



Paper 6/1 – Industry background information

For information

1. Purpose

1.1 This paper provides Commissioners with background information on energy intensive industry in Scotland. Scottish Government officials have provided the information in this paper, at the request of the secretariat.

2. Background

1.2 The paper summarises a range of evidence that is drawn from Scottish Government analysis, published statistics and research projects.

1.3 The paper outlines current trends in energy intensive industry, industrial decarbonisation, as well as the Grangemouth cluster specifically. Additional information is also provided at the end of the paper on Carbon Capture Utilisation and Storage in Scotland.

1. Energy intensive industries - sector background information

Headlines

- The manufacturing sector plays a vital role in the Scottish economy:
 - 185,000 high value jobs, 11% GVA
 - Energy intensive industries (EII) are at the heart of our manufacturing base
- Industry as a whole is a large contributor to national emissions (approx. 30%), with EII responsible for around half of this.
- Unless industry accelerates the present trajectory of emissions reductions, 2030 targets will be very difficult to meet.
- UK Committee on Climate Change (UK-CCC) advice is to develop a coherent policy framework for industrial decarbonisation, and that the trading environment must not undermine competitiveness, as there is greater opportunity for promoting the energy transition with EII maintaining a Scottish/UK presence.
- There is increasing evidence, allied with industrial stakeholders viewpoints, that successful transition will require systemic change (some of which will be disruptive innovation).
- To aid industry's transition towards a net-zero economy, Scottish Government is developing policy that responds to the huge challenge to mitigate domestic greenhouse gas emissions, whilst protecting the vital economic contribution of industrial sites.

Introduction

1.1 The paper provides an overview of the profile of EII which, by definition, require high levels of energy (often in the form of heat) for their processes. It identifies where the larger operations are sited and outlines recent sector trends in terms of economic impact - Gross Value Added (GVA) - emissions and energy use.

1.2 The paper outlines EII in a wider socio-economic context, By doing so, Scottish Government hopes to create improved conditions to encourage innovation, and attract investment towards transition, whilst mitigating the risk of carbon leakage (when domestic industries relocate overseas, where regulation may be less stringent).

1.3 EII form a core part of Scotland's manufacturing base, and tend to cover sites which emit large volumes of greenhouse gases (GHG). Within the UK Government's Clean Growth Strategy Industrial Decarbonisation and Energy Efficiency Action Plans¹, that promotes the incentivizing of measures to decarbonise industrial processes, these EII subsectors are defined:

¹ <https://www.gov.uk/government/publications/industrial-decarbonisation-and-energy-efficiency-action-plans>

- Oil & Gas Refining
- Cement
- Pulp & Paper
- Food & Drink
- Iron & Steel
- Chemicals
- Glass
- Ceramics

1.4 Within Scotland, these industries, manufacture many of the principal sources of material for our productive economy - for example chemicals as feedstocks, cement for construction, or glass-bottles that directly support the significant Scottish food and drink sub-sector.

1.5 In 2018, the manufacturing sector remains a major employer totalling 185,000 jobs in 2018, with around 69,000 of these identifiable within EII. The Annual Survey of Hours and Earnings (2019) reports Median Gross annual earnings for jobs in the sector as £29,331.

1.6 The sector is worth around £15 billion in GVA to Scotland's economy, representing over 11% of total Scottish GVA, around 3% to UK GVA, with Scottish EIIs contributing around £6 billion to this total. Scotland's manufacturing sector accounts for over half of our exports² and total business research and development expenditure.

1.7 EII were collectively responsible for approximately 15% of all Scottish GHG emissions³.

FIG 1. Employment, GVA, and GHG emissions for Scotland's industrial subsectors (2017)

EII Sector	Employment (000s)	GVA (£ million)	Emissions (MtCO2e)
Glass	3.0	260	0.05
Cement	0.3		0.60
Oil Refining	0.9	200	2.10
Food and Drink	44.2	3,600	0.60
Iron, Steel and metals (inc. aluminium)	2.5	150	0.10
Chemicals and Pharmaceuticals	9.6	1,100	2.30
Paper and Pulp (inc. wood products)	11.8	800	0.10

Source: Scottish Annual Business Statistics, Scottish GHG Inventory, Scottish Pollution Release Inventory

