

Climate Council Report

Reviewing the progress of the Carbon Neutral Roadmap 2022

March 2026



Contents

Executive Summary	3
Introduction	6
Building the Foundations for Jersey's Climate Response	6
Establishing the Climate Council	6
Purpose and scope of this Report	7
Methodology	8
Summary of public survey responses	9
Chapter 1: Audit of Progress – the Story so Far	12
Current Status (2022–2026)	18
Assets and Activity	18
Emissions (2022–2026 trend)	24
The Systems and Stakeholders Shaping Climate Preparedness	27
Delivery Plan 1: Summary and Lessons	31
Policy Interventions	32
Return on Investment, Comparison to UK & Just Transition	32
Supply-side levers are currently underused	35
Behavioural Responses	35
Blockers and Opportunities	35
Chapter 2: Future outlook to 2030	37
Specific 2030 Roadmap targets	39
Opportunities and blockers analysis	43
Policy opportunities	43
Delivery and funding opportunities	44
Behavioural and socio-economic opportunities	44
Resourcing and funding needs (2026–2030)	48
Financing decarbonisation	48
Major levers	49
Long-term versus short-term	49
Tactical and operational readiness	50
Policy readiness	50
Delivery capacity	51
Behavioural readiness	52
Market and supply-chain readiness	52
Priority actions to re-align sectors with 2030 pathway	53
Immediate policy shifts (2026–2027)	53
Investment priorities	55

Behavioural and cultural change interventions.....	55
Data and monitoring	56
Risks, assumptions and dependencies.....	57
Conclusion	59
Chapter 3: Ambition to 2050: Does the Ambition Still Make Sense? (2030–2050)	61
Feasibility analysis of Jersey’s 2050 ambitions.....	62
Analytical Approach	62
Scenario Structure.....	63
Key Results and System-Level Findings.....	64
Transport: Implications beyond 2030	67
Heating: Implications beyond 2030	68
Other Emissions: Implications beyond 2030	69
Implications for Primary Energy Supply	70
Other Implications: Carbon Budgets	70
Conclusion	71
Chapter 4: Counterfactual: Implications for Jersey if it fails to meet targets	72
Transport.....	72
Heating.....	74
Sustainable Finance	75
Chapter 5: Conclusions and Recommendations	77
System-level and Governance.....	77
Cross-Sector Themes.....	78
Sectoral Conclusions and Recommendations	79
Transport.....	79
Heating.....	80
Other Emissions	81
Sustainable Finance	82
Closing statement	82
Appendices	83
ANNEX A: Roadmap Transport & Heating Policy Framework (2022).....	83
ANNEX B: CEF Allocation and Climate Council RoI Scores	87
ANNEX C: Primary Energy Supply Data (2023)	90
ANNEX D – Assumptions in long-term (2050+) scenario modelling.....	91
Glossary.....	101
Thank you to contributors.....	106
Process reflections.....	107
Climate Council Members	108

Executive Summary

This first report of the Climate Council evaluates the Government of Jersey's progress in implementing the Carbon Neutral Roadmap (the 'Roadmap') and reducing emissions during the initial delivery phase from 2022-2025. It assesses whether current policies place the Island on a viable pathway to meet its climate commitments, identifies gaps or areas of concern, and provides recommendations to support more effective, fair and resilient climate action in the years ahead.

Jersey's ambition and intent in developing the Roadmap is laudable and aligns with good international practice. Citizen engagement in assessing the case for change was best practice. Jersey starts from a great place relative to many jurisdictions (including the UK) with an effectively decarbonised electricity system that is well placed to deal with future system demands, supply security, and robust energy and telecoms infrastructure fundamentals. Most social housing already benefits from electric heating and Jersey has relatively little exposure to the hardest to abate sectors – such as long-haul aviation and some heavy industry. Jersey's role as a global financial hub provides it with the opportunity to deliver impact disproportionate to its scale in global emissions reduction. As an Island with robust sovereign legislative independence, Jersey enjoys significantly greater agency and control than any city (let alone community of similar size) in the UK or EU.

Jersey does face some structural challenges – executive and legislative bandwidth is limited, physical space is constrained, both competitive dynamics and robust regulatory structures are lacking compared with many countries. A consequence of Jersey's size and high level of autonomy is that the administrative challenge is compounded by the need for the same Government bodies to develop and deliver policies and programmes that in larger jurisdictions would be handled at distinct national and local government levels. In common with most other European economies, economic growth has been fragile in recent years and balancing public finances challenging.

Jersey's prior success in decarbonising electricity means that there is disproportional dependence on the "hard yards" of decarbonisation – the elements that impact and depend on citizens/consumers (heat, mobility, waste management), their behaviours, investments and day to day spending.

Despite modest levels of overall policy investment in support of delivering the Roadmap – about £220 per resident since 2022, or roughly £55 per resident per year - there has been progress against many of its elements, in particular some of the enabling activities and the deployment of grants to support the adoption of lower carbon technologies, including electric vehicles and electrical heating systems. Overall, around 60% of the Climate Emergency Fund (CEF)¹ has been directly invested in emissions reducing interventions. There are also good examples of private sector led experimentation, with low carbon alternative fuels and some deployment of on-island renewable generation. The prospect of a clear energy strategy is welcome – as is the pragmatism that has meant that little effort has been wasted on uncertain emergent technologies, such as green hydrogen or nuclear fusion.

The shift from fossil to low carbon energy is underway, but (perhaps unsurprisingly, given the absence of low hanging fruit and the short life of the actions taken so far) the impact on overall emissions has been minor. With the cost per tonne of carbon abated through CEF subsidies and grants ranging from £165 per tonne CO₂e under the Low Carbon Heating Incentive² to £437

¹ [Climate Emergency Fund](#)

² [Low carbon heating incentive](#)

per tonne CO₂e under the Electric Vehicle Purchase Incentive³ according to Council analysis, they have started to seed new markets, capabilities and expectations.

However, on the current trajectory, the 2030 targets laid out in the Roadmap and associated policies are unachievable.

But the goal remains valid. Despite arguments that Jersey is too small to matter, that the transition is unaffordable or that geopolitics have moved on, the contention of the Council is that Jersey's commitment to net zero remains critical and doable. Our analysis shows that in three of the four scenarios modelled, energy costs per person come down, including two scenarios where emissions per capita come down to less than 1% of today's level (effectively, net zero).

The Council's analysis has shown that:

- Decarbonisation does not inherently imply higher ongoing energy costs at the system level.
- Electricity demand growth is manageable, particularly if transition occurs steadily rather than being delayed.
- The most significant risks arise not from technology limits, but from policy uncertainty, delayed action and asset lock-in.

These findings support the Council's conclusion that the principal challenges facing Jersey are how to manage the capital cost of transitioning energy systems and the residual value of fossil systems in a socially just manner, rather than technical or long-term economic concerns.

