job opportunities in the energy sector in Scotland.
- A highest proportion of *agreement* was from respondents working in the Other (90%) and Renewables (84%) sectors, compared to only 39% of respondents working in Nuclear and 54% in Oil & Gas.
- Those working in Nuclear had the highest proportion of *disagreement* with this statement (40%) followed by Oil & Gas (29%).

THE ENERGY TRANSITION

The transition to net zero will weaken energy security in Scotland - by Sector
(n=916)

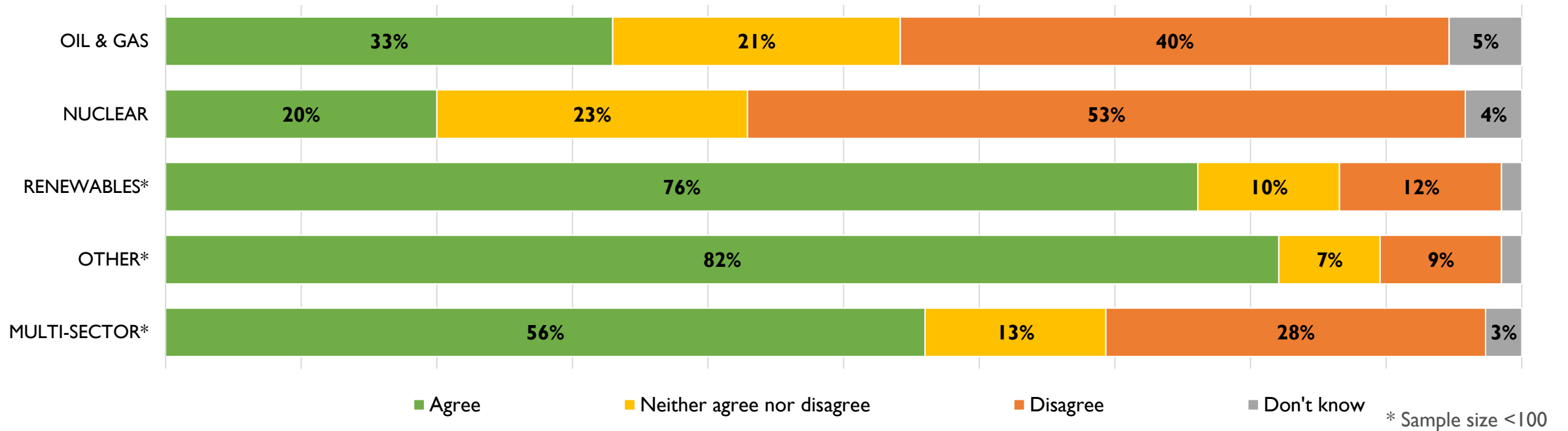


* Sample size <100

- Views on whether the transition to net zero will weaken energy security in Scotland varied across different sectors.
- **A large majority of respondents working in Nuclear (71%) agreed with this statement. By comparison just 22% of those working in Renewables and 13% in Other sectors agreed.**
- There was majority disagreement with the statement amongst respondents in the Renewables (60%) and Other (79%) sectors. However, just 16% of those working in Nuclear disagreed.
- Those working in Oil & Gas expressed more mixed views, with 46% *agreeing* and 32% *disagreeing*.

THE ENERGY TRANSITION

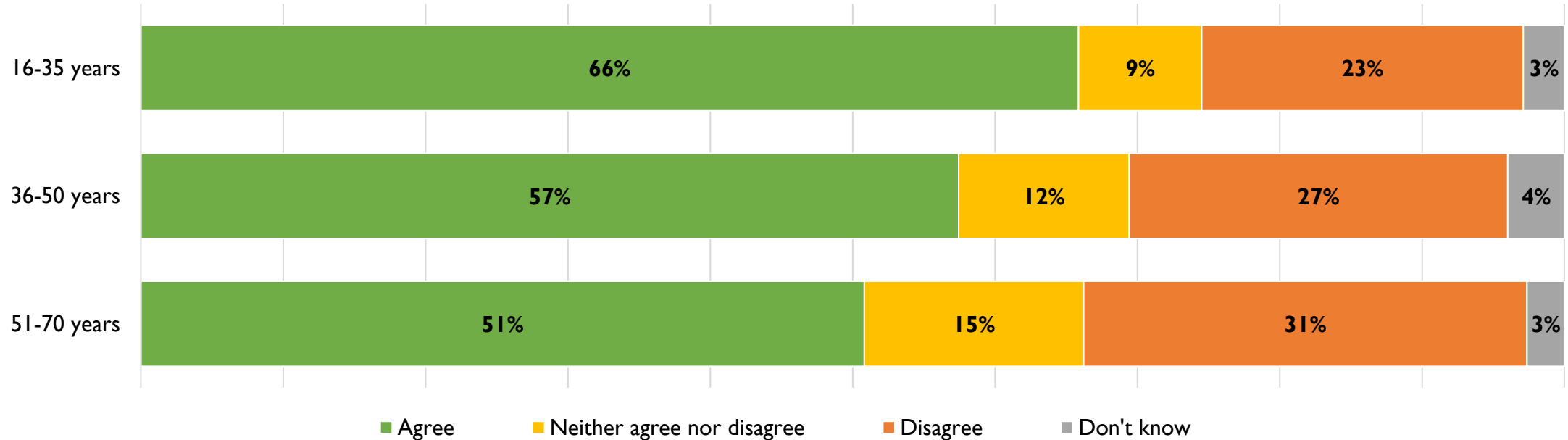
The transition to net zero will contribute to a strong and prosperous Scottish economy - by Sector
(n=916)



- There was a difference in perspectives on whether the transition to net zero will contribute to a strong and prosperous Scottish economy between respondents working in different sectors.
- **More than three quarters of respondents in Renewables (76%) and Other (82%) sectors agreed with this statement, compared to just one fifth (20%) in Nuclear and one third (33%) in Oil and Gas.**
- The majority of respondents working in Nuclear (53%) disagreed with the statement, as did 40% in Oil and Gas.

THE ENERGY TRANSITION

The transition to net zero will create new job opportunities in the energy sector in Scotland
- by Age Group
(n=889*)

