



Department for
Business, Energy
& Industrial Strategy

STRENGTHENING THE UK'S OFFSHORE OIL AND GAS DECOMMISSIONING INDUSTRY

Call for Evidence

Closing date: 08 May 2019



March 2019



OGL

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Foreword

Claire Perry MP, Minister of State for Energy and Clean Growth

The offshore oil and gas sector has been an integral part of the UK economy for the last fifty years and will continue to be so for decades to come. The industry has contributed over £330 billion in direct production taxes to the Exchequer and supports hundreds of thousands of jobs across the UK.

Over the last few years, since the creation of the Oil and Gas Authority (OGA), the oil and gas industry has made real progress to reduce costs, find efficiencies and improve collaboration which, combined with recent fiscal changes, has served to make the UK an attractive destination for new investment in oil and gas projects. There are an estimated 10 to 20 billion barrels of oil equivalent remaining under the United Kingdom's Continental Shelf (UKCS) and this government is committed to the strategy of maximising economic recovery and will continue to support this vital sector of the economy.



The UKCS is a mature basin and in parallel to new developments, decommissioning of offshore oil and gas infrastructure will be increasingly prominent in the years ahead. The potential opportunities that will arise from the development of a world-leading domestic decommissioning industry are vast. It is the government's ambition for the UK to capitalise on our first-mover advantage in this sphere and become a global centre of expertise for decommissioning.

At Budget 2018, the Chancellor of the Exchequer announced a call for evidence on what could be done to achieve this goal. Responses to this call will allow the government, industry and the OGA to assess the relative strengths of the UK decommissioning industry and provide a strategic, coordinated approach, to take advantage of the global opportunities that will arise. Developing a world class decommissioning industry at home, with cutting-edge facilities and technology, will equip new and existing talent with the right skills, whilst creating a wealth of high-skilled jobs to boost earning power – a key ambition of our modern Industrial Strategy.

The OGA plays an important role in the sector and its contribution to this call will be key. That is why the Exchequer Secretary and I have formally commissioned Dr Andy Samuel, in his capacity as Chair of the Maximising Economic Recovery (MER) UK Forum, to help consider how the objective of positioning the UK as a global hub for decommissioning best fits with the government's other objectives of maximising economic recovery and reducing decommissioning costs.

I encourage industry, trade associations and academic, research and technology organisations to respond to this call. We want to understand how a domestic UK decommissioning industry could best serve the UK market, ensuring we have the skills and capability to meet domestic demand while encouraging the industry to export its decommissioning expertise abroad and position the UK as a global leader.

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General information

Purpose of the call for evidence

Government is seeking the views of industry, trade associations, research and technology organisations and MER UK Taskforces (established by the OGA), and any other interested parties, including academia, on what more needs to be done to ensure that Scotland together with the rest of the UK can become a global hub for offshore oil and gas decommissioning.

Call for evidence details

Issued: 13 March 2019

Respond by: 8 May 2019

Enquiries to:

Oil & Gas Exploration and Production team
Department for Business, Energy & Industrial Strategy,
3rd Floor, Orchard 2,
1 Victoria Street,
London, SW1H 0ET
Tel: 0207215 1481
Email: callforevidence_decommissioningUK@beis.gov.uk

Consultation reference: Strengthening the UK's Offshore Oil and Gas Decommissioning Industry

Territorial extent:

This is a UK-wide call for evidence.

How to respond

Your response will be most useful framed in direct response to the questions posed, though further comments and evidence are also welcome.

Respond online at: beisgovuk.citizenspace.com/energy-development/uk-decommissioning-industry/

or

Email to: callforevidence_decommissioningUK@beis.gov.uk

Write to:

Oil & Gas Exploration and Production team
Department for Business, Energy & Industrial Strategy,
3rd Floor, Orchard 2,
1 Victoria Street,
London, SW1H 0ET

When responding, please state whether you are responding as an individual or representing the views of an organisation.

Confidentiality and data protection

Information you provide in response to this consultation, including personal information, may be disclosed in accordance with applicable legislation (the Freedom of Information Act 2000, the Data Protection Act 2018, the General Data Protection Regulation, and the Environmental Information Regulations 2004).

If you want the information that you provide to be treated as confidential please tell us but be aware that we cannot guarantee confidentiality in all circumstances. An automatic confidentiality disclaimer generated by your IT system will not be regarded by us as a confidentiality request.

We will process your personal data in accordance with all applicable data protection laws. See our [privacy policy](#).

We will summarise all responses and publish this summary on [GOV.UK](https://www.gov.uk). The summary will include a list of names or organisations that responded, but not people's personal names, addresses or other contact details.

Quality assurance

This consultation has been carried out in accordance with the government's [consultation principles](#).

If you have any complaints about the way this consultation has been conducted, please email: beis.bru@beis.gov.uk.

Executive summary

The UK Continental Shelf (UKCS) is a mature petroleum province, with offshore oil and gas production taking place since the 1960s. Production is expected to continue for decades to come as new developments come on stream, particularly in the frontier areas such as West of Shetland. At the same time, older fields, mainly concentrated in the Southern and Central North Sea, will reach the end of their economic lives and will require decommissioning.

