

ALLIES FOR DELIVERY

**REBUILDING FAITH IN
SCOTTISH POLITICS VIA
THE NORTH SEA**

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and Dave Hawkey**

October 2026

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SUMMARY

1. **Scottish politics is fragmenting, not realigning.** The SNP remains the governing party but fell short of the majority it wanted; Labour failed to become the obvious alternative; Reform entered Holyrood as a serious force; the Greens strengthened; the Conservatives diminished; and turnout fell. This is not a clean transfer of authority from one bloc to another, but the dispersal of trust.
2. **The centre is being hollowed out by distrust and non-delivery.** Voters feel politics no longer speaks to their everyday reality. Low trust produces low turnout; low turnout rewards sharper populist politics; and sharper politics risks pushing mainstream parties further away from the material concerns voters raise first: bills, jobs, services, housing and the cost of living.
3. **Voters are “scunnered” but not disengaged from wanting change.** Public First’s focus groups show voters describing insecure work, home insecurity, weak services and a feeling that Scotland is in “free fall”. But low expectations are not the same as no expectations: voters still want delivery, but no longer assume any party will provide it.
4. **Trust in political delivery is dangerously low.** In our polling, Scottish voters were more likely to describe Scottish politicians as ineffective than effective, incompetent than competent, and “looking out for themselves” rather than “looking out for people like me”. Even the SNP, the most trusted party on delivery, is only trusted or somewhat trusted by 43 per cent to deliver its promises.
5. **The SNP’s election success is therefore hollow unless it becomes a delivery mandate.** The SNP’s continued dominance should not be mistaken for deep public confidence. It reflects voters’ even lower confidence in the alternatives. If the SNP cannot turn this parliament into proof of practical delivery, its broad church will become even harder to sustain.
6. **A majority constituency for practical politics still exists.** Cost of living is the dominant issue, selected by 70 per cent of Scottish adults, followed by the NHS at 48 per cent, immigration at 37 per cent and the economy at 36 per cent. This shows that the centre ground is not ideological moderation for its own sake but material politics focussed on bills, services, work and security.
7. **Party tribes show strong divisions on immigration and independence but clear commonalities remain.** Reform voters are more likely than others to prioritise immigration at the next election (they are the only group for whom cost of living is not the top priority). Conservatives are more likely than others to prioritise the economy. SNP voters are outliers in the priority they give to independence. Liberal Democrats are the most likely to prioritise the NHS. None of these are surprising, nor do they obscure key areas of agreement about the issues facing the country.
8. **Shared views on independence make the Greens the best bet for the SNP – but building “delivery alliances” with the rest of the progressive bloc is worth the effort.** The SNP has the first opportunity to rebuild the middle ground because it remains the governing party and can assemble issue-by-issue majorities. The Greens are the most promising partner due to their shared views on independence. However, finding tactical alliances with Labour and the Liberal Democrats demonstrates that Holyrood can be effective while also

helping to build bridges with the Westminster government, whose support will be required on key topics.

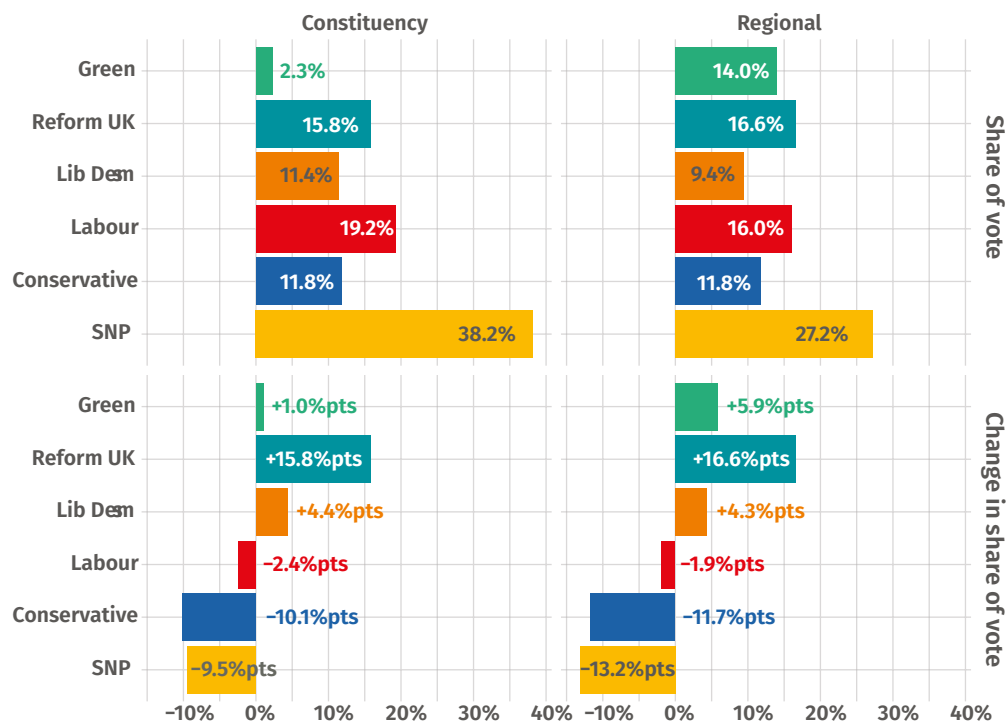
9. **Given the array of allies available, practical delivery of climate action is a promising area for collaboration.** The current Scottish government has the ability to build a broad governing consensus around practical delivery on key issues such as lowering bills, employment opportunities (particularly through the energy transition), and improvements to public services. Action on climate can help deliver this by strengthening and securing energy supplies, and generating new revenue streams as legacy assets go offline.
10. **The North Sea is the sharpest test of a managed energy transition.** The transition is not a choice between net zero and jobs; it is a test of whether politics can tell the truth about economic change. North Sea oil and gas is already in structural decline, and new licences can, at most, slow the pace of that decline. If climate policy becomes the scapegoat for that structural transition, voters will be offered false reassurance while the practical work of building the next economy is delayed.
11. **The North East is therefore a key demonstrator of practical government.** Holyrood cannot freeze the North Sea in time. While competence for legacy oil and gas management sits in Westminster, the task for Scottish government and Holyrood is to support the North East's next economic phase: protecting workers; transferring offshore skills; securing local benefit from ScotWind; investing in ports, colleges and supply chains; and ensuring that communities see new jobs before old ones disappear.
12. **Voters support climate action and renewables, but they do not trust transition as an abstract promise.** Support depends on lower bills, secure work, energy security, and visible investment in affected places. The opportunity is to move the debate out of a misleading and unhelpful "net zero versus North Sea" frame and into a delivery agenda that parties across Holyrood can support.