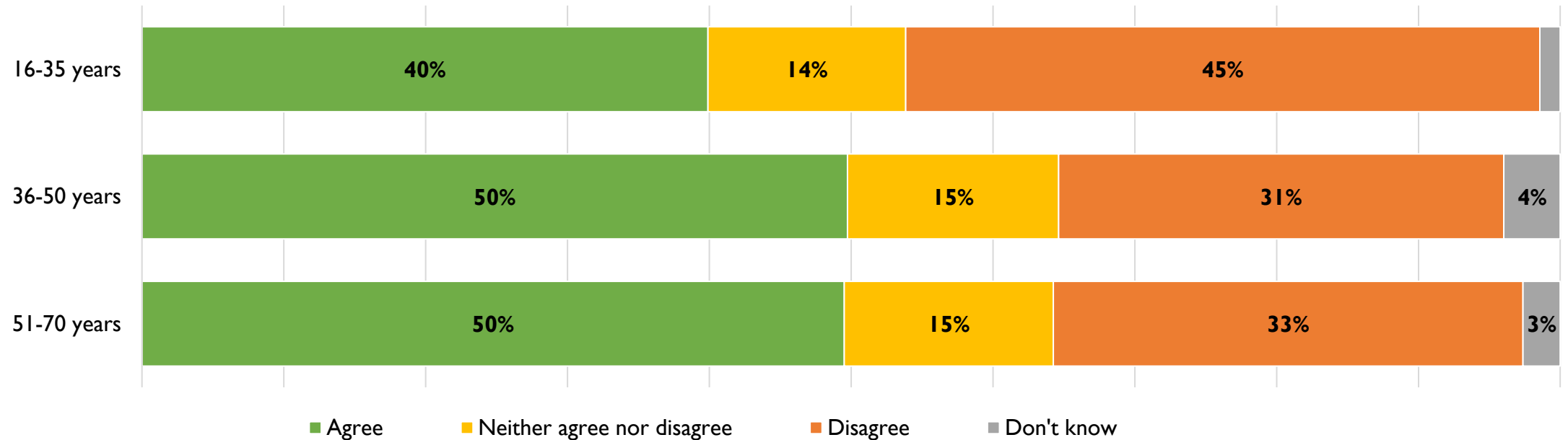


* Excludes 27 respondents who chose not to disclose their age

- Whilst a majority of all age groups agreed that transition to net zero will create new job opportunities in the energy sector in Scotland, the proportion of respondents agreeing declined with age. **Two thirds (66%) of the youngest age group (16-35 years) agreed with this statement**, compared to 57% of 36-50 year olds and 51% of 51-70 year olds.

THE ENERGY TRANSITION

The transition to net zero will weaken energy security in Scotland - by Age Group
(n=889*)

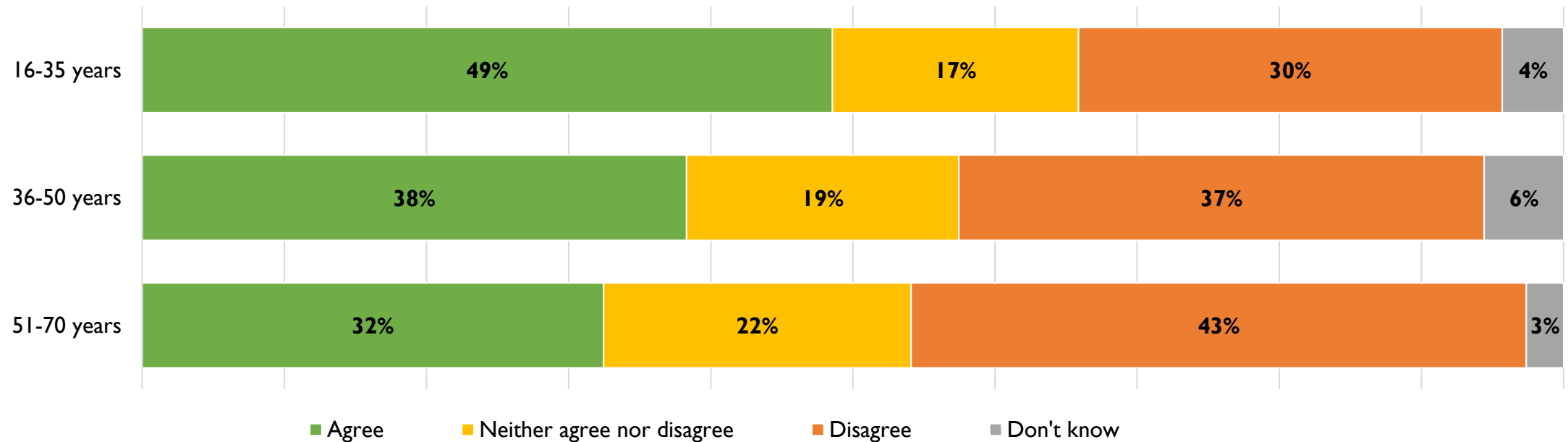


* Excludes 27 respondents who chose not to disclose their age

- Views on whether the transition to net zero will weaken energy security in Scotland were very similar for the older two age groups (36-50 years and 51-70 years) with half (50%) agreeing, and 31-33% disagreeing.
- There were higher levels of disagreement (45%) and lower levels of agreement (40%) amongst the youngest age group (16-35 years).

THE ENERGY TRANSITION

The transition to net zero will contribute to a strong and prosperous Scottish economy - by Age Group
(n=889*)

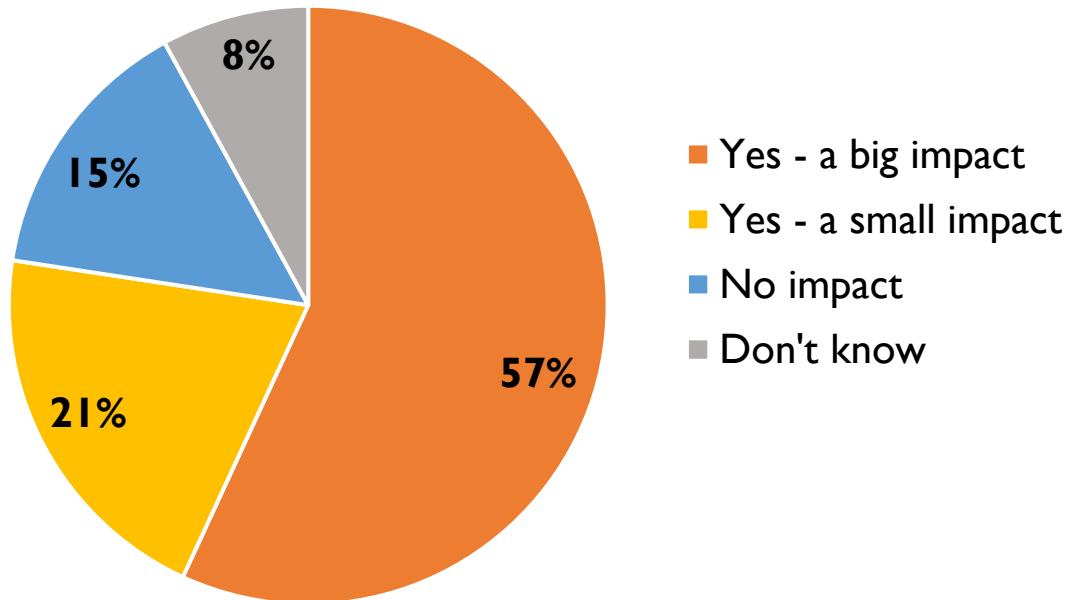


* Excludes 27 respondents who chose not to disclose their age

- There was a correlation between respondents' age and their views on whether the transition to net zero will contribute to a strong and prosperous Scottish economy. **Almost half (49%) of 16-35 year olds agreed with this statement, compared to 38% of 36-50 year olds and 32% of 51-70 year olds.**
- 43% of 51-70 year olds disagreed with this statement, compared to only 30% of 16-35 year olds.