To date, a small percentage of the oil and gas infrastructure on the UKCS has been decommissioned. Over the next decade, as decommissioning activity increases, the UK market is expected to become by far the largest decommissioning market globally.

This should provide the UK supply chain with an opportunity to utilise first-mover advantage and develop a world-leading decommissioning industry. If the sector can decommission our offshore infrastructure in a safe, efficient and environmentally friendly manner, whilst also meeting the OGA's ambitious cost reduction targets, it will be positioned to offer cost effective solutions to the global market. This represents a significant prize, with the 12 largest markets for decommissioning expected to be worth US\$82 billion over the next 10 years.¹ Our ambitions in this area fit closely with those of our modern Industrial Strategy, of which exporting is a key part. Businesses that export account for 60% of the UK's annual productivity growth and pay higher wages than those that don't.

It is within this context that the government launches this call for evidence. We are seeking views from all interested parties on what steps need to be taken to ensure that Scotland and the rest of the UK build on our current strengths and develop a world-leading offshore decommissioning industry.

This call focuses on the issues that are crucial for both operators and the supply chain. The two central themes that the call for evidence will request responses on are:

- How could the UK decommissioning industry further improve its ability to serve the UK market, support MER UK and reduce the overall costs of decommissioning; and
- What could be done to encourage the domestic industry to export its decommissioning expertise abroad and position Scotland, together with the rest of the UK, as a world leading hub for decommissioning.

A number of questions that build on these central themes are asked at the end of this document. We welcome evidence that can be provided in response to these, which will help the government to assess the relative position of the UK industry in both the domestic and international markets, alongside our strengths and the areas in which the UK should seek to build its capability.

As part of this, the government has commissioned the Chief Executive of the OGA, Dr Andy Samuel, in his capacity as Chair of the Maximising Economic Recovery (MER) UK Forum, to provide a response focused on how this ambition aligns with our wider MER strategy, and the target to reduce UK decommissioning costs by 35%.

¹ 'Upstream Decommissioning: where's next and who pays?', Wood Mackenzie, July 2018

Decommissioning

Offshore decommissioning is part of the lifecycle of upstream oil and gas production. It is the process of removing a facility from an operational state once a field ceases production, and returning the seabed, as closely as possible, to its natural state. This primarily involves plugging and abandonment of wells and the removal of platforms and subsea facilities. The UKCS has nearly 500 installations (50:50 fixed and subsea production systems), approximately 5,000 wells and 3,300 pipelines; it is estimated that around 10% of this infrastructure has already been decommissioned.

Decommissioning currently accounts for around 8% of industry expenditure on the UKCS.² Industry has developed a standard approach to modelling decommissioning using the Work Breakdown Structure (Figure 1; page 10). Figure 2 (page 11) shows the breakdown of decommissioning costs per activity. The standard working assumption is that nearly 50% of the total cost of decommissioning is on the offshore plugging and abandonment of wells. Quayside dismantling, which generates significant public attention, accounts for only 2% of total costs.

The decommissioning of offshore oil and gas installations and pipelines on the UKCS is regulated through the Petroleum Act 1998. The UK's international obligations on decommissioning are governed principally by the 1992 Convention for the Protection of the Marine Environment of the North East Atlantic (OSPAR Convention). Agreement on the regime to be applied to the decommissioning of offshore installations in the Convention area was reached at a meeting of the OSPAR Commission in July 1998. However, the regulation of any aspect of decommissioning, including questions pertaining to compliance with our international treaty obligations with respect to decommissioning, is not part of this call for evidence.

Role of the Oil and Gas Authority

The OGA plays an important role in decommissioning, assessing operator decommissioning programmes on the basis of cost, future alternative use and collaboration, as well as assessing and approving Supply Chain Action Plans relating to each proposed Decommissioning Plan. Its Decommissioning Strategy, supported by the MER UK Decommissioning Task Force, describes its role and expectations, providing clear direction to achieve three priorities:

- cost certainty and cost reduction;
- supply chain capability and capacity; and
- scope, guidance and stakeholder management.

The OGA is committed to achieving the maximum economic extension of field life and ensuring that decommissioning is executed in a safe, environmentally sound and cost-effective manner. In particular, the OGA's decommissioning strategy published in 2016 states: "The development of a technically competent, efficient and cost-effective decommissioning capability means the UK will be well-placed to gain global recognition and create export opportunities. This is dependent on creating the right commercial cultures, behaviours and conditions to become globally competitive and innovative."

