BREAKING IT DOWN: OBSERVATIONS ON ENERGY MARKET DECOMMISSIONING

AN ANNUAL REPORT

In partnership with

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CONTENTS

WELCOME

This year's Decom Mission annual report comes at a pivotal time for our industry. While work scopes continue to mount, challenges and uncertainty remain.

This report provides an opportunity to reflect on the past year, highlight progress made, and share insights from our collective work. It captures the outcomes of Decom Week 2025, the results of our annual member survey, and the observations gained from our role as the decommissioning industry's trade organisation.

Despite a growing backlog of decommissioning activity, concerns persist around the pace of delivery and wider uncertainty in the energy sector. Against this backdrop, Decom Mission has remained committed to its purpose: to lead, lobby, liaise, and provide platforms that strengthen our members' voices.

This enables us to raise awareness, influence debate, and champion decommissioning as a force for good — environmentally, socially, and economically.

This report also offers the opportunity to acknowledge the people who make this work possible. To our members, partners, Executive Team, and Board, we thank you for your support and collaboration. Together, we remain committed to ensuring decommissioning is not only done well but done in a way that delivers lasting benefit.

As ever, my team and I encourage conversations, input and feedback. You can find our contact details below.

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Chief Executive Officer

Executive Team

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BOARD COMMENTARY

Jinda Nelson
Decommissioning Project Manager, PDi, and Decommissioning Advisor with a North Sea Operator

Reflections from Jinda Nelson

Chair of the Board, 2019 – 2025

"As I look back on six years as Chair, it strikes me how much has changed in decommissioning - and equally, how much hasn't! When I began, people asked "when will decommissioning really start?" Projects have indeed since begun and lessons have been learned, but the same question still lingers. The reality is that macro factors and uncertainty make forecasting difficult, for both the operators and the supply chain. It creates real strain, but it's critical to remember that the work is happening, and the challenge is around how best to get involved.

"During my tenure, we have evolved from Decom North Sea to Decom Mission, expanding our focus beyond oil and gas to include renewables, nuclear, and international markets. This shift has strengthened our ability to guide members through transition and uncertainty. A highlight for me has been developing Decom Live; affordable, accessible, practical events where members can showcase technology and capability. From Aberdeen to Amsterdam, Great Yarmouth to Peterhead, these events have brought the decom community together and kept the work we do visible.

"Looking ahead, we know the supply chain is under pressure and the industry remains unpredictable. But there is also hope. Decommissioning is not just about the execution phase; it is about innovation, planning, and collaboration. The UK has world-class, exportable expertise, but we must hold on to it.

"If you have waited this long, don't give up now, the work is coming, and someone will deliver it. Let's make sure it is us, together, as a decommissioning community.

"I would like to extend my sincere thanks to two exceptional Vice Chairs I have worked with, Dawn Robertson and Calum Crighton whose support and leadership have been instrumental in building Decom Mission into the organisation it is today. Together, we have helped shape a strong, resilient team ready to meet the challenges ahead.

"It has been a privilege to serve as Chair of Decom Mission from 2019 to 2025, and I want to thank our members, partners, and Board for the trust you have placed in me, your commitment to the organisation, and your collaboration throughout this journey.

"I warmly wish the incoming Chair every success in their new role, and have full confidence in their leadership as Decom Mission continues to grow, adapt, and deliver for our community."

Calum Crighton
Vice Chair, Gilson Gray LLP

"Working alongside Jinda Nelson over the past years has been a privilege. Her leadership, vision, and unwavering commitment have helped shape Decom Mission into the dynamic and forward-thinking organisation it is today.

"As we look to the future, it's clear that the market needs more than just representation, it needs a trade organisation that actively drives collaboration, champions innovation, and supports the development of scalable, exportable expertise.

"We must continue to be a trusted partner to our members, helping them to navigate uncertainty and seize opportunity. I look forward to working closely with our new Chair to build on this foundation and ensure Decom Mission remains a vital force in the evolving decommissioning landscape."

Latest Additions to the Decom Mission Board

In April we were delighted to welcome **Caroline Lawford** as our newest board member. Currently the Manager of Decommissioning at CNR International. Caroline has an outstanding track record in the industry, bringing a wealth of expertise to our board and has been involved in landmark North Sea decom projects, including Murchison.

Caroline comments: "Decom Mission is a vital organisation; it is a privilege to serve on the Board and contribute to shaping its future. During my tenure, I hope to continue to encourage cross-industry conversations that foster the innovation and collaboration so critical to a safe, efficient and cost-effective decom industry. Decommissioning is a growth area with many opportunities, the work that Decom Mission does to support the supply chain and emerging professionals is critical to ensuring the success of the industry now and in the decades to come."

In October, we announced **Gareth Jones** as the Decom Mission Chair. Gareth has been played an active role in the organisation for several years, including his tenure as Board member and his input into the establishment of the Emerging Professionals in Late Life and Decommissioning network.

Gareth comments: "It's an honour to become Chair of Decom Mission. I want to thank our outgoing Chair for her vision and leadership, which have built the strong foundation upon which we now stand. Our industry is at a pivotal moment. Oil & gas decommissioning has become a strategic priority as the UK basin moves into late life, bringing new complexity and urgency. Political shifts are reshaping regulation and energy policy at home and overseas, reminding us to stay agile, transparent, and proactive - and so we must continue to advocate for evidence-based approaches that balance environmental responsibility with operational practicality.

"At the same time, competition for vessels, equipment, and skills intensifies across other industries. Decommissioning must remain attractive, investable, and world-class in safety and performance. Globally, decommissioning is accelerating. The UK has an opportunity to lead in this respect, exporting expertise, building partnerships, and championing sustainable practices.

"So what does all this mean for Decom Mission? It means we must continue to be a trusted voice, connecting industry, government, and communities. Together, we can shape the future of decommissioning here in the UK, and worldwide."

PROJECTS GROUPS

Decom Mission's Project Groups are accessible to all members and overseen by an experienced Steering Committee. These groups focus on key topics that are vital to the decommissioning sector. They are shaped in collaboration with our members and the Leadership Team to reflect emerging industry needs. Projects may not always be live in all focus areas, however proposals for new projects are always welcomed from members.

Core Focus Areas:

- **Well Plug & Abandonment (P&A):** Aimed at reducing costs and improving outcomes in oil and gas decommissioning.
- **Marine Structures:** Covers decommissioning tasks across oil, gas, and renewable sectors, including topsides, jackets, and turbines.
- **Subsea Structures:** Focuses on pipelines, cables, manifolds, and other subsea equipment, addressing both expertise requirements and cost-effectiveness.
- **Waste Management & Circular Economy:** Tackles energy transition challenges through reuse, recycling, and effective waste characterisation.
- **Onshore Activities:** Includes decommissioning of diverse infrastructure such as nuclear, renewable, terminal, and refinery sites - spanning demolition and dismantling.
- **Skills & Energy Transition:** Covers workforce development themes, including diversity, training, and programmes such as Women in Decom (WiD) and Emerging Professionals in Late Life and Decommissioning (EPLLD).
- **Safety:** Central to all initiatives, projects are supported by collaborative safety advocacy via Step Change in Safety.

There is a structured process for proposing and selecting new project topics. Interested members can contact the Decom Mission team or access further details via the member area on decommission.net.

Well Decommissioning Project Group

Led by Sandy Fettes, the Wells Decommissioning Workgroup aims to be an influential voice in promoting safe, effective, and fit-for-purpose well abandonment across the UKCS.

The project works to raise awareness of the need for decommissioning, balance supply and demand, and identify risks and opportunities while engaging operators, regulators, and the supply chain.

Through positive communication with the current and future workforce, the group shares progress via the NSTA's Decommissioning and Repurposing Taskforce and delivers initiatives such as exploring AI/digital tools for knowledge retention, creating a UKCS risk register, improving stakeholder communications, and defining a model for success.

DELIVERING VALUE, DRIVING DECOMMISSIONING

Decom Mission is the only trade organisation dedicated exclusively to late-life operations and decommissioning. As such, our perspective on decom across the energy sector is uniquely focused.

As the global energy industry advances toward a net zero future, decommissioning has become an increasingly urgent and visible challenge. With activity accelerating across oil and gas, nuclear, and emerging renewable sectors, Decom Mission is uniquely positioned to inform debate, influence decision-making, and ensure that the voice of decommissioning is clearly represented.

For our members, we provide a trusted platform for connection and collaboration. We bring asset owners and the supply chain together to share insight, build capability and develop innovative solutions to shared challenges. We also deliver market intelligence, business development opportunities, and regular forums that strengthen commercial relationships.

Advocacy is central to our role. We lobby on behalf of our members with governments, regulators, and stakeholders - ensuring membership interests are represented at all necessary levels. Our independent voice is valued in both Holyrood and Westminster, where we raise awareness of the sector's contribution to the economy and the energy transition, as well as advocating for safe, cost-effective and sustainable decommissioning.

Safety underpins everything we do. Through initiatives such as the **Safety in Decommissioning Network (SiDN)**, we promote the highest standards of practice, ensuring that decommissioning activity protects people and the environment.

Our programme of events and knowledge-sharing opportunities is central to our mission. **Decom Week** brings the community together to explore challenges and opportunities, share knowledge, and showcase expertise. **Decom Live** provides a hands-on platform for demonstrating technologies and solutions in action. Our regular **webinars** ensure members can access timely insights, technical expertise, and peer-to-peer learning in an accessible format. We also attend, exhibit and present at key **industry forums** including SPE Offshore Europe, Subsea Expo and NDA Group Supply Chain events. In other words, our events calendar is focused on keeping members informed, connected, and visible within the global decommissioning community.

We also recognise the importance of building stronger links across the wider energy sector. Decom Mission works at the intersection of oil and gas, nuclear and renewables, enabling cross-sector collaboration that strengthens capability, uses transferable skills, and drives innovation. As part of this, we are establishing the Energy Leadership Exchange. This new initiative will connect individuals across different areas of the energy sector to share knowledge, develop leadership, and accelerate the transfer of expertise.

Above all, we exist to support our members, helping them to navigate uncertainty and unlock opportunity. By connecting expertise across industries and geographies, we help build a sustainable, competitive decommissioning sector that supports jobs, drives innovation, and delivers tangible benefits to society and the environment. In short, Decom Mission ensures decommissioning is not just done, but done well, for our members, for the industry, and for the wider world.

DEEP DIVES

The Deep Dive is a confidential, in-depth review of a member's business and operations, led by Sam Long, Callum Falconer, and Morag Young.

Drawing on senior experience across both operators and the supply chain, the team works directly with member management to review capabilities, ambitions, and challenges - providing independent, expert perspective.

The team provides advice to support members to improve their operations and strategy.

Key areas explored include:

- **People:** talent attraction, retention, training and competence
- **Commercial:** finance, margins, debt, payment terms, and contractual matters
- **Assets & Innovation:** utilisation, R&D, and technology development
- **QHES & Sustainability:** safety, circularity, and decarbonisation practices
- **Industry Context:** market activity levels, regulatory concerns, and sector needs

The sessions not only support members in improving business performance but also deepen Decom Mission's understanding of our members' strategies, successes and challenges. In turn, this strengthens representation and ensures member voices are heard at every level.

RVA GROUP

Founded in 1992, RVA is a specialist consultancy delivering safe, efficient decommissioning projects worldwide for asset owners in energy and process industries, with a strong focus on HSE excellence.

Trusted support for safe and efficient decommissioning.

Services cover:

- **Regulatory compliance** – CDM/regional regulations, principal designer role, assurance, audits, training
- **Project preparation** – hazard reviews, options analysis, pre-COP demolition design, pre-decommissioning yard audits
- **Technical & commercial support** – scopes of work, supplier assessment, documentation development
- **Safe systems of work** – review of risk assessments/ methods for demolition, dismantling, hazardous materials removal
- **Waste management** – classification, duty of care, tracking, and compliance audits
- **Cost expertise** – estimating, cost management, and cost engineering

RVA Group – SABIC Teesside

Since 2012, RVA has supported SABIC's decommissioning at its Wilton and North Tees sites, managing 19 contracts and over 1.2 million safe hours of demolition. The project has delivered Europe's largest distillation column removals, cleared extensive plant infrastructure, and achieved a 98% recycling rate, including safe management of asbestos and hazardous waste. Delivered on track and under budget, the programme is set to complete by the end of 2025.