If Jersey fails to maintain best efforts, the counterfactual risks include lost economic and investment opportunities, lost skilled jobs, higher consumer costs, avoidable harms to public health, reputational damage and significant competitive disadvantage for the critical finance sector.

The report starts with a review of the current position and the impact so far of policy interventions in the Roadmap. It goes on to offer proposals on levers to intensify focus on emissions reduction and get short to mid-term delivery on track. The viability of the longer-term net zero ambition is assessed in Chapter 3 followed by an overview of the possible consequences of not following through. The report concludes with a summary of the proposals put forward through this report.

The Council's concerns on the experience so far can be grouped into four overarching themes:

1. Just Transition Failures

- Subsidies skewed towards the wealthy.
- Polluter-pays principles weakened or abandoned.
- Untaxed high-emissions activities (e.g. aviation).

2. Over-reliance on Technological Fixes

- Electrification prioritised over demand reduction, behavioural change, and transitional solutions.

3. Falling Behind International Best Practice

- Waste, transport, and finance policy lagging comparable jurisdictions.

4. Focus on End Use Rather Than Supply

- Limited use of fuel taxation, standards, or mandates.

³ [Electric Vehicle Purchase Incentive](#)

The specific recommendations of the Council for future action can be found in Chapter 5. Most can be grouped under the following broad headings:

1. Stable, predictable and Consistent policy: Output driven budgets, funded and monitored.

- Provide multi-year programme funding aligned with multi-year output-driven Carbon Budgets and underpinned by clear and consistent policy commitments.
- Apply system level analysis on how different sectors and objectives are interconnected.
- Use timing as a lever to minimise trade-offs with Jersey's other strategic objectives.
- Review the resourcing of support and governance.
- Measure, encourage and recognise private sector leadership.

2. Cross-Sector Themes

- Apply the Polluter Pays principle.
- Infrastructure migration: Clear and firm commitments to the phase-out of Internal Combustion Engine (ICE) vehicles and boilers, prioritise a waste strategy to replace the Energy Recovery Facility (ERF) dependence and develop robust strategies for managed transition or exit of some fossil fuel systems.
- Establish clear transition strategies to balance transition timings and upfront cost.
- Shift in behaviour, modes and making a reduction in energy wastage easy.
- Data improvements (type, amount and timing).
- Prioritise the skills agenda, particularly in sustainable finance and infrastructure transition.
- Enable market-driven finance options (e.g., green bonds and mortgages).

The Council is clear that Jersey has the potential to be both a leader and a beneficiary of the global emissions transition. We feel privileged to have been invited to engage with Jersey's Government, private and third sector communities, are grateful for the generosity of time and spirit extended to us and are deeply impressed by the commitment and expertise of many that we spoke with. We urge Jersey to stay the course and hope that our report is of use and supports the further delivery of a transition that is fair, effective and positive.

Introduction

Building the Foundations for Jersey's Climate Response

On 2 May 2019, the States Assembly declared that Jersey faced a climate emergency, an acknowledgment that global environmental change posed profound risks to the Island and required decisive, long-term action. In the years following this declaration, international scientific evidence has only strengthened. The World Meteorological Organization reported that the past seven years have been the warmest on record, while extreme events, from devastating heatwaves and wildfires to unprecedented flooding, have underscored both the scale and urgency of the challenge. The 2022 Intergovernmental Panel on Climate Change (IPCC)⁴ report further emphasised that human-induced climate change is already causing widespread, and in some cases, irreversible impacts to people and ecosystems around the world.

These developments unfolded alongside the far-reaching effects of the COVID-19 pandemic, which reshaped societies, disrupted global systems and reminded governments of the importance of resilience and collective action. For Jersey, the pandemic also illustrated how easily attention can shift away from long-term risks when urgent crises emerge. In this context, the Island's climate response required an approach capable of withstanding future pressures, one rooted in strong foundations, extensive community engagement and a clear long-term direction.

It was against this backdrop that the Government of Jersey developed the Roadmap, agreed by the States Assembly in April 2022. This strategic plan sets out the Island's pathway for reducing greenhouse gas emissions and lays the groundwork for the social, economic and technological changes needed over the coming decades. Recognising that the transition to a low-carbon future will not be linear, the Roadmap emphasises the importance of whole-Island ownership, ensuring that individuals, businesses, community groups and public bodies play an active role in shaping and delivering the Island's climate response. Islanders' views and lived experience were central throughout the Roadmap's development, supported by wide-ranging consultation, independent research, and a commitment to transparent, evidence-based policymaking.

A key principle embedded within the Roadmap is the commitment to a Just Transition; ensuring that the costs and benefits of decarbonisation are distributed fairly and do not disproportionately impact lower-income households or those working in carbon-intensive sectors. The Climate Emergency Fund (CEF) was established to protect investment in climate action and help rebalance economic incentives, recognising that significant and sustained funding is essential for enabling households, businesses and government to reduce emissions effectively.

The Roadmap was designed as a living framework, recognising that climate science, technology and public expectations will continue to evolve. As new evidence emerges and implementation progresses, delivery plans will need to be revisited and updated to ensure that Jersey remains on track to meet its climate commitments.

Establishing the Climate Council

To support accountability, continuity and independent oversight throughout this long-term transition, the States Assembly approved the establishment of an independent, science-led Climate Council (the 'Council') for Jersey. This followed an amendment to the Roadmap brought forward by the Environment, Housing and Infrastructure Scrutiny Panel, and later refined by the Minister for the Environment. The Council was created to ensure rigorous monitoring of

⁴ [Climate Change 2022: Impacts, Adaptation and Vulnerability | Climate Change 2022: Impacts, Adaptation and Vulnerability](#)

government progress, provide expert analysis and advice, and help maintain consistent climate ambition across successive States Assemblies.

The Council's role is to report, at the end of each four-year delivery phase of the Roadmap, on Jersey's progress in reducing greenhouse gas emissions and implementing climate policies. The Council's assessments will sit alongside the annually produced, independently verified greenhouse gas emissions inventory, which forms the Island's primary performance indicator for emissions reduction.

To ensure transparency and independence, the Council's membership comprises experts across fields including energy, economics, climate technology and just transition issues, appointed through a joint decision of the Assistant Minister for the Environment (Minister for Energy and Climate Change) and the Chair of the Environment, Housing and Infrastructure Scrutiny Panel. Members will meet at key points in each four-year cycle and produce a comprehensive assessment for presentation to the States Assembly.