NB: The above table should be treated as illustrative as the EII sectors are not categorised within official employment, GVA, or emissions statistics

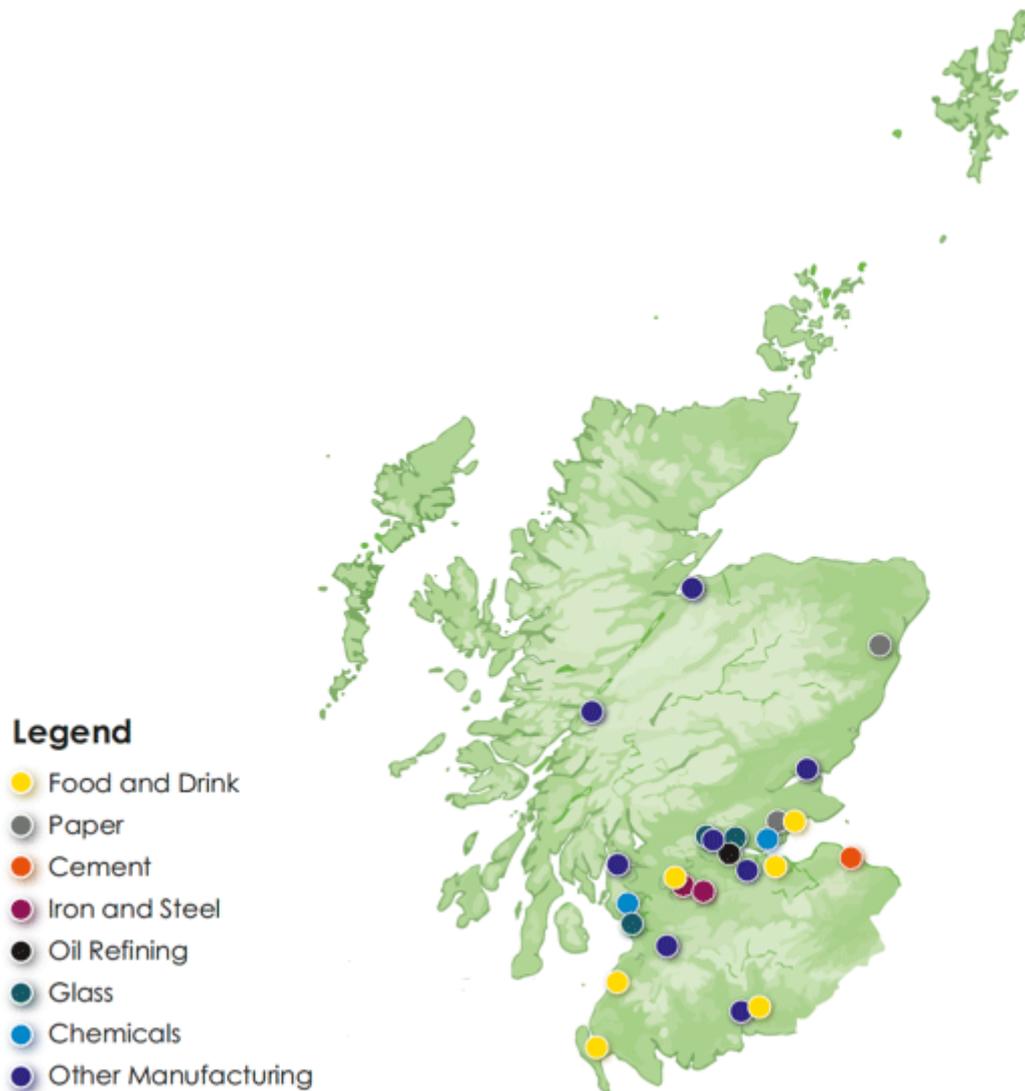
1.8 In 2017 there were 28 large EII sites located across Scotland. 'Clustered' industries may act as catalysts for the development of new advanced manufacturing sectors, attracted by the locational advantages of shared low carbon energy supplies, development of alternative fuels, and access to Carbon Capture Utilisation and Storage (CCUS) infrastructure.

1.9 Clusters, whether from the same sub-sector or not, will share infrastructure already, but there may be a case to consider development that makes more of proximity to improve efficiencies in energy productivity, material supply chains, or the local re-use of by-products such as excess heat.