² 'Decommissioning Insight 2018', OGUK, November 2018

Figure 1: Oil and Gas UK Decommissioning Work Breakdown Structure

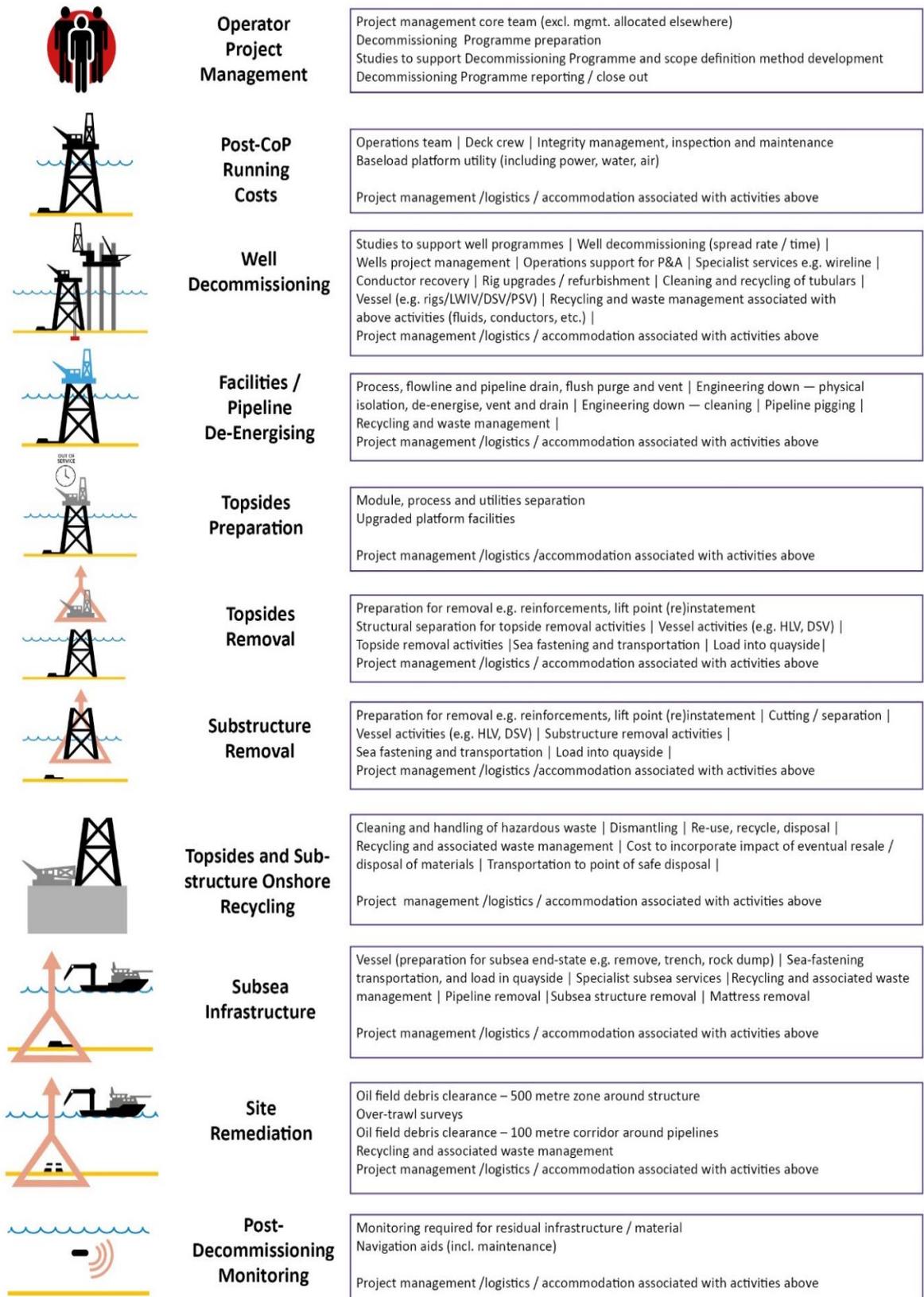
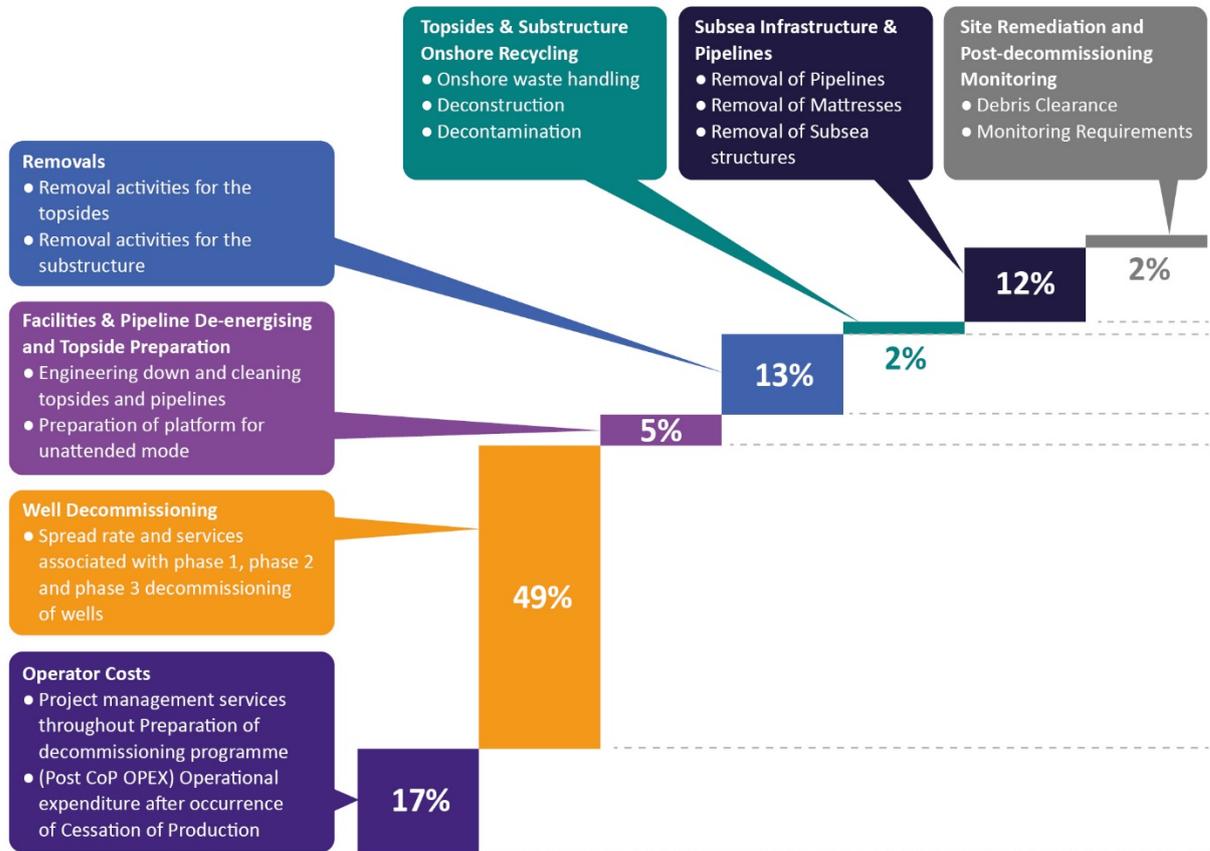