In preparing the 4-yearly report, the work of the Climate Council may include⁵:

- Providing independent science-based advice on setting and meeting carbon budgets and preparing for climate change.
- Monitoring progress in reducing emissions and achieving carbon budgets and targets and recommending actions to keep Jersey on track.
- Conducting independent analysis into climate change science, economics and policy where such information cannot be transposed from other peer reviewed scientific research or analysis.
- Engaging with a wide range of organisations and individuals to share evidence and analysis.

Purpose and scope of this Report

This first report of the Council evaluates the Government of Jersey's progress in implementing the Roadmap and reducing emissions during the initial delivery phase. It assesses whether current policies place the Island on a viable pathway to meet its climate commitments, identifies gaps or areas of concern, and provides recommendations to support more effective, fair and resilient climate action in the years ahead.

In undertaking this review, the Council has prioritised assessment of those sectors and policy areas that currently account for the largest share of Jersey's greenhouse gas emissions and where delivery actions are expected to have the greatest near to medium-term impact. As a result, some elements of the Roadmap have not been assessed in detail within this report. This includes enabling policies and cross-cutting initiatives, which are referenced where relevant but not reviewed as standalone areas. Certain sectors, such as construction, have not been examined separately, reflecting both the contraction of activity in recent years and the fact that construction-related emissions are largely captured within the analysis of heating and built environment measures set out elsewhere in the report. Other areas, including carbon sequestration, offsets, carbon neutral networks, blue carbon and aspects of the marine economy, were not within the scope of this review due to time constraints and their comparatively limited contribution to current territorial emissions.

⁵ [P.117-2022.pdf](#)

The Council considers that this focused approach provides the most effective basis for assessing progress and informing recommendations aligned with Jersey's primary emissions sources and economic context.

The Council recognises that its recommendations have not been costed and that implementation support will need to be sized appropriately, although it considers that most of the recommendations carry little or no additional cost to government.

During this review, the Council had the opportunity to meet with many of the Officers responsible for advancing the Roadmap. We were consistently impressed by their passion, commitment and professionalism in delivering shared climate objectives, often under significant constraints. The Council recognises that the change in Government in early 2024, alongside shifts in funding priorities and tighter spending controls, has affected the pace of delivery in several areas. We therefore acknowledge and commend what has been achieved within the limits of the available budget, capacity and political direction. The Council urges decision-makers to continue to value and prioritise the objectives of the Roadmap, and to ensure that the teams tasked with its delivery are resourced and supported appropriately. We also recognise that some workstreams may have progressed or been prioritised outside the restricted evidence-gathering window that informed this report, and we welcome continued momentum in those areas.

Methodology

In preparing this report, the Council adopted a mixed-methods approach, combining documentary analysis, stakeholder engagement and public consultation to develop an independent and evidence-based assessment of progress under the Roadmap.

The Council undertook a detailed review of reports, data and background materials provided by the Environment and Climate Policy Team, alongside information supplied by other relevant Government of Jersey departments. This included policy documents, delivery updates, emissions data, monitoring reports and supporting technical evidence. The purpose of this review was to understand both the intent of the Roadmap and the progress made in implementation across key sectors.

In parallel, the Council sought to engage with a broad range of stakeholders to gather qualitative insight into delivery challenges, enablers and emerging issues. Engagement was undertaken with representatives from Government, delivery partners, industry, third-sector organisations and other relevant bodies, within the limits of the time available for this review. These discussions helped to contextualise documentary evidence and provided insight into practical considerations affecting delivery on the ground.

Public perspectives formed a further important component of the Council's evidence base. A public survey was conducted to capture Islanders' views on progress under the Roadmap, perceived barriers to emissions reduction, and expectations of government action.

The Council recognises limitations to the evidence base used in this review. The assessment was conducted within a defined timeframe, which constrained the depth and breadth of stakeholder engagement possible. While the Council sought to engage with a wide range of stakeholders, not all perspectives or sectors could be covered in equal detail.

The Council also notes that its review relies on data, reports and information available at the time of assessment. For example, emissions data for 2024 is not yet available – the Council relied on 2023 data for some of its analysis – although the modest (but positive) changes to

amount and type of energy consumed in 2024 compared to 2023 suggests that more current data would not materially change the conclusions in the report.

Use of Evidence

Taken together, these strands of evidence enabled the Council to triangulate policy intent, delivery experience and public perception. The combined use of documentary review, stakeholder engagement and public input has allowed the Council to assess not only progress against formal commitments, but also the credibility, coherence and public acceptability of the current approach.

This integrated evidence base underpins the Council's findings and recommendations, which are intended to support transparent accountability, inform future decision-making, and strengthen the delivery of Jersey's climate objectives over the coming phases of the Roadmap.

Summary of public survey responses

As part of its evidence gathering process the Council conducted a public survey during December 2025 to understand public perspectives on progress under the Roadmap. The anonymous survey captured a wide range of views from Islanders on the feasibility, visibility, fairness and delivery of climate action, with a particular focus on transport and heating.

The survey consisted primarily of open-ended questions designed to elicit qualitative insight rather than statistically representative results. Questions explored awareness and understanding of climate targets, perceptions of progress across key sectors, barriers to emissions reduction, and views on what further support, or action is required from government.

A total of between 77 and 78 responses were received per question, with minor variation due to skipped responses. Only one respondent reported having been a member of the 2021 Citizens' Assembly, indicating that the survey largely reflects wider public perspectives rather than prior deliberative engagement. Responses were analysed thematically to identify recurring issues, areas of consensus and divergence, and key concerns raised by participants.

While the survey sample is not statistically representative of the Island's population, it provides valuable insight into public sentiment and highlights issues relevant to confidence, engagement and delivery of the Roadmap. Taken together, this evidence informs the Council's assessment and underpins the findings and recommendations set out in this report.

Overview of Public Sentiment

The survey reveals a highly engaged but deeply divided public. Some respondents expressed strong support for ambitious climate action and frustration at the perceived lack of progress, while others questioned the relevance, feasibility or fairness of Jersey's climate targets, or rejected the premise of net zero policies altogether. Between these positions lies a substantial group of Islanders who accept the need to reduce emissions but are concerned about cost, delivery and communication.

Importantly, the survey suggests that disengagement is not the primary challenge. Instead, many respondents reported uncertainty, scepticism or frustration, often linked to a perception that climate policy is being "done to" the public rather than developed with them. Confidence in the current delivery of the Roadmap appears fragile, particularly where costs are visible, but benefits and progress are unclear.

Perceived Barriers to Progress

Affordability was overwhelmingly identified as the principal barrier to emissions reduction. Respondents frequently cited the high upfront cost of electric vehicles and low-carbon heating systems, limited or inconsistent financial support, and concerns that climate policies may disproportionately affect lower- and middle-income households. There was widespread anxiety that climate action is being pursued without sufficient regard to current cost-of-living pressures.