² <https://www2.gov.scot/Topics/Statistics/Browse/Economy/Exports/ESSPublication/ESSExcel>

³ Includes emissions from all manufacturing sites within SEPA's SPRI database.

FIG 2. This map, from the paper: [‘Decarbonising Scotland’s industrial sectors and sites’](#) includes 29 SPRI reporting sites in 2016 - not sites (including at least four distilleries) who reported to ETS but not SPRI.



The Grangemouth cluster

1.10 Grangemouth is of considerable strategic importance to Scotland, as a significant source of skilled employment, economic output and fuel security. The cluster comprises three leading businesses in the downstream oil and gas sector, with energy intensive processes :a crude oil refinery; petrochemicals plant⁴; - and the Forties Pipeline System (FPS).

⁴ Emissions data from these sites is available at SEPA:
<http://apps.sepa.org.uk/SPRIPA/Search/ByPollutant/Results.aspx?Media=air&Pollutant=2&Year=2017>

1.11 The Grangemouth site is home to Scotland's only crude oil refinery (owned by a joint venture company, Petroineos) with capacity to produce around 9m tonnes of fuel per annum. As the only refinery north of the River Humber (one of 6 in UK), it is key to the efficient functioning of the Scottish economy, providing the majority of road fuel to central Scotland and aviation fuel to our airports. Its key strategic strengths within a UK context include direct connection to North Sea production (via FPS) location to serve both east and west coasts; and is connected to Finnart Ocean Terminal for crude oil import and finished product export. The refinery serves Scottish demand but also serves some requirement elsewhere.

1.12 Owned and operated by Ineos Olefins and Polymers (O&P) UK, the petrochemicals plant hosts one of Europe's few ethane gas crackers. Using shale gas ethane transported from USA as feedstock, the plant has capacity to produce 1.3 million tonnes of products annually – used in pharmaceuticals, medical appliances, insulation and food packaging. In February 2019, Ineos announced investment of £350m to construct an energy plant which will provide efficient, secure energy and utilities (heat and steam) to over the coming decades. The new energy plant will have capacity to provide steam to the petrochemical plants, FPS and refinery.

1.13 FPS opened in 1975 to transport crude oil from BP's Forties field to terminals and processing. Ineos acquired the asset in 2017 and the system now links over 80 North Sea fields, transporting around 40% of UK continental shelf oil and gas. Ineos has announced plans for £500m investment to extend the lifetime of the asset out to 2040s and implement Best Available Techniques (BAT) as required under the Pollution Prevention and Control (Scotland) Regulations 2012.

1.14 Ineos operations at Grangemouth including the refinery directly employ over 1,300 highly skilled personnel with up to 1,000 additional contractors on site in any day.⁵

1.15 The Falkirk & Grangemouth Investment Zone, extending across the Forth Valley, aims to deliver transformational economic, inclusive and clean growth locally, regionally and nationally. At its heart is a vision to develop a sustainable, long term investment area, within which a number of projects aim to meet the challenges of climate change. More in separate briefing.

Trends in EII activity

1.16 2017 Emissions from large EII sites are similar to 2007 levels, but down 15% from a peak in 2008.

⁵ Ineos: <https://www.ineos.com/sites/grangemouth/careers/>

FIG 3. Emissions from large EII sites, 2007 to 2017 (Graph shows emissions from industry as a whole sector within the Climate Change Plan then differences from SPRI site level data, and manufacturing/ EII within SPRI)

