

What the North Thinks

The first independent survey of over 3,000 people across Scotland's communities most impacted by energy transition.

TRUE NORTH
ADVISORS

 **Diffley**
Partnership

ETZ
ENERGY TRANSITION ZONE

Foreword

ETZ Ltd is proud to partner with Diffley Partnership and True North Advisors in presenting the findings of this independent study of unprecedented scale and detail.

Over 3,000 people across Aberdeenshire, Aberdeen City, Angus, Highland, Moray and Perth & Kinross – the communities most impacted by energy transition – have been surveyed on vital issues such as the delivery of renewable energy projects, upgrading Scotland's electricity grid, community benefits, transmission charging and the role of oil and gas.

These communities are at the vanguard of the ambition to establish a globally recognised domestic renewables industry. The size of the potential economic prize is vast and the North and North East of Scotland have the vital ingredients required to win a significant portion of the spoils.

Firstly, we are blessed with an unrivalled pipeline of projects spanning offshore wind, hydrogen, carbon capture and decommissioning. To take just one example, offshore wind projects from ScotWind and INTOG leasing rounds are expected to generate £96.1bn of investment over the next 15 years and the surveyed areas are located close to most of these sites.

Secondly, owing to a world-class oil and gas sector, the North and North East are home to over 1,000 energy supply chain companies, the highest concentration of such businesses anywhere in the UK, and they have the existing capability – excellence in R&D, innovation, technology, engineering – to deliver these projects when they become available at commercial scale.

Quite clearly, this is strong platform for success, but in order to secure a competitive advantage there are still significant challenges to overcome if we are to turn the potential into a reality.

This survey tests these challenges directly with our fellow citizens and it is evident that whilst they are largely supportive of the need for energy transition, it must be aligned with demonstrable local job creation and investment, as well as the overcoming of various public policy hurdles, with clearer lines of communication among government, energy companies and the public. There is also clear recognition among respondents that we must not lose our existing, highly valuable industry and skills base that the oil and gas sector already provides.

ETZ Ltd will therefore share these findings extensively with industry and policymakers, at a local and national level, to ensure that, working together, we respond positively to these views and deliver a truly managed and just transition that provides the lasting economic and societal benefits that we all desire.

**Maggie
McGinlay**
CEO
ETZ Ltd.



Analysis of Findings

Scotland is going through an energy transition that will transform the country's industrial base, impacting how we all consume our energy in the future. The most visible sign of this is the ongoing upgrading of Scotland's electricity system, including building new onshore and offshore links and substations to support this transition to renewable energy.

The impact of the transition, in terms of employment, infrastructure, local economies and the visual landscape, is particularly relevant to the North and North East of the country.

Like any transformational change of this magnitude, it is vital to understand the views and perceptions of those communities most deeply affected, and crucial that policymakers and those planning and implementing the transition, take these views into account.

Our survey of people in those communities offers firm, high quality insights into their views and aspirations for future energy provision. Interviewing 3,235 people across the most impacted areas (Aberdeenshire, Aberdeen City, Angus, Highland, Moray and Perth & Kinross) in November 2025, this is a study of unprecedented scale and detail.

There are a number of key themes that flow from the analysis of the research and some clear steers for decision makers and the sector as they consider how to maximise success from the transition.

There is undoubtedly considerable enthusiasm and positivity about the electricity upgrade, what it signifies and what it could mean for communities.

More than 4 in 10 (43%) feel positive about the work underway to upgrade the grid, double the proportion of those who feel negative (22%) and this sense of positivity prevails when we dig into more detail.

This includes the 55% who think that the upgrade will create new jobs, 51% who think the upgrade is necessary to tackle climate change and 42% who think the upgrade will be good for their community; in all cases these far outweigh those who feel negatively on these issues.

More broadly, the public in the North of Scotland are supportive of the bigger picture with the transition. A clear majority (55%) think the switch to renewables is 'the right thing to do', double the proportion who think the opposite (28%), and almost half (47%) think that renewable energy projects are not being delivered quickly enough (just 15% think they are), signifying a desire for speedier progress on the transition.