Infrastructure constraints were also a prominent theme. In transport, respondents highlighted inadequate public transport provision, insufficient Electric Vehicle (EV) charging infrastructure, and a lack of safe walking and cycling routes. In relation to heating, concerns included the availability of skilled installers, uncertainty over the suitability of low-carbon technologies for Jersey's housing stock, and pressures on the electricity network.

Political leadership and delivery emerged as a further concern. Many respondents questioned whether climate action remains a consistent priority for Government, pointing to mixed messages, delayed decisions and a perceived gap between stated ambition and implementation.

Visibility and Understanding of Targets

The survey identifies a clear disconnect between climate policy and public understanding. While headline commitments, such as net zero by 2050 or the proposed phase-out of new petrol and diesel vehicles from 2030, are relatively well known, awareness of interim targets for transport and heating is low. Most respondents reported limited understanding of how progress is measured, how much has been achieved to date, or what changes are expected of them personally.

This lack of visibility and transparency was frequently linked to mistrust and resistance, particularly where policies are perceived as unrealistic or insufficiently explained. Respondents consistently called for clearer, more regular communication that explains not only what the targets are, but why they matter and how they will be achieved.

Expectations of Government Support

Across responses, there was broad agreement that Government has a central role in enabling change. Respondents expressed strong expectations that Government should:

- Provide stable, long-term financial support rather than short-lived incentives
- Invest in enabling infrastructure before introducing restrictions or mandates
- Lead by example by decarbonising its own buildings, fleets and procurement; and
- Communicate honestly about progress, costs and trade-offs.

There was also notable support for exploring a wider range of financing mechanisms, such as low-interest loans, green bonds and partnerships with the private sector - reflecting recognition that public funding alone will not be sufficient to deliver the transition.

The survey responses highlighted a consistent set of themes that respondents considered critical to the credibility and effectiveness of Jersey's climate response. These included the need for clearer and more transparent communication on progress and targets; a stronger and more explicit commitment to a just transition that protects lower-income households and avoids disproportionate impacts; accelerated investment in enabling infrastructure, particularly in transport, energy efficiency and low-carbon heating; and stronger government leadership

through decarbonisation of public assets and procurement. Respondents also emphasised the importance of aligning ambition with deliverability, providing long-term policy certainty, and treating interim milestones - such as 2030 - as opportunities for learning and course correction rather than fixed end points. The Council has taken these themes fully into account in forming its assessment of progress under the Roadmap, and they are reflected throughout the conclusions and recommendations set out in this report.

Chapter 1: Audit of Progress – the Story so Far

Context

The Roadmap agreed in April 2022, established an ambitious pathway to reduce total emissions from the 1990 levels by 68% by 2030, 78% by 2035 and to reach net zero by 2050.

This chapter provides the Council's review of the current context and the effectiveness of the initial delivery plan actions under the Roadmap. Transport and heating were identified as the most critical and complex sectors for decarbonisation and are the focus of this chapter, but other omissions - waste, water and agriculture, and a broad review of primary energy are also included. Attention has also been paid to the role of Jersey's economically critical finance sector.

Transport

Transport is the single largest contributor to Jersey's greenhouse gas emissions, responsible for approximately **43–45%** of total emissions in recent years. It is recognised as one of the most critical and complex sectors for decarbonisation.

The Roadmap set several transport-related strategic policies in its Delivery Plan:

- End registration of new and used petrol and diesel cars and small vans by 2030.
- Achieve a 67% decarbonised vehicle fleet by 2030.
- Support a modal shift to walking, cycling, and public transport.
- Develop a Sustainable Transport Policy integrating infrastructure, pricing, and behaviour change.

The Roadmap's Transport Policy Framework (2022) included a group of strategic transport measures intended to deliver a rapid reduction in vehicle-related emissions by 2030 - ([Annex A](#)) transport policies were expected to account for nearly half of near-term Roadmap carbon abatement. Since the Roadmap was adopted, several of the original transport policies have either evolved, been delayed, or replaced by new frameworks.

Despite clear ambitions, progress has been limited. High car dependency, incremental infrastructure delivery, and the absence of strong price signals have kept emissions largely flat since 2020. In addition, key elements of the transport system – notably aviation, maritime and freight – remain outside any detailed decarbonisation pathway, meaning a substantial share of the sector's emissions is not yet governed by clear policies or targets.

Heating

Heating is the second-largest source of greenhouse gas emissions in Jersey, accounting for approximately **30–35%** of total territorial emissions, driven primarily by fossil fuel use in residential and commercial buildings. Heating emissions are dominated by long-lived, capital-intensive assets, e.g. boilers, fuel tanks, pipework and building fabric, which typically remain in service for 20-40 years. This makes early and decisive policy action particularly critical.

The Roadmap set out a trajectory based largely on electrification of heat, supported by insulation and energy efficiency improvements. This envisaged a rapid scaling of heat pumps and low-carbon heating systems through the Low-Carbon Heating Incentive (LCHI), complemented by improvements in building performance and longer-term regulatory measures.

Since adoption of the Roadmap, heating policy has delivered measurable emissions reductions, but progress has been uneven, socially skewed, and insufficiently aligned with the scale of change required to meet the 2030 and 2035 targets.

Other Emissions (waste, water, agriculture)

Agriculture contributed **5.7%** of total greenhouse gas (GHG) emissions, and waste management (excluding the Energy Recovery Facility (ERF) Incineration) contributed **3.5%**. ERF incineration of waste is a significant contributor to Jersey's overall emissions at **14%**. Given its disproportionate contribution the appraisal of this element is included within this section as a waste management activity.

Waste

The (paraphrased) objectives for waste were:

- Development of a circular economy strategy.
- High level specification for a net-zero successor to the ERF from 2040.
- Explore opportunities to carbon capture from the existing ERF in 2022.
- Research the introduction of commercial waste charges.

These objectives have been assessed as "off-track" with a red RAG rating in the Government's Progress Report published in July 2025⁶, with work either re-prioritised or delayed until the next term of Government.

In the case of Fluorinated Gas (F-Gas) emissions the three objectives were:

- To reduce emissions in line with the Montreal protocol⁷ and Kigali Amendment⁸.
- Reduce consumption of Hydrofluorocarbon (HFCs) by 85% between 2019 and 2036.
- To seek extension of the UK's compliance with the Kigali amendment to Jersey by 2025.

The first two are assessed as "on-track" (green RAG rating), and the third as "work ongoing, delayed" (amber RAG).

The context for the Roadmap's waste objectives relate to the significant contribution to carbon emissions that arise from the current practice of waste incineration. Energy supply contributes 14% of the total carbon emissions for the Island, the majority of which (86% in 2023) relates to the ERF which only contributes approximately 5% of the total electricity supply. This highlights that the ERF is a waste management asset, which is not required for the Island's energy supply, meaning that any reductions in its use, and its eventual replacement, are valuable targets as part of the Roadmap.