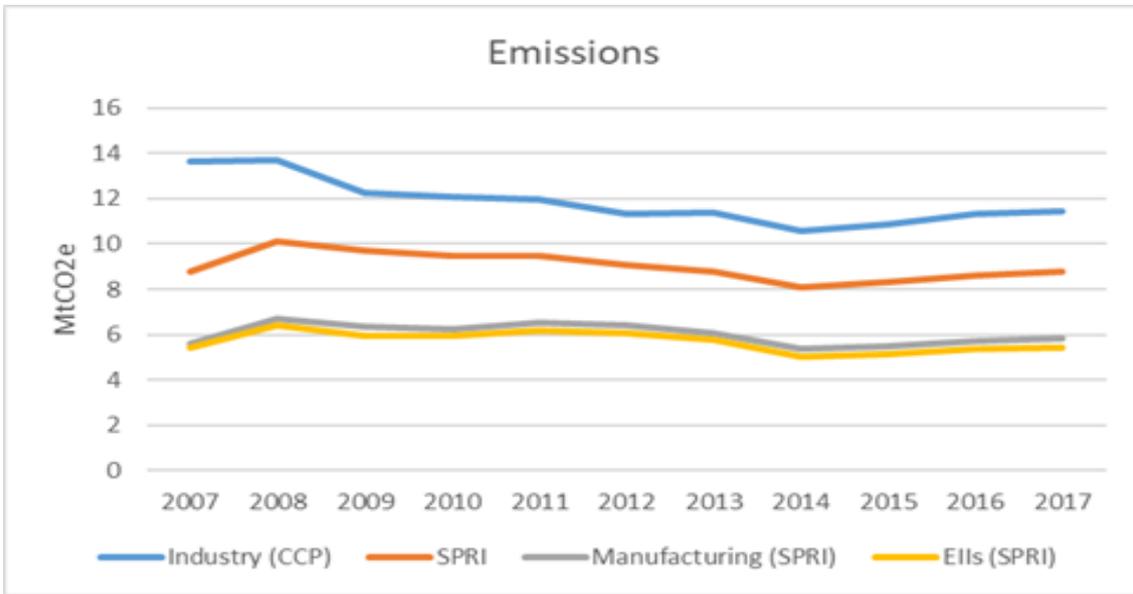
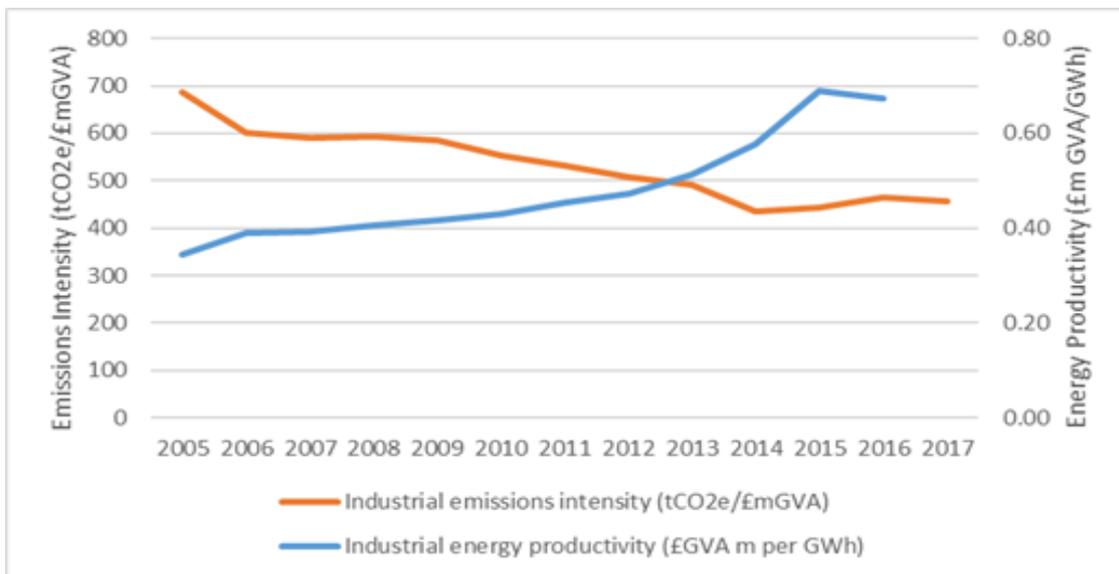


FIG 4: Comparison of historical (2005-2016) Energy Productivity (GVA/GWh) and Emissions Intensity (tCO2e/£m GVA) in the Scottish Industrial sector⁶



1.17 There has been a positive trend of increasing energy productivity and falling emissions intensity since 2005, although from 2014-16 there was a slight reversal. From 2005-16, it is estimated that energy use in the industrial sector fell by a third, and emissions by 28%. GVA in the

⁶ change of methodology for energy productivity means data only available to update chart to 2017 for emissions intensity

industrial sector also grew during this time, by around 6% overall. Therefore improvements have resulted from a growing industrial sector with falling emissions and energy usage.

