A Quandary For Britain: Drill or Not?

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FULL TEXT

Britain is considering expanding fossil fuel production at the risk of undermining its climate goals.

The British North Sea, once a hub for oil and gas drilling, has faced a quarter-century of declining production, depriving communities along a foggy stretch of Scottish coastline of their economic core.

Now applications for two new offshore drilling projects — a lifeline for the region — could be decided by the government in the coming days or weeks. Andy Burnham, Britain's prime minister, faces a choice with complex economic and political ramifications, no matter what he does.

He could approve the projects — known as Rosebank and Jackdaw — and face a potential revolt from powerful clean energy constituencies that strongly oppose more drilling.

Or Mr. Burnham could stop new fossil fuel development in the North Sea and risk sealing the economic fate of the nation's energy heartland.

"It's a tricky decision for the prime minister," said Paul de Leeuw, director of the Energy Transition program at Robert Gordon University in Aberdeen, Scotland.

The drilling plans have been delayed by policy shifts through successive governments, as well as lawsuits. Mr. Burnham has signaled that he may support one or both of the projects. The war in Iran has made imported energy more expensive, giving supporters a potent argument for increasing domestic production.

Then there's the Trump factor. President Trump, who mocks climate change and is pushing his fossil fuel agenda on Europe, has pressured Mr. Burnham to open the North Sea. The decision by Mr. Burnham, who took office in July, could set the tone of his relationship with Mr. Trump for years to come.

Taylor Rogers, a spokeswoman for Mr. Trump, said in a statement that new drilling would allow Britain to "restore its energy security and increase global supplies."

And yet, experts say, any new drilling can only buy time for Britain's North Sea region. About 93 percent of the basin's oil and gas has already been extracted, and no amount of political momentum can change its physical limits.

Last month, the British oil giant BP, which has been operating in the North Sea for six decades, announced it would put its business there up for sale.

In Aberdeen, the epicenter of Britain's drilling industry, the future of the North Sea is a constant topic of conversation. Local leaders acknowledged that the city might never be the energy powerhouse it once was. But, they argued, the government also shouldn't push it into an early grave.

"You've now got something called British Petroleum saying they can't operate in Britain anymore because of British policy," said Russell Borthwick, chief executive of the Aberdeen and Grampian Chamber of Commerce. "Talk about a message of deindustrialization."

On a screen in front of him was a photo taken 51 years ago of Queen Elizabeth II inaugurating a BP oil field. In it, she is pressing a gold-plated button to start the flow of crude to a refinery in the town of Grangemouth in central Scotland. Refining activities at Grangemouth stopped last year after years of financial losses.

"The reality is, the peak of North Sea production has passed," Mr. Borthwick said. But he added, "The question is, how quickly do we want to end it?"

Rosebank, off the Shetland coast, is Britain's last major developed offshore oil site, with an estimated 300 million to 350 million barrels of recoverable oil. Jackdaw is a gas field east of Aberdeen with an estimated 200 million barrels of oil