A further feature relevant to the ERF emissions is the very low rate of recycling in Jersey relative to other modern jurisdictions. This is due to the lack of a coherent waste management strategy and framework, a fragmented waste management and collection system, and limited public ownership of the issue.

Liquid waste has also been reviewed. The Aether GHG Inventory Guide 2023⁹ estimates this component based on UK data for domestic wastewater treatment, scaled by population. Although a detailed assessment has not taken place, there has been improvements in the treatment of the Island's liquid waste by virtue of an upgrade and expansion of the Bellozane Sewage Treatment Works in around 2015. This included an anaerobic digestion plant including sludge pasteurisation using heat from a Combined Heat and Power (CHP), which also

⁶ [Carbon Neutral Roadmap Progress Report August 2024](#)

⁷ [About Montreal Protocol](#)

⁸ [UNTC](#)

⁹ [Microsoft Word - Jersey Inventory Guide Update 1990-2023_Final_v4.docx](#)

generates an average of 8880 kilowatt-hour (kWh) of electricity a day, providing approximately 55% of the total energy demands of the site. The CHP facility uses 98.4% of the biogas generated which used to be flared to atmosphere.

Water

The Roadmap sets the objective to "produce a net-zero Water Management Strategy by 2025" and is rated as "delayed" with an amber RAG assessment rating. Work on this commenced in 2025 and is heavily dependent on [Jersey Water](#)'s own published 2025 Water Resource and Drought Management Plan (WRDMP)¹⁰, which follows UK Water Industry Best Practice and is produced independently of Government (with consultation).

The purpose of a WRDMP is to provide a long-term strategy to maintain the balance between the supply and demand for water. Operational and embodied carbon of the water supply infrastructure is a relatively minor consideration amongst the appraisal criteria of feasible options for the Island.

The Government's own water strategy is still in development and will independently assess the Jersey Water strategy against a wider range of criteria including its net zero qualities.

At the time of writing it is too early to assess this progress against Policy OE4b.

Agriculture

The Roadmap objectives include:

- Reduce emissions from agriculture/aquaculture activities in line with the Rural/Marine Economy Strategies.
- Support the Rural/Marine Economy Strategy objectives to be implemented through the 2022 - 2026 Government Plan.

These objectives are marked as green, "On-Track" in the Government's Progress Report¹¹.

Agriculture's contribution of **5.7%** of the Island's 2023 emissions primarily comprises livestock emissions (enteric fermentation), manure management, and soils emissions (fertiliser applications). Since 1990 overall agriculture emissions are calculated to have reduced by 32%, largely due to reduced dairy herd.

Farming in the Island is of immeasurable cultural, social, environmental, and economic importance. The Island has been shaped by farming over centuries and Jersey's dairy cattle, and Jersey Royal new potatoes hold global provenance. The outcome of the Roadmap policies has been to support and sustain the existence of the sector during a period of globally driven, multifaceted challenges.

Emissions from the marine sector were de-prioritised due to limited Roadmap activity and time limitations and are not currently reported in the UK's GHG inventory.

¹⁰ [Our 2025 Water Resource and Drought Management Plan - Jersey Water](#)

¹¹ [Carbon Neutral Roadmap Progress Report August 2024](#)

Sustainable Finance

Jersey as a jurisdiction

Jersey is a recognised, established and award-winning international financial centre (IFC), known for its strong governance, political stability, skilled workforce and tax neutrality. The Island continues to attract capital from across the world.

Financial services (FS) and auxiliary industries account for half of direct national income, and more via indirect means such as third-party spending in the economy.

With such a high dependency ratio of the economy in FS and a lack of diversification, the continued prosperity of the Island remains dependent on a strong and globally competitive FS sector. This puts greater emphasis on Jersey successfully delivering a sustainable finance framework as targeted in the Roadmap and ensuring the capture of the rewards of the global shift towards sustainable finance becoming core and mainstream, rather than niche. This is a risk due to external pressures and factors that affect the FS industry, which Jersey cannot control. The global environment continues to look uncertain in this regard.

The total net asset value (NAV) of the Jersey funds business as of 30 June 2025 is £465.9bn and the total number of funds 608, within that there are 1,942 separate pools¹².

This NAV value has been higher in the past, with the highest amount being £488.9bn on 31 December 2022. The drop in value from the record high could be due to a number of factors, many external and out of the control of policymakers.

This problem will continue to be acute in Jersey, as the growth in net revenue expenditure by the Government continues to be significantly greater than growth in income. The deficit has been funded by drawdowns in the strategic reserve fund and borrowings. With a high reliance on the FS industry, this makes it even more important to ensure the Island is keeping up with what investors and stakeholders require. The OECD global tax reform initiative titled Pillar Two¹³, which ensures all multi-national entities pay a minimum of 15% tax, is expected to positively impact Jersey. Government is depending on this income to begin to rebuild their reserves. This uncertain upside further highlights the role and reliance the Island has on its status as an IFC, especially as it lacks independent monetary policy.

In 2024, the economy contracted by 0.7% due to a fall in banking profits, and if FS as excluded, the economy grew by 3.1%. FS accounted for 39% of economic output, with banking alone accounting for 21%. The drop in economic output is attributable to lower interest rates rather than decreased productivity in the sector, highlighting Jersey's reliance on external factors to power its growth.

Delivering a sustainable finance framework

The Roadmap states an ambition to develop a sustainable finance framework that supports decarbonisation efforts in Jersey and across the world, recognising that the most significant impact Jersey can make to climate change globally is via its finance sector.

¹² [Funds statistics — Jersey Financial Services Commission](#)

¹³ [Global Anti-Base Erosion Model Rules \(Pillar Two\) | OECD](#)

There are three areas of delivery for this goal:

1. Sustainable Government investment – public finance sustainable financing framework

This framework lays out the basis for identifying, selecting, verifying and reporting on projects that will be eligible for financing from the proceeds of green, social or sustainability financing instruments. Consideration is given as to how the Island's money is invested and how it can be made more sustainable via paragraph 1.21 of the States Investment Strategies ([Appendix 6E](#)). This could be further strengthened by detailing how responsible investment is achieved, as detail around this and the metrics that judge this are high-level.

2. Climate finance

Government has yet to determine what funds it can allocate to international climate finance to support a 'just' transition, and there are currently no requirements for Jersey to do so as part of UK Government climate finance provisions.

3. Jersey as a sustainable finance centre

Jersey is an IFC with over £1tn of assets channelled through the Island and across the globe. Due to this scale, Jersey has a responsibility to consider the carbon impact of this investment.

Financed emissions

Financed emissions are those associated with investment and lending activities by financial services entities. These are classed as Scope 3 emissions and will likely account for a large part of the emissions of any financial services entity.