THE ENERGY TRANSITION

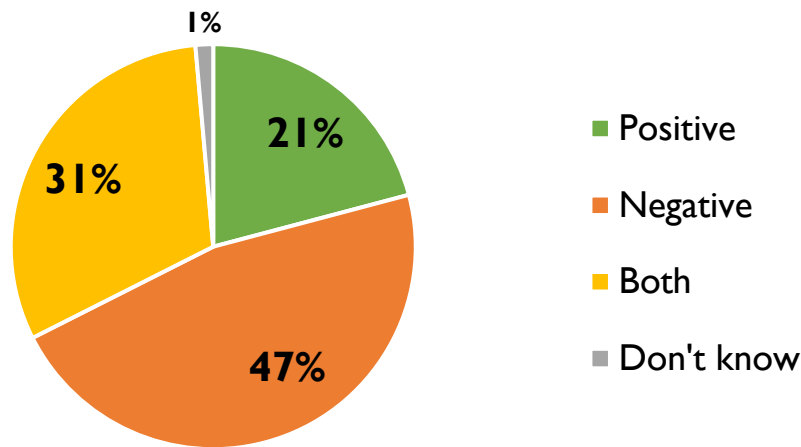
Do you think the transition to net zero will have an impact on your current employment?
(n=916)



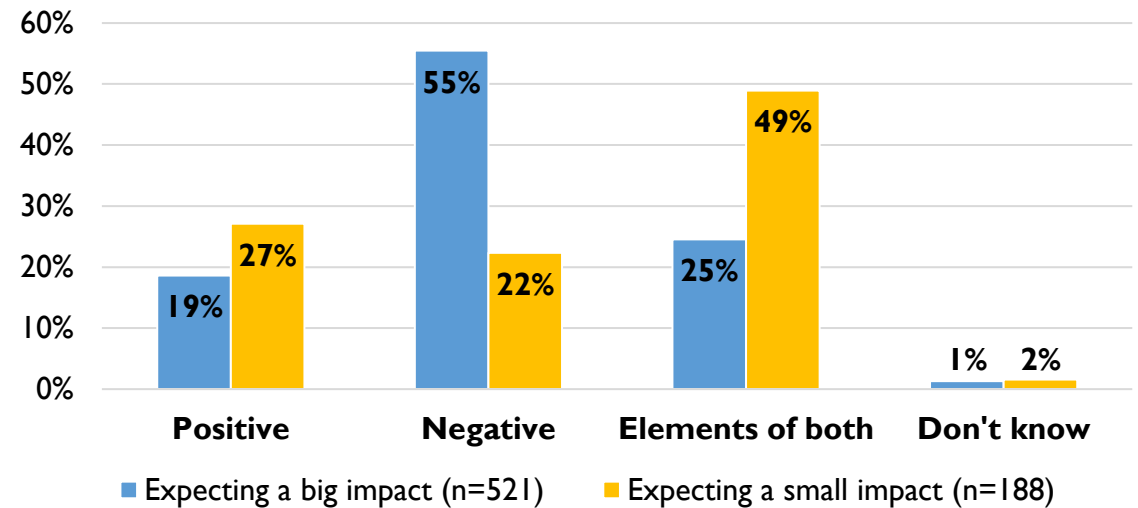
- A large majority (78%) of respondents think the transition to net zero will have an impact on their current employment.
- 57% think this will be a big impact.
- 15% do not think the transition will have an impact on their current employment.

THE ENERGY TRANSITION

Do you think the net zero transition will have a positive or negative impact on your employment?
(n=709)*



Do you think the net zero transition will have a positive or negative impact on your employment?
(n=709)*



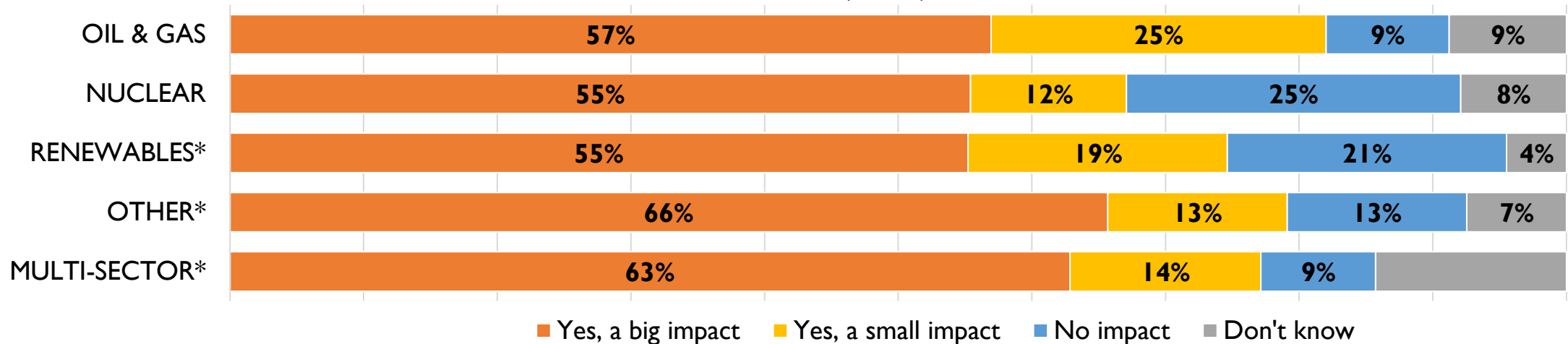
* Only includes respondents who stated that they think the net zero transition will have an impact on their current employment

- The 709 respondents who said that they think the transition will have an impact on their employment were asked whether they thought this impact would be positive or negative or have both positive and negative elements.
- Only around a fifth (21%) of respondents think this impact will be positive, **almost half (47%) think the impact will be negative**, and 31% think there will be both positive and negative elements.
- Over half (55%) of those who stated that they expect a big impact on their employment expect this impact to be negative, whereas only 22% of those expecting a small impact expect this to be negative. Almost half of those expecting a small impact think this will include both positive and negative impacts, compared to a quarter (25%) of those expecting a big impact.

THE ENERGY TRANSITION

Do you think the transition to net zero will have an impact on your current employment?

By Sector
(n=916)



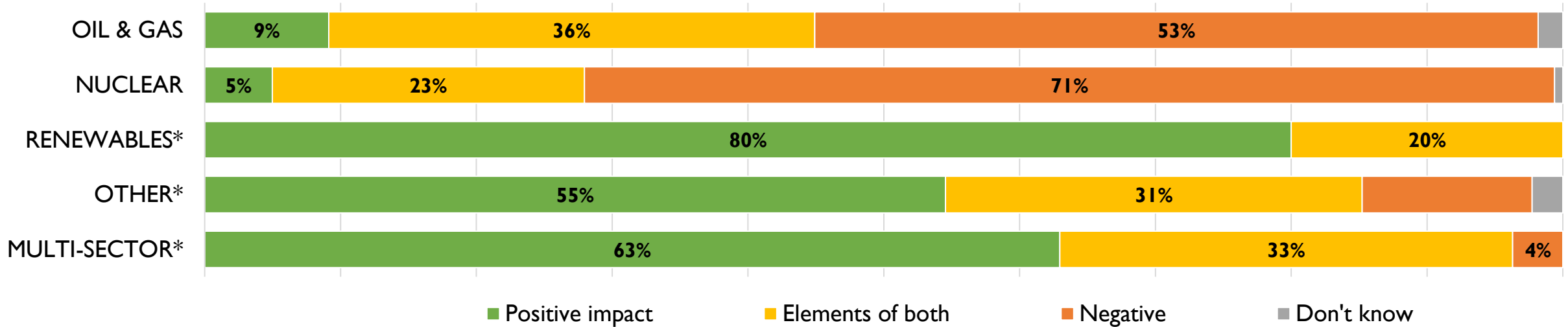
* Sample size <100

- The **majority of respondents across all sectors** said that they think the transition will have an impact on their **current employment**, although there was some variance in the specific proportion between sectors.
- Overall, 82% of respondents working in Oil & Gas expect some impact on their employment, which was the highest proportion of all sectors.
- Nuclear had the lowest proportion of respondents who expected an impact. At 72%, this was still a large majority of respondents. However, a quarter (25%) of respondents working in Nuclear did not think the transition would have an impact on their employment, compared to just 9% working in Oil & Gas or in Multiple Sectors.