CONSUB

CONSUB delivers independent engineering and project management services across the full lifecycle of offshore and onshore energy projects, from concept and design to construction and operations.

With a highly experienced team, the company provides independent, focused, flexible support that enhances technical and commercial performance and drives client success. Combining technical, environmental, and commercial expertise for successful decommissioning.

Services cover:

- **Late-life asset support** – integrity assessment, wax management, and bespoke valve release solutions
- **Regulatory & permitting** – EIAs, DEPCONs, NSTA/ OPRED submissions, and compliance assurance
- **Waste management** – identifying providers, ensuring environmental and regulatory compliance
- **Supply chain support** – scoping, tendering, evaluation, and contractor engagement
- **Project delivery** – full project management and client representation during engineering and execution

CONSUB – Recent Decommissioning Projects

In 2024, CONSUB successfully restored three seized valves on a North Sea FPSO using its Valve Release Service, ensuring critical shutdown operability. In 2023, the team delivered a pipeline cleaning, corrosion, and wax study in the UK sector, refining predictive models and assessing cleaning and integrity risks ahead of decommissioning. CONSUB also supported decommissioning of a Southern North Sea gas field, managing hydrocarbon cleaning, subsea removals, debris clearance, and final pipeline handover.

HCS

HCS, an Aberdeen-based engineering company, is renowned in the oil and gas sector for its design and manufacture of IWOCS, production control systems and subsea assemblies.

Having become members of Decom Mission in 2021, the team at HCS has ensured it has put its membership to good use by taking advantage of many member opportunities.

Most recently, Business Development Manager Linsey Jarvis was selected to present an Innovation Showcase, detailing the innovative work HCS is undertaking on decommissioning projects, during Decom Mission's curated theatre session at SPE Offshore Europe 2025.

The Decom Mission team also visited HCS on-site to learn more about the business' strategy and outlook, as well as to advise on the decommissioning sector landscape.

HCS chose to partner with Decom Mission during Decom Week 2024. As Refreshments Partner the HCS branding featured prominently throughout the event. The benefits of this partnership were secured at a member-exclusive rate and provided HCS with a platform amongst the decom-focused attendees.

HCS also exhibited at Decom Live at Peterhead in September 2024, where the team displayed kit on the quayside, allowing delegates to get up close and understand the practical applications of HCS' expertise.

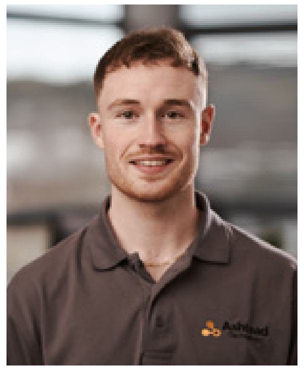
HCS team members have attended webinars, business breakfasts and lunch & learns, and Linsey Jarvis is a regular attendee at the Wells Workgroup.

> **"BEING PART OF DECOM MISSION MEANS WE'VE BEEN ABLE TO COLLABORATE, SHARE LESSONS, AND STRENGTHEN OUR PRESENCE IN THE DECOMMISSIONING COMMUNITY. IT HAS ENABLED US TO BUILD MEANINGFUL RELATIONSHIPS ACROSS THE SECTOR, BROADENING OUR NETWORK AND CREATING OPPORTUNITIES TO BOTH LEARN FROM AND CONTRIBUTE TO THE INDUSTRY."**

Linsey Jarvis
Sales & Business Development Manager, HCS

EMERGING PROFESSIONALS IN LATE LIFE AND DECOMMISSIONING

Retaining talent and developing the next cohort of decommissioning experts is vital for the sector, and in 2021 Decom Mission was instrumental in establishing the Emerging Professionals in Late Life and Decommissioning (EPLLD) group.



Darren Elder
External Sales Engineer,
Ashtead Technology

Bringing together likeminded individuals at the start of their careers, EPLLD provides a network for members to connect and share with. The group plans webinars, lunch & learns and gets involved in Decom Mission and other industry events. Darren Elder, External Sales Engineer at Ashtead Technology, has led the EPLLD for the past year. Under his guidance, the group has continued to build momentum, creating opportunities for young people and those making a career move into the industry to connect, share experiences, and develop the skills that will shape the future of decommissioning.

"My involvement with the Emerging Professionals in Late Life and Decommissioning (EPLLD) group began when Sam Long visited our facility in 2021. I was completely new to both my role and decommissioning, and Sam encouraged me to join the first meeting of a group of like-minded emerging professionals he had encountered across the industry.

"The group provided me with the opportunity to grow my network with peers at a similar career stage and to learn more about the wide-ranging opportunities within decommissioning.

"One of the biggest challenges lies in attracting young people into a career in decommissioning and then retaining them in an industry where the political and regulatory environment is often uncertain. Encouragingly, progress is being made: graduate schemes, networking groups, and trade bodies are actively working to raise the profile of decommissioning, helping new talent to see it as a promising and rewarding career choice.

"Looking ahead, more work is needed to reach potential recruits earlier -particularly school leavers - to explain what the industry entails and where it can take them. At the same time, businesses must remain committed to recruiting new talent, investing in development, and recognising that patience is required to nurture the next generation of industry leaders.

"The EPLLD group is planning several initiatives to support these goals. At this year's Offshore Europe we hosted a panel session on enabling careers in decommissioning, followed by a webinar to build on the discussion. We are also planning a Toastmasters-style event, designed to provide both networking opportunities and a supportive environment for building confidence and developing public speaking skills.

"Through these activities, we are helping to create the connections, visibility, and encouragement that emerging professionals need to thrive in decommissioning, securing the future of the industry while giving young talent a platform to grow."

COMMENTARY & OBSERVATIONS

Decommissioning remains a vital enabler of the energy transition, offering clear benefits to the environment, jobs market, and the economy. By responsibly retiring assets, we reduce risk, sustain employment, and contribute to a Just Transition.

Yet, as an end-of-lifecycle activity, it lacks the profit-driven incentives that motivate other parts of the energy value chain, creating a fundamental challenge for asset owners. Against this backdrop, Decom Mission's role is to unite asset owners and the supply chain to deliver safe, cost-effective, and timely decommissioning.

In doing so, we must also remain mindful of how the sector is perceived externally, recognising the importance of social licence and the need to demonstrate transparency, responsibility, and environmental stewardship at every stage.

The UK Continental Shelf faces an inevitable bow wave of offshore decommissioning projects, but the sector stands at a moment of crisis. The supply chain is under considerable strain, while asset owners themselves face mounting pressures. Our annual survey highlights these concerns, with the availability of skilled people and specialist equipment standing out as the most significant issue.

This shortage has a direct impact on project delivery and an indirect impact on overall costs – and these are costs that ultimately affect both owners and wider society. Cross-industry collaboration offers one of the clearest opportunities to improve efficiency, sustain critical skills, and enhance long-term capability across the sector.

Safety remains firmly at the top of the priority list and the formal launch of the Safety in Decommissioning Network (SiDN) in conjunction with Step Change in Safety underscores our shared commitment to ensuring that standards remain high across all projects. We are also mindful of decommissioning's impact on mental wellbeing, as discussed in our standout session with member FidesOak during Decom Week 2025. Continuing this work, we are focused on supporting individuals in the months and years ahead as we face a precarious outlook.

Despite the challenges, opportunities remain. Export markets in both nuclear and international oil and gas are developing strongly, while our dialogue with the UK renewables community continues to evolve. As offshore wind and other clean energy technologies mature, the parallels with oil and gas decommissioning become clearer, presenting both short- and long-term prospects for the supply chain.

Decom Week 2025 was designed to lay out the challenges we face, as well as the opportunities that lie ahead, and the outcomes of Decom Week reflect the strength and resilience of our community when it comes together.

Alongside this, our work in lobbying and awareness-raising remains critical, although we believe more must be done to highlight the economics of decommissioning, including its gross value added to the UK economy, and to promote the science of how assets interact with the marine environment. In other words, subjects that deserve greater attention in public and policy debate.

CONCLUSIONS

This year's survey confirms what many of us already feel: decommissioning is an industry which delivers consistently on safety and technical excellence, but continues to be tested by some fundamental challenges.

Commercial pressures - tight margins, difficult payment terms, and ongoing financial risks - remain the number one concern for our members. Alongside, the question of people and skills is becoming ever more pressing. Attracting, retaining, and developing the next generation of talent is critical if we are to sustain capability for the long term.

I am encouraged, however, by the resilience and determination shown across the industry. Safety continues to be a non-negotiable priority. There is also real appetite for collaboration, not just within our own industry but across the broader energy sector, with nuclear, renewables and beyond, where shared learning and innovation can make a tangible difference.

We cannot ignore the wider context. Political and economic uncertainty is creating hesitation around investment and planning. That is why our role at Decom Mission in advocating on behalf of our members, raising awareness with government and regulators, and championing best practice has never been more important.

The message is clear; our sector is resilient, but it needs collective action. By addressing commercial practices, investing in people, embracing innovation, and strengthening our advocacy, we can ensure decommissioning not only supports the UK's energy transition but also creates international opportunities for our supply chain.

Sam Long
Chief Executive, Decom Mission

My Key Takeaways

- **Commercial strain is real.** Margins are tight, payment terms are difficult, and too much risk still sits with the supply chain. This must change if we want a healthy, sustainable industry.
- **People remain our future.** We need to do more to attract young people into decommissioning, give them reasons to stay, and invest in their development. Without them, the industry simply cannot thrive.
- **Safety is non-negotiable.** It's reassuring to see this consistently prioritised across the board. We must never lose that focus.
- **Collaboration works.** Whether with nuclear, renewables, or other industries, shared learning and innovation give us real opportunities to strengthen our industry.
- **Uncertainty is holding us back.** Political and economic headwinds make planning difficult. That's why Decom Mission will keep raising your voice with regulators and government to create a more stable environment for growth.

THE DECOM MISSION ANNUAL SURVEY 2025

Decommissioning is a critical enabler of the energy transition in delivering safe, responsible retirement of assets while supporting jobs, communities, and the wider economy.
Yet the sector continues to face complex challenges around cost, skills, regulation, and long-term sustainability.

The Decom Mission Survey 2025, with insights from respondents across operators, supply chain organisations and regulators, provides a clear picture of industry sentiment. Building on the 2023 baseline, it highlights both enduring strengths - notably safety and technical expertise - and persistent pressures in areas such as commercial viability, workforce development, and regulatory effectiveness.

This whitepaper summarises those findings and points to where collective action and advocacy are needed most to ensure decommissioning is not just delivered but delivered well. We extend our thanks to Empirisys, a Decom Mission member and valued partner, for compiling this report.

In partnership with

empirisys

EXECUTIVE SUMMARY

Purpose

With responses from respondents representing operators, supply chain participants and regulators, the Decom Mission Survey 2025 provides insight on themes from Commercial and Contractual through to Regulations and Safety.

The report will provide a deep-dive into the scores across demographics, themes and comments made by the participants, aiming to supply an insight into decommissioning across the energy sector from the perspective of its participants.

1. **Safety Still a Strong Point**

   Safety continues to be the highest-scoring theme, with all top five individual survey questions linked to safety. Respondents consistently reported strong safety cultures, leadership commitment, and psychological safety in raising concerns. This provides reassurance that despite commercial and operational pressures, safety remains the foundation of decommissioning delivery.

2. **Engagement is lower, though sentiment is stable**

   Compared to 2023, the number of respondents almost halved, raising questions about engagement and representativeness. Yet, the stability of scores across most themes indicates that perceptions of the industry's strengths and weaknesses are unchanged: safety and cashflow management are seen positively, while project execution and commercial alignment continue to score poorly.

3. **Commercial and strategic tensions are a recurring barrier**

   The single most persistent theme across comments is the disconnect between operator expectations and the supply chain's ability to deliver safe, efficient, and sustainable decommissioning at current margins. Unrealistic pricing, risk transfer, and contract practices are seen as eroding confidence and discouraging investment. Without resolution, this misalignment constrains progress across innovation, environmental ambitions, skills development, and project performance.