However, the data also reveals public hesitancy and a lack of confidence in achieving net zero targets combined with significant positivity for the ongoing economic importance of the oil and gas industry.

The public in Northern Scotland is split evenly on the issue of net zero, with 38% believing that the UK's ambition to achieve it by 2050 is right and 37% seeing it as wrong. There is, however, very little confidence that the 2050 target is achievable, with just 7% believing it will be met, while 63% think the opposite.

And while, as we have seen, there is optimism that grid upgrades will create new jobs, the public is split on whether renewable energy developers will create long-term and local jobs, with 34% thinking this will happen and 31% thinking otherwise.

So, the public view is both supportive of transition and the need to move more quickly in that regard, while recognising the economic value of traditional energy supply during the transition period. Looking ahead, the public is also clear on what they see as priorities for the grid upgrade and transition to renewables, and the benefits they want to see in their communities.

It is clear that local jobs and investment are a key requirement for people in the North of Scotland.

Behind the generic wish that the upgrade leads to lower energy bills, the provision of local jobs and investment is the standout issue, with 4 in 10 (39%) saying that it would be a significant benefit to their community.

The research also gives a clear steer on other issues, specifically the perceived unfairness of the transmission charges levied on companies developing renewable projects.

The transmission charges, which are calculated in relation to relative population sizes, are seen as unfair by 60% of those in Northern Scotland, with just 7% thinking they are fair. This will go a long way to explaining why two-thirds (65%) think that the system is in need of reform, a finding that should alert decision makers.

More broadly, there is strong continued support for the oil and gas sector among those in the North of Scotland. Positivity about the economic importance of the sector is significant, with three quarters (73%) saying that North Sea oil and gas companies make a positive impact on the UK economy, while just 7% characterise the contribution as negative. This is reinforced by 87% who think that the UK should aim to meet more of its demand for oil and gas from domestic production rather than through imports.

The final, and crucial, insight from the research is the role of information sharing about the ongoing grid upgrades, and the impact that information sharing appears to have on the perceptions and attitudes of those in rural Scotland.

Only a third of those in Northern Scotland consider themselves to be either very well informed (7%) or somewhat well informed (25%) about the grid upgrades in their area, suggesting that the vast majority are waiting to hear more about the projects. This provides policymakers and developers with a significant opportunity, because the research points to a positive relationship between how well informed you are and your attitudes to the upgrades and the transition to renewables more generally.

The evidence for this relationship appears throughout the research; for example, while 43% overall feel positively about the work underway to upgrade the grid, this rises to 55% among those who feel well informed about the process. The message from the research is clear, that good quality, accurate information is likely to drive positivity towards the upgrade, and a mixture of national and local government, energy companies, community groups and local press are seen as the most trustworthy providers of that information.

The people of the North of Scotland are broadly supportive of the grid upgrade and the energy transition, valuing the economic importance of the oil and gas sector while the transition is ongoing. **They are keen for progress to be sped up and want policymakers to prioritise jobs and investment in their areas to make the upgrade a success in their communities.**