1.18 Considering the interaction of energy, emissions and GVA it is clear that in order to make progress, programmes which support investment to reduce emissions whilst developing economic growth are critical to achieve our targets. Reducing industry emissions whilst boosting productivity is challenging. If trends in emissions and energy consumption remain on their current trajectories, due to stalling investment in efficiency or diminishing returns on the gains from decarbonisation, the annually monitored targets, as set in the Climate Change Plan, are likely to be missed.

1.19 The Scottish Government continues to raise awareness of existing incentives or programmes of energy efficiency advice and support for industry. We convene an Industrial Decarbonisation Agency group to coordinate existing agency-led activity. A strong focus of agency action is to support opportunities in low-carbon transition as well as high value manufacturing.⁷

1.20 However there remains a significant risk for EII that could lead to carbon leakage. Both support for investment and a regulatory level playing field is needed. That is why the Scottish Government will continue to seek to ensure that we access emissions trading markets after EU Exit – either through continued participation in the EU Emissions Trading System, or through the creation of a UK Emissions Trading System, linked to the EU ETS.

Economic and Development impact to Scotland (and UK)

1.21 Industrial decarbonisation is an economic opportunity – to grow our existing energy intensive sectors, and to attract new, advanced manufacturing industries of the future.

1.22 The Scottish Government wants to support activity to incentivise investment, building on the considerable strengths of existing sectors, some of which are specific to our unique characteristics. We also want to secure investment in new manufacturing attracted by a low carbon energy supply, new fuels such as hydrogen, our R&D excellence, our high skilled labour force, and the locational advantages that clustering and access to CCUS infrastructure can offer. Securing technological investment can also help to deliver inclusive growth and connect with global Sustainable Development Goals.

1.23 The case for resources to facilitate investment is more likely to succeed when environmental concerns are allied to supporting economic output and growth at industrial sites. Investment in environmental performance, through transformational change if necessary, can deliver not only cost savings via efficiencies, but also significant reductions in GHG. Investment can sustain a significant number of high-value jobs, that are often at the base of supply chains. This economic activity is vital, not only for securing a better future for regional communities, but for the Scottish manufacturing sector and economy as a whole. Our focus is on factors that we can influence, therefore we are working to:

- better target interventions that have an increased chance of industry take-up;
- maximise the effectiveness of public and private sector resources in overcoming barriers;

⁷ <https://www.scottish-enterprise.com/media/1955/business-plan-2018.pdf>

- prioritise support to where it can best influence outcomes and more directly connect with the delivery of our high level targets; and look at the wider economic and social impacts as EII adapt by engaging with initiatives such as Scotland's Just Transition Commission.

1.24 The high levels of investment that Scottish industry will require to decarbonise must largely be sourced from corporate sources. However, our engagement with industry shows that there are significant barriers to attracting the necessary investment – particularly long payback periods – whilst sites must remain internationally competitive. Consequently, the Scottish Government must assess how we can help make this a more attractive commercial investment proposition, and whether innovative finance (for example 'patient' capital loans and/or equity investment) could be deployed to help stimulate the required investment, where it is possible to provide such capital in the challenging fiscal climate.⁸

Barriers to investment or transition, as well as opportunities.

1.25 Representatives from Scottish agencies and EII attended workshops during 2018-19 where the following main barriers to investment and opportunities to decarbonise were identified:

Top cross-sector barriers

- Unattractive payback periods on measures so investment is diverted to other areas
- The cost of energy (including rising costs as a result of policies on renewables)
- Policy uncertainty in some areas such as on bio-energy
- Limits to growth, change or decarbonisation, often due to constraints on network infrastructure
- Lack of long-term incentives

Top cross-sector opportunities

- Many potential resource efficiency projects, especially industrial heat recovery (IHR)
- Potential to do more with products viewed as waste and use them more in processes
- Industry to support, and extract efficiency benefits from the distributed storage of energy
- With financial support, Scottish EII have an appetite for an ambitious low-carbon future

Skills

1.26 Working with delivery agencies can assist in identifying a different set of skills and competences in a lower-carbon production environment. Industry needs to look at ways of re-skilling the current workforce and consider how it competes with other industries for future talent.