THE ENERGY TRANSITION

Do you think the net zero transition will have a positive or negative impact on your employment?

By Sector
(n=709)**



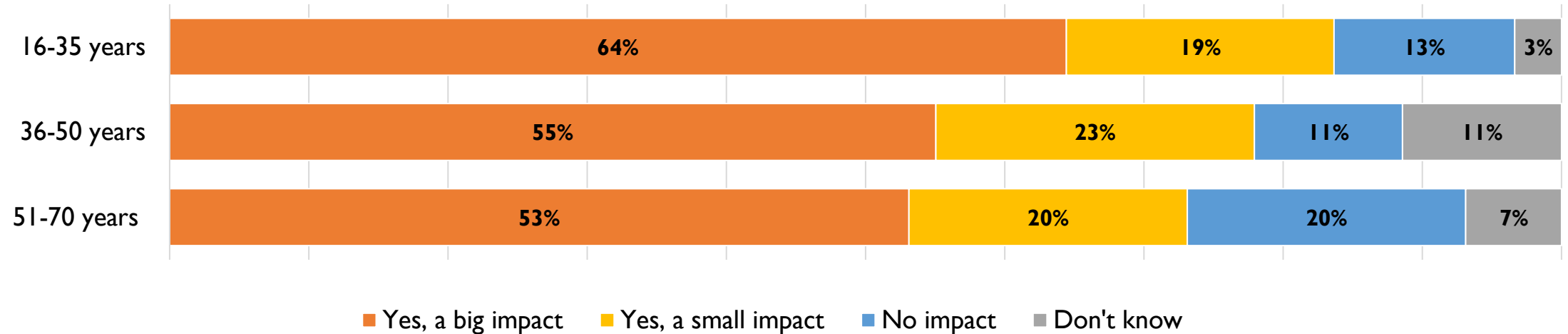
* Sample size <100

- There were clear differences between sectors when respondents were asked whether they expected this impact to be positive or negative.
- **Just 5% of those working in Nuclear and 9% in Oil & Gas think that the impact on their current employment will be positive, compared to 80% working in Renewables.**
- None of the respondents working in Renewables expected a negative impact on their employments, compared to 71% in Nuclear and 53% in Oil & Gas.

THE ENERGY TRANSITION

Do you think the transition to net zero will have an impact on your current employment?

By Age Group
(n=889)*



* Excludes 27 respondents who chose not to disclose their age

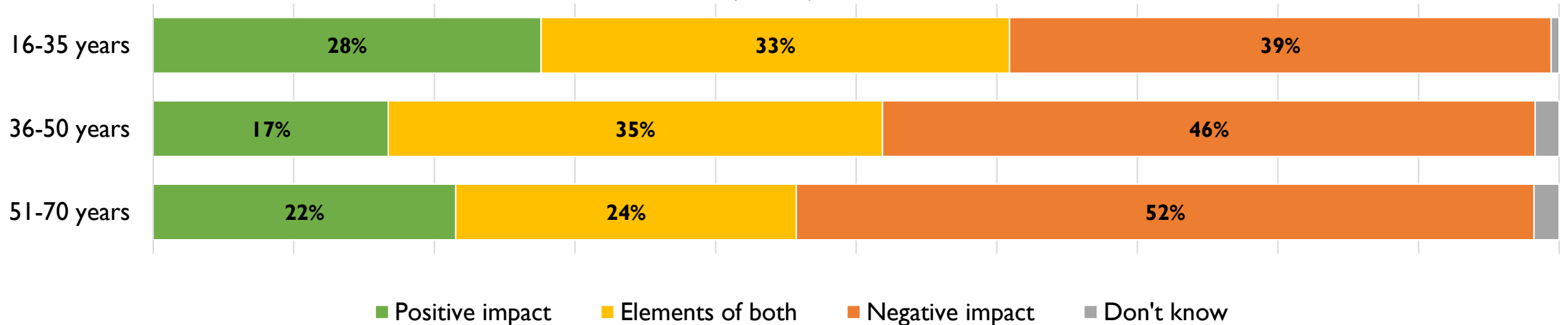
- The majority of respondents across all age groups expect the net zero transition to have an impact on their current employment.
- The proportion of respondents who expect there to be an impact on their employment is **higher for the youngest age group (16-35 years) with 64% expecting a big impact.**
- By comparison, 55% of 36-50 year olds and 53% of 51-70 year olds expect a big impact on their employment.

THE ENERGY TRANSITION

Do you think the net zero transition will have a positive or negative impact on your employment?

By Age Group

(n=709)*

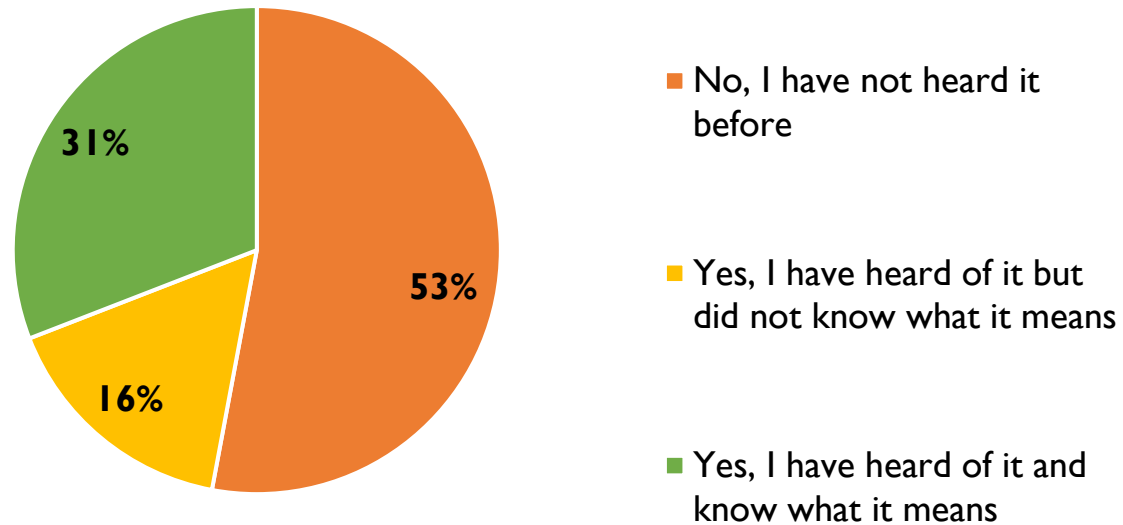


* Excludes 27 respondents who chose not to disclose their age

- The proportion of respondents who expect the impact on their employment to be negative is correlated with age.
- **Over half (52%) of the oldest age group (51-70 years) expect a negative impact**, compared to 46% of 36-50 year olds and 39% of 16-35 year olds.
- Whilst the proportion who expect a positive impact is highest for the youngest age group (28%), it is lowest for the middle age group (36-50 years) with only 17% expecting a positive impact.