1. HOW THINGS FALL APART

The centre is not simply being outflanked. It is being hollowed out by distrust, low turnout and the sense that politics no longer speaks to everyday reality.

FIGURE 1.1: THE SNP GOT THE LARGEST SHARE OF THE VOTE, BUT THIS REDUCED FROM THE 2021 ELECTION. THE REFORM UK VOTE SHARE INCREASED THE MOST

Constituency and regional vote shares for the 2026 Holyrood election



Source: BBC News 2026

The picture in Holyrood is a complicated one. Turnout in 2026 fell dramatically compared to the last election (from 64 per cent to 53 per cent); Labour failed to break through; Reform entered Holyrood as a serious force; the Greens strengthened; the Conservatives diminished; and the SNP won without securing the majority it sought. The result is not a clean realignment but fragmentation. Scotland remains a nation looking for competent government, but is increasingly unwilling to give any single party the job.

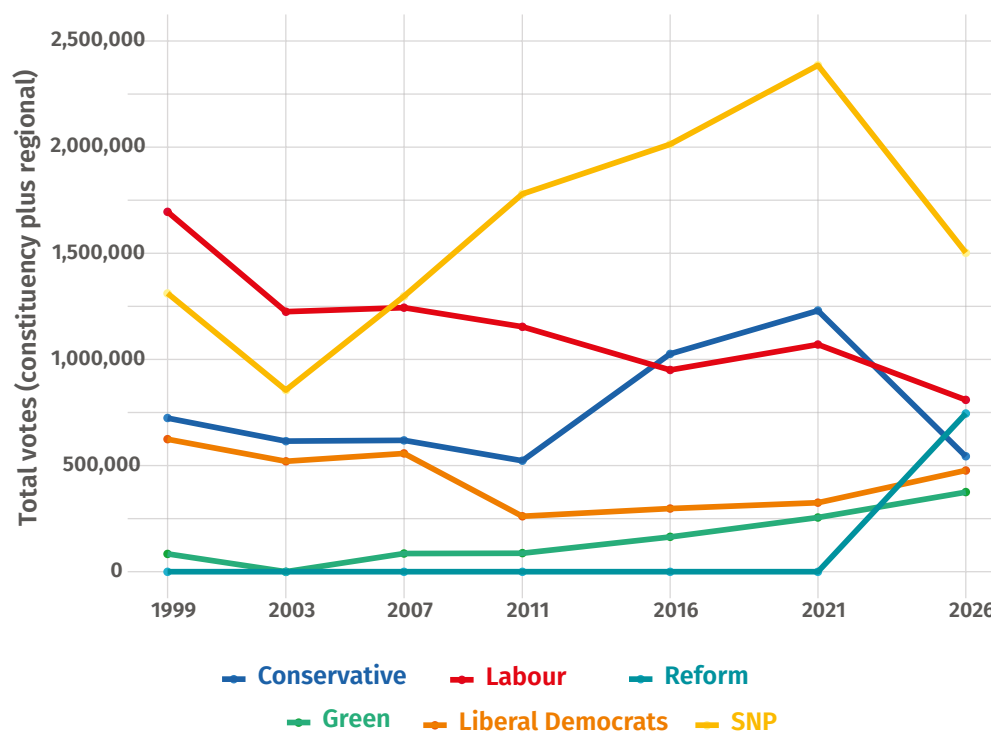
The danger is that political disconnection becomes self-reinforcing. Low trust produces low turnout; low turnout rewards sharper populist politics. Meanwhile, sharper politics pushes mainstream parties further away from the material concerns voters raise first: bills, jobs, services, housing and the cost of living. It is easy to feel that this trajectory is inevitable when looking at the long-term

picture. Fragmentation is clearly a structural trend (as explored in Hawkey and Smith's recent IPPR Scotland paper) not a one-election story.

By middle ground, we do not mean ideological centrism. We mean a material majority: voters who want politics to make everyday life feel more secure, and who will give permission for climate action only when it is connected to bills, jobs, services and place.

FIGURE 1.2: THE SCOTTISH PARLIAMENT HAS EVOLVED FROM ONE DOMINATED BY TWO PARTIES, TO A MORE FRAGMENTED SYSTEM

Scottish parliament elections: total votes by party, 1999–2026



Source: Vote totals from Wikipedia (2026a–g)

2. DIMINISHED EXPECTATIONS

Voters have not changed their values; they have lost confidence that any party can deliver on them.

Voters describe acute cost of living pressures, insecure work, weak services and political fatigue. These experiences are driving their political behaviour. The sentiment is best captured by the Scots word “scunnered”, meaning thoroughly fed up, bored, annoyed, disgusted, or tired of something.

PF Global documented these views in eight focus groups with voters from a range of locations in Scotland. They had different party affiliations, but the same hopelessness was evident in these conversations. We also ran two nationally representative polls with a combined sample of over 2,000 Scottish adults in the run-up to the Holyrood election.

“I feel like everyone’s working poor now. Everyone’s unstable. Jobs are unstable. There’s no job security, there’s no home security. It’s difficult for young people to go in the job market.”