1.27 Expertise is expected to play a significant part in the related energy transition, with required in hydrogen production and CCUS technology, both of which have been identified as key for the UK's energy transition. If not addressed, skills shortages could the attractiveness of industry to becomes more competitive globally, thus severely limiting the potential to deliver a decarbonised Scottish Industrial. Practical steps would include:

- Engage with the skills workstream within ' Making Scotland's Future', as well as NMIS.

⁸ Subject to state aid limits, depending on how finance is packaged.

- Address the issue of large industries not necessarily having enough skill or capability on the ground in Scottish sites to drive innovations and investment fast enough.
- The newly created Energy Skills Alliance is tasked to create an integrated skills strategy across the energy sector. This could be a model when an EII group is established.

EII in energy transition

1.28 Recent recommendations from UK-CCC's report: 'Net Zero – The UK's contribution to stopping global warming'⁹, outline that in a net-zero economy there will continue to be demand for production from EII. Therefore policies need to ensure that emissions from trade-exposed industries are reduced including some similar to those in place today (allocation of allowances within an emissions trading scheme) or new incentives such as border tariff adjustments or product standards that drive demand for low-carbon goods. Decarbonising industry more quickly than the EU-ETS (or its successor) may require significant public investment to avoid relocation to less carbon aware jurisdictions. Offshoring emissions would be economically damaging, nor would it address the global climate emergency given that we'd need to import more goods. Scottish Ministers want to ensure these sectors continue in Scotland where there is a measure of influence to decarbonise them.

1.29 Businesses currently considered by the EU to be at significant risk of relocating, such as the manufacturing of chemicals, employ over 91,000 workers in Scotland, have an annual turnover of around £19 billion, and account for over 45% of all Scottish international exports.¹⁰ To counter this, Scotland's strategic EII sites and the skills therein - such as those present in the Grangemouth cluster – should be harnessed as assets in the energy transition.

1.30 If policies disincentive business such that they cannot manage their exposure to carbon leakage and relocate outside of Scotland, the weakening of the employment base would undermine Scotland's capacity to produce the fuels necessary in our future low carbon energy system, or deliver goods that enter our supply chains. Any moves towards discouraging the companies behind these sites is likely to impede the very investment that is required to decarbonise operations. Maintaining the investment and skills potential of these sites is an important part of the sequencing towards decarbonisation.

1.31 The regulation of the energy market, and also fuels (oil, gas, coal, electricity), are reserved to the UK Government. Crucially for the decarbonisation of industry, CCUS is also reserved. This constrains the role of the Scottish Government in supporting the transition and substantial decarbonisation as action will be required by the UK Government to allow Scotland to meet its own targets.¹¹ These targets are now provided statutory basis in the Climate Change (Emissions Reduction Targets) (Scotland) Act 2019.¹² Any support from the Scottish Government must also

⁹ [The CCC: Net Zero – The UK's contribution to stopping global warming](#)

¹⁰ Scottish Government analysis using the EU Carbon Leakage List and data from the Scottish Annual Business Statistics 2015 and Export Statistics Scotland 2016 as cited in SG publication "When to set a net-zero greenhouse gas emissions target year: information and analysis to support CC Bill" (May 2018) https://www.parliament.scot/S5_Environment/General%20Documents/20180524_Scottish_Government_Information_and_Analysis_Paper.pdf

¹¹ Ibid page 209

¹² Available at: <http://www.legislation.gov.uk/asp/2019/15/enacted>

satisfy the requirements of State Aid, prescribing strict parameters surrounding any proposed interventions with a view to safeguarding effective competition.

Relevant Scottish Government and wider policy

1.32 Scottish Government is committed to achieving a net-zero economy in a way that is fair for all and to ensure a just transition. Industry can and will play a positive role in this transition, helping to channel its resources and innovate within supply chains.

1.33 The Scottish Government is working in partnership with EII to build on considerable existing sector strengths, and highlight that industrial decarbonisation is an economic investment opportunity.

1.34 With a focus on the Grangemouth cluster, officials and enterprise agency representatives continue to engage positively with on a range of issues - with a view to maximising the economic and environmental benefits from significant investments which have been announced to date. Coordinated activity across partners, including Falkirk Council, aims to ensure that skills and expertise can help facilitate significant emissions reductions whilst supporting the wider economy.