equivalent.
Adura, a joint venture between Shell and the Norwegian energy company Equinor that wants to develop the fields, has said the gas from Jackdaw could supply about 6 percent of Britain's gas and heat roughly 1.4 million homes. Oil from the Rosebank field is expected to be shipped primarily to Europe for refining and sold on the international market.
The fields were approved in 2022 and 2023, when the Conservative Party was in power of Britain's government. Environmental groups sued, and those approvals were later overturned.
When the Labour Party, under Mr. Burnham's predecessor, took power in 2024, it pledged a moratorium on new drilling licenses. That promise came after a landmark agreement signed by Britain and nearly 200 other nations to transition away from fossil fuels.
"You cannot approve the U.K.'s largest undeveloped oil field and claim to be taking the climate seriously," said Tessa Khan, the executive director of Uplift U.K., an advocacy group.
The burning of coal, oil and gas creates carbon dioxide emissions, the primary greenhouse gas contributing to climate change. Global temperatures have risen 1.4 degrees Celsius since the 19th century. The damage can be felt across the globe, from the intense heat waves that broiled Europe this summer to more intense wildfires and drought.
Chris Aylett, an environmental research fellow at Chatham House, a London think tank, said the amount of oil and gas to be drilled in the North Sea was not worth undermining Britain's climate pledges.
"Considering what's left in the North Sea, it would do little for energy security," Mr. Aylett said.
Advocates for Rosebank and Jackdaw argue that the energy they produce would allow Britain to import less gas from Norway and less liquefied natural gas from the United States, Qatar and elsewhere.
And far from being on its last legs, they say, the North Sea has enough oil and gas to sustain jobs and the local economy for years.
"I've got a niece that's 9 years old, and there's enough oil in the North Sea to see beyond her days," said Derrick Mackey, 59, who drives for a car service in Aberdeen. He said that "woolly headed do-gooders" were the only ones insisting that the basin was depleted.
On Norway's side of the North sea, companies invested about $24 billion last year, according to David Whitehouse, chief executive of Offshore Energies UK, a trade association. Britain's North Sea saw about $5.5 billion in investment.
"In reality, the basins are of similar age," Mr. Whitehouse said. The difference, he said, is that the more pro-drilling policies of Norway, one of the world's largest gas producers, draw more money to explore and pump.
Advocates for drilling blame Britain's Energy Profits Levy, which in 2022 raised the tax rate on profits from oil and gas extracted in the country to nearly 80 percent.
Renewable energy is growing fast in Britain, but not fast enough. The local business chamber said Aberdeen was losing more than 1,000 jobs in the oil and gas sector each month.
The tension between the old fossil fuel economy and the renewable future can be seen at the Port of Aberdeen. Three years ago, the port completed a 420-million-pound ($568 million) expansion — hoping it would become a hub for the transit of goods used in offshore wind.
Instead, on a recent afternoon, the new harbor was nearly empty but for a giant load of timber heading to Germany and a rusty oil platform that was being decommissioned. Across the way, at the port's original harbor, cranes were picking up containers of food, fuel, spare parts and other machinery coming and going from oil platforms.
Bob Sanguinetti, chief executive of the Port of Aberdeen, said 60 percent of the port's revenue came from oil and gas. That activity is decreasing about 15 percent each year. Meanwhile, renewable energy accounts for about 1 percent of activity and is not yet growing.
"If you had asked me five years ago, I would have expected to see some of the bigger floating offshore wind projects come to fruition by now," Mr. Sanguinetti said. Now he thinks it will be at least another five years.
John Underhill, director of the energy transition at Aberdeen University, said communities around the North Sea were eager for a transition to renewable energy.
"The North Sea oil and gas bonanza is behind us," Mr. Underhill said. But, he said, new drilling "buys us time to get the transition right, which at the moment feels unmanaged, unjust and disorganized."

By Lisa Friedman

DETAILS

Subject:	Ports; Oil fields; Fossil fuels; Renewable resources; Energy transition; Offshore; Prime ministers; Drilling; Climate change; Litigation
Business indexing term:	Subject: Ports Renewable resources
Location:	North Sea; Scotland; United Kingdom--UK; Norway; Europe
Identifier / keyword:	North Sea; Offshore Drilling and Exploration; Natural Gas; Aberdeen (Scotland); Great Britain; BP Plc; Labour Party (Great Britain); Burnham, Andrew M (1970-); Trump, Donald J
Publication title:	The New York Times, International edition; New York
First page:	B1
Publication year:	2026
Publication date:	Sep 14, 2026
Section:	Business
Publisher:	New York Times Company
Place of publication:	New York
Country of publication:	United States
Publication subject:	General Interest Periodicals--France
ISSN:	24747149
Source type:	Newspaper
Language of publication:	English
Document type:	News
ProQuest document ID:	3385038409
Document URL:	https://ezproxy.rgu.ac.uk/login?url=https://www.proquest.com/internationalnews1/newspapers/quandary-britain-drill-not/docview/3385038409/sem-2?accountid=16859
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Last updated:	2026-09-15
Database:	International Newsstream Collection

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