Female, 50s, towns/rural swing conservative

“It doesn’t even just feel like it’s in decline. It’s a bit like free fall. I also work with schools and they’re going under, I mean everybody is absolutely pushed to the limit ... the lack of hope is palpable throughout services.”

Female, 50s, cities loyal progressive

That persistent hopelessness has accompanied a loss of faith in politicians from all parties, which we see from voters across the political spectrum. In our March poll, the Scottish public were more likely to think that Scottish politicians were ineffective than effective (49 per cent versus 32 per cent), incompetent than competent (43 per cent versus 38 per cent) and “looking out for themselves” than “looking out for people like me” (53 per cent versus 27 per cent). That is a terrible scorecard.

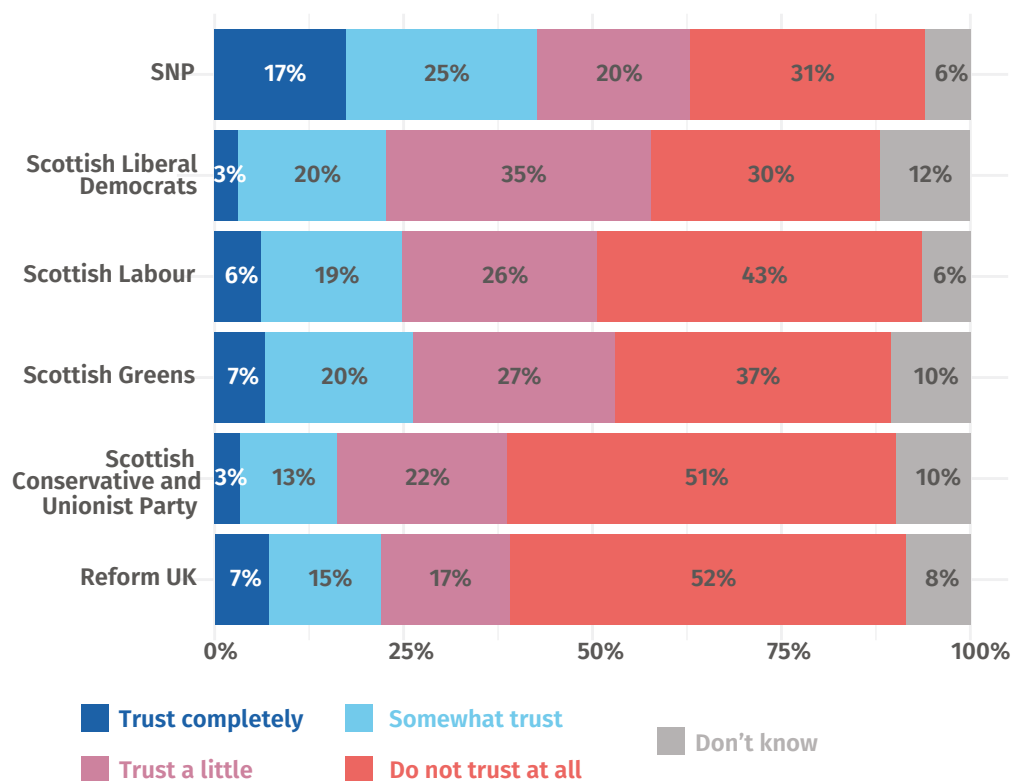
“I’ve personally lost trust and faith in politicians. One party’s going to do all these things and blame the other party for the mess. Another party comes in, they promise all these things and blame the last person for the mess and the country’s finances ...”

Female, 50s, towns/rural swing conservative

This loss of faith means that voters increasingly describe voting tactically or preventively, rather than being motivated by a stable party identity. They are looking for a candidate who can deliver tangible change. The tangibility is key here: despite repeated research finding that parties deliver around 67 per cent of their manifestos on average, voters have lost faith that this is the case. The SNP are the most trusted to deliver on their promises, though only 43 per cent of voters trusting or somewhat trusting that they will follow through.

FIGURE 2.1: THE PROPORTION OF SCOTTISH ADULTS WHO TRUST EACH POLITICAL PARTY IS VERY LOW

To what extent do you trust or distrust that the following parties will deliver on their election manifestos if they were to win a majority in the upcoming Scottish parliament elections?



Source: PF Global polling of 1,336 adults in Scotland, 23–28 April 2026

It doesn't have to be this way. Beneath the cynicism, there remains a majority constituency for practical delivery. Diminished expectations are not the same as no expectations. We still have an opportunity to draw voters back into the middle ground of politics.

The desire for delivery is visible in the polling: 47 per cent say the next parliament should focus on small, minor changes that get results today, while 44 per cent prefer a bold long-term vision. That is not a rejection of ambition. It is a demand for proof alongside ambition.

The public has not stopped wanting change but it has become disillusioned with change as a slogan.

3.

MAJORITY SUPPORT IS STILL POSSIBLE

Despite fragmentation, voters are not unreachable or ideologically lost. There remains a majority constituency for practical, material politics.

The dominant issue that motivates voters is the cost of living, chosen by 70 per cent of Scottish adults as one of the three “most important issues facing the country at this time”. After that, there is a second tier of three issues: quality of the NHS at 48 per cent, levels of immigration at 37 per cent, and the state of the economy at 36 per cent. Everything else is much lower: availability of housing is next at 15 per cent, followed by Britain leaving the EU at 14 per cent and taxation at 13 per cent.

FIGURE 3.1: SCOTS OVERWHELMINGLY CHOOSE THE COST OF LIVING AS ONE OF THE MOST IMPORTANT ISSUES FACING THE COUNTRY

Which of the following do you think are the most important issues facing the country at this time? Please select up to three

Issue	% selecting
Cost of living	70%
Quality of the NHS	48%
Levels of immigration	37%
State of the economy	36%
Availability of housing	15%
Britain leaving the EU	14%
Level of taxation	13%
Number of people on welfare	11%
Levels of crime	10%
Threat of climate change	10%

Source: PF Global polling of 1,336 adults in Scotland, 23–28 April 2026

Given the fragmentation we are describing, it is natural to ask how much these views vary across Scotland.