Figure 2: Breakdown of decommissioning activities per cost:



Source: Oil & Gas UK, OGA

Source: Oil & Gas UK, OGA, 2017 Cost Estimate Report data

Industry, government and regulators work together through the MER UK Forum and the MER UK Taskforces. Two of these Taskforces – that separately focus on Decommissioning and the Supply Chain and Exports – will be crucial to this call for evidence, both through their own submission and through the leveraging of their membership. The OGA is also providing a platform for industry collaboration and capturing and sharing lessons learned and success stories.

The UK decommissioning market

Decommissioning of oil and gas assets on the UKCS is a major opportunity for the UK-based supply chain. The OGA central estimate is that decommissioning of the UKCS will cost £58 billion in total, although industry and the OGA are committed to a 35% reduction in these costs. Over the next decade, UKCS expenditure on decommissioning is forecast to be c.£15.3 billion, with the rate of expenditure likely to stabilise at around £1.5 billion per annum.³ Nearly half of this expenditure will take place in the Central North Sea.

While the government does not want to see assets decommissioned prematurely (since this is contrary to the MER UK strategy), there will be increasing demand for end-of-life services and an opportunity for the UK to establish leadership in late-life field management and decommissioning, which, with specialisation and efficiencies, present significant export opportunities.

Decommissioning expenditure in the UK is forecasted to be spread over several decades. This should mean that a domestic decommissioning industry can be sustained, whilst international export opportunities are sought.

Current status of the UK decommissioning industry

The OGUK Decommissioning Insight 2018 shows that the UK is emerging as a global leader in decommissioning, particularly building on its technical and commercial strengths, as well as in project delivery.⁴ A decade of decommissioning experience, operating within a robust regulatory system, has ensured that UK companies operate to the highest environmental and safety standards, with other countries looking to learn from the experiences on the UKCS.

Decom North Sea, the trade association representing the North Sea's decommissioning sector, has developed a directory of companies offering decommissioning services across the UKCS. This directory captures the capability of almost 300 supply chain companies which can service the UKCS across the decommissioning supply chain Work Breakdown Structure categories (Figure 1, page 9), from planning stages through to site remediation and long-term monitoring. The OGA are also developing a lesson learned tool and sharing key success stories which will help the UK decommissioning industry to develop cutting edge expertise.

Cost leadership is considered essential and rapid improvements in productivity and efficiency are already beginning to be achieved. As a result, the forecast decommissioning costs per well have decreased by 26% during 2018, and decommissioning expenditure is estimated to be 20% lower than previously forecast over the next decade. This is a good indication that the sector is maturing and developing the capability to deliver on OGA/industry's cost reduction target of 35%. In addition to the strong commercial incentives to bring costs down, the expertise created will be of long-term economic benefit to the UK.

Industry has identified a number of successful measures in aiding decommissioning cost reduction. These include:

³ 'Decommissioning Insight 2018', OGUK, November 2018

⁴ 'Decommissioning Insight 2018', OGUK, November 2018

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- campaign approaches involving multiple wells;
- collaboration between operators such as vessel sharing and cross-operator campaigns;
- technology developments and deployment;
- optimising activity schedules;
- early engagement and planning with all the relevant authorities (such as Offshore Petroleum Regulator for the Environment and Decommissioning, OGA, Health and Safety Executive and the Scottish Environmental Protection Agency).

Current pipeline of UK decommissioning activity

The maturity of the UKCS was brought into sharp focus by the recent prolonged collapse of the oil price. Wood Mackenzie estimates that a third of all operational platforms on the UKCS are over 30 years old, with many already beyond their designed lives.⁵ These assets cannot continue production indefinitely and will need to move to cessation of production (CoP) at the end of a field's economic life.