1.35 Work is ongoing to establish a Grangemouth Programme Board for public sector partners to engage proactively; listening to business owners and wider stakeholders to investigate areas where further investment could be unlocked. Officials continue to advance joint projects (within the levers and competency available) to further decarbonisation and energy efficiency measures.

1.36 A number of connected policy areas, that are largely within devolved competency, are working up positions during the year ahead. Many of these will have direct relevance for mapping out actions to support industrial decarbonisation, including:

- Heat decarbonisation policy statement
- Bioenergy action plan
- Hydrogen road map

1.37 At a UK level, relevant incentives are available via the Industrial Strategy. More specifically, an Industrial Energy Transformation Fund will open for applications by late-2020. Financial assistance for industry for the purposes of promoting or sustaining economic development or employment is not reserved, however there may be benefits in alignment with UK-wide funding opportunities. The Scottish Government has interest in how these funds are managed, and wants to optimise any investment funding opportunities towards measures that are relevant to our circumstances.

1.38 At a wider scale, the current primary policy lever for decarbonisation of EII is participation in the EU Emissions Trading System (EU-ETS). This carbon market covering the traded sector (power sector, some EII and intra-EEA aviation) is designed to deliver a 43% reduction in emissions by 2030, one of the 3 key strands of EU climate policy. The EU ETS is the largest mechanism to contribute towards Scotland's statutory climate targets, covering approx. 25% of Scotland's GHG emissions in 2017.

1.39 There is a risk that policy moves to exceed the emissions reduction trajectory of the EU ETS would generate an uneven playing field for Scottish/ UK industry, with the consequence of offshoring emissions. Many of the key tenants of Scotland's EII base operate in global markets therefore the trading environment must not undermine the competitiveness of industry, as there is greater opportunity for promoting the energy transition with such companies maintaining a domestic presence. This is acknowledged in the CCC report of 2 May 2019:

“The design of the policy framework to reduce UK industry emissions must ensure it does not drive industry overseas, which would not help to reduce global emissions, nor the UK economy...reshoring industry to the UK will ultimately improve the global effort to tackle climate change.”¹³ “Furthermore, the pace and sequencing of policy interventions and decarbonisation initiatives ought to be considered. The CCC recognises the need to treat industry differently from other sectors, and that change here may well be slower: “the need for strategic decisions, repurposing/upgrading of infrastructure and...mean that it is difficult to see how [the sector] could contribute as much emissions reduction towards an earlier date than 2050 for net-zero emissions.”¹⁴

Current activity and next steps

1.40 Scotland's world-leading climate change legislation sets a target date for net-zero emissions of all greenhouse gases by 2045. Therefore we are updating our Climate Change Plan to reflect the increased ambition of the new targets set in the Climate Change (Emissions Reduction Targets) (Scotland) Act 2019.

1.41 Our 2019-20 Programme for Government (PfG) recognises UK-CCC's point that eliminating emissions from industry is particularly challenging. However, we have the opportunity to reduce emissions to much lower levels by a combination of three principal means: making industrial processes more efficient, primarily in terms of energy input but also taking account of how materials are consumed and reused; switching to lower carbon fuels, or capturing carbon emissions to be utilised or stored (CCUS).

1.42 Achieving technological deployment will require a radical rethink including through highlighting the potential of industrial decarbonisation as an investment opportunity to grow existing sub-sectors, and to attract new, advanced manufacturing, with knock-on socioeconomic benefits.

1.43 Scottish Government is progressing the PfG Commitment to optimise our existing support so that Scotland's industrial sites are better positioned to access funding opportunities that will help them to deliver emissions savings. And we are leading the following initiatives to augment our evidence base, raise knowledge and understanding, and steer specific policy and programme actions:

- Promoting project progression – creating a pipeline for industrial decarbonisation in Scotland. This will establish a greater understanding of projects of all sub-sectors that will

¹³ Committee on Climate Change, *Net Zero – The UK's contribution to stopping global warming*, 2 May 2019, page 202: available at: <https://www.theccc.org.uk/publication/net-zero-the-uks-contribution-to-stopping-global-warming/>

¹⁴ Ibid page 165



contribute to the decarbonisation; and how these projects, across the full spectrum of developmental stages, are expected to progress in the short-to-medium term

- Assessment of viable emissions reduction profiles for the Scottish industrial sector. This will outline options that could achieve transformational emissions reductions then inform ongoing engagement with EII stakeholders related to Climate Change Plan interim targets
- Understanding potential market benefits from incentivising industrial production of lower-carbon products in Scotland – including via public procurement.