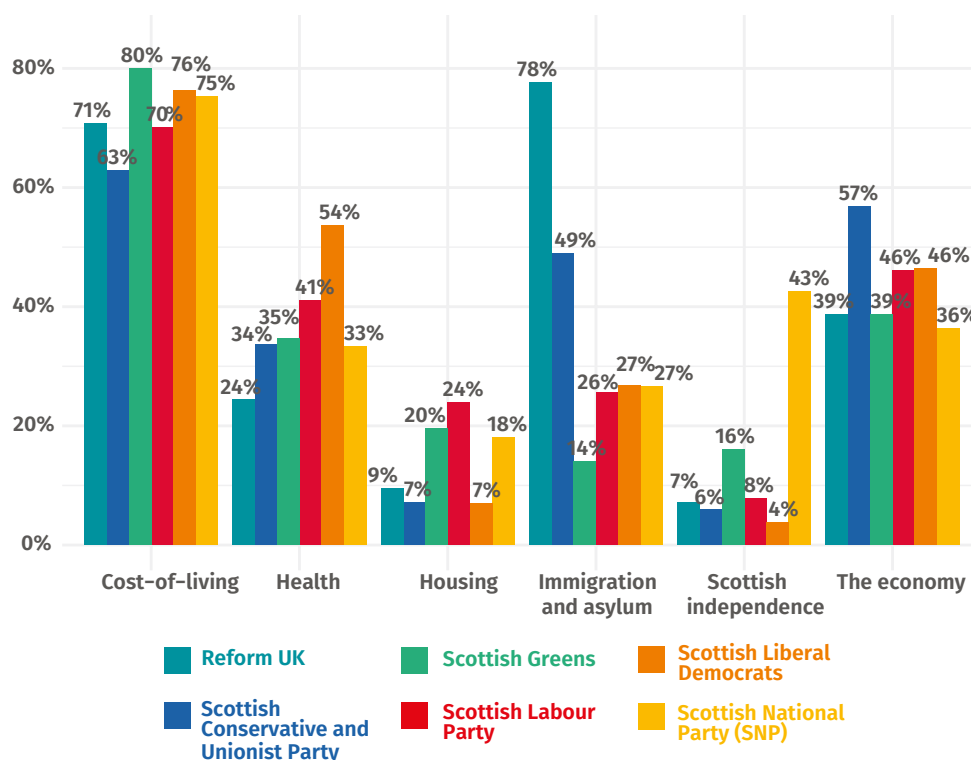
Age is the clearest demographic divide. Cost of living is the top issue for every age group under 65, peaking at 80 per cent among 45- to 54-year-olds. Among the over-65s, however, the NHS becomes the top concern, chosen by 62 per cent, ahead of cost of living at 58 per cent. Younger adults are much more likely to cite housing availability – 25 per cent of 18- to 24-year-olds and 23 per cent of 25- to 34-year-olds, compared with 10 per cent of the over-65s.

Social grade makes a big difference to concerns about the economy. AB¹ voters are more likely to emphasise the economy (45 per cent, compared with 33 per cent among DE voters) and taxation (19 per cent versus 10 per cent among DEs). C2 voters stand out on immigration, with 47 per cent selecting it, compared with 28 per cent of AB voters.

By current Scottish parliament constituency vote intention, the divide is much stronger than by standard demographics, but clear commonalities remain. When it comes to voting priorities, Conservative and Reform voters are more likely than others to prioritise immigration (though Conservatives are still more likely to choose the economy than immigration). SNP voters are outliers in the priority they give to independence. Liberal Democrats are the most likely to prioritise the NHS. None of these are surprising, nor do they obscure key areas of agreement about the issues facing the country.

FIGURE 3.2: IMMIGRATION IS MORE LIKELY TO SWAY THE VOTES OF CONSERVATIVE AND REFORM VOTERS, WHILE SNP VOTERS ARE MOTIVATED BY INDEPENDENCE

Thinking about how you'll vote in the upcoming Scottish elections, which issues are the top priorities for you? Please select three



Source: PF Global polling of 1,336 adults in Scotland, 23–28 April 2026

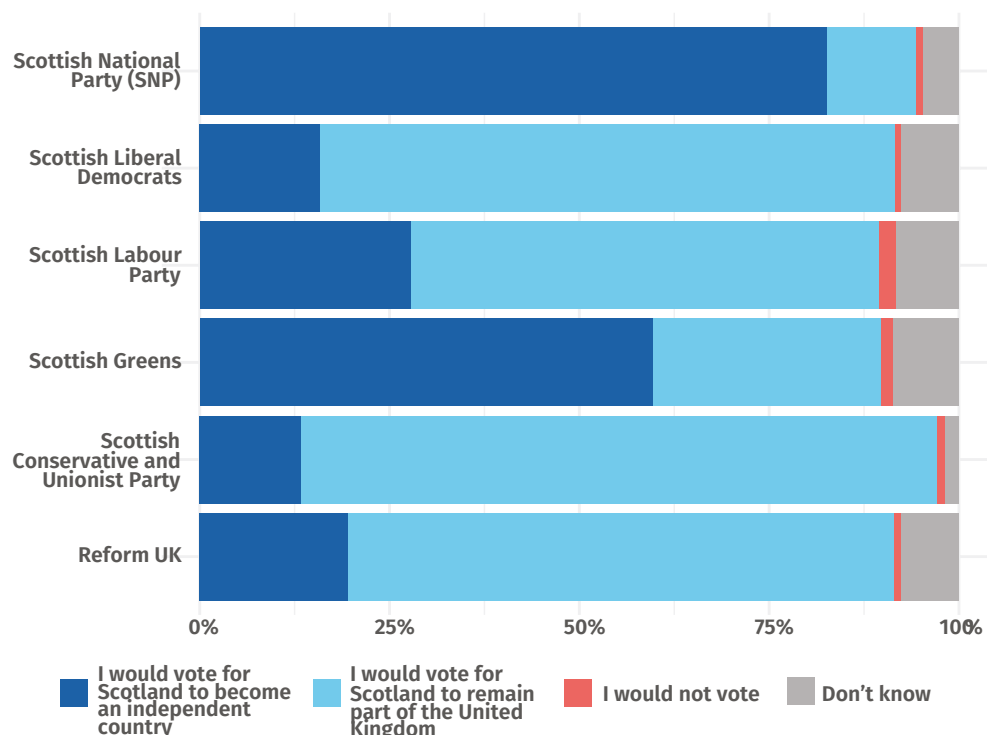
This sets up a classic left/right divide for the current session of parliament. On one side is an SNP/Labour/Green/Liberal Democrat bloc, which currently holds 100 seats in Holyrood and tends to look at these issues through the lens of public services. On the other is a Conservative/Reform grouping, currently