A number of significant decommissioning projects are underway within the UKCS and the UK oil and gas industry is constantly learning from its experiences. Industry forecasts decommissioning expenditure of around £1.5 billion per year for the next decade in the UKCS.

One area where industry is already developing a great deal of expertise is in well plug and abandonment. Some 7,874 wells have been drilled on the UKCS to date and 4,135 have been permanently abandoned.⁶ The current rate of well abandonment has increased four-fold in the last three years to 150 to 200 per annum and this is expected to continue for decades to come.

Both the UK and Scottish governments are exploring the potential with industry of the establishment of an ultra-deep water port in the United Kingdom that would be able to receive ultra-heavy lift crane vessels direct to quaysides. This work continues.

A 2018 Decom North Sea Supply Chain Capacity Report estimates:⁷

- 804 platform wells will require P&A based on current potential CoP dates to 2023
- 462 subsea wells will require P&A based on current potential CoP dates to 2023
- 98 projects have subsea infrastructure removal requirements based on current potential CoP dates to 2023
- 115 projects were identified with topside removal requirements based on CoP up to 2023
- 109 projects were identified with substructure removal requirements based on CoP up to 2023

⁵ 'US\$32 billion of decommissioning worldwide over the next five years: is industry ready?', Wood Mackenzie, December 2017

⁶ 'Wells Insight Report', OGA, 2018

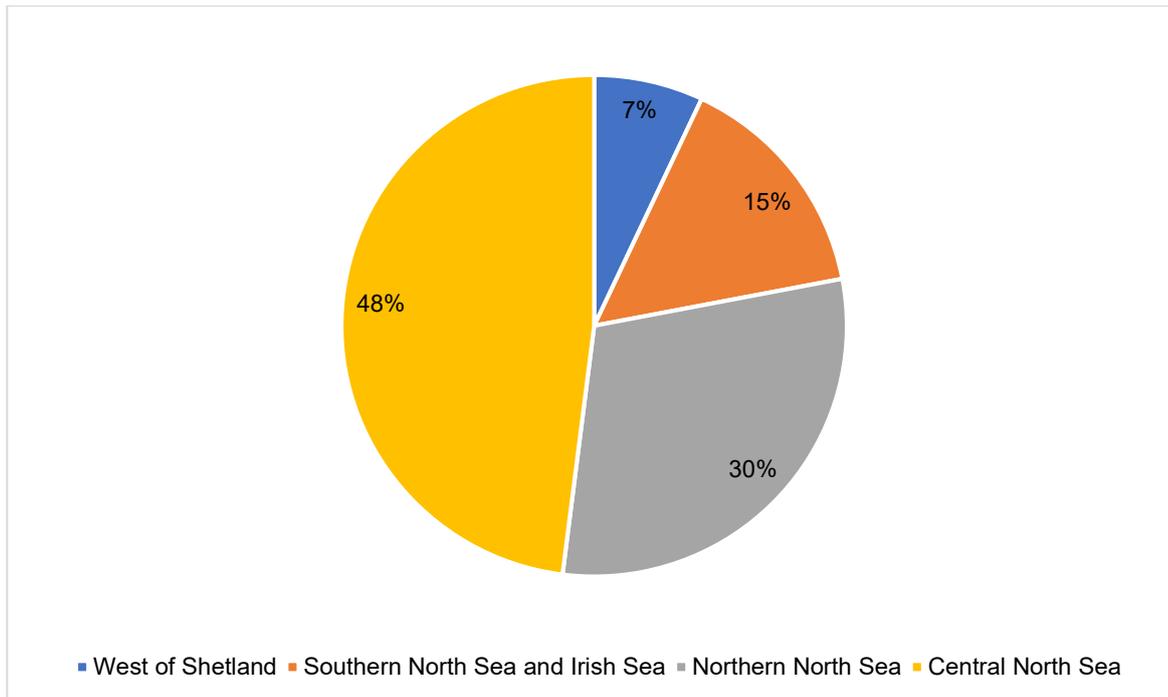
⁷ 'Supply Chain Capacity Report', Decom North Sea, March 2018

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- a total of 801,660Te of infrastructure was estimated for removal from the UKCS, requiring a total of 15,241 days of onshore work

The result of the above estimates are a forecast of expenditure on decommissioning per region of the UKCS, shown in Figure 3 (below).

Figure 3: UKCS Decommissioning Expenditure by region of UKCS – Next 10 years



Source: OGUK, Decommissioning Insight 2018

UK decommissioning skills and innovation

The UK's offshore oil and gas industry already has decades of expertise, knowledge and skills that can transition to this growing sector. In particular, the UK operator and service sectors have extensive project management and delivery, engineering and offshore construction skills, which are directly applicable to decommissioning work. To complement this, decommissioning focused training is becoming more prominent. The University of Aberdeen launched the world's first MSc in Decommissioning in 2017 and Robert Gordon University provides a short course on 'Planning for Decommissioning'; a course for industry, developed in conjunction with the OGA, BEIS and the Health and Safety Executive.