METHODOLOGY

The survey was divided into eight themes with questions covering different aspects of each.

For some themes, straightforward *Likert Scale* questions were used to gauge opinion and strength of feeling; for others, multiple choice questions were more appropriate..

Where *Likert Scale* questions were used, these have been converted into scores between 0 and 1. A 0 represents an entirely negative perception ("Strongly Disagree") and a 1 represents an entirely positive perception ("Strongly Agree"). The averages used in the report are calculated using the responses to these questions.

Occasionally, a question was reverse-coded, such as with the question *"There is a notable decrease in experience/skills among individuals in the decommissioning industry every year"* where a negative response should actually be considered as a positive. These questions are used to ensure consistency of responses – where they have been used their answer has also been reversed when used in calculations.

Finally, all themes have a comment question for the respondent to leave their thoughts related to the specific topic. A *Final Thoughts* question also allowed for topics that may not have been raised. These questions have been analysed by AI and people to extract similar topics and sentiment and these are included in this report with each theme.

Additionally, this presentation provides insights for both the present 2025 survey, and the previous 2023 survey, providing insights to compare and contrast them.

Themes

ENVIRONMENTAL
COMMERCIAL
CONFIDENCE
CONTRACTUAL
PEOPLE & SKILLS
PROJECT EXECUTION
REGULATION
SAFETY

Likert Scale Questions
15

Comment Questions
9

Multi Choice Questions
11

Grid Scale Questions
5

Checkbox Questions
1

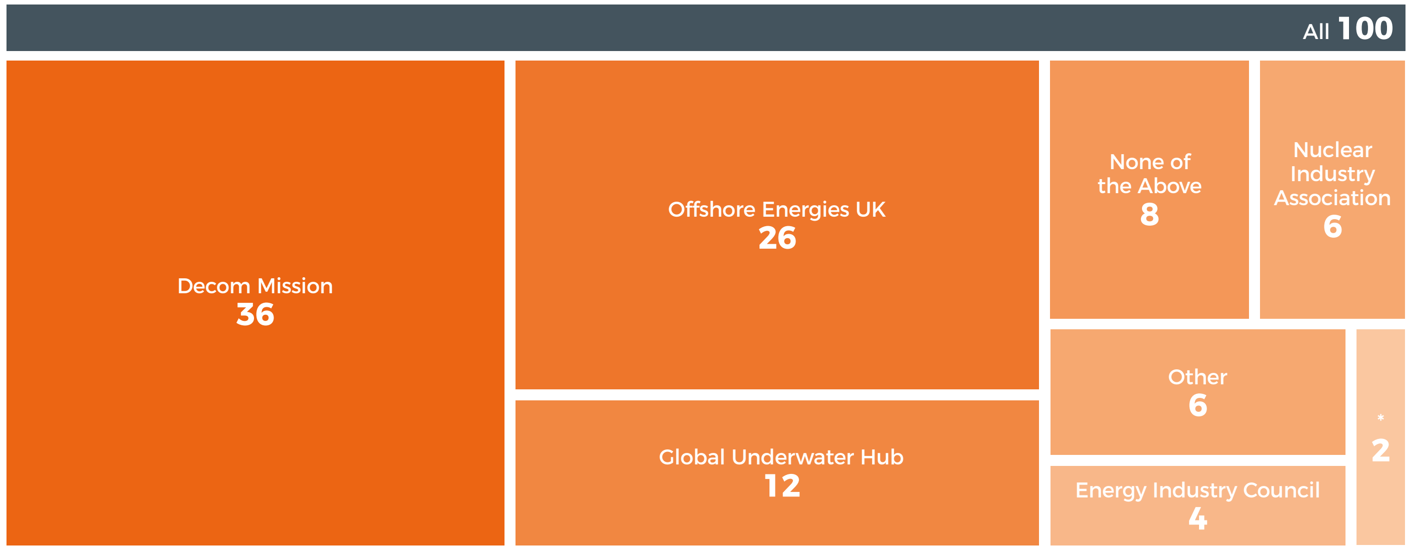
Grid Choice Questions
2

ORGANISATION DEMOGRAPHICS

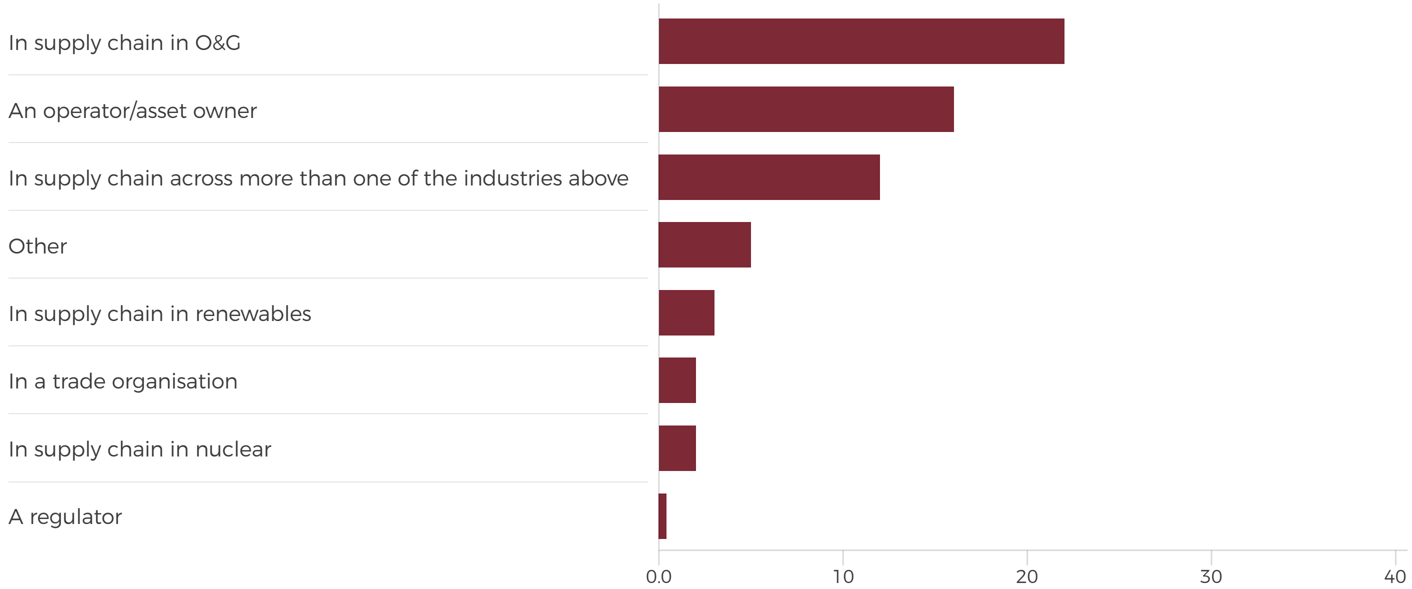
Most respondents were members of Decom Mission, with a considerable proportion (nearly half) also members of Offshore Energies UK. Only 8% of respondents were not members of any of the organisations listed.

About a third of respondents work in supply chain in oil & gas with more than half of respondents working in supply chains across industries. Very few renewables, regulators and trade organisation members responded to the survey which should be considered when interpreting the results.

My organisation is a member of:



*East of England Energy Group

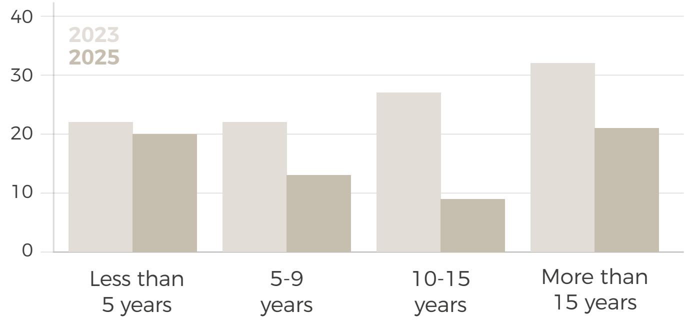


Respondent Profile Overview

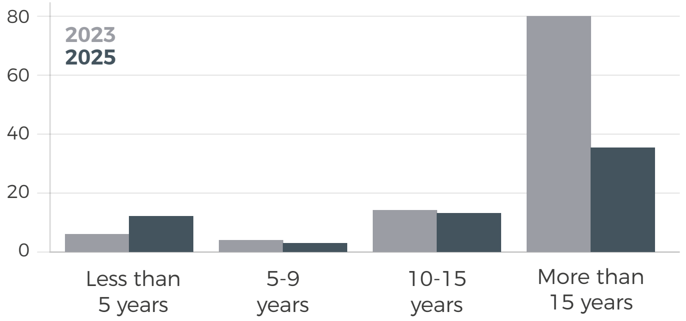
In both 2023 and 2025, the survey saw a consistent majority of respondents (39%) representing organisations within the Oil & Gas supply chain. Across all industries, over 60% of participants were engaged in supply chain functions.

However, response rates from stakeholders in renewables, regulatory bodies, trade organisations, and nuclear and renewables supply chains remained notably low in both years. These participation gaps should be considered when interpreting the survey findings and drawing sector-wide conclusions.

I have worked in decommissioning:



I have worked in the energy industry:



THEME OVERVIEW

Context

The chart shows the average (mean) scores for all Likert Scale questions in each theme, for Surveys from 2023 and 2025, respectively. The Likert Score ranges from 1 to 5.

Comparison 2025 vs 2023

Number of Respondents
There were significantly less respondents in 2025. This year had only 57 respondents, which is 45 respondents (44%) less than in 2023.

Overall Survey Score
The overall scores were the same at 62%.

Individual Themes Scores
The average scores for the themes are almost identical across both 2025 and 2023, with the differences in scores ranging between 0-4%.

Highest Scoring Theme

Safety is by far the highest scoring theme, which when converted back to the survey is somewhere between Agree and Strongly Agree. This was consistent across all questions in the theme.

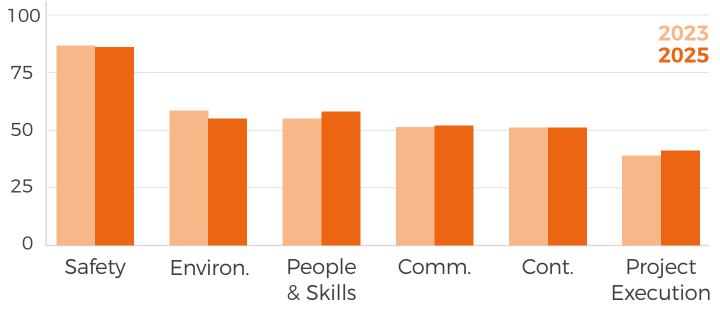
Lowest Scoring Theme

On the other hand, Project Execution was an outlier at 41% in 2025 and 39% in 2023, with all 3 of the questions in the bottom 5 overall in both surveys.

Other Themes

The other themes scored between 51- 59%.

Average Scores by Theme



Average survey score:

Number of respondents

THEME BY COMPARISON

Context

As well as comparing the scores for each theme, it's also informative to compare the variance in the scores. Variance measures how much agreement there is in the responses.

The graphs illustrate a comparison of the average score (along the bottom on the X-axis) with consensus (the variance inverted, along the left Y-axis) per theme, per year. To aid comprehension, scores approaching the top-right are the most consistently positive.

Scores in the top left show a high level of consensus but low scores – no themes have appeared here, which is a positive.

Comparison 2025 VS 2023

Very Similar Scores & Consensus
The Consensus across themes remains very similar between 2025 and 2023, with differences in variance ranging between only 0-2%. Average scores are also very similar, ranging between 0-3%. This indicates that overall, sentiment of respondents has not changed in the past two years.

Safety has Highest Score & Consensus
Safety has by far the highest score (86%) in both years, and still places first in Consensus in 2023, a rank it shares with Commercial in 2025. In other words, most respondents answered similarly to each other and positively across both years for Safety, a reassuring result.

Other Themes
Most other themes sit closer the bottom of the X and Y axis of the chart, with relatively more mixed scores and consensus. That is, for each of those themes, respondents gave more varying answers, and the overall score average being lower also suggests that respondents have less confidence across those themes. This may be reflective of the wide variety of industry participants completing the surveys.