¹ Our research uses the term socioeconomic group which describes the types of job someone does and is based on the main income earner in the household: AB – intermediate and higher managerial professions; C1 – junior managerial professions; C2 – skilled manual workers; DE – semi- or non-skilled manual workers and non-working people.

holding 29 seats, that tells a story linking SNP and Labour rule with immigration and decline. Neither side of this confrontation will succeed unless they can concretely connect their own agenda to the everyday experiences of Scottish voters and show real progress.

FIGURE 3.3: SNP AND SCOTTISH GREEN VOTERS ARE THE MOST LIKELY TO SUPPORT INDEPENDENCE

If a referendum on Scottish independence were held tomorrow, how would you vote?



Source: PF Global polling of 1,336 adults in Scotland, 23–28 April 2026

Independence remains a mobilising force, but it cannot do all the work of enabling a minority administration to deliver policy. Meanwhile, the SNP's constitutional case becomes weaker, not stronger, if Holyrood looks incapable of delivery. Practical government is not a distraction from the independence argument; it is the condition that makes it credible.

That is why the Greens matter, but also why they cannot be the whole governing answer. The Greens are the SNP's most important partner for confidence and supply, and the most likely source of voters for independence. On the managed transition itself, however, the SNP will also need Labour and Liberal Democrat support on skills, warm homes, industrial strategy and regional investment, with Conservative and Reform pressure sharpening the cost and energy security tests.

Finding ways to work collaboratively with Scottish Labour could also pave the way to more cordial relationships between the Scottish and UK governments, opening the door to more joined-up policy in key areas.

4.

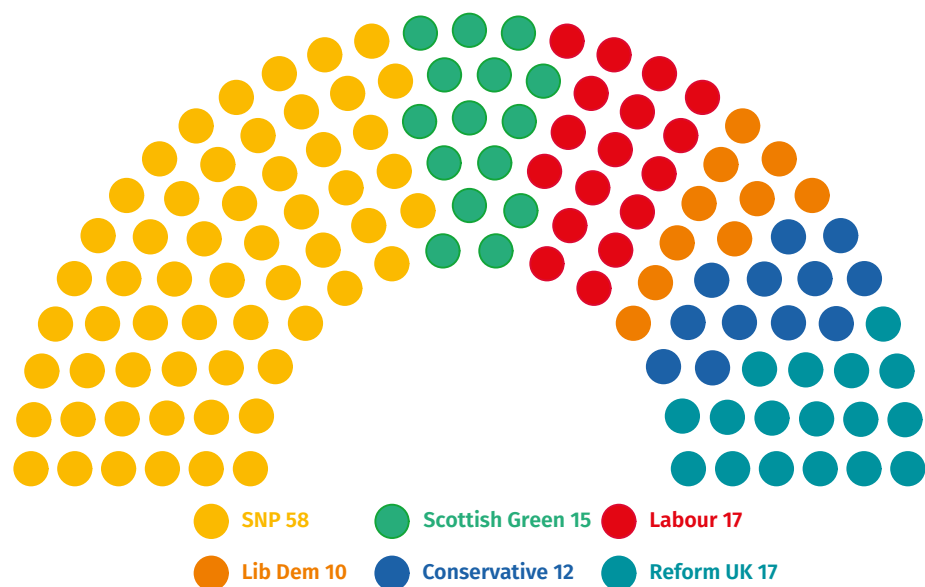
DELIVERING CHANGE BY BUILDING ALLIANCES: PLAUSIBLE, NOT SELF-EXECUTING

Seat shares in the new parliament reflect diversity in Scottish political preferences.² No party has a majority but this need not mean parliament is paralysed. There is enough manifesto overlap to build a jobs-and-cost-of-living transition agenda without a formal SNP majority. But overlap is only the starting point: the SNP will need to turn shared language into disciplined, issue-by-issue deals, budget choices, delivery institutions and proof points voters can recognise.

The practical challenge is to prioritise and construct those deals with the material that the voters have supplied: Green members for climate ambition and independence-facing politics; Labour and Liberal Democrats for skills, warm homes, industrial strategy and public-service delivery; and, where useful, Conservative pressure on cost, energy security and pace.

FIGURE 4.1: SCOTTISH PARLIAMENT ELECTION RESULTS 2026

Number of seats won by party (65 seats for a majority)



Source: Scottish Parliament 2026

2 For more on this, see Hawkey D and Smith C (2026).

To understand what is possible, we analysed each of the party manifestos, looking for substantial agreement on core topics.

We conducted analysis of the policies proposed by each party on each of the top 10 issues identified by Scottish voters as important, to investigate where alliances can be built.

On climate, tax, welfare, immigration and Europe, the spectrum of views is most stark. Greens and Reform sit at opposite ends on climate and fossil fuels. Greens and Conservatives/Reform sit at opposite ends on tax and welfare. SNP, Greens and Lib Dems are broadly pro-European and more migration-positive; Reform and Conservatives are much more restriction/local-priority focussed. Labour often sits between those blocs: harder-edged than SNP/Greens/Lib Dems on crime and delivery, but much closer to them than to Reform/Conservatives on public services and social investment.