The innovation and transformation, which is already underway within the industry, will determine its ultimate success, but more immediate incremental improvements will also deliver significant results. Our modern industrial strategy places a high priority on the development of skills and aims to ensure that everyone can improve their skills throughout their lives, increasing their earning power and opportunities for better jobs. We will equip citizens for jobs shaped by next generation technology. The new National Decommissioning Centre (NDC), a

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£38m partnership between the Oil and Gas Technology Centre and the University of Aberdeen, is a milestone on the pathway towards enhancing the UK's decommissioning skills, innovation and expertise. Launched in January 2019, the NDC received funding from the Aberdeen City Region Deal; a deal which included £125m committed to by the UK Government. It is set to become a global technology research and development hub focussing on the evolving challenges that are faced by industry in decommissioning. The NDC builds on the world-leading capability at the University of Aberdeen in areas such as decommissioning technologies, predictive modelling, environmental assessment and the economics of decommissioning. Linking industry demand and expertise with academic capability and skills at the NDC will become a pathway to create a competitive advantage for the UK's oil and gas supply chain.

Additionally, by the late 2020s, the offshore wind sector will be addressing issues such as life extensions, repowering and decommissioning as the earliest operational projects reach the end of their operating lifetime. The government will work with the offshore wind sector as this develops, to ensure that the UK maximises the economic value of such work and provides value to consumers. There is the potential for synergies such as shared facilities and people using their expertise across different sectors of offshore energy. The offshore wind sector, through the Offshore Wind Sector Deal, has committed to developing an Offshore Energy Passport (recognised outside the UK) to accredit offshore workers and facilitate job-mobility between offshore renewable and extractive industries.

Infrastructure re-use

Operators are required to consider opportunities to re-use, or re-purpose infrastructure before progressing with decommissioning. The OGA asks operators, as part of approving any CoP plans, to show that they have considered economic development opportunities, including the potential to use any infrastructure for carbon capture, usage and storage (CCUS).

The government wants the UK to become a global leader in CCUS, with an aim to secure the added value CCUS can bring to our industrial centres and businesses across the UK. CCUS refers to a number of techniques and processes, which capture carbon dioxide emissions, generally from industrial processes. The carbon dioxide can then be transported, including via repurposed gas pipelines, and stored, for example in underground locations within the rock formations below the Central North Sea.

The government believes that the UK should have the option to deploy CCUS at scale during the 2030s, subject to the costs coming down sufficiently. As such an Action Plan was published in November 2018 that aims to enable the establishment of the first CCUS facility in the UK, operating from the mid-2020s.⁸ As part of this Action Plan, the government will complete a process with the OGA, industry, The Crown Estate and The Crown Estate Scotland in the first half of 2019, which identifies existing oil and gas infrastructure that has the potential for re-use to support the development of CCUS in the UK.

There are many ideas about other re-use opportunities, such as in the offshore renewable or aquaculture sector and some proposals such as rigs to reef. Any re-use opportunities will have to comply with our international treaty obligations.

⁸ www.gov.uk/government/publications/the-uk-carbon-capture-usage-and-storage-ccus-deployment-pathway-an-action-plan

Late-life asset management

As a mature petroleum basin, the UKCS has numerous 'late-life' assets approaching the point of decommissioning. Many of these assets are still owned by the companies who originally developed them, however in recent years there has been an increasing number of new entrants taking over these older fields. The efficient management of late-life assets, in the final stage of their lifecycle prior to decommissioning, is vital both to successful decommissioning and maximising economic recovery of our oil and gas resources.

In order for decommissioning to be carried out in the most efficient manner, preparation for decommissioning must begin significantly in advance. It is also expected that significant amounts of decommissioning will occur prior to cessation of production from a field. A late-life asset operator must therefore maintain a dual focus on:

- ensuring maximum recovery of a field's remaining reserves
- allowing decommissioning to ultimately be carried out in the most efficient manner possible

The UK is already recognised as a basin with many of the leading specialist late-life asset operators, and these companies will play a significant role in building a decommissioning industry for the UK.