Lowest Consensus
In particular, People and Skills and Environmental have the lowest consensus across both years (variance 10-13%).

THEME BY DEMOGRAPHICS

Splitting the data by demographics yields some results and some further questions. The associations between tenure and average Likert scores were different between 2025 and 2023.

Scores by Tenure

2025 Decommissioning
The highest scores of 63-64% are for those between 5-15 years of tenure, while those with less than 5 years have a very slightly lower 61% score, and those with most experience at 15+ years have the lowest score at 59%. This is an interesting result that contrasts with 2023, where longer tenure was associated with a higher score for every tenure category.

2025 Energy Industry
In 2025, there seems to be no association between Energy Industry tenure and average Likert score. The highest score was for those with 5-9 years at 65%, followed by 62% for those with 15+ years, with 0-5 years and 10-15 years sitting at 60%.

2023 Decommissioning
The scores were slightly higher for those with longer decommissioning tenure, starting with an average score of 60% for those with less than 5 years of experience, and progressively rising to 64% for those with more than 15 years.

2023 Decommissioning
Splitting the scores by Energy Industry tenure allows us to see that the lowest score of 59% was for those with least experience of 0-5 years, followed closely by 61% for those with 15+ years. The highest scores were for those with 5-15 years tenure, at 65%.

Insights
We note that respondents in the Energy Industry tend to have long tenures, with only a few having less than 10 years of experience. This is also true for Decommissioning, but less so.

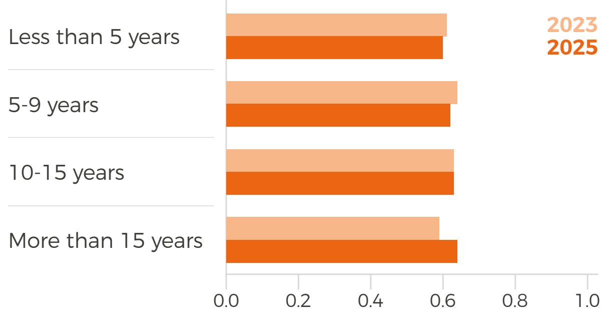
For decommissioning tenure, the 2023 data suggests there is a higher level of positivity from those who have been in the decommissioning industry a shorter amount of time, however the current data from 2025 does not support this hypothesis.

As for tenure in the Energy Industry, in both 2025 and 2023 there is no clear association between tenure and score.

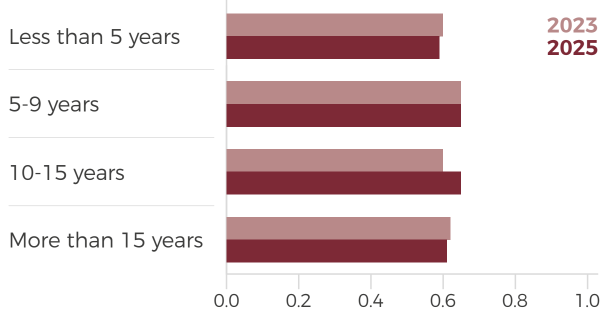
Scores by Organisation

If we only consider organisations with 5+ respondents, it appears that results between 2025 and 2023 are consistent with each other, except for Supply Chain in Oil and Gas, which, sitting at 62%, was 4% lower in 2025 than in 2023. However, the overall consistency in scores across organisations is interesting because of the significant difference in the numbers of respondents between 2025 and 2023.

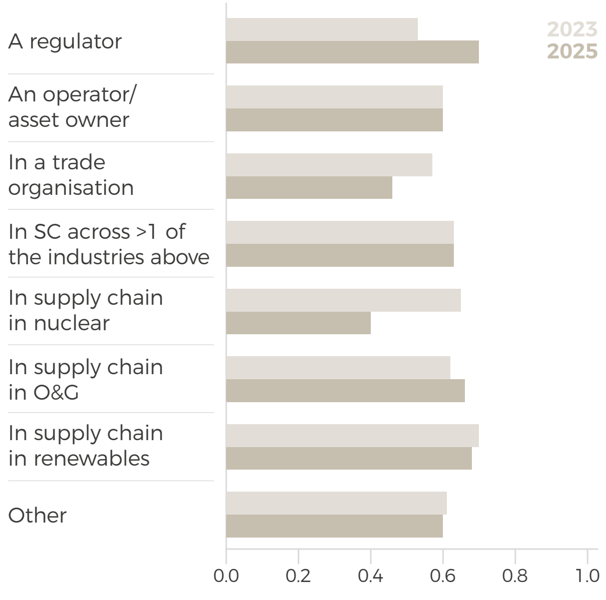
Average scores by tenure in decommissioning:



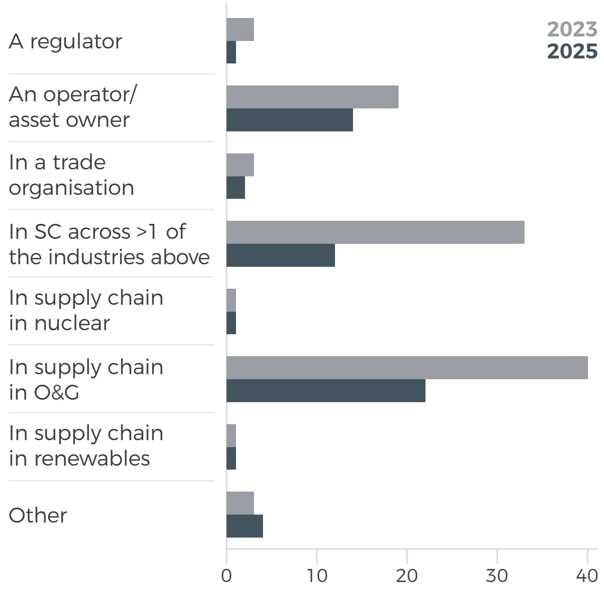
Average scores by tenure in energy industry:



Average scores by organisation:



Number of respondents by organisation



COMMERCIAL

The commercial aspects analysed by the survey concerned margin, revenue, payment terms and the future outlook of the organisation.

2025 vs 2023

Results were overall similar, with average Likert scores differing only by 1%.

Company Margin

Most responses to the question "I consider the margin my company receives [...] to be fair and reasonable" were overall neutral in both years, with 2025 at 52%, and 51% In 2023.

Cashflow, Debt, Future Investment & Access to Capital

More positively, in 2025, respondents overall felt that their organisations could manage cashflow (average score of 77%) and debt (average score of 74%), however, there was relatively less confidence in future investment (66%) and access to capital (67%). All figures are 3-6% higher than the 2023 survey, suggesting an increase in positive outlook.

Revenue & Payment Terms

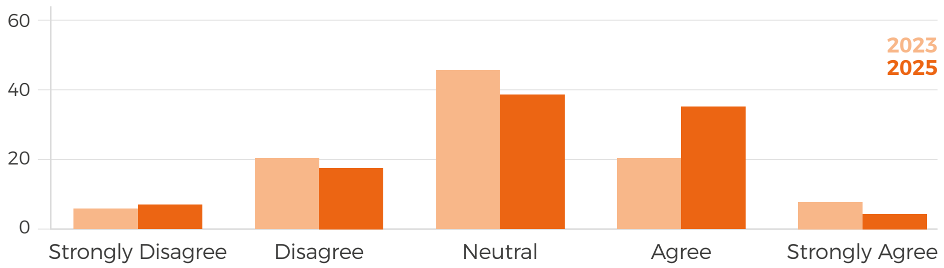
Finally, the decommissioning being revenue proportion of 25% or less was the most common response amongst respondents, with 32% in 2025, and 39% in 2025, respectively.

Furthermore, in both years, most commonly respondents' companies get paid for decommissioning after 60 days, although we note that in 2025, the 23% from this category was closely followed by 30 days, at 19%. This contrasts with 2023, where 60 days had a clear majority at 35%.

Comments

The theme also has high consensus, coming second only to Safety.

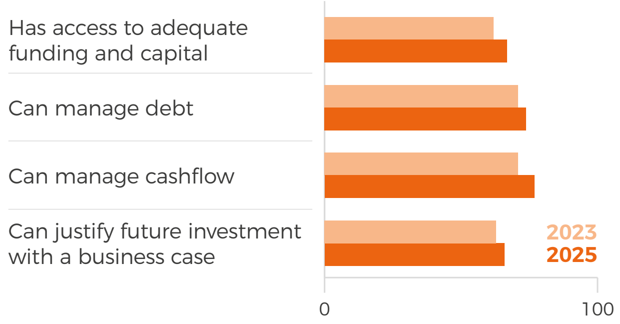
Score distribution:



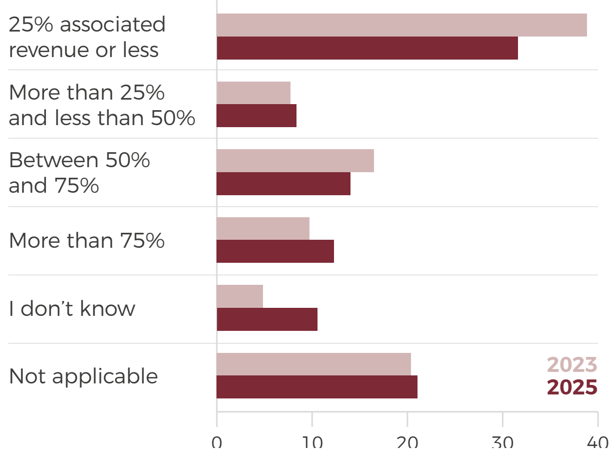
Average scores by question:

I consider the margin my company receives for the decommissioning work it has won to be fair and reasonable

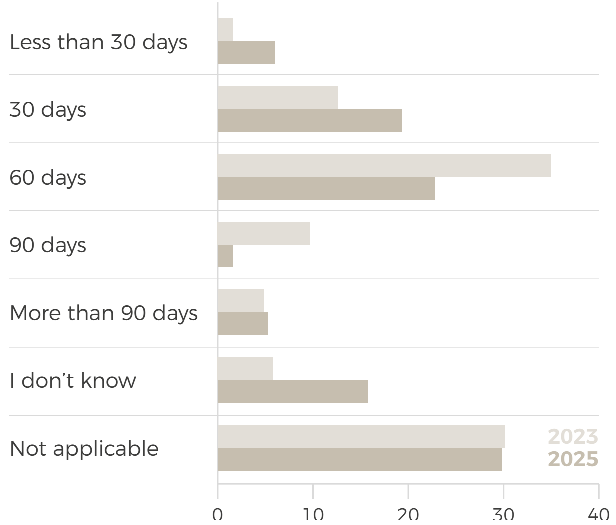
In order to meet decommissioning demand of the future my company:



Within my organisation, decommissioning accounts for the following proportion of revenue:



My company is usually paid for completed decommissioning work in:



Feedback Overview

Overall, the commercial environment is perceived as challenging and negative, with respondents highlighting systemic issues including margin erosion, risk transfer, slow innovation uptake, funding gaps, and supply chain constraints.

There is a widespread call for more realistic commercial approaches, better risk sharing, and commitment to funding and innovation to support the long-term success of decommissioning efforts in the UK sector.

Feedback Top 5

1. **Claims and Risk Allocation at Contract End**
   Persistent issues with claims being raised by operators at contract completion and attempts to shift risk onto contractors. Concerns about disputes over ambiguous topics such as "value for money."
2. **Profitability and Margin Pressure**
   Increasing difficulty in achieving adequate profit margins due to competitive pricing, unrealistic client expectations, fixed-price contracts, and risk transfer. There's a perception that decommissioning is often expected to be delivered "for nothing," squeezing suppliers.
3. **Funding Availability and Obligations**
   Challenges with securing funding at the point of need, especially given the complex liabilities (e.g., Section 29 holders). Funding mechanisms do not always align with the commercial realities of project execution.
4. **Innovation and Technology Adoption**
   Respondents highlight a disconnect between operators' stated desire for innovation and technology and their reluctance to actually deploy new solutions in the field. Longstanding discussions around new techniques and business models often do not result in action.
5. **Supply Chain Consolidation and Market Entry Barriers**
   Larger contractors' ability to accept lower margins creates barriers for new entrants and risks supply chain health over the longer term. There are concerns this reduces competition and innovation.