Mark Diffley
Founder and
Director
Diffley Partnership

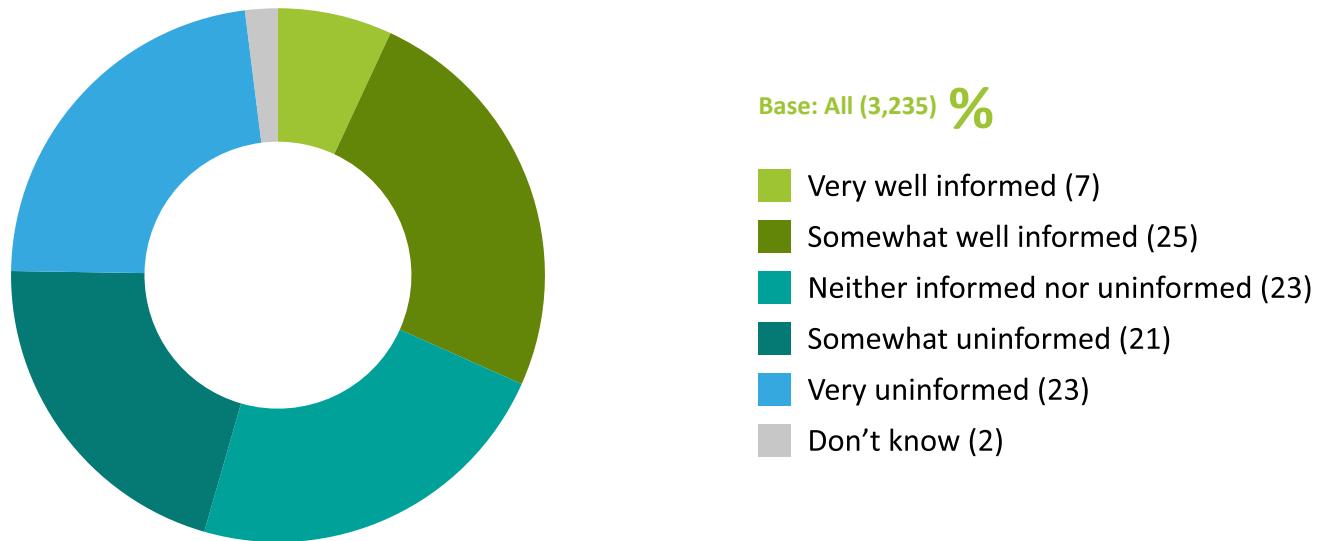


The following questions are about energy in Scotland.

Question 1

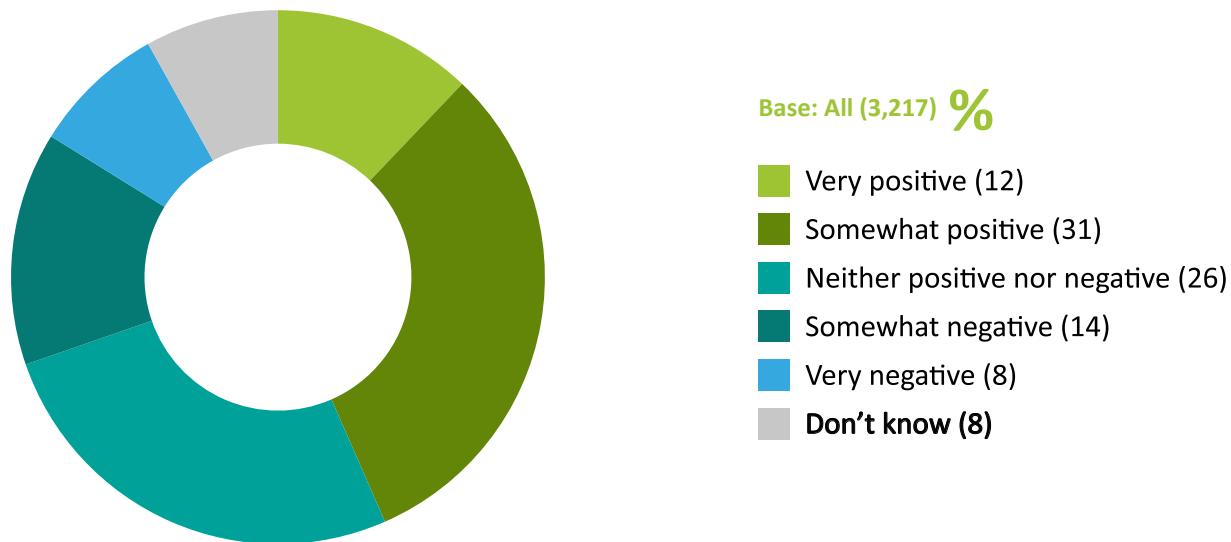
Scotland's electricity system is currently undergoing upgrading. This includes building new onshore and offshore links and substations to support the energy transition to renewable energy.