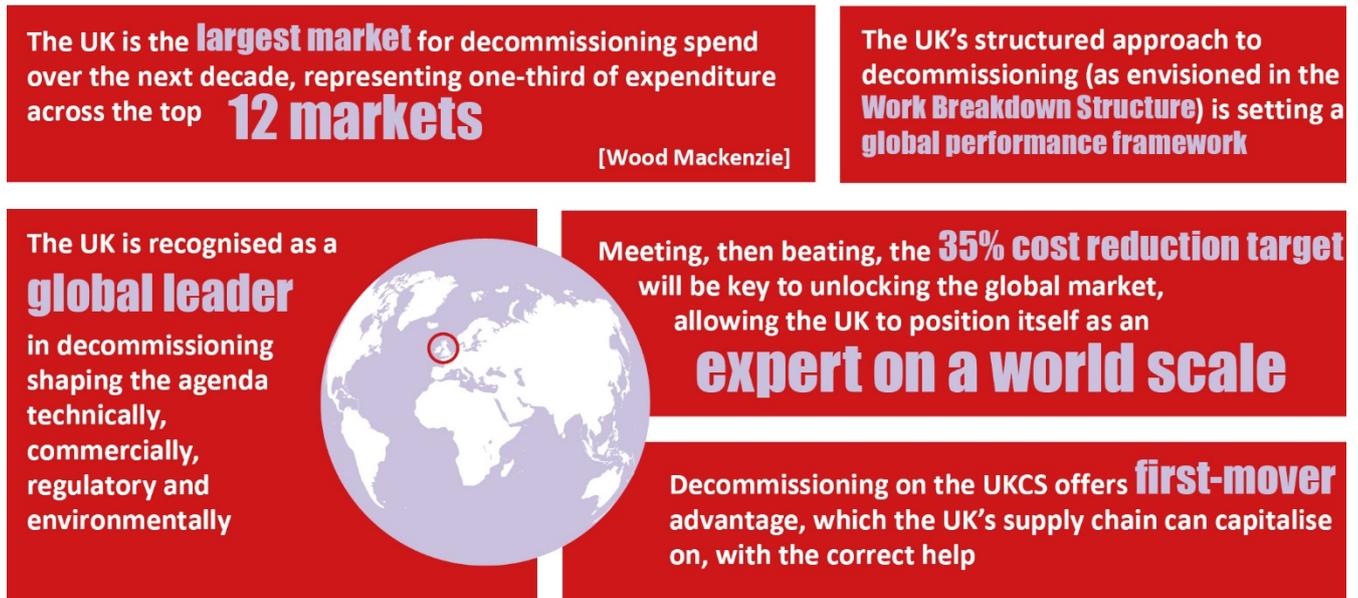
It is widely recognised that these specialists have rejuvenated some of our aging fields by devoting time and resources to exploiting reserves that were ignored by the previous, larger operators. It is also expected that these specialists will develop innovative approaches towards decommissioning to make the process more efficient and reduce overall costs. This is expected to involve enhanced collaboration with other operators and the supply chain.

The government has therefore supported the entrance of late-life specialists into the UKCS through a number of fiscal reforms, such as the Decommissioning Relief Deed (DRD) in 2013 and transferable tax history (TTH) in 2018. The DRD provided much needed certainty around decommissioning tax relief for new entrants, unlocking around £6 billion of capital and lowering the cost of security guarantees that new entrants were often required to provide. TTH, which became available for field transfers taking place on or after 1 November 2018, removes tax barriers to new entrants to ensure they can compete on a level playing field with existing licensees.

The global decommissioning opportunity

Wood Mackenzie expects US\$32 billion of decommissioning activity worldwide between 2018 and 2022. Looking further out, the remaining decommissioning costs for offshore fields globally could reach US\$340 billion in total, with as much as US\$105 billion spent over the next decade (2018 real terms).

Figure 4: Global Opportunity



Source: OGUK, Decommissioning Insight 2018

Geographic proximity to other continental shelves within the North Sea could be pertinent to the UK Supply Chain. Decommissioning activity over the same period in other North Sea markets is expected to be as follows: 419 wells on the Dutch Continental Shelf, 132 wells in Denmark, and 363 wells on the Norwegian Continental Shelf (NCS). These markets will also have significant amounts of topsides and substructures that will need to be removed.

Figure 5 (page 18) shows that the North Sea is currently the largest market for decommissioning and over the next 10 years, representing around 50% of worldwide decommissioning expenditure. Whilst total decommissioning expenditure in the North Sea is expected to increase, its market share will gradually decline as decommissioning activity increases in other basins. As such, by 2027, the North Sea will only represent around 25% of global spend on decommissioning. It is therefore in the UK's interest to make the most of our early advantage with a view to increasingly providing the necessary skills, technology and expertise to the global decommissioning market in the long-term.

Wood Mackenzie estimate that if oil prices stay around US\$65/barrel (2018 real terms), a further 700 fields around the world are forecast to cease over the next five years. Decommissioning costs will become particularly notable in the Asia Pacific region, where the final bill could exceed US\$100 billion.

Figure 5:

Chart 1: global decommex 2018-2027

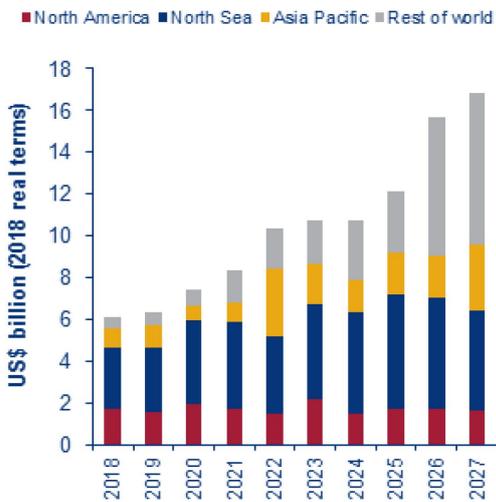
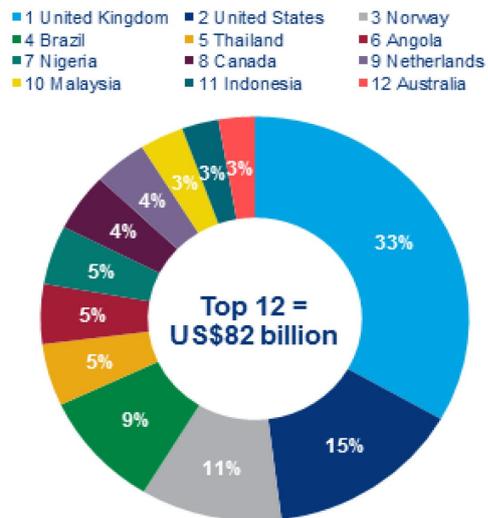