CONFIDENCE

2023

In 2023, for Operator / Asset owners, their belief was that the EPL will generally delay decommissioning, while Supply Chain are a little more split with most choosing the option Accelerate decommissioning (although a sizeable minority selecting either Delay or Strongly delay decommissioning).

Overall, the majority across all demographics was split between Accelerate, Delay, and I don't know.

2025

In 2025, we see stronger polar isation of sentiment compared to 2023, with the most popular options other than I don't know being Strongly Accelerated, or Strongly Delayed, followed closely by behind by Accelerated and Delayed.

A lower proportion selected No Impact, suggesting that more respondents perceive EPL as having impact.

Confidence did not have any Likert Scale questions, instead utilising multiple choice questions to understand the respondent's feelings about the future of the industry.

Pursuing Decommissioning Opportunities

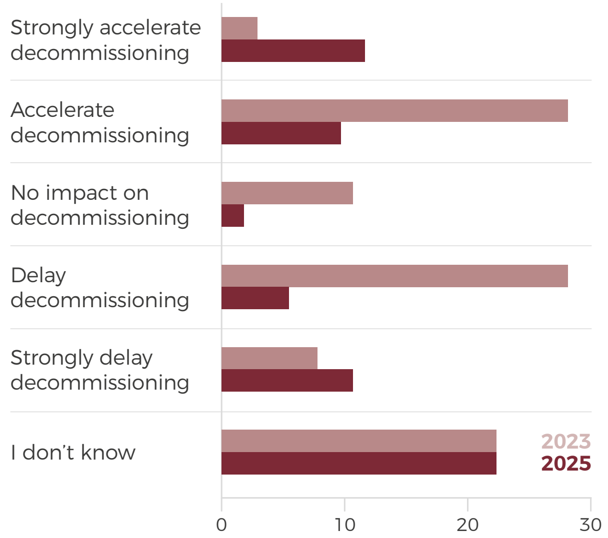
2025 vs 2025
For the question "My organisation already pursues or plans to pursue decommissioning opportunities in the following sectors", the distribution of selected answers is very similar between 2025 and 2023, with differences in proportion of selected responses ranging no more than between 0-3%, for any given response value.

Most & Least Selected Options
In both years, Upstream Oil & Gas was the most selected response value (31-33%), followed by Renewables (18-19%), and in third place Midstream Oil & Gas (15%). The least selected option was Pharmaceuticals or other heavy industries, at 3-5%.

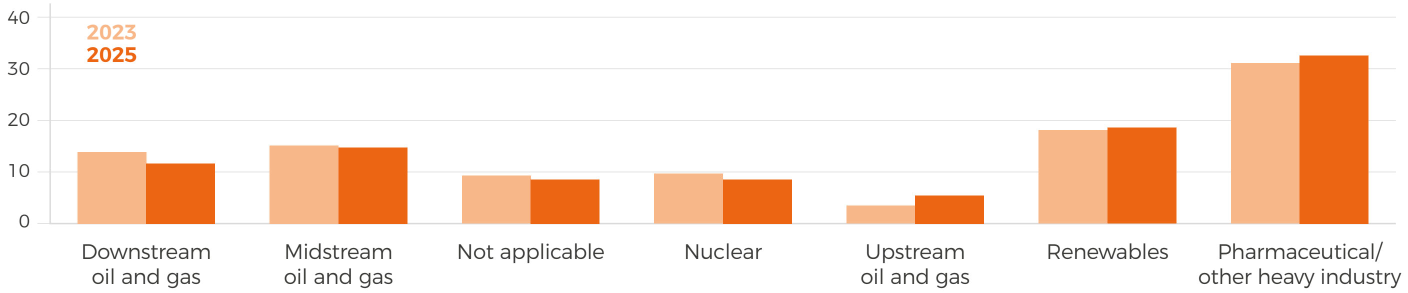
EPL Impact

The 2025 question "What impact has the Energy Profits Levy (EPL) had on oil and gas decommissioning in the UKCS?" provides an interesting follow up to the 2023 question, "What impact has the Energy Profits Levy (EPL) had on oil and gas decommissioning in the UKCS?"

What impact will the Energy Profits Levy (EPL) have on an and gas decommissioning in the UKCS?



My organisation already pursues or plans to pursue decommissioning opportunities in the following sectors



Feedback Overview

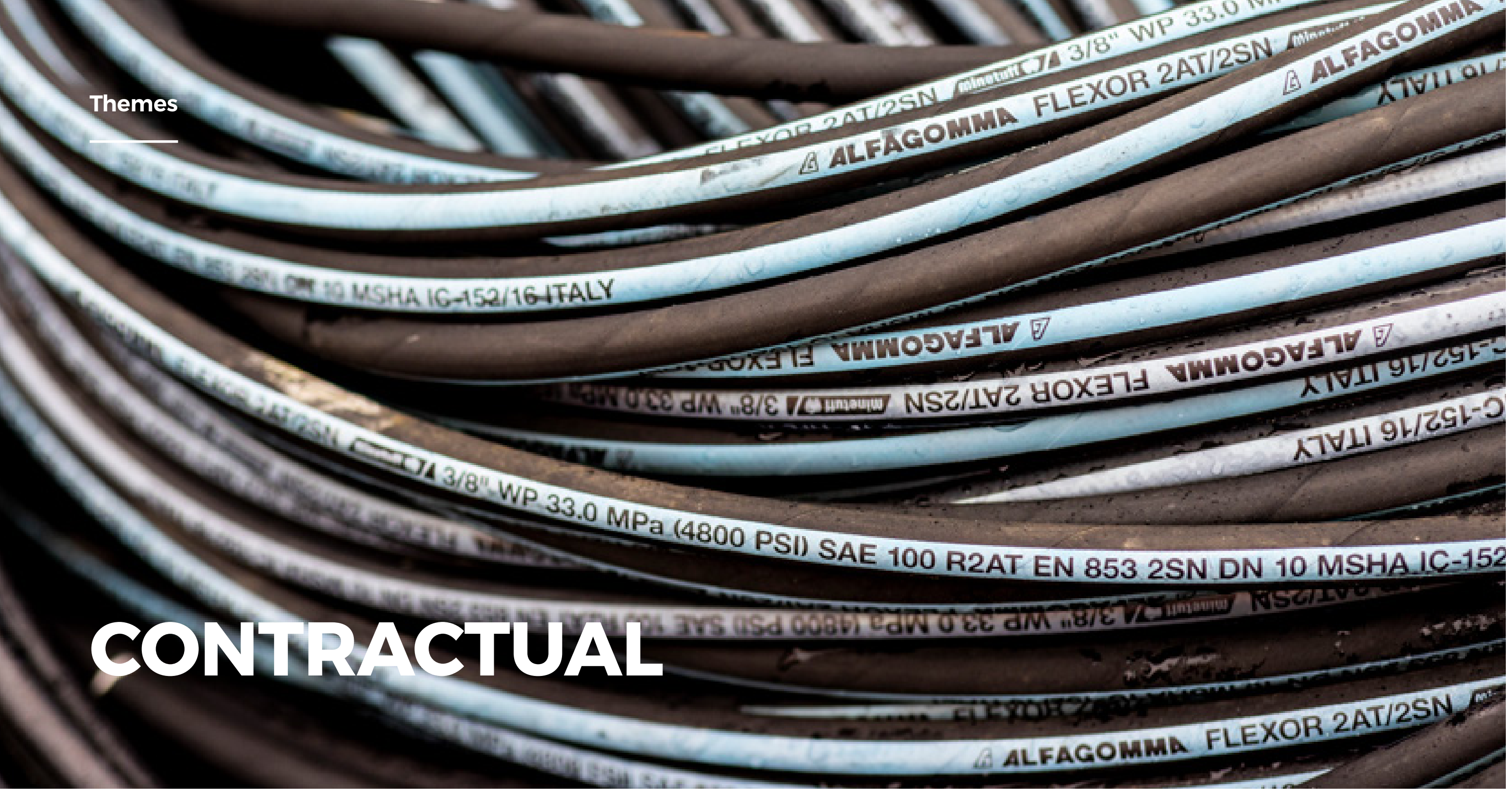
The results express clear pessimism about the direction of decommissioning activity in the UK oil and gas sector. Confidence is being undermined by fiscal policy, market and regulatory shortcomings, and a lack of industry unity.

Despite expectations for a short-term uptick in activity, respondents foresee a sharp contraction ahead, with significant risks to both the workforce and the supply chain.

There is a call for better coordination, regulatory robustness, and a renewed commitment to UK value retention to mitigate an increasingly negative outlook.

Feedback Top 5

1. **Lack of Confidence in Projections and Coordination**
   Respondents express skepticism about current decommissioning activity forecasts. There is a sense that industry presentations and published numbers are well-publicised but lack real coordination or clarity, fueling uncertainty in the sector's direction.
2. **Impact of the Energy Profits Levy (EPL)**
   The UK's Energy Profits Levy (EPL) is cited as a major factor dampening confidence—viewed by some as a significant deterrent to investment and continuity in decommissioning projects. The levy is characterised as damaging, potentially driving work and investments away from the UK Continental Shelf (UKCS).
3. **Supply Chain Pressures and Uncertainty**
   Concerns abound regarding the stability of the supply chain. Respondents voice worries over the shrinking base of contractors and service providers, driven by price pressures and the uncertain long-term future of the basin. Stagnant pricing (no increase in rental rates for years) is indicative of deeper issues.
4. **Regulatory and Market Delays**
   Operators are reportedly using current global uncertainties as a pretext to delay projects, while regulators are criticized for being passive and failing to enforce meaningful penalties for such delays. This lack of assertive regulation is seen as contributing to inertia in the sector.
5. **Short-Term Activity Spike Followed by Steep Decline**
   There is a widespread expectation of a surge in decommissioning activity over the next five years, followed by a dramatic drop. This anticipated boom-and-bust cycle is creating anxiety about the future workforce, as many foresee a significant outflow of skilled labour when activity inevitably falls away.



CONTRACTUAL

2025 vs 2023

Overall results are similar between the two years, with the total average Likert score being identical at 51%.

EPRD Model

The biggest difference between 2025 and 2023 is in the distribution of Likert responses for the EPRD question. In 2025, The score distribution is more even, with 28% for Disagree, 37% selecting Neutral, and 19% for Agree. This is a more even spread compared to 2023, which was more clear cut with half (51%) selecting Neutral, and a slight negative skew to Disagree (22%) as opposed to Agree (11%).

Bidding & Contracting

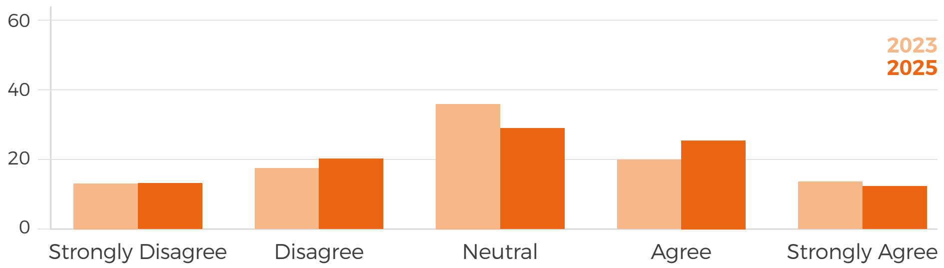
The distribution of responses for this Likert question were both extremely similar between the years, with differences for any category of response value ranging only between 1-3%, and relatively evenly spread between the responses.

In both years, there is a slight skew towards Agree, but overall, the distribution was relatively even, suggesting there is no consensus. This remains the case when splitting the demographic to only the Supply Chain, however when looking only at Operators/Asset Owners, interestingly there is an overall positive skew in 2025, whereas in 2023 there is a slight negative skew. In 2025, Operators/Asset Owners selected a majority of Neutral (36%), followed by Agree (29%) in second place, with Disagree and Strongly Disagree jointly accounting for less than a third (28%), giving 2025 an overall positive skew for this question.