JUST TRANSITION

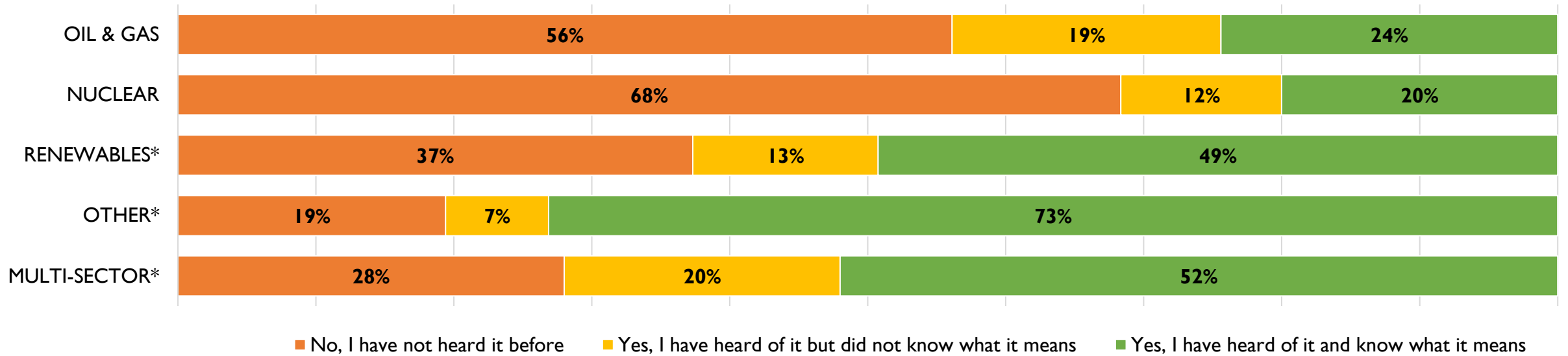
Have you heard of the term Just Transition before?
(n=916)



- The majority (53%) of respondents said that they had not heard of the term 'Just Transition' before taking the survey.
- Whilst a total of 47% had heard of the term 'Just Transition', only 33% said they know what it means.

JUST TRANSITION

Have you heard of the term Just Transition before? – by Sector
(n=916)

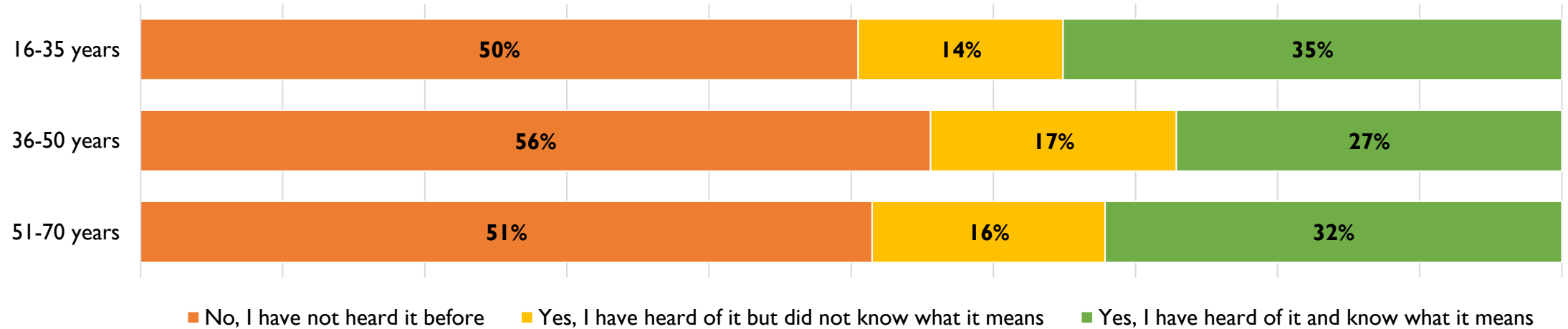


* Sample size <100

- The majority of respondents working in both Nuclear (68%) and in Oil & Gas (56%) said they had not heard of the term Just Transition before.
- By comparison, 62% of those working in Renewables, 72% in Multiple Sectors and 80% in ‘Other’ sectors had heard of Just Transition before.
- However, **less than half (49%) in Renewables, a quarter (24%) in Oil & Gas and a fifth (20%) in Nuclear said they knew what the term meant.**

A JUST TRANSITION

Have you heard of the term **Just Transition** before? – by Age Group
(n=889*)

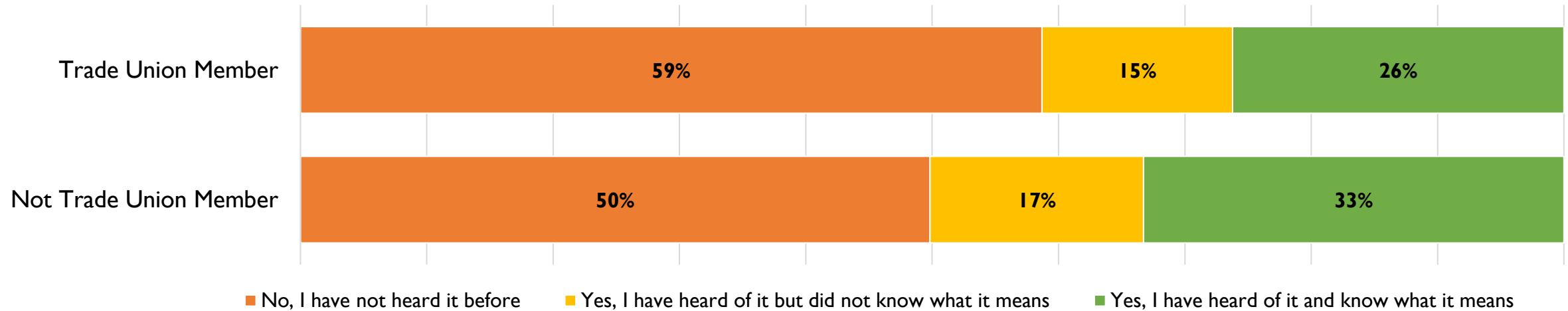


* Excludes 27 respondents who chose not to disclose their age

- There was **no apparent correlation between age group and awareness of the term 'Just Transition'**, with approximately similar proportions in each age group having heard of the term.