How informed or uninformed do you feel about projects to upgrade the electricity grid in your area?



Question 2

How positively or negatively do you feel about work underway to upgrade Scotland's electricity grid?



Question 3

To what extent do you support or oppose the following statements about upgrading Scotland's electricity grid?

Base: All (3,226)	Strongly support	Somewhat support	NET: Support	Neither support nor oppose	Somewhat oppose	Strongly oppose	NET: Oppose	Don't know
	%	%	%	%	%	%	%	%
Upgrading Scotland's electricity grid will create new jobs	19	36	55	20	7	6	12	12
Upgrading Scotland's electricity grid is necessary to tackle climate change	20	31	51	19	8	13	21	9
Upgrading Scotland's electricity grid is short term pain for long term gain	19	31	50	19	9	10	19	12
Upgrading Scotland's electricity grid will be good for my community	14	28	42	24	9	13	22	12
Upgrading Scotland's electricity grid will allow me to save on my household energy bills	15	18	32	19	10	18	27	21

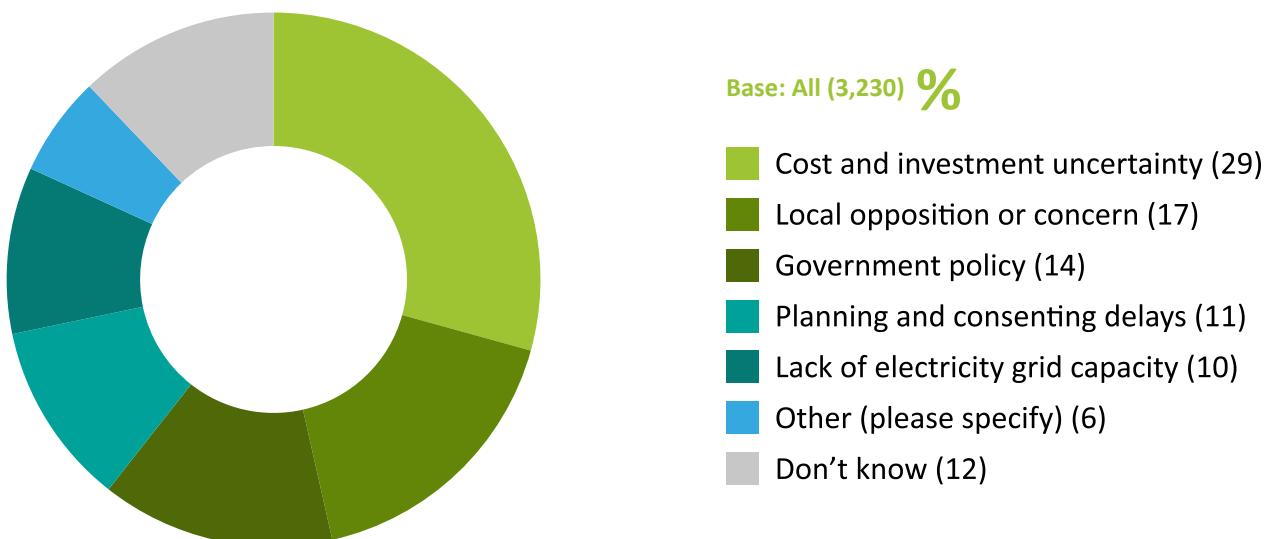
Question 4

To what extent do you agree or disagree with the following statements?