Project Bids vs Wins Ratio

Finally, the question regarding the ratio of project win to project bids shows that in both 2025 and 2023, higher bid to win ratios are common. The 1:3 win rate is the most common (23-28%), with progressively lower rates for 1:5 (14-16%) and 1:10 (7-14%).

Score distribution:



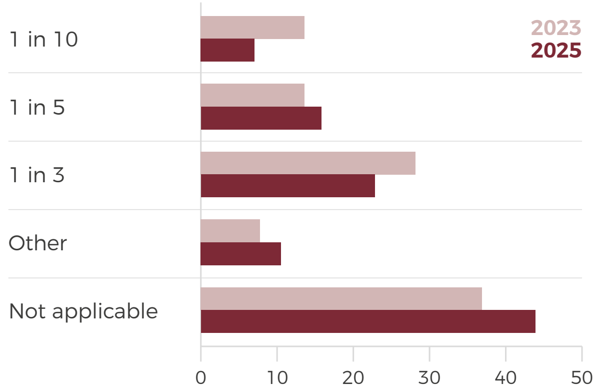
Contractual average score:

Average scores by question:

If more time was invested in bidding and contracting, outcomes would improve.

The Engineer Prepare Remove Dispose (EPRD) contract model creates a fair market where the supply chain can effectively compete.

In my organisation, the ratio project wins to project bids is:



Feedback Overview

Overall sentiment from survey respondents is one of frustration - a contracting environment seen as outdated, risk-averse, and unfit for the complexities of decommissioning. There is a perceived lack of innovation, with contract practices defaulting to traditional, cost-driven models, with too much risk to the supply chain, especially SMEs.

Many believe that more equitable risk allocation, earlier engagement, and a shift from cost-driven tender decisions are essential to improve project outcomes. Growing concern also surrounds the sustainability of the domestic decommissioning supply chain, given international opportunities.

Feedback Top 5

1. **Overly Complex and Onerous Tendering Processes**
   Respondents highlighted that tendering involves excessive bureaucracy and documentation, often mimicking the approaches used in new development projects. This level of complexity can be prohibitive, especially for SMEs, resulting in duplicated work and excessive cost before any real activity begins.

2. **Unbalanced Risk Allocation/Unfair Payment Terms**
   A widespread perception that current contracting models transfer too much risk and cost down the supply chain, putting undue pressure on smaller companies. Payment times and onerous terms disproportionately strain SMEs, who struggle with cash flow whilst being required to absorb most of project risk.

3. **Cost Over Technical Merit**
   A dominant theme is the prioritisation of the lowest cost bids at the expense of technical excellence and robust project delivery. A focus on price over best solution leads to underestimated bids, project overruns, and the issuance of multiple variation orders (VOs), ultimately undermining the goal of efficient, high-quality decommissioning.

4. **Limited Inclusion/Engagement Across the Supply Chain**
   Feedback shows that current strategies, like EPRD, often exclude specialist providers, reducing opportunities for SMEs with deep expertise. Early engagement and specialist consultation are seen as missing elements that could unlock better project outcomes and innovation.

5. **Lack of Standardisation and Industry Evolution**
   Frustration at a lack of standard contract adoption and consistent documentation formats across operators, leading to inefficiency. Many believe industry relies too heavily on traditional models rather than new execution or commercial models that could deliver optimised results.

ENVIRONMENTAL

Decarbonising Decommissioning Projects

In both 2025 and 2023, the three related fact Likert questions regarding decarbonising decommissioning projects were generally on the positive side of neutral. In 2025, each of the responses around capability, willingness and commitment, scored between 54-58%, and we note that 2 out of 3 were 4% higher than in 2023.

When cutting across different demographics, we can see that for 2025, the scores are 9-10% lower for every question, when splitting by Operator/Asset Owner, whereas for the Supply Chain, the scores are 4-6% higher.

This contrasts with 2023, where splitting by Operator/ Asset Owner increases the average score by less (2-4%), while splitting by the Supply Chain 1-2%. This suggests that the feeling was generally shared by respondents in 2023, but in 2025, Operators have a visibly more negative perspective compared to the Supply Chain.

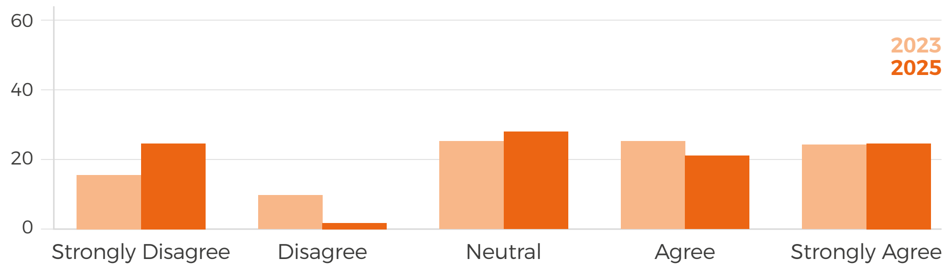
Environmental Protection

Environmental protection was overwhelmingly positive with almost all participants suggesting that this topic is either always or frequently discussed, in both years. In fact, in 2025, a 6% higher proportion (51%) of respondents selected "Always" compared to 2023 (45%), while the proportion of Frequently stayed the same at 39%. This may suggest that environmental protection is being seen as a higher priority now, than before.

Rigs to Reefs

This is the only Likert question for this theme, "Within the oil and gas industry, rigs to reefs, as practiced in Gulf of Mexico, whereby items are deposited on the seabed, should be adopted in more regulatory jurisdictions." Which in 2025 scored 55%, that is 3% lower than 2023. In terms of distribution, the proportion of respondents selecting "strongly disagree" rose by 9% in 2025 (25%) compared to 2023 (16%), leading to increased polarisation.

Score distribution:



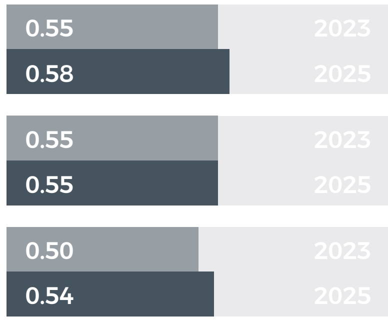
Average scores by question:

Rigs to reefs, as practiced in Gulf of Mexico, whereby items are deposited on the seabed, should be adopted in more regulatory jurisdictions.

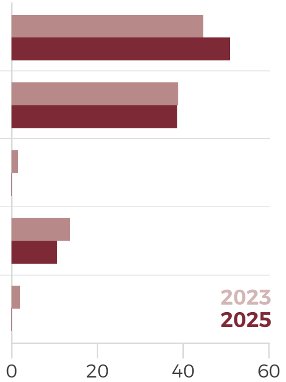
Circularity & Repurposing

Results are similar between 2025 and 2023 for the question regarding circularity and re-purposing in decommissioning. It has an interesting breakdown in the data, where most participants believe that it needs to be pursued "more aggressively" (47-49%). The remaining participants are split between feeling that it is "not being addressed appropriately" (24-26%) and "currently being developed at an adequate pace" (19-24%). The only substantial difference between the years is that in 2025, a lower proportion of respondents selected "currently being developed at an adequate pace" (19%) than in 2023 (24%).

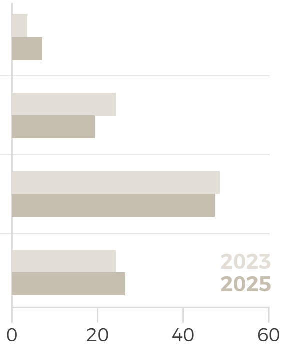
When it comes to decarbonising decommissioning projects, our industry:



Environmental protection is discussed in my organisation:



Circularity and repurposing in decommissioning:



Feedback Overview

Overall, responses reflect scepticism and frustration with the current approach to environmental considerations in UK decommissioning, citing significant barriers posed by regulation, misalignment between messaging and reality, and lack of practical progress toward circularity. There is wariness about promoted solutions like Rigs to Reefs being put forward without suitable environmental justification, especially in unsuitable regions like the North Sea. Respondents feel more strategic alignment and practical expertise at regulatory and execution levels are needed to genuinely improve environmental outcomes. There is a shared sense that ambition far outpaces execution, with the lowest-cost options trumping environmentally superior practices in decision-making.

Feedback Top 5

1. **Rigs to Reefs (R2R) Debate**
   Respondents expressed significant debate around the suitability of the "Rigs to Reefs" approach, with many noting this should only be considered where clear environmental benefit can be demonstrated and regulatory hurdles, such as OSPAR, must be navigated. Others felt that the North Sea is typically an unsuitable environment for this option, and that its promotion can be viewed as an operator's shortcut rather than a legitimate strategy.
2. **Regulatory and Alignment Challenges**
   There is a strong call for greater alignment between regulators and industry bodies (DM, NSTA, OEUK, OPRED) to present a united front in discussions, especially regarding lobbying for more progressive regulation with bodies like OSPAR. Respondents feel current regulations leave little flexibility for practical, innovative decommissioning solutions.
3. **Circular Economy and Repurposing Limitations**
   Many survey participants noted scepticism over the scalability of circularity and repurposing within decommissioning; much equipment is unfit for reuse due to condition, and industry is perceived to prioritise cost-cutting over genuine environmental gains. The gap between "circular economy" aspirations and operational reality is widely acknowledged.
4. **Effective Recycling and Waste Management**
   Respondents highlighted missed opportunities to maximise recycling/reuse due to a lack of experience and awareness at project/contractor levels. There is a perception that more value could be extracted from assets by better understanding both the waste hierarchy and the true utility of equipment earmarked for disposal.
5. **Pragmatic, Risk-Based Assessments**
   Several comments called for environmental decisions to be made based on risk and holistic benefit; not only compliance, costs, or simplified frameworks. The industry was urged to apply the Best Practicable Environmental Option (BPEO) more thoroughly.

PEOPLE & SKILLS

2025 vs 2023

Out of 7 questions in this theme, 2 were answered more negatively in 2025, compared to 2023, 2 more positively, and 3 were overall similar. However, overall the sentiments are similar in both years.

Optimism about Staying in Decommissioning

The question "I see myself still being part of the decommissioning industry in five years time" scored a relatively high 71% in both years, which placed it as the top scoring question in the survey outside of those asked in the Safety theme, for both years 2025 and 2023.

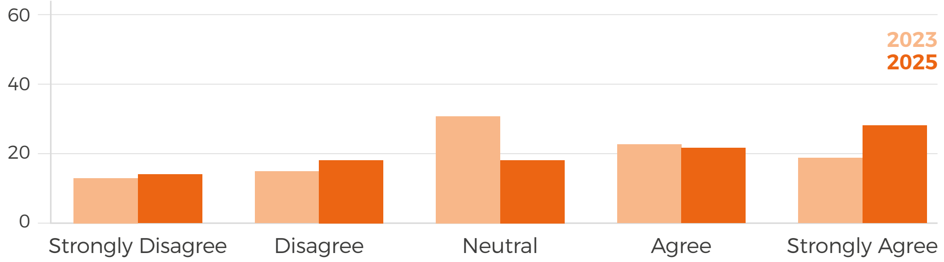
Problem with Skills Gap & Experience

Questions regarding increase in skills gaps and decrease in experience both scored rather high on the agreement scale (48% and 54% respectively), which is consistent with the comments submitted for this theme, and suggesting that there is a strong awareness of a skill gap and a need for more specialised training in decommissioning. Both were 4% more negative compared to 2023.

Problem with Retaining, Attracting & Training Workforce

The above results are supported by additional questions regarding how challenging it is to retain (45% in 2025, 46% in 2023) and attract (36% in both years) individuals to decommissioning. Both questions scored very poorly in both years, echoing the findings across this theme. The same applies to questions regarding sufficiency of training available for those hoping to develop (49% in 2025) and those hoping to join (40% in 2025), and both these questions scored higher than 2023 by 7% and 3% respectively.

Score distribution:



People & Skills average score:

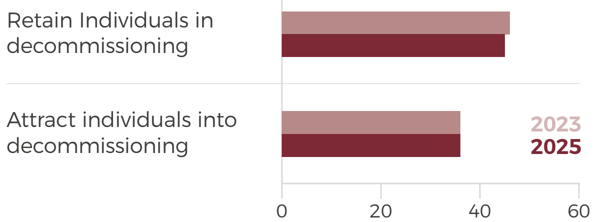
Average scores by question:

There is a notable decrease in experience/skills among individuals in the decommissioning industry every year.