1.44 Following workshops during 2018-19 there is support amongst EII stakeholders to build on existing engagement to work in partnership when developing policy. With Scottish government in the lead, an EII group can inform the next steps, or where to target investment within a strategic approach, to enable deeper industrial decarbonisation across Scotland.

2. Carbon Capture, Utilisation and Storage (CCUS) – additional information

2.1 CCUS is an industrial scale decarbonisation system which has the potential to make a significant contribution to achieving Scotland's emissions targets. CCS is flexible and can be applied to fossil fuel energy production, hydrogen production and energy intensive industrial processes preventing large-scale CO₂ emissions from entering the atmosphere.

Why CCUS in Scotland

2.2 The Scottish Government believes Scotland is in a unique position to undertake this technology on an industrial scale and that the opportunity to repurpose key existing pipeline infrastructure assets already in place provides the most cost-effective pathway to the deployment of CCUS. Our waters in the North Sea also provides access to vast carbon storage resources in depleted oil and gas reservoirs and we believe that coupled with our existing oil and gas capabilities, ready supply chain, and strategically important industrial clusters, Scotland is potentially the best-placed country in Europe to realise CCUS on a commercial scale

The role of CCUS in the Just Transition

- Scotland's industrial clusters and largest point sources of CO₂ in the North East and in Grangemouth are linked by a network of pipelines to depleted and well-mapped oil and gas fields in the North Sea. This legacy offers rare access to existing infrastructure for carbon storage and provides Scotland with a competitive advantage in carbon capture and storage.
- The development of CCUS could offer a range of opportunities for Scottish oil and gas firms and domestic supply chain companies. From building and maintaining pipeline infrastructure to our extensive experience in platform and well management, Scotland already has the expertise and transferable skills to kick-start what could become a whole new on and offshore industry.
- The development of strategically located CCS infrastructure in Scotland's industrial clusters in Grangemouth and the North East could protect and ensure that important domestic industries such as petro-chemicals, gas processing are able to compete in the future low-carbon world that is the aim of the Paris Agreement.

NECCUS

2.3 North East CCUS (NECCUS) is a newly established industry-led alliance drawn from industry, academia, membership organisations and private sector bodies to promote CCUS in Scotland. The group has emerged out of a need to create a formal entity to coordinate and promote CCUS in Scotland at a Scottish, UK and European level.

2.4 The objective of NECCUS is to articulate and promote the CCUS offering provided in Scotland, to attract funding for CCUS in Scotland and to secure the first CCUS project in the UK to be in Scotland.



Acorn CCS Project

2.5 The Scottish Government are already supporting efforts to deploy CCS in Scotland. In 2019 we provided funding of £275k to the Acorn CCUS project positioned in the North East of Scotland at St.Fergus to drive forward the project's feasibility programme.

2.6 The Acorn project is a standalone industrial CCS project to engineer a minimum viable full-chain CCS project to initiate CCS in the UK. Led by energy consultants Pale Blue Dot, the project focuses on the St Fergus gas terminal, which possesses the location, existing offshore pipeline infrastructure, and access to offshore storage (including the Goldeneye field) necessary to complete the CCS process. PBD estimate Acorn could be operational by 2023.

2.7 Scotland's key CCUS resource is our vast potential for CO₂ storage. The depleted gas fields and aquifers identified as suitable for injection of CO₂ in the Central North Sea are far larger than the totality of Scotland's carbon emissions. Scotland's 'over-supply' of storage assets presents us as a Nation with an economic opportunity in future to be at the centre of a European hub for the importation and storage of CO₂ from the rest of the UK as well as Europe.

2.8 The Acorn project is already looking into importing CO₂ from outside Scotland. We are supporting this solution as part of our promotion of the Scottish CCUS cluster with the UK Government.