Base: All (3,225)	Strongly agree	Somewhat agree	NET: Agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	NET: Disagree	Don't know
	%	%	%	%	%	%	%	%
Switching from fossil fuels to renewable energy is the right thing to do	30	24	55	13	15	13	28	4
Renewable energy projects in Scotland are not being delivered quickly enough	19	28	47	28	8	7	15	10
The UK's ambition to reach net zero by 2050 is right	16	21	38	18	16	21	37	7
Those developing renewable energy will create long-term jobs in my area	11	23	34	21	16	15	31	13
The UK will meet its target of achieving net zero by 2050	1	6	7	17	27	36	63	13

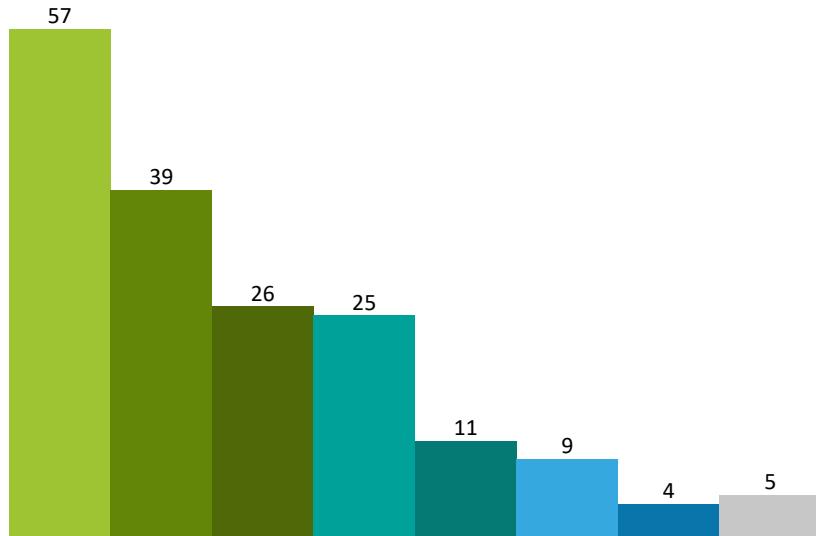
Question 5

Looking at the list below, what do you think is the single most important barrier to faster delivery of renewable energy projects in Scotland?



Question 6

Looking at the list below of possible community benefits that could be delivered from grid upgrades, which do you think would be most beneficial for your community?