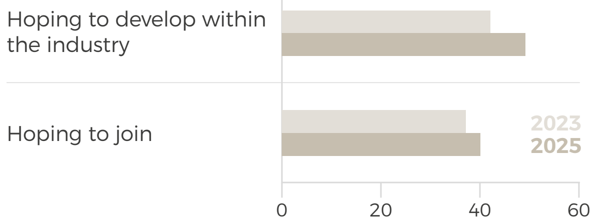
In my organisation, there is a gap between the skills available and the skills needed to meet the demands of the decommissioning industry.

I see myself still being part of the decommissioning industry in five years time.

In my experience it is challenging to:



The training available in the decommissioning industry is sufficient for those:



Feedback Overview

Respondents express both confidence and concern regarding the UK decommissioning workforce. While there is a broad base of transferable skills and foundation of experienced individuals, the sector struggles with knowledge continuity, project execution, and attracting new entrants.

Issues including the lack of transparent information sharing, an unclear value proposition for younger workers, and fears about job security must be addressed industry-wide to unlock future skills development and career pathways.

Despite challenges, there is optimism that with innovation, active project engagement, and better-managed training/ graduate programmes, the sector can remain viable and attractive.

Feedback Top 5

1. **Experience Through Practice and Project-Based Learning**
   A recurring sentiment is that hands-on, practical experience in live decommissioning projects is irreplaceable for building true competence. Many noted formal training and academic courses cannot substitute the depth of expertise gained through active participation on-site.
2. **Skills Transfer from Related Sectors and Need for Project Management**
   Many respondents indicated that core skills required for decommissioning are similar to those in project management/operations within oil, gas, and infrastructure. A significant gap was noted in project management experience and delivery, compounded by fewer major projects in recent years.
3. **Barriers to Training – Information Sharing and**
   Confidentiality issues and lack of operator willingness to share proprietary data were highlighted as impediments to developing effective training. Lack of accurate public domain information and difficulty standardising training across projects further hinder skills development.
4. **Challenges in Attracting and Retaining New Talent:**
   Attracting young people and retaining experience is a clear concern, with graduates and early-career professionals struggling to access meaningful roles or see long-term career prospects. Respondents also highlighted an impending gap as experienced operational staff near retirement with too few successors in place.
5. **Labour Mobility, Retention and Perceptions of Job Security:**
   Workforce mobility within larger companies supports talent retention, but smaller firms struggle to offer varied career progression. Insecurity about the longevity of decommissioning roles leads to seeking stability on longer-life assets, creating further attrition in this skills pool.

PROJECT EXECUTION

Lowest Scoring Theme

Project execution is the lowest scoring theme across both 2025 and 2023, and there is some interesting data in the responses to help understand why. Each of the 3 Likert Scale questions focused on a different aspect and in most cases, the scores were neutral to negative. The fact that the majority of answers were neutral (33-36%) could be because the respondents don't know the answer.

Published Outturn Reports Accuracy, Need for R&D

Published outturn accuracy scored 47% in 2025, almost same as 46% in 2023, while the need for Research and Development scored 38% in 2025, which is 5% higher than in 2023. An increased perception for the need for R&D resources may indicate that decommissioning is perceived as higher priority now than two years ago.

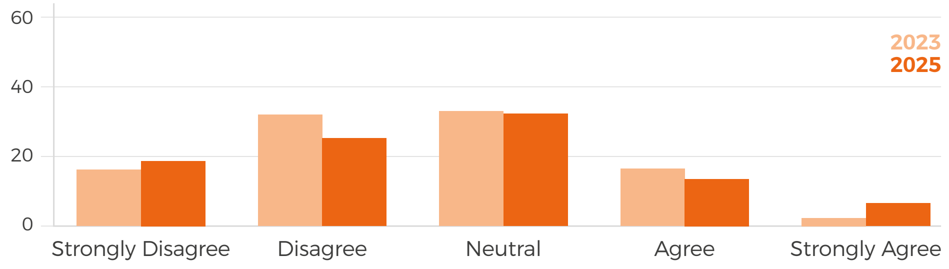
Effectiveness at Meeting Current Demand

At 38% in both years, this shows a consistent lack of confidence in the industry's capabilities. It is one of the two equally lowest ranking questions in the 2025 survey, and the second lowest in the 2023 survey, which contributes to this theme having the overalllowest score.

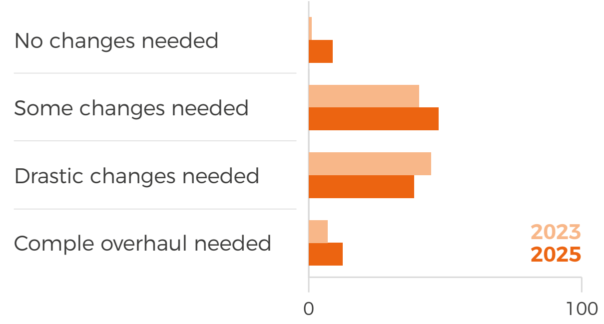
Present Delivery of Decommissioning Projects

Stakeholder satisfaction (61%) and on time delivery (41%) increased in 2025 compared to 2023 by 3% and 5% respectively, while on budget delivery stayed the same at 39%. The particularly low scores of budget and timeliness of delivery suggest that Project Execution is a low-point for the industry.

Score distribution:



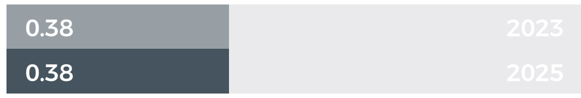
What do you think about the ability of the decommissioning industry to effectively meet demand in the coming 10 years?



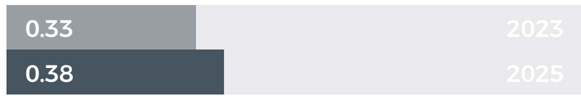
Average scores by question:

Within my experience, published outturn reports accurately reflect project outcomes.

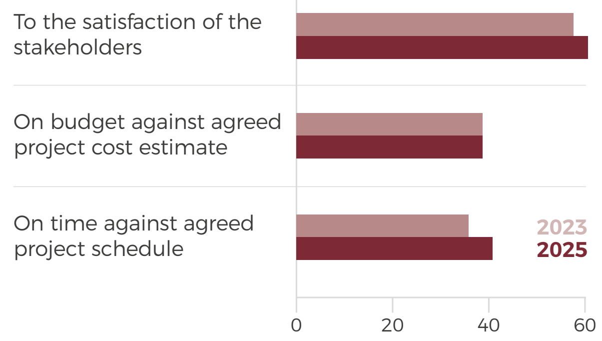
The decommissioning industry in its current form is effective at meeting the existing demand.



The industry requires significantly more Research & Development to provide innovative tools that will make decommissioning safer and more efficient.



In my experience decommissioning projects are typically delivered:



FEEDBACK OVERVIEW

The survey reveals a sector capable of delivering decommissioning projects but beset by frustration over uncertain project pipelines, investment risk, and unsustainable commercial dynamics.

Respondents want greater leadership from operators and regulators, more predictable planning, and a shift from cost-cutting towards quality and collaboration.

While there is appreciation of emerging best practices, the predominant mood is one of caution and impatience – a desire for systemic reform and transparent, long-term market signals. Respondents urge industry stakeholders to address deep-rooted structural and commercial issues to unlock.

FEEDBACK TOP 5

1. **Uncertainty and Lack of Work Pipeline**
   Concern over the unpredictability of decommissioning project timings and a lack of sustained, committed pipelines from operators undermines confidence and stability in the sector. Respondents express frustration that this erodes supply chain investment, putting UK capability at risk of disappearing.
2. **Supply Chain Capacities and Constraints**
   Many comments note the supply chain's struggle to commit capacity and expertise in the face of variable demand, with specific concerns over vessel and port availability, and competing priorities with other industries.
3. **Cost Pressure and Profitability Challenges**
   There is widespread dissatisfaction with ongoing cost pressures, "race to the bottom" tendering, and narrowing margins, making sustainable business models for decommissioning suppliers hard to justify. Respondents are wary of operators pushing for unrealistic prices, resulting in poor project quality and persistent market instability.
4. **Need for Systemic and Process Innovation**
   While some see best practices emerging, several urge a shift in focus from merely developing new hardware to driving top-down transformation in methodologies, processes, and contracting models. There's a recognition that innovative, sustainable progress also depends on nuanced changes across the value chain.
5. **Collaboration, Policy, and Strategic Direction**
   There is a call for stronger collaboration among operators, government, and partners (including with Norway/EU) to align innovation, securing a UK decommissioning future. Cautious optimistim that with the right policy and industry coordination, the sector can thrive.

REGULATION

OSPAR Decision 98/3 Derogation

Majority Selection
The first question is very specific: "In the context of oil and gas decommissioning in the North Sea, do you think the current provision for derogation within the OSPAR decision 98/3 should:" with answers ranging from re-examination through to remain unchanged. There is a clear majority response, as across both 2025 (47%) and 2023 (48%), the majority believe it should be objectively re-examined.

2025 VS 2023

However, interestingly, the proportion of respondents selecting remain unchanged has risen from 8% in 2023, to 17% in 2025. This brought up the remain unchanged option from 4th place in 2023, to 2nd most popular choice in 2025. Together with the score fall in option for objectively re-examined, this may suggest that perspectives on this have become more polarised.

Effectiveness of Regulators & Regulations

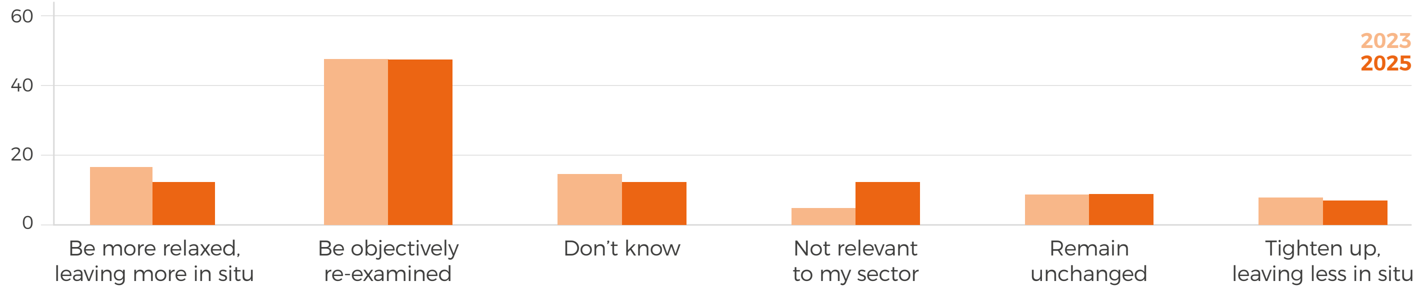
All Participants
The question regarding the adequacy and effectiveness of regulators and regulations shows a polarised result in both years. In 2025, 58 participants (47%) feel that regulators and/or regulations are inadequate and require change, which is close the 50% recorded in 2023.

Operator / Asset Owner
When looking at Operators / Asset owners alone, there is a clear skew negative skew towards "inadequate and requiring change" compared to all participants.

Supported by Comments

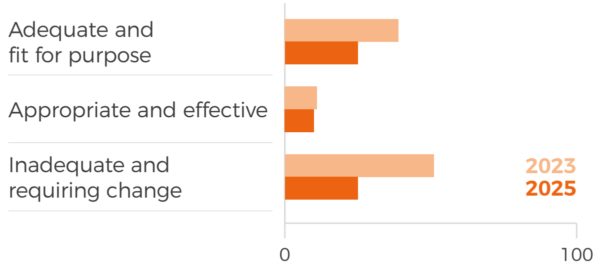
This is echoed heavily in the comments from both years with a heavy focus on dissatisfaction towards the current regulatory environment.

