NETZERO WATCH

SAMIZDAT

THE WEEKLY ENERGY AND CLIMATE BRIEFING

Labour MPs turn on Burnham over North Sea drilling ban

Good afternoon. This week, Labour faces a rebellion over its North Sea drilling ban, while the Chancellor reportedly puts the brakes on Ed Miliband's 2030 green electricity ambitions. Meanwhile, Germany enters winter with dangerously low gas reserves and Italy moves to accelerate domestic oil and gas production. Is economic reality finally catching up with the Government's Net Zero agenda?



THE WEEK IN BRIEF

- **North Sea:** Labour MPs attack the Government's ban on new oil and gas exploration as an act of economic self-harm.
- **Clean power:** The Chancellor reportedly restricts funding for green projects, casting doubt on Labour's 2030 electricity target.
- **Energy security:** Germany begins winter with gas storage at just 61%, well below its own target.
- **European policy:** Italy moves to accelerate domestic oil and gas production amid growing concerns over energy imports.
- **Climate science:** Roger Pielke Jr. challenges research attributing $28tn in economic damages to fossil fuel companies.



THE BIG STORY

Labour rebels over North Sea drilling ban as Net Zero tensions deepen

Andy Burnham is facing a growing rebellion from his own MPs over plans to permanently ban new oil and gas exploration in the North Sea. Labour backbenchers have condemned the policy as an act of economic self-harm, warning that it threatens British jobs, investment and billions in potential tax revenues.

The Government's Energy Independence Bill would prevent new exploration licences being issued, despite Britain's continuing reliance on imported oil and gas. Critics accuse ministers of hypocrisy for restricting domestic production while leaving the country exposed to volatile international energy markets.

Why it matters: The backlash exposes a growing divide within Labour between its Net Zero commitments and the interests of industrial communities. Having approved Jackdaw while leaving Rosebank unresolved, the Government now faces opposition from its own MPs over legislation that could make Britain increasingly dependent on foreign energy supplies. Read more



UK

Chancellor puts brakes on Miliband's 2030 green power pledge

John Healey has reportedly dealt a major blow to Ed Miliband's 2030 clean-power ambitions, instructing officials to fund only green energy projects that reduce bills and can be readily connected to the National Grid. The move could make new offshore wind farms harder to approve and leave Labour's pledge to generate 95% of electricity from renewable sources by 2030 in serious doubt. Read more

Government seeks to make drilling moratorium permanent

Labour has introduced legislation to enshrine its ban on new North Sea oil and gas exploration licences in law. Reversing the restriction would require a future government to secure parliamentary approval. Shadow energy secretary Andrew Bowie argues that the policy will increase Britain's reliance on imports while discouraging investment in domestic energy production. Read more



INTERNATIONAL

European households face renewed energy price pressure

European gas prices have reportedly exceeded €100/MWh for the first time since 2022, leaving ministers with limited options to protect households from rising costs. Writing for *Watts Up With That*, Eric Worrall questions the contribution of green policies to electricity bills, citing an uncertain, AI-generated estimate suggesting that renewable subsidies, carbon costs and related grid expenditure could account for 20–35% of household electricity charges. Read more

Germany enters winter with record-low gas reserves

Germany began November with gas storage just 61.05% full, according to Reuters, significantly below both its 70% target and the EU average of 74.56%. Analysts warn that reserves could fall to 20–25% by the end of winter, amid elevated prices and supply disruption linked to the Iran conflict. Poland, by contrast, has filled its storage facilities to 99% of capacity. Read more

Italy accelerates oil and gas production to bolster energy security

Italian Prime Minister Giorgia Meloni is moving to cut bureaucracy and speed up domestic oil and gas exploration. Special commissioners will be appointed to unblock projects delayed by local authorities. With natural gas providing almost half of Italy's electricity and its energy import bill estimated at €60bn this year, the Government is prioritising domestic production as international supply pressures intensify. Read more



OPINION AND ANALYSIS

Four arguments to read alongside this week's news.

Britain's green transition risks increasing dependence on China

Writing for *Bloomberg*, Matthew Brooker warns that Britain is poorly prepared for a new wave of Chinese industrial competition. China already produces 75% of the world's electric cars, 80% of lithium-ion batteries and more than 70% of wind generators. As British manufacturing faces mounting pressure, the country's increasing dependence on imported Chinese clean-energy technology raises questions about industrial resilience and economic security. Read more

Roger Pielke Jr. challenges $28tn climate damages claim

Climate policy researcher Roger Pielke Jr. says a replication of two influential scientific studies has uncovered major errors involving temperature scales, currency conversions and economic data. Correcting four errors, he reports results ranging from a $5tn economic gain to a $2tn loss, rather than the published $28tn loss. He argues that the papers, published in Nature and Science Advances, should be retracted. Read more

The Times: Rosebank delays expose contradictions in energy policy

A *Times* editorial highlights the contradiction between the Treasury's reliance on future North Sea tax revenues and ministers' continued reluctance to approve Rosebank. Together with Jackdaw, the projects could generate £3.8bn in tax receipts by the end of the next parliament. The newspaper argues that Britain's energy strategy must place greater weight on domestic production, investment and affordability. Read more

Ross Clark warns against climate engineering

Writing on *Substack*, Ross Clark argues that large-scale attempts to manipulate the Earth's climate could prove even more dangerous than premature efforts to achieve Net Zero. He warns that geoengineering programmes could create new international tensions and potentially conflict, adding another dimension to the debate over the unintended consequences of climate intervention. Read more



We have launched a new **Email Your MP** campaign to help constituents raise concerns about the government's proposed ban on new North Sea oil and gas exploration licences.

Use the tool to ask your MP to vote against the Energy Independence Bill if it still contains the provision ending new licences. You can personalise the email to explain what's at stake for you and your community.

EMAIL YOUR MP