A JUST TRANSITION

Have you heard of the term Just Transition before? - by Trade Union Membership
(n=891*)



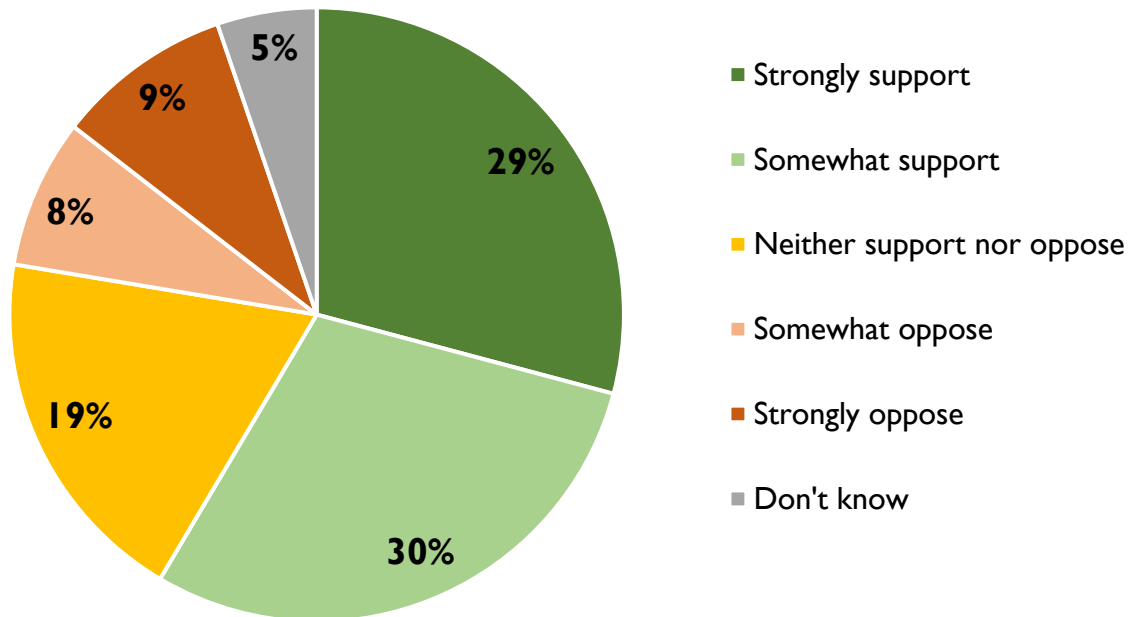
* Excludes 25 respondents who chose not to disclose whether they were a trade union member

- There was **slightly higher knowledge of the term 'Just Transition' amongst those who were not trade union members.**
- A third (33%) of respondents who stated they were not members of a trade union said that they had heard of Just Transition and know what it means, compared to just over a quarter (26%) of respondents who were trade union members.
- A greater proportion of trade union member respondents had not heard the term before (59%) than those who were not trade union members (50%).

N.B. The majority (85%) of respondents who stated they are trade union members currently work in either the Nuclear or Oil & Gas sector.

A JUST TRANSITION

To what extent do you support the Scottish Government's approach to a just transition?
(n=916)



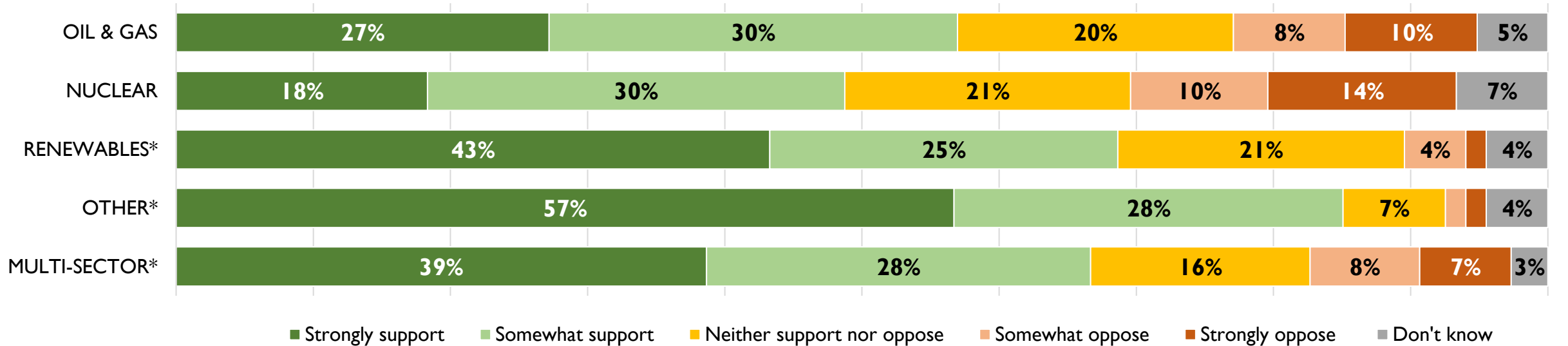
- Participants were provided with a description of the Scottish Government's approach to just transition (shown in the box below) and asked whether they support this approach.
- **The majority (59%) of respondents said they support the Scottish Government's approach to just transition.**
- 15% said they somewhat or strongly opposed the approach, and 19% neither supported or opposed it.

The Scottish Government has described just transition as:

"Both the outcome – a fairer, greener future for all – and the process that must be undertaken in partnership with those impacted by the transition to net zero. Just transition is how we get to a net zero and climate resilient economy, in a way that delivers fairness and tackles inequality and injustice."

A JUST TRANSITION

To what extent do you support the Scottish Government's approach to a just transition? - by Sector
(n=916)

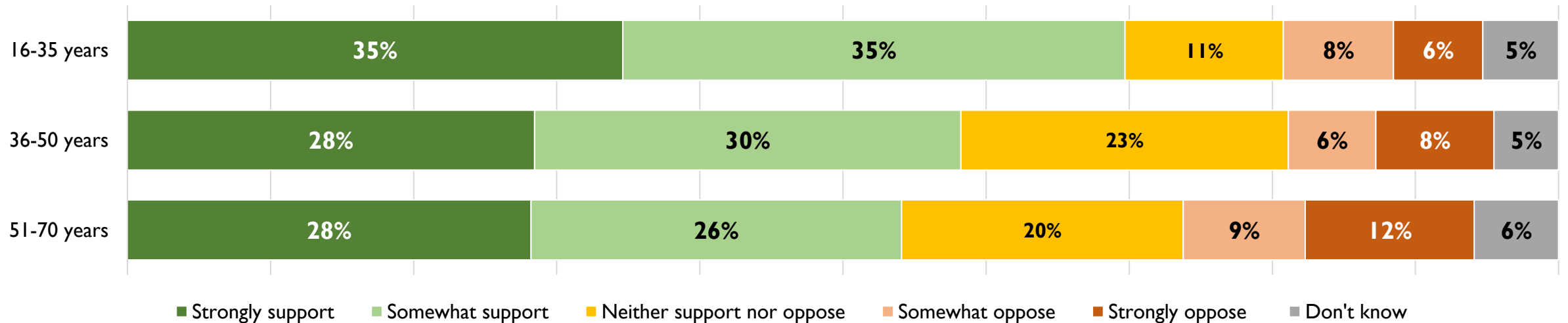


* Sample size <100

- There was majority support for the Scottish Government's approach to just transition amongst respondents working in all sectors except Nuclear.
- **Less than half (48%) of respondents working in Nuclear said that they somewhat or strongly support the Scottish Government's approach**, and around a quarter (24%) said they somewhat or strongly opposed it.
- **By comparison, over two thirds (68%) of those working in Renewables and 85% in 'Other' sectors support the approach**, and 5% or less oppose it.