There are various types of financed emissions, such as:

- Listed equity and corporate bonds
- Vehicle loans
- Business loans
- Use of proceeds
- Project finance
- Commercial real estate
- Structured products
- Sovereign debt
- Commercial and residential mortgages
- Capital market issuances

Insurance-associated emissions are important to be considered given Jersey's active insurance sector, and they include:

- Project insurance
- Commercial insurance
- Vehicle insurance
- Treaty insurance

The measurement of financed emissions is important given the size of Jersey’s financial services sector. Accurate measurement is required to ensure transparency, ability to track targets and aid risk management.

However, there are data challenges in measurement. Emissions data can be incomplete and inconsistent, or even missing. The technology needed to process emissions is also challenging.

Primary Energy Supply

The focus of the Roadmap is on demand drivers: infrastructure and appliances, behaviours and enablers at a sector level. However, given that approximately 90% of Jersey’s emissions are related to energy use, a cross-cutting review of the scale, sources and characteristics of primary energy consumption is valid.

According to the 2024 Energy Trends¹⁴ report published in August 2025, primary energy supply is 1,590 GWh, of which final consumption is 1,550 GWh¹⁵ split between liquid fuels (880 GWh, 57%) gas (47 GWh, 3%) and electricity (620 GWh, 40%). Apart from 47 GWh of electricity generated inside Jersey, all energy is imported, either as liquids (gasoline, diesel, aviation fuel, biofuel or LPG), or electrons.

According to the most recent Energy Trends Report, since 2022 primary energy consumption has changed only at the margin: liquid fuel consumption reducing by 4.2% and gas by 8.5% and electricity consumption growing by 1% (overall, a 2.3% reduction). The most significant longer-term trend has been the 21% decline in gas use since 2020. Per capita final energy consumption, shown from 2020 to 2024 in Figure 1, has fallen slightly, by 2.5% since 2020.

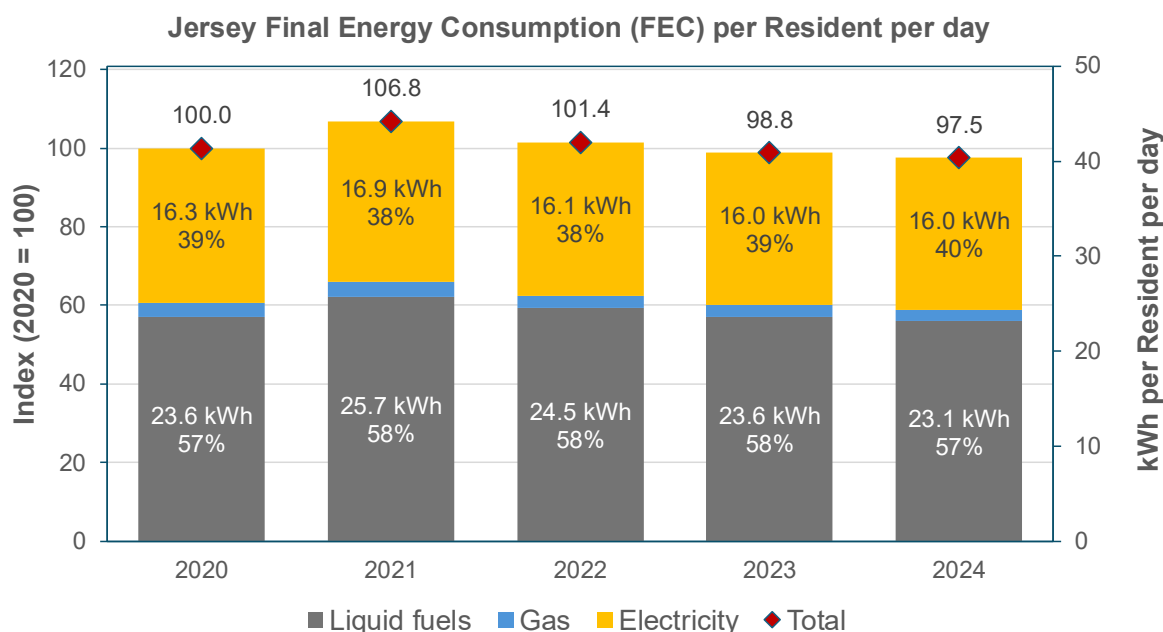


Figure 1. – Jersey Final Energy Consumption per Resident per day. Source: FEC, Energy Trends Report 2024; Populations, Jersey Statistics

¹⁴ [Energy Trends 2024](#)

¹⁵ The difference is accounted by energy losses (primarily in the electricity system) and the energy used to convert LPG into a gas.

Current Status (2022–2026)

Assets and Activity

Transport

Sustainable Transport Policy (STP)

The STP was published as the ‘Sustainable Transport Policy: Next Steps’¹⁶ in December 2023. The STP was produced as part of the detailed Roadmap with six priority areas:

1. Making roads safer for all users reallocating road space to prioritise cycling and walking raising the profile of public transport
2. Managing vehicle movement through parking measures.
3. Supporting the Island’s economy Enabling future mobility and legislative change. The STP focuses on decision-making principles and coordination, not quantified emission-reduction actions, representing a shift from a delivery plan to policy principles, and reducing the near-term carbon focus.
4. Several of the enabling measures envisaged in the STP, such as a Bus Service Development Plan, a refreshed Parking Plan and a Roads Law review to formalise road-space reallocation, are making some progress yet have not yet been translated into binding standards or funded delivery programmes, limiting their impact on transport emissions to date.

Vehicle Electrification and Incentives

The Electric Vehicle Purchase Incentive (EVPI) was launched in August 2023 and ran until December 2024 with 1,208 grants issued, costing £4.3M, leading to ~906 “net additional” EVs and ~1,347 tCO₂e annual savings. As of 2025, there is currently no approved or funded programme to support further EV uptake, despite EVs representing only around 3.5% of vehicles in use.

The E-bike Grant Scheme¹⁷ launched January 2023, was not part of the Roadmap as approved in April 2022 and was added following the 2022 election. The scheme closed in June 2024 with 666 grants redeemed leading to ~500 net additional e-bikes, saving ~93 tCO₂e per year.

The Electric Vehicle Charger Incentive (EVCI)¹⁸ opened in 2023 and is ongoing, with limited uptake of 163 approved applications, 132 redeemed, and an average £1,462.00 installation cost as of December 2025.

Fuel and Fleet Decarbonisation

To address the Government’s own Scope 1–2 carbon footprint, it planned to move its diesel fleet of vehicles to Hydrotreated Vegetable Oil (HVO), aiming to cut reported transport emissions by over 93% by the end of 2025 compared to 1990 levels, with a projected steady-state saving of ~1,000 tCO₂e each year. This would be impactful for the public sector slice, but small relative to Island-wide transport.