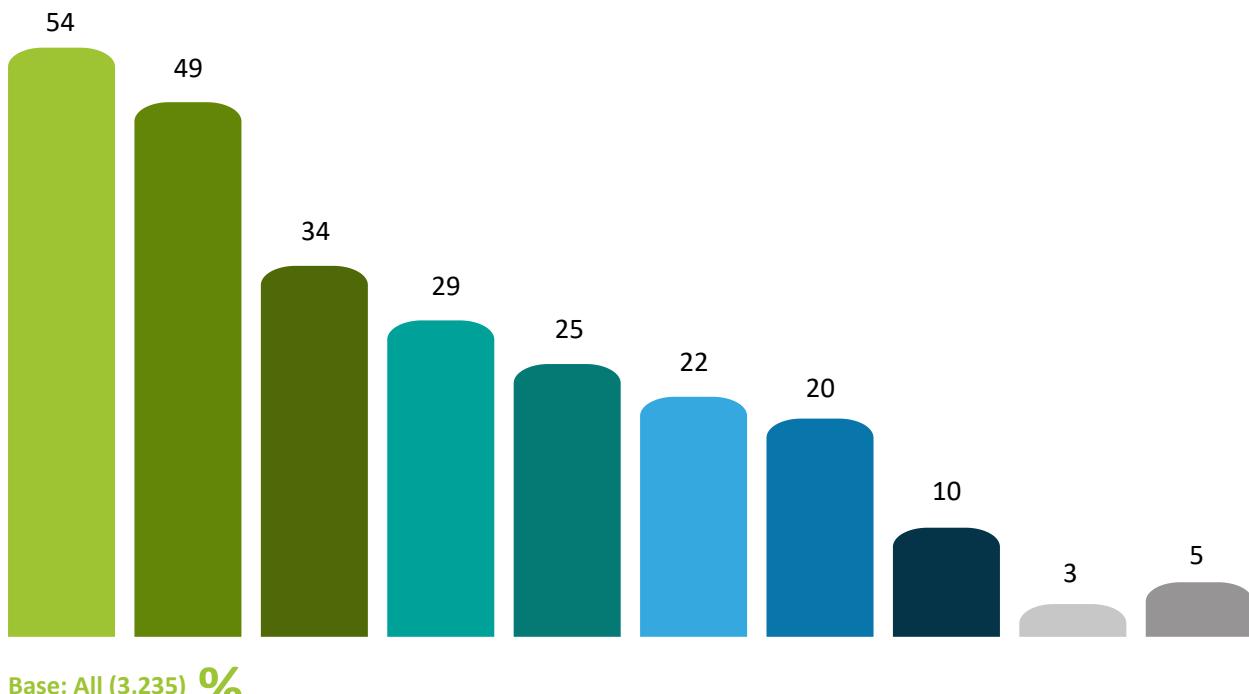


Base: All (3,235) %

- Subsidised energy bills
- Local jobs and investment
- New or improved public spaces (i.e. parks, sport and leisure facilities, public libraries, etc.)
- More high-quality apprenticeships for young people
- Support for community groups
- The delivery of new houses
- Support for music, culture and the arts
- None

Question 7

Thinking about the upgrading or expansion of electricity lines and pylons in your area; looking at the list below, what do you most associate with upgrading or expanding electricity lines and pylons?



Base: All (3,235) **%**

- █ Visual impact on the landscape (e.g. views, countryside appearance)
- █ Effects on wildlife or natural habitats
- █ Construction disruption (traffic, noise, access issues)
- █ The potential to lower energy bills
- █ Impact on property values
- █ Environmental benefits through enabling renewable energy
- █ Local jobs and business opportunities
- █ Investment in local community projects or facilities
- █ Other (please specify)
- █ Don't know

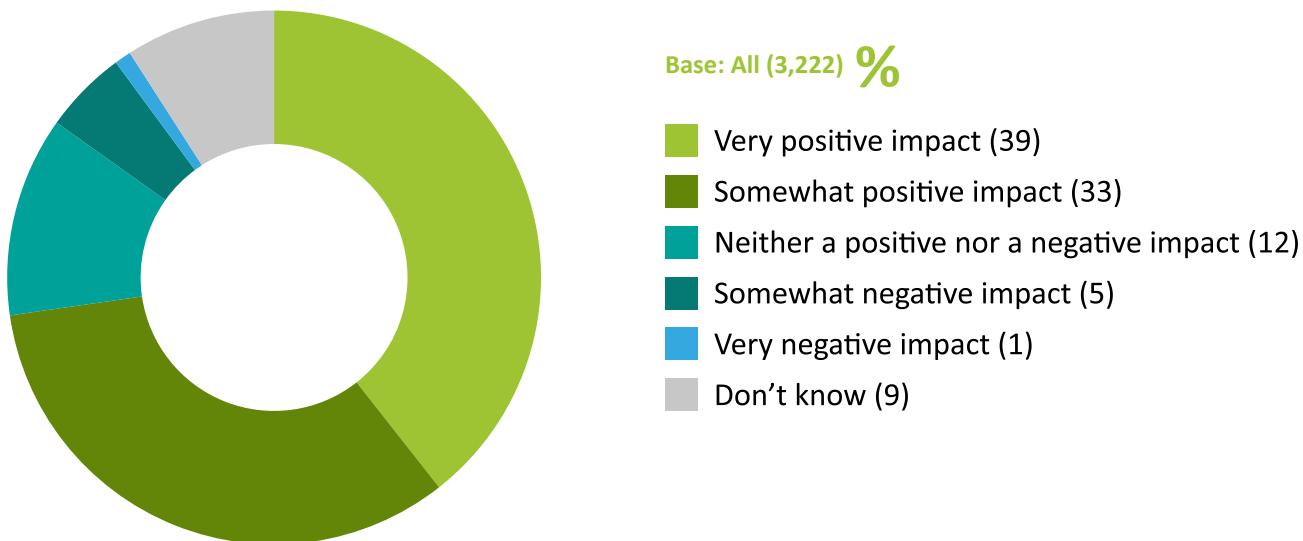
Question 8

Companies developing renewable energy projects are charged levies, known as transmission charges, to pay for upgrading and maintaining the UK electricity grid. These transmission charges are calculated in relation to population sizes, meaning that developers in the North of Scotland are charged more than developers in parts of Southern England. To what extent do you agree or disagree with the following statements:

Base: All (3,185)	Strongly agree	Somewhat agree	NET: Agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	NET: Disagree	Don't know
	%	%	%	%	%	%	%	%
The transmission charges system is fair	2	5	7	17	19	41	60	17
The transmission charges system is in need of reform	41	24	65	16	1	2	3	16

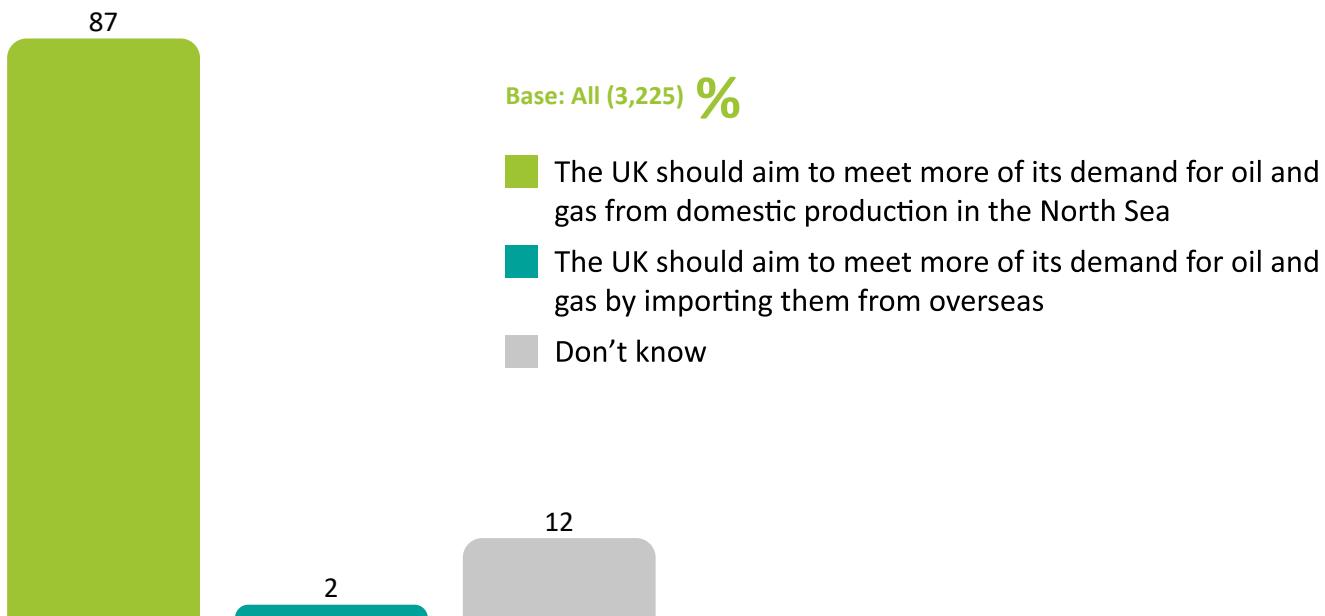
Question 9

What impact, if any, do you think that oil and gas companies operating in the North Sea have on the UK economy?



Question 10

Which of the following statements is closest to your view on oil and gas?



Technical details:

- The survey was designed and undertaken by Diffley Partnership, and invitations were issued online using the ScotPulse panel.
- Results are based on a survey of 3,235 adults (16+) from Aberdeen City, Aberdeenshire, Highland, Moray, and Perth & Kinross local authority areas.
- Fieldwork was conducted between 17th – 23rd November 2025.
- Results are weighted Scottish mid-year adult population estimates 2023 for relevant areas.
- Percentages may not always total 100% due to rounding.