A JUST TRANSITION

To what extent do you support the Scottish Government's approach to a just transition? - by Age Group
(n=889)

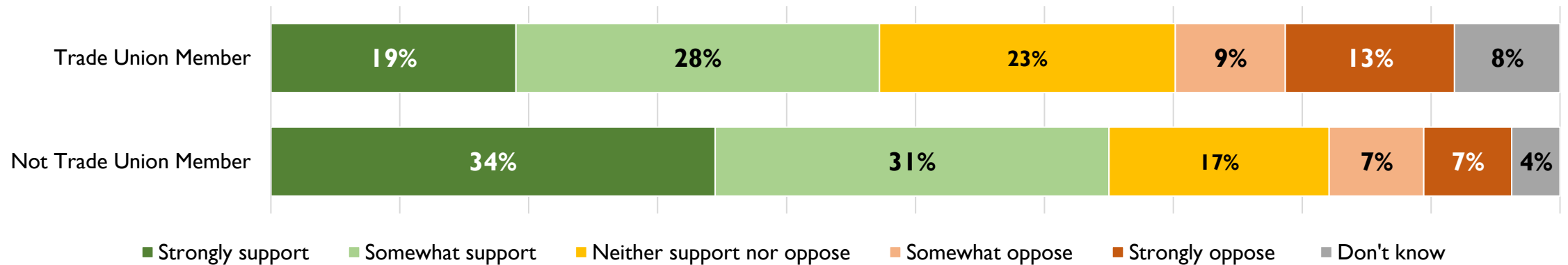


* Excludes 27 respondents who chose not to disclose their age

- The proportion of respondents stating they strongly or somewhat support the Scottish Government's approach to just transition was **highest for the youngest age group (16-35 years), with a total of 70% of respondents stating support.**
- By comparison, 54% of the oldest age group (51-70 years) said they strongly or somewhat supported the approach.
- Over a fifth (21%) of respondents in the oldest age group opposed the approach, compared to 14% in the youngest age group.

A JUST TRANSITION

To what extent do you support the Scottish Government's approach to a just transition?
- by Trade Union Membership
(n=891*)



* Excludes 25 respondents who chose not to disclose whether they were a trade union member

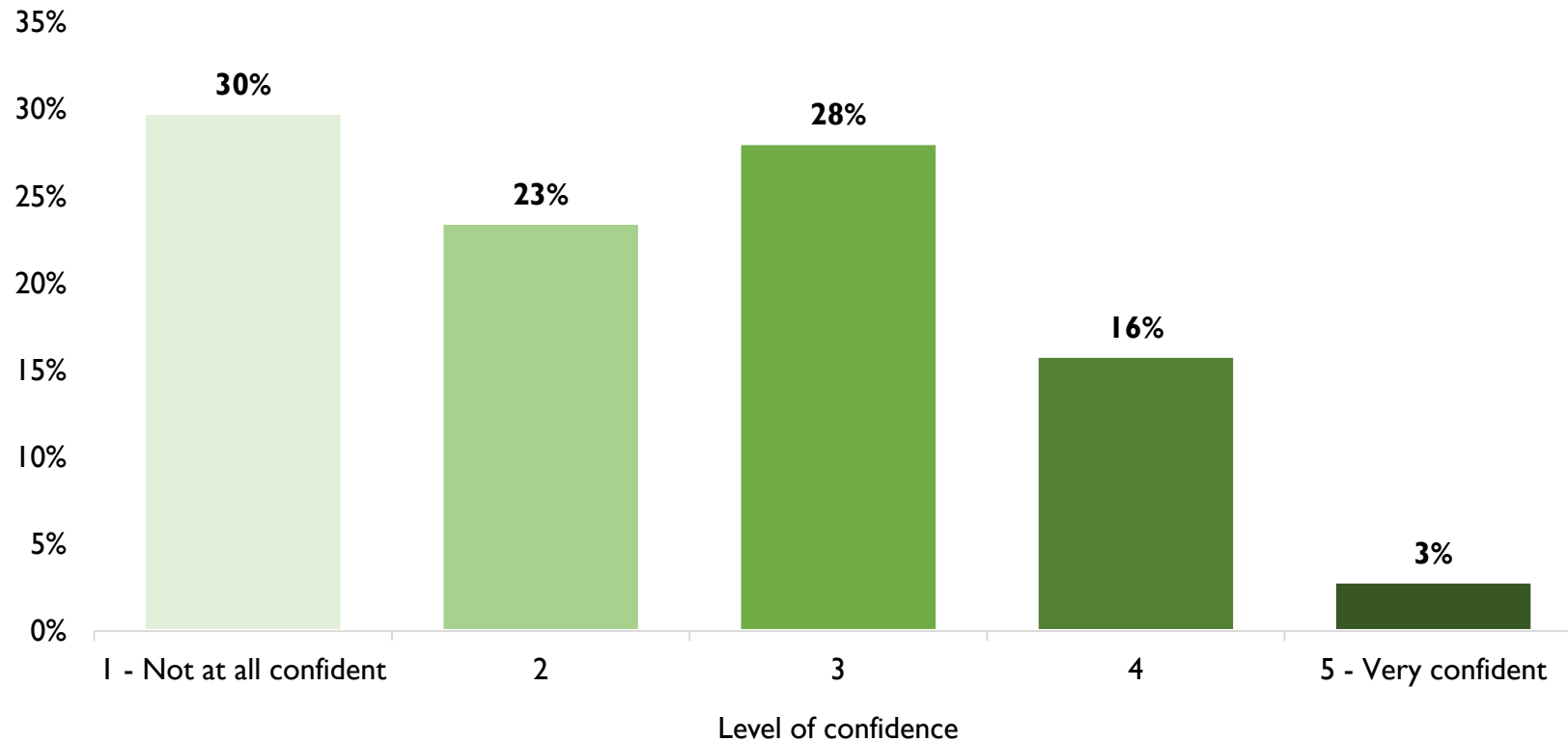
- A greater proportion of respondents expressing support for the Scottish Government's approach to just transition amongst those who stated they were not trade union members than those who were trade union members.
- **Almost two thirds (65%) of those not in a trade unions stated that they strongly or somewhat support the approach, compared to less than half (47%) of respondents who were trade union members.**
- Over a fifth (22%) of those who were in a trade union stated that they strongly or somewhat opposed the approach, compared to 14% of those we were not trade union members.

N.B. The majority (85%) of respondents who stated they are trade union members currently work in either the Nuclear or Oil & Gas sector.

A JUST TRANSITION

How confident are you that Scotland will achieve a 'Just Transition' for the whole energy sector by 2045?