¹⁶ [Sustainable Transport Policy Next Steps.pdf](#)

¹⁷ [E-bike Grant Scheme](#)

¹⁸ [Electric Vehicle Charger Incentive](#)

However, transition-fuel support for private fleets was paused in 2023. The current business case for GOJ fleet (2025) seeks a tapered HVO subsidy only for 2025, funded by the CEF. HVO is classified as a transition measure and long-term continuation is uncertain. Stakeholder evidence highlights that similar transition fuels have been trialled in limited parts of the bus fleet (now contractually funded by the bus provider) and at the ports, but the absence of a managed, time-bound role for HVO as a bridge to full electrification future policy support makes them currently unsuitable as a primary decarbonisation strategy, let alone a substitute for structural change.

Active travel and public transport

[Active Travel](#) projects, such as [Jersey School Streets](#) and [Love to Ride Jersey](#) were delivered, but there has been a lag in infrastructure upgrades. Bus development trials were also funded but with limited expansion beyond existing south-coast services. The 2023–25 period focused on engagement, not reallocation of road space or fare reform. Pilot-scale activities have not been expanded into network-scale delivery and therefore modal-shift consequences have been low.

This sits uneasily alongside the new 10-year bus operating contract with LibertyBus¹⁹, which includes commitments to introduce ultra-low-emission buses and undertake full fleet renewal in line with Jersey's carbon-neutral strategy. The Climate Emergency Fund has contributed £850,000 towards the development of the Western Bus Gate, due for completion in Q3 2026, representing a tangible step toward bus-priority infrastructure. However, these contractual commitments risk remaining insufficient to deliver measurable modal shift and emissions reduction at scale.

Fiscal and regulatory levers

Fuel duty had been frozen at 64 p/litre since January 2022, representing a 19% real-terms reduction versus Retail Price Index (RPI). In addition, road-user charging, parking-pricing reform, and low-emission-zone concepts remain unimplemented. In December 2025 the 2026–29 Budget was approved, which included a 2.6% RPI increase for all dutiable road fuels from 1 January 2026, other than HVO, which was frozen to support increased uptake.

The CEF spend has fallen from about £7m in 2023 to £4m budgeted by 2025. Of which transport related activities account for about 60–70% of that spend (£4.3–5.0m) in 2023, driven mainly by EV incentives and HVO. Even at this relatively high share, spending was concentrated on short-term incentives, not structural system change.

The fiscal “sticks” originally envisaged in the Roadmap were never introduced. Instead, policy emphasis started with incentives and has moved toward voluntary uptake and awareness.

At the same time, important enabling legislation – including a comprehensive Roads Law update to support active-travel infrastructure, mobility hubs and bus priority – remains incomplete. This combination of weak price signals and limited regulatory reform has left many of the highest-impact transport measures without an effective implementation route.

¹⁹ [Liberty Bus](#)

Heating

Low-Carbon Heating Incentive (LCHI)

The LCHI has been the single largest area of CEF expenditure to date. As of September 2025, approximately £3.3m had been spent under the scheme, supporting heat pumps, insulation and related measures and delivering estimated annual emissions savings of ~2,600 tCO₂e.

In abatement-cost terms, LCHI has performed better than transport incentives, delivering higher emissions savings per £ of Government spending than EV purchase grants. However, stakeholder evidence highlights several structural weaknesses:

- **Distributional impacts:** LCHI primarily benefits wealthier owner-occupiers, typically those living in detached or rural properties with oil boilers. Most recipients must fund ~50% of a £12,000–18,000 capital cost, except low-income households who can receive up to £15,000 funding for air-source heat pumps or £10,000 for other approved technologies) without match funding (assuming that the project can be completed within these grant limits). The latter 100% funding is somewhat similar to UK schemes, which attempt to partly deal with distributional impacts, but in practice the intersection of owner-occupiers with fossil heating system in receipt of e.g. Government benefits is understandably relatively small. In practice, the scheme arguably effectively excludes many lower-income households above the low-income threshold (e.g. not receiving Government benefits) and discourages landlord participation.
- **Limited reach:** Private landlords have little incentive to invest where benefits accrue mainly to tenants. Meanwhile social housing — which notionally represents the lowest-income decile — had largely already transitioned away from fossil heating through earlier programmes led by [Andium](#).
- **Scalability constraints:** Even if extended beyond 2025, LCHI alone cannot deliver the pace or scale of change required for 2030 without unsustainable levels of public subsidy.

Stakeholders consistently emphasised that while LCHI has helped seed the market and build installer capability, it cannot be the primary long-term delivery mechanism.

Biofuels and Transition Options

A noticeable finding from stakeholder engagement is that biofuel conversion of existing oil-heated homes was assessed favourably in Government's own business case but does not appear to have been pursued as a holistic policy, beyond trials for conversions. Relevant industry also stated that they have presented a range of options to deal with perceived challenges with biofuel use to enable a much more rapid decarbonisation, but this route has so far remained blocked, with no clear levers in place to motivate the on-going additional green premium ('greenium') on biofuels (through fossil carbon taxes, mandates, incentives or otherwise), and over-stated concerns on involvement in funding extremely modest biokerosene conversions (compared to the greenium costs for the user) for heating oil being later retrofitted.

Evidence from fuel suppliers indicates:

- Conversion costs of approximately £500 per home
- No material supply-chain or skills constraints
- Willingness to supply bio-kerosene at scale

- Feasible mechanisms to prevent reversion to fossil fuel use (e.g. registered tanks, supplier controls).

Despite this, Government policy has focused almost exclusively on end-use electrification, while supply-side decarbonisation of heating fuels has been largely ignored. This represents a missed opportunity to deliver rapid, low-cost emissions reductions, particularly for households unable to electrify in the near term.

Government Estate

Stakeholder evidence highlighted a major credibility gap: Government has continued to install new fossil-fuel heating systems in its own buildings, even while promoting electrification to households and businesses.

This is particularly problematic because:

- Government buildings offer ideal demonstration opportunities
- Public-sector transitions build institutional learning and market confidence
- There are tailored financing products available for public-sector decarbonisation.

Continuing fossil installations undermine public trust and weaken the “lead by example” principle that underpins successful climate transitions.

Energy Performance Certificates (EPCs)

The EPC programme has attracted significant criticism across the housing, construction and finance sectors. Concerns include:

- Variable assessor quality and highly varied construction expertise
- Heavy reliance on UK-calibrated software with questionable applicability to Jersey’s building stock
- Limited practical value for retrofit decision-making.

While EPCs are required for access to LCHI and for some financing purposes, stakeholders questioned why CEF funding has been used to expand EPC volume rather than improve EPC quality and usefulness.