The strongest practical alignment for the SNP is likely to be with Labour and the Liberal Democrats on NHS access, housing supply, skills, economic development, warm homes and managed energy transition. The Greens are the closest ideologically on climate, rights, redistribution and public services, but they are also the party most likely to push the SNP harder on the wind down of oil and gas.

This distinction matters. The Greens are the SNP's most important partner for climate ambition, parliamentary stability and the independence-facing story. But the managed transition bargain cannot be built with the Greens alone. It requires Labour and Liberal Democrat support on the practicalities, while Conservative and Reform pressure makes the cost and security test politically unavoidable.

The policy landscape displayed in our analysis therefore neatly mirrors the movement of the public. As we stated above: this election was not a display of fundamental realignment, but instead a fragmentation within the traditional left/right voting blocs. In short, there is broad agreement that delivery matters, but our manifesto analysis demonstrates that the parties disagree sharply about the theory of delivery. This will make substantial policy change difficult, but it also shows how the SNP can pass policies that enjoy multi-party consensus if it defines the agenda around practical delivery.

This is why the politics of transition, and especially the North East, becomes the worked example. It is the policy area where Green ambition, Labour and Liberal Democrat delivery politics, Conservative and Reform pressure on costs, and the public's concerns about jobs and bills all meet. There is a policy route here that is legislatively plausible, but not self-executing. The SNP occupies a political space which allows for pragmatism to support the managed decline of legacy oil and gas, while building on the foundations of renewable energy. But it will need to turn manifesto overlap into a disciplined programme of votes, budgets and delivery bodies which rally the remaining parties.

5.

A WORKED EXAMPLE: MANAGING NORTH SEA DECLINE AND THE NORTH EAST'S NEXT ECONOMY

The North Sea is not declining because Scottish politicians have failed to defend it loudly enough. It is declining because the basin is mature and production is falling. The political debate has too often implied that Scotland could choose to keep the industry at its current scale if only it were less committed to net zero. That is a false promise. It gives anxious communities a misleading account of their future, and lets climate policy take the blame for geological realities that would exist anyway.

This is why the North Sea should be treated less as a contest between climate ambition and local employment, and more as a worked example of whether Scotland can manage industrial change honestly and positively. The public position is neither “drill forever” nor “stop now”. The polling shows a demand for sequencing, fairness and proof: lower bills, protected skills, reduced exposure to volatile imported energy, and visible investment in places that have powered Scotland for decades.

In short, the North Sea matters because it exposes the difference between symbolic climate politics and material transition politics. If decline is misdescribed as the product of net zero alone, Reform and the Conservatives will be able to turn the transition into a grievance issue. But if the SNP can show that the next phase of the North East economy is being built before existing work disappears, it can demonstrate something much larger: that climate ambition, economic realism and practical delivery can reinforce each other.

WHAT THE PUBLIC SAYS

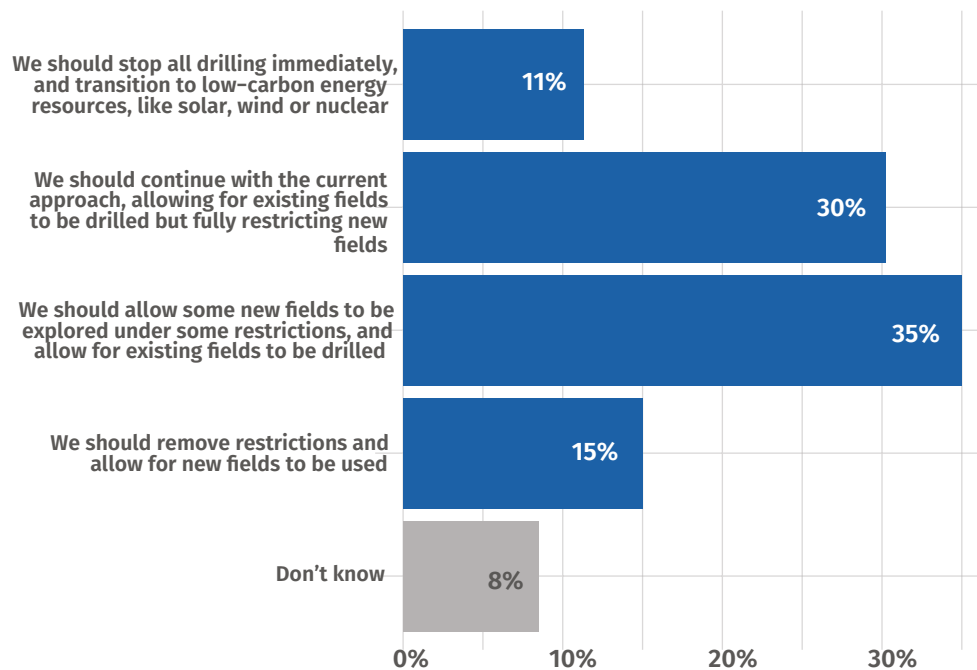
The polling points to three conclusions.

1. Climate action retains broad public permission, but that support is not unconditional. Voters value Scotland's natural environment and support investment in renewables: in the March poll, 80 per cent agreed that protecting nature, especially in Scotland, is important, while 61 per cent said it is important for Scotland to transition to net zero. The April poll found 84 per cent agreeing that Scotland's natural environment is one of the most important parts of the country, and 63 per cent supporting further investment in renewable energy. But climate is not the public's first-order demand. Cost of living, bills, public services, jobs and economic security sit closer to the surface: 70 per cent select cost of living as a top issue, compared with 10 per cent selecting climate change. That means climate policy has to be made relevant to the material concerns voters already have. The question is not whether Scotland should transition, but what kind of transition voters will consent to.