In the context of oil and gas decommissioning in the North Sea, do you think the current provision for derogation within the OSPAR decision 98/3 should:

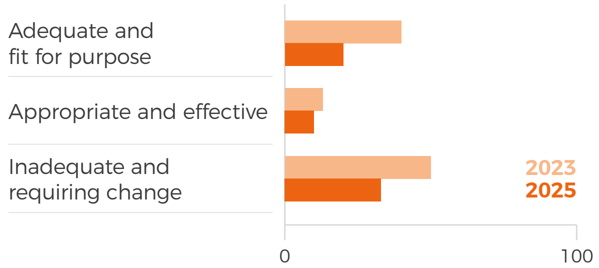


All Respondents:

For decommissioning activities in my sector, regulations are:

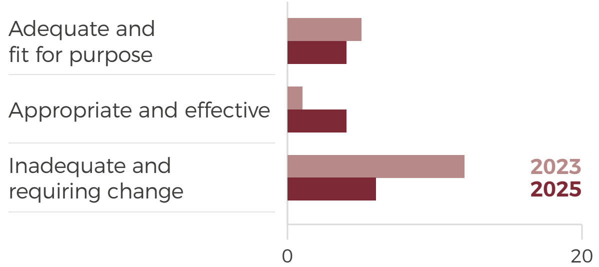


For decommissioning activities in my sector, regulators are:

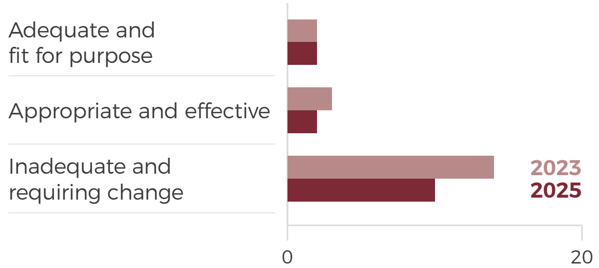


Operator/Asset Owner Only:

For decommissioning activities in my sector, regulations are:



For decommissioning activities in my sector, regulators are:



FEEDBACK OVERVIEW

Overall, sentiment toward decommissioning regulation in the UK oil and gas sector is one of significant dissatisfaction and concern. Respondents feel that regulatory bodies lack capacity, drive, and sometimes competence, hampering project progress and undermining the UK supply chain. There is a widespread call for clearer, more consistent, and better-enforced regulations, alongside improved engagement with industry stakeholders at all levels. Many also warn that without urgent reform, investment and expertise will be lost, with long-term consequences for the industry.

FEEDBACK TOP 5

1. **Regulatory Capacity and Effectiveness**
   Many respondents express concern that regulators are underfunded, slow to engage, and fail to enforce standards robustly or timely, leading to delays and confusion in decommissioning projects.
2. **Support for the UK Supply Chain**
   There is strong frustration that current regulations and practices do not sufficiently support UK suppliers, with specific references to loss of business to EPRD contracts and NORM (Naturally Occurring Radioactive Material) exports that harm domestic capability and expertise.
3. **Need for Regulatory Reform and Consistency**
   Operators call for more powers and clearer, globally consistent regulations. Lack of cohesion with global standards and populist-driven policy changes are seen as detrimental to effective decommissioning and business certainty.
4. **Stakeholder Engagement and Collaboration**
   Respondents highlight a lack of regular, constructive engagement between regulators and industry, especially at senior levels, with calls for more frequent, meaningful dialogue to improve mutual understanding and practice.
5. **Policy and Fiscal Barriers**
   Fiscal policies and incentive structures are seen as insufficient or even obstructive, deterring investment in decommissioning projects and risking long-term industry decline without targeted reforms.

SAFETY

Highest Scoring Theme

Safety is the highest scoring theme across both 2025 and 2023, with all questions scoring consistently well. This give a picture of an industry that is safety focused throughout.

2025 vs 2023

However, it is clear that for every question, the 2025 results are more negative when compared to 2023.

Slight Drop in Safety Training Standards

In 2025 the score for "Safety training provided by my organisation meets recognized industry standards" is 82%, 4% lower than in 2025.

Same Score for Raising Issues, Safety as #1 Priority, Leadership Commitment

The Likert questions relating to freely raising safety issues, safety being #1 priority, and leadership understanding of safety was the same in 2025 as 2023, differing only by 1% at most.

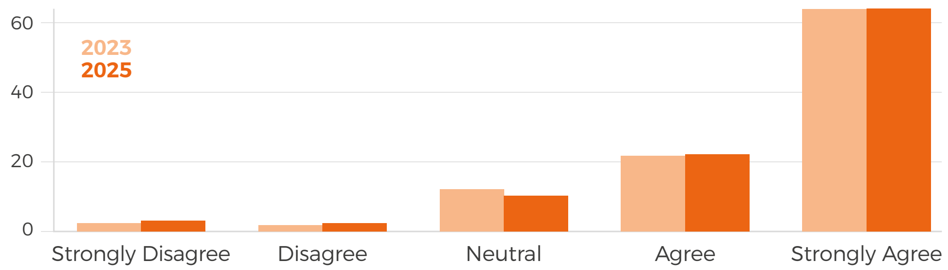
Sharing Safety Learnings Internally

"My organisation shares project safety learnings internally", the proportion of respondents selecting "Frequently – as part of our culture" was very high in both years, but 8% higher in 2025, with 91% (86 respondents) in 2025, and 83% (52 respondents) in 2023.

Sharing Safety Learnings Externally - Area for Improvement

If there is an area to work on with regards to safety, it may be around sharing safety learnings externally. In both years, less than half of the participants said this is done frequently (39% in 2025, and 47% in 2023). This echoes other similar surveys where sharing across organisations is still only embedded informally and not done consistently. We note also that for this question, the sc

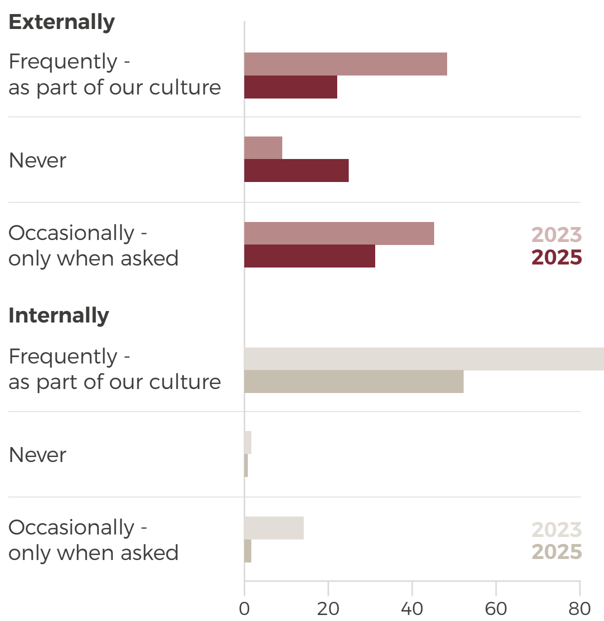
Score distribution:



Safety average score:

Average scores by question:

My organisation shares project safety learnings:



FEEDBACK OVERVIEW

The general sentiment from respondents underscores that while there have been real improvements and effective collaborations in decommissioning safety, there is an ongoing need to keep safety as the foremost consideration.

Positive trends around information sharing and listening to workforce innovations are noted, but there remains anxiety about the potential for safety to be undermined by commercial pressures and insufficient regulatory visibility.

Overall, there is cautious optimism about progress made, tempered by strong advocacy for constant vigilance and resistance to complacency or short-sighted cost savings in safety management.

FEEDBACK TOP 5

1. **Need for Ongoing Focus on Safety**
   Respondents repeatedly highlight that safety must remain a constant, central priority throughout decommissioning, rather than taking a backseat to commercial or supply chain pressures. Multiple comments mention the importance of not allowing cost or operational demands to overshadow critical safety considerations.
2. **Importance of Collaboration and Information Sharing**
   Industry-wide collaboration, such as between initiatives like Decom Mission and Step Change in Safety, is seen as a positive force, with several comments applauding efforts to share knowledge and best practices to improve overall safety standards.
3. **Concerns Over Cost Cutting Practices**
   There are strong worries expressed around the negative safety implications of cost-cutting measures, especially reductions in workforce skills and experience. Some respondents directly warn that seeking quick cost savings risks future incidents, emphasizing that investment in safety is non-negotiable.
4. **Openness to Innovation and New Methods**
   Several responses call for greater flexibility and open-mindedness from operators and contractors regarding methodologies, suggesting that reliance on default or traditional approaches (e.g., hot work cutting) can sometimes compromise safety, and that learning from contractors' frontline experience can yield improvements.
5. **Adequacy of Regulatory Awareness and Reporting**
   There is a recurring suggestion that regulators like the HSE could do more to raise awareness or publish findings specifically related to decommissioning safety, indicating a desire for transparent and accessible safety reporting.

FINAL THOUGHTS

What additional information would help your organisation to address future decommissioning needs?

Respondents expressed frustration at a lack of clear and timely information, both from operators and regulators, which hinders effective business planning. There is a broad consensus that transparency, meaningful benchmarking, and early engagement would drive more effective and innovative approaches to decommissioning. The supply chain is calling for a level playing field, fair commercial practices, and more recognition of their role in successful project delivery. Overall, the mood suggests a need for industry organisations to recalibrate their value and communication to members, as well as for regulators and operators to take more concrete actions to support the entire ecosystem.

"Make regulators regulate, make operators comply, make tier 1 companies act properly by paying the supply chain on time, allow the supply chain to actually make money, and ask operators to look further than the tier 1 companies and actually see what else is involved with their decommissioned items."

Final Thoughts Top 5

1. **Greater Transparency and Sharing of Decommissioning Plans**
   Respondents consistently called for clearer and more frequent publication of decommissioning schedules from operators, including well plug and abandonment (P&A) timelines and regional decom plans. Enhanced transparency would enable better planning across the supply chain and foster collaboration among stakeholders.
2. **Effective Regulatory Enforcement and Consistency**
   There is a strong desire for regulators to take a firmer stance in mandating decommissioning activities and timelines. Consistent enforcement and clearer regulatory guidance are seen as critical to ensuring industry alignment and timely project execution.
3. **Improved Access to Data and Meaningful Benchmarking**
   Survey participants requested more open access to detailed, comparable decommissioning cost and performance data, such as a global benchmarking system or a "Rushmore Reviews" approach for decommissioning. The current mixed data landscape is seen as an obstacle to accurate planning and competitive bidding.
4. **Early and Genuine Engagement with the Supply Chain**
   Early notification of project opportunities and greater openness to new suppliers and service providers were highlighted as essential. Concerns were raised that valuable opportunities are often allocated before being communicated, limiting fair competition and innovation.
5. **Fair Financial Practices and Supply Chain Support**
   Several responses stressed the need for fairer commercial arrangements, including timely payment to the supply chain and more equitable membership fees, especially for smaller companies. Ensuring commercial viability for suppliers was seen as crucial for maintaining a healthy, competitive sector.

KEY THEMES

QUESTIONS	FREE TEXT ANSWERS
Commercial: Challenge on margins; moderate confidence in cashflow & debt management	**Commercial:** Margins are tight; funding and unrealistic client expectations threaten sustainability
Confidence: Focus on upstream oil and gas; mixed views on EPL	**Confidence:** Low confidence persists due to uncertain pipelines and delayed projects
Contractual: Issues with EPRD market fairness; need for more bidding & contracting; strong project bid vs win ratio	**Contractual:** Cumbersome contracts, misaligned risks, unsustainable pricing challenge execution
Environment: Limited expertise, willingness & commitment; environmental protection discussed often; gap in circularity & repurposing	**Environment:** Regulations limit sustainability, circular economy adoption remains slow, inconsistent
People & Skills: Challenges retaining, attracting & training workforce; confidence to remain in decommissioning	**People & Skills:** Attracting, training, and retaining skilled talent remains a major challenge
Project Execution: Lack of effectiveness meeting demand; Significant R&D investment required	**Project Execution:** Execution hindered by scheduling uncertainty, supply chain issues, inconsistent planning
Regulations: OSPAR 98/3 decision should be objectively re-examined; challenge with effectiveness of regulators & regulations	**Regulations:** Under-resourced, inconsistent enforcement; stronger, aligned regulations urgently needed
Safety: Positive culture, training and leadership; psychological safety to raise issues	**Safety:** Safety is critical, but cost-cutting threatens workforce and innovation

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