Chart 2: largest spenders next 10 years

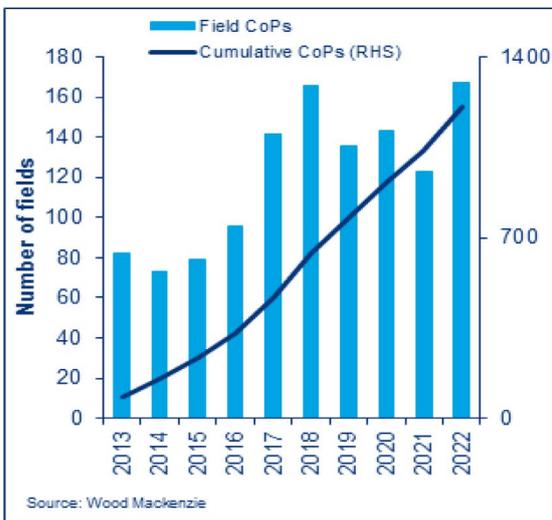


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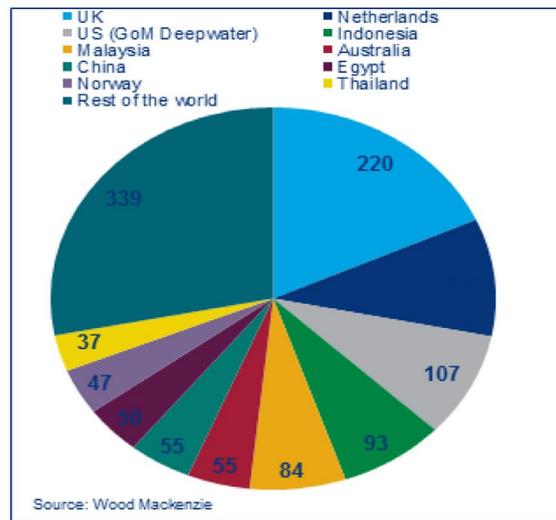
Source: Wood Mackenzie, Upstream Decommissioning: where's next and who pays? July 2018

Figure 6:

2013-2022 Field cessation of production (CoP) vs cumulative CoPs



2013-2022 Field cessation of production (CoPs) by country distribution



Source: Wood Mackenzie, US\$32 billion of decommissioning worldwide over the next five years: is the industry ready? December 2017

Figure 6 shows us a forecast of future Cessation of Production (CoP) across the world, which highlights the decommissioning opportunity for the UK supply chain. As highlighted elsewhere

⁹ "The data and information provided by Wood Mackenzie should not be interpreted as advice and you should not rely on it for any purpose. You may not copy or use this data and information except as expressly permitted by Wood Mackenzie in writing. To the fullest extent permitted by law, Wood Mackenzie accepts no responsibility for your use of this data and information except as specified in a written agreement you have entered into with Wood Mackenzie for the provision of such of such data and information."

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in this call for evidence, globally 472 fields ceased production between 2013 and 2017 but this may ramp up to a further 700 fields between 2018 and 2022.

Internationalising the Industrial Strategy

We are using the Industrial Strategy internationally to boost trade and investment, shape collaboration, promote the UK as a partner of choice and expand UK influence abroad.

Transformations will disrupt nearly every sector and every country. They also create new opportunities, where we can build on our strengths to put the UK at the forefront of the industries of the future. Our overall approach to the Industrial Strategy is a collaborative one that goes beyond government. In partnership with business, we are harnessing ingenuity to create solutions while ensuring workforces have the skills and opportunities they need.

The decommissioning of offshore oil and gas wells and infrastructure presents a huge global market opportunity. If UK industry can prove it has the ability to decommission our offshore infrastructure in a safe, efficient, innovative and environmentally friendly manner, whilst also meeting the OGA's ambitious cost reduction targets, it should be able to build on this competence to offer expert solutions to the global market.

Call for evidence questions

1. What core strengths does the UK have in offshore decommissioning, where we might be able to build a competitive advantage?
2. Are there any gaps or areas of weakness in UK capability, and if so, is there a need to actively seek to address them?
3. Are there any emerging technology areas that should be pursued that will support the development of a world-class domestic decommissioning industry and help UK-based companies win international business?
4. What specific areas or capabilities of the decommissioning value chain have the greatest potential for export?
5. What are the main export markets for the UK decommissioning industry and over what timeframe?
6. What is your experience in international markets and what are the main challenges/barriers you have faced?
7. What are the main barriers to the UK becoming a global hub for decommissioning and what could be done to address these?
8. What can be done to enable UK industry to become more proficient in its domestic market and to enhance UK exports of decommissioning services?
9. With regards to decommissioning, which interventions by the OGA have you found most valuable? What other actions might make an impact?
10. Is there anything else you want to share with us on this topic?

This consultation is available from: www.gov.uk/government/consultations/strengthening-the-uks-offshore-oil-and-gas-decommissioning-industry-call-for-evidence

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