2. Few of the public are at either extreme of arguments about the North Sea. Public First's polling among the Scottish public finds repeatedly that voters favour pragmatic and nuanced approaches to these complex topics. For example, in March 2026, our poll found only 11 per cent thought that all drilling should cease immediately, and only 15 per cent that restrictions on drilling should be removed. The vast majority of the public steered away from these extremes.

FIGURE 5.1: THE MAJORITY OF SCOTS FAVOUR A NUANCED POSITION ON NORTH SEA OIL AND GAS

In your view, how should the North Sea be used?



Source: PF Global polling of 1,022 adults in Scotland, 19–25 March. Base: 506 respondents

3. Instead, voters want decisions made on practical, case-by-case terms. PF Global polling shows 69 per cent agree that oil and gas decisions should be made on a case-by-case basis, while 61 per cent support continuing oil and gas use case-by-case to support a transition to clean energy. The same practical instinct is visible on place-based support: 77 per cent agree that government must invest in towns affected by refinery closures and oil and gas job losses during the net zero transition. That finding matters because it points to a political route through the argument. “Case-by-case” should not be presented as an evasion or a compromise slogan. It should be defined as a disciplined test of whether each decision is compatible with climate budgets, energy security, jobs, bills and transition investment.

The public is not split neatly between climate ambition and fossil-fuel restoration. The centre of gravity is conditional transition: climate permission, but with clear expectations on honesty, cost, security, pace, decision-making and place-based delivery.

A PRAGMATIC RESPONSE FROM HOLYROOD

A credible North Sea position should be framed around real-world tests, rather than any pretence that Scottish politics can choose the size of the basin. North Sea positions should be set within a wider energy strategy that will be held to account against five main criteria, from voices across the political spectrum:

1. Is the decision consistent with Scotland's net zero pathway and legally binding climate obligations?
2. Is the plan honest about declining North Sea production and falling demand, rather than implying that Holyrood (or Westminster) can hold the industry steady?
3. Are workers, apprenticeships and supply chains protected before existing work disappears?
4. Does the decision reduce exposure to global energy shocks and avoid unnecessary import dependence?
5. Are affected communities receiving visible investment, infrastructure and replacement opportunities?

The Scottish government does not control every lever that matters. Oil and gas licensing, major fiscal tools, the Energy Profits Levy, grid regulation and much of energy market design sit primarily with Westminster. Nor can Holyrood determine geology or reverse the maturity of the basin. But Holyrood is not powerless. It controls, shapes or influences many of the levers that determine whether transition feels real in people's lives – and whether it is a positive or negative force. These include planning, skills and colleges, economic development, heat in buildings, energy efficiency, public procurement, local infrastructure such as transport and ports, community benefits, regional investment, and the political signals that give investors confidence. The Scottish government's task is to build the delivery environment for the North East's next economic phase.

The legislative pathway for this is also more plausible than the parliamentary fragmentation suggests. The Greens are the SNP's most important partner for climate ambition and the wider independence-facing coalition, but they cannot be the only partner for a managed North Sea settlement. On different parts of the agenda, different coalitions are available.

This is the crucial distinction. The SNP has formed a minority government, but it will need a broader Holyrood strategy to deliver a pragmatic, middle-ground agenda. The Greens create pressure for pace and ambition. Labour and the Liberal Democrats can support the delivery architecture around skills, homes, bills, industrial strategy and regional investment. Conservatives and Reform will use the same debate to attack net zero from a cost and security perspective. That pressure could, in turn, make it more important for the SNP to define a credible centre before its opponents define the extremes.

The managed transition agenda is therefore deliverable without a formal majority, but not automatically. It requires the SNP to translate manifesto overlap into a disciplined programme of consensus building: a small number of visible commitments, attached to clear parliamentary routes, credible delivery levers and proof points that voters can see.

The Scottish government should therefore frame the North East as an economic-development challenge, not simply a debate over the future of oil and gas. As jobs in oil and gas decline, some workers will move into decommissioning and other offshore work, but many will need opportunities in renewables, ports, subsea engineering, logistics, construction, manufacturing and services. Energy will likely always be important to the North East economy, but the strategy for its economic development does not need to exclude other industries and activities because of

that. A combination of transferable skills and an effective skills pathway can also open up opportunities in other sectors – from geothermal and nuclear to research and consulting – providing value to the region and the country. The SNP needs to shift the argument away from “will net zero destroy jobs in the North East?” to “what is the next phase for the economy and communities of the North East?” The progressive bloc shows consistent support for activist labour-market policies, which can demonstrate that government is getting its hands dirty and helping change lives.

TABLE 5.1: POTENTIAL ALLIANCES AND RISKS FOR DELIVERING A MANAGED TRANSITION

Policy plank	Potential parliamentary route	Key delivery levers	Risk to manage
Renewable investment and grid/planning reform	SNP, Greens, Labour, Liberal Democrats	Planning reform, infrastructure prioritisation, public investment and community benefits	Green concerns about private developer gain; local resistance to infrastructure
Warm homes and lower bills	SNP, Labour, Liberal Democrats, Greens; potential Conservative support on cost	Heat in buildings, energy efficiency, local delivery and public procurement all designed to drive down demand and align with lower extraction pathways	Upfront costs, delivery capacity and household disruption
Jobs and skills transition	SNP, Labour, Liberal Democrats, Greens	Colleges, apprenticeships, skills passporting and regional employability	Training not matching real jobs; workers seeing promises before opportunities
North East transition compact	SNP, Labour, Liberal Democrats; Greens if climate tests are strong	Regional investment, ports, colleges, enterprise agencies, just transition funding	Seen as either too slow by Greens or too weak by industry and workers
North Sea decline and transition framework	SNP, Labour and Liberal Democrats; Greens on climate tests; Conservatives may reinforce jobs and security arguments from a different direction	Skills, planning interface, transition investment, UK government negotiation	Direct licensing powers are reserved; risk of implying that Holyrood can control geology or production
Visible local delivery dashboard	Broad cross-party potential	Scottish government reporting, public bodies and local authorities	Over-promising or creating another reporting exercise without visible change

Source: Authors’ analysis

WESTMINSTER

Meanwhile, both the SNP and Labour in Westminster have an incentive to demonstrate that the transition in the North Sea is broadly successful. A key goal for the SNP at Holyrood should be to build constructive links between policymakers so that real progress can be made on this keystone issue. In particular, using industrial strategy tools to build up new industries that create new jobs in the North East must remain a target for both governments.