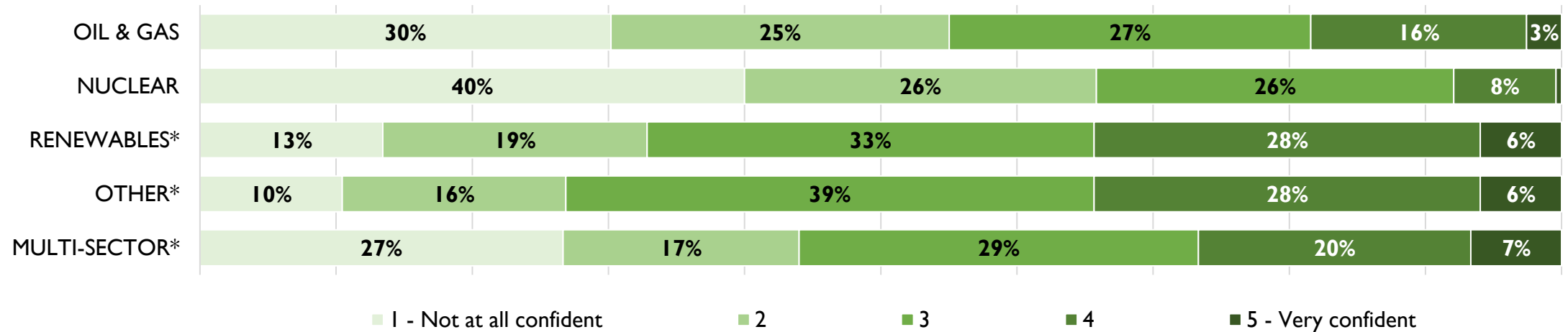
(n=916)



- Participants were asked to indicate how confident they were that Scotland will achieve a just transition for the energy sector by 2045, using a scale from 1 to 5, where 1 is 'not at all confident' and 5 is 'very confident'.
- **Just 3% of respondents said they were "very confident" and 30% said they were "not at all confident"**.
- Overall, over half (53%) of respondents selected 1 or 2 (indicating low confidence) and only 19% selected 4 or 5 (indicating high confidence).

A JUST TRANSITION

How confident are you that Scotland will achieve a 'Just Transition' for the whole energy sector by 2045? - by Sector
(n=916)

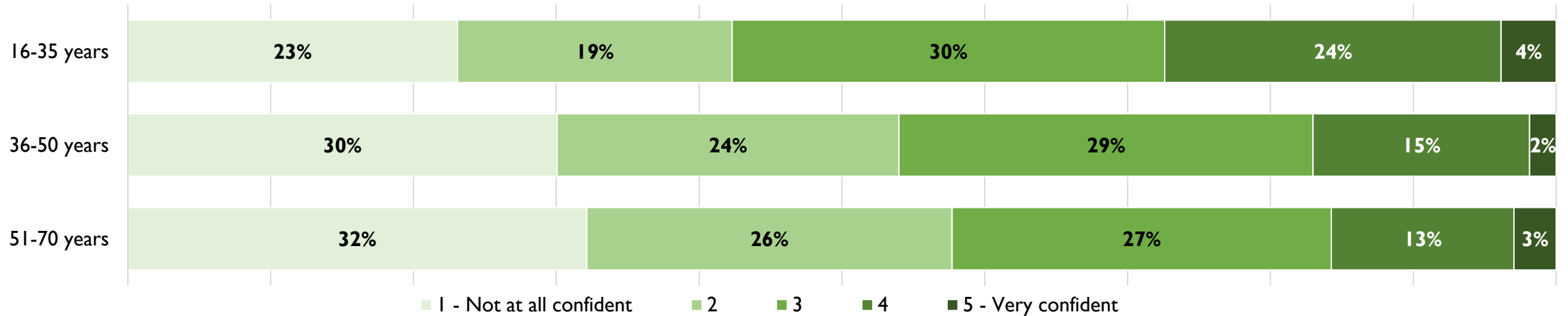


* Sample size <100

- Respondents in different sectors expressed different levels of confidence in Scotland achieving a just transition by 2045.
- **Two thirds (66%) of those working in Nuclear and 55% in Oil & Gas indicated low confidence (1 or 2), compared to one third (32%) in Renewables and around a quarter (26%) in 'Other' sectors.**
- Over a third (34%) of respondents in both Renewables and 'Other' sectors indicated high confidence (4 or 5) compared to just 9% in Nuclear and 19% in Oil & Gas.

A JUST TRANSITION

How confident are you that Scotland will achieve a 'Just Transition' for the whole energy sector by 2045?
- by Age Group
(n=889*)

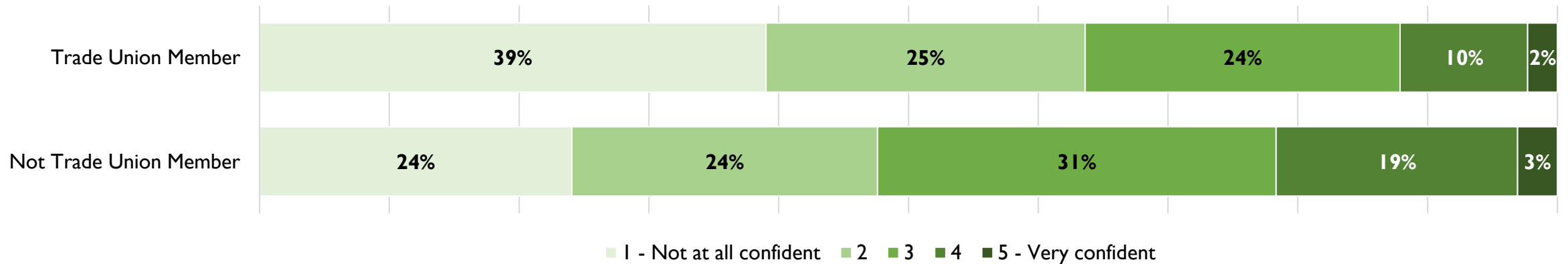


* Excludes 27 respondents who chose not to disclose their age

- The level of confidence in Scotland achieving a just transition by 2045 varied across respondents in different age groups.
- **The oldest age group (51-70 years) had the highest proportion of respondents indicating low confidence, with 58% selecting 1 or 2, compared to 42% in the youngest age group (16-35 years).**
- The youngest age group also had a higher proportion of respondents indicating higher confidence, with 28% selecting 4 or 5, compared to 16% in the oldest age group.

A JUST TRANSITION

How confident are you that Scotland will achieve a 'Just Transition' for the whole energy sector by 2045?
- by Trade Union Membership
(n=891*)



* Excludes 25 respondents who chose not to disclose whether they were a trade union member

- There was a greater proportion of respondents expressing low confidence that Scotland will achieve a 'Just Transition' for the whole energy sector by 2045 amongst those who stated they were trade union members than those who were not.
- **Almost two thirds (64%) of trade union member respondents selected a low confidence level (1 or 2), compared to less than half (48%) of respondents who were not trade union members.**
- Over a fifth (22%) of those not in a trade union expressed high confidence (4 or 5), compared to just 12% of trade union members.

N.B. The majority (85%) of respondents who stated they are trade union members currently work in either the Nuclear or Oil & Gas sector.