WHAT THIS MEANS FOR THE SNP

For the SNP, the North Sea becomes a political trap if the choice is presented as simply Green acceleration or business as usual for oil and gas. But it can be an opportunity if it is handled as a practical test of a wider governing philosophy: tell

the truth about the decline of oil and gas, protect workers through the transition, and build the next economy before the old one disappears.

The SNP minority government should not let its opponents frame the choice as “net zero versus jobs.” Nor should it pretend that Scotland can preserve the old North Sea through political will alone. The better framing is that Scotland needs to manage demand down, build replacement industries up, protect communities through the transition, and secure local benefit from the wider energy sectors – spanning both onshore and offshore technologies, including wind, nuclear and CCUS. That is where the public is and where the SNP has the best chance of holding together Green pressure, North East anxiety, Labour and Liberal Democrat delivery politics, and its own claim to competent government.

Inevitably, some members of the administration will be wary of the politics of consensus. They might perhaps be more swayed by the impact of political fragmentation on the independence debate: the SNP’s constitutional argument for independence becomes weaker, not stronger, if Holyrood looks incapable of delivery. Practical government is not a distraction from the case for more powers; it is the condition that makes the case credible. A managed North Sea transition gives the SNP a way to show that Scotland can make hard choices without abandoning communities, and that climate ambition can be turned into lower bills, safer jobs and visible local investment.

The same can also be said for the unionist parties. If Westminster wants to win back the confidence of voters who currently lean towards independence, it must show that on this crucial topic, the UK government – and UK political parties – can work with the Scottish administration to improve life for Scottish citizens.

6.

CONCLUSION: REBUILDING FAITH IN POLITICS THROUGH HONEST TRANSITION

Scottish politics is in flux. The minority administration has recently lost an emblematic by-election, Labour has a new prime minister after months of internal bickering, and both Reform and the Conservatives are shifting further to the right. All of this means precious time will be lost, with a high chance that elites will drift further into a polarised – and polarising – debate about net zero, which could quickly become a story about jobs, bills and decline.

We argue in this paper that the North Sea is where the current parliament's central question becomes unavoidable. Can Scottish politicians still build enough of a consensus to deliver meaningful change for disillusioned voters? The answer will not come from rhetorical moderation or from a false promise that the basin can be held steady. It will come from a bargain that voters can understand: climate ambition alongside economic realism. That means making sure the North East and wider Scotland benefit from the transition; reducing oil and gas without abandoning workers; putting jobs and household bills at the centre of renewables and clean industry; and supporting the Greens' pressure on pace, but with wider public consent on cost, security and place.

This is the honest approach to the transition: moving away from oil and gas while protecting jobs, investing in exposed places, and maintaining energy security as production and demand fall. It rejects both an accelerated exit that treats communities as collateral damage, and a misleading defence of the status quo.

The polling does not reveal a public looking for delay or denial. It shows a public willing to consent to transition when it is tied to bills, jobs, security and visible investment in affected places. These findings should not be read as a mandate to pretend that the decline of North Sea oil and gas can be avoided.

For the SNP, as the largest party in Holyrood, this creates an opportunity to deliver real change and respond to the public's key demands: reducing bills, supporting the North East's next economic phase, maintaining energy security, and delivering visible improvements to everyday life. This should include a clear focus on ensuring that the decline of oil and gas does not translate into a decline in employment opportunities. All of these can be delivered by an effective climate policy programme. In the past, the Scottish parliament has proved capable of building consensus to achieve bigger goals for the greater good; the SNP will need to revive that spirit if it wants to do more than tinker around the edges.

The resulting practical offer should be concrete enough to be judged within a parliamentary term. It could mean a North East transition compact; a warm homes and bills package; a skills passport and apprenticeship guarantee; a clear plan for local economic benefit from ScotWind; investment in ports, colleges

and supply chains; visible local environmental delivery on public realm, sewage, litter and nature; and a public dashboard for transition jobs and investment. The politics here is not anti-ambition. Voters do not reject ambition; they just want proof alongside it.

If the SNP fails to do this, voters now have plenty of other places to go: Greens, Reform, Labour, Liberal Democrats, Conservatives, or abstention. And as partisanship and distrust grow, consensus could become harder to reconstruct with every passing election.

Handled well, the North Sea can become a vital case study for how to rebuild the middle ground: not through rhetoric about moderation or by pretending that geology can be overridden by political will, but by delivering jobs and services in the communities that need them.

METHODOLOGY

PF Global conducted eight online focus groups who were recruited across a range of geographies in Scotland to capture both rural and urban demographics and voting intention as follows.

- Split voting intention by progressive/conservative swing: Identified voters who supported a progressive party in the last Holyrood election (for example, SNP, Labour, Liberal Democrats) and now intend to switch to another progressive party in 2026, and the equivalent for conservative-leaning voters.
- Split voters by urban/rural: Captured how differences in locality, industry, and community context may influence what turns people into swing voters.

Groups were conducted between 30 October and 11 November 2025, involving a total of 50 participants.

PF Global conducted two nationally representative, anonymous online surveys of adults in Scotland. Fieldwork for the first poll was conducted between 19 and 25 March 2026 and surveyed 1,022 Scottish adults. Fieldwork for the second poll was conducted between 23 and 28 April 2026 and surveyed 1,336 Scottish adults. All results are weighted using iterative proportional fitting, or 'raking', and were weighted by interlocking age, gender and region to nationally representative proportions.

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