Fossil Boiler Phase-out Policy

The Roadmap envisaged a progressive phase-out of new fossil fuel heating systems, recognising that boiler replacement cycles are a primary driver of long-term emissions lock-in. Early policy signals indicated an intention to restrict new installations in the second half of the 2020s, supported by LCHI grants and complementary regulation.

However, since 2022, the fossil boiler phase-out has been repeatedly delayed. While consultation has taken place and draft timelines have been discussed, no clear, binding phase-out date for new fossil boiler installations is currently in force. This policy ambiguity has had several material consequences.

- **Uncertainty has weakened market signals** - heating industry stakeholders reported that the absence of a sound phase-out date is a more significant barrier to investment and workforce scaling than a lack of financial incentives. Installers and suppliers consistently indicated that they are technically and operationally ready to respond to

increased demand for low-carbon heating but are reluctant to expand capacity in the face of unclear long-term policy direction.

- **The delay has extended the installation of new fossil assets with lifetimes of 20–30 years** - directly increasing the risk that emissions will remain locked into the housing and commercial stock well beyond 2030. Each additional year of uncertainty compounds the challenge of meeting future targets, as later interventions must address a larger installed base of relatively young fossil systems.
- **The lack of clarity has undermined the effectiveness of LCHI** - grants are most effective when paired with a clear regulatory backstop. In the absence of a phase-out signal, LCHI functions primarily as a voluntary subsidy rather than as part of a coordinated transition framework, limiting its ability to drive widespread behavioural change.
- **The credibility of the phase-out policy has been further weakened by Government's own continued installation of fossil heating systems in public buildings** - this sends a contradictory signal to households and businesses. Stakeholders highlighted that this inconsistency risks eroding trust in future regulation and reinforces perceptions that climate policies are optional rather than inevitable.

In summary, while a fossil boiler phase-out is widely recognised as necessary and inevitable, delays and uncertainty have materially reduced its effectiveness as a policy lever. Clear, staged and credible timelines, even if accompanied by transitional measures, were consistently identified as essential to unlocking private investment and accelerating delivery at scale.

Other emissions (waste and agriculture)

Waste

The "off track" red rating for waste management objectives accurately reflects the lack of progress in this area since 2022. Commercial and domestic waste management in the Island is a politically sensitive matter; costs are obscured by the Parish rates system and general taxation, rather than "user based" systems.

Waste stream separation and recycling on an island without substantial re-processing infrastructure brings complexity and cost and must be carefully navigated. Driven largely by necessity, an example of a coherent and ambitious approach has been delivered by Guernsey, whose waste generation for 2024 was 118 kg per capita compared to Jersey's 348 kg per capita, and achieves recycling rates of approximately 70%²⁰ compared to Jersey's latest figure of 35%. Precise comparisons here are difficult due to variances in reporting, but this should not detract from the headline differences between the islands. Guernsey's improvements, though recently plateaued, been delivered across a similar timeframe to Jersey's period of relative inactivity.

In respect of F-Gases, there is no accurate Jersey-specific data available on its management, with population-based UK assumptions feeding into the Aether inventory. Whilst not unusual for a small jurisdiction, there is no current evidence of a regulatory framework for the management of F-Gases on-island. In the absence of a robust system of regulatory compliance; leak detection, evidence of containment, record keeping, training, and certification it is reasonable to assume that the measures taken by on-island handlers and commercial entities to manage the

²⁰ [Annual Waste Management Report 2023](#)

release of high-GWP (Global Warming Potential) F-Gases do not follow best practice. The reported figures in the GHG inventory are therefore impossible to verify and could be reasonably challenged.

Looking forward, it is fair to assume that the phase-out of HFCs will be dictated by the market to phase out by refrigerant type. For this reason and the considerable cost and effort of implementing a new regulatory system for F-Gases is not a current recommendation from the Intergovernmental Panel on Climate Change (IPCC)²¹.

Agriculture

The delivery of stated objectives, including [Rural Support Scheme](#) (RSS) and [Agricultural Loans Fund](#) between 2022 and 2025 is commendable. It has arguably been a critical life-support for the sector, with survival being a greater priority than carbon emissions performance.

Put briefly, the RSS operates under a scoring system by apportioning credits for various farm operations that deliver environmental and social benefits, which in turn unlocks the grant scheme supporting local food security and resilience in the wider rural economy. In the context of this report 'farm credits' include:

- Carbon net-zero plans
- Carbon net zero recording
- Energy audit and plans.

A brief review of the RSS submissions shows that of the 98 claimants in 2025, 20 had submitted a Carbon Net Zero Plan, and 15 (13 of which are dairy farms) had Carbon Net Zero Recording. The proportion of dairy farms is reassuring given its contribution to sector emissions, but the relatively low proportion from other farms likely reflects the relatively low priority for this component of the RSS across the sector.

In the potato industry, [Albert Bartlett](#) acquired the [Jersey Royal Company](#) in 2024, this provides increased marketing strength for the product and importantly for the Roadmap, it brings strategy, focus, technology and investment into the sustainability credentials of the Jersey Royal production.

Sustainable Finance

The delivery of a sustainable finance framework has been adopted by many key Island stakeholders, with sustainable finance leads in place at the Government, Jersey Finance Limited (JFL), Jersey Financial Services Commission (JFSC), a sub-committee at the Jersey Banking Association (JBA) as well as numerous private sector law, accounting and FS firms.

This recognises that one of the main ways Jersey can positively influence net zero is via its FS sector.

A strong sustainable finance framework is needed to achieve this. The JFSC engaged a broad range of sectors through its 2025 Sustainable Finance consultation and henceforth concluded that existing Codes already provide an adequate basis for managing sustainability related risks. Consequently, no new sustainability risk management provisions will be introduced in 2026.

²¹ [IPCC — Intergovernmental Panel on Climate Change](#)

The JFSC will instead publish a Sustainable Finance guidance note in early 2026, planned to be developed in collaboration with industry, to clarify expectations on how firms should address these risks within the current framework. However, revisions to the Codes will be made in relation to business integrity risks - such as anti-greenwashing. These changes will require sustainability related claims to be supported by robust evidence and plan to be released in Q1 2027.

This is once again in contrast to many other jurisdictions who are formalising the reporting of climate and sustainability-related risks in their corporate governance regimes

[Jersey Electricity](#) (JE) operate a deferred payment scheme which allows consumers to access finance for low-carbon heating technology.

Primary Energy Supply

Although safety and planning regulations are in place, there are comparatively few economic or competitive regulatory structures, despite the vertically integrated (and in some cases effective monopoly) positions held by JE, [Island Energy](#) and [Rubis Channel Islands](#). This has been justified historically by the small size of the market and potential inefficiencies if contrived competitive structures were imposed. JE is majority owned by the state, which mitigates market abuse risk.

Competition exists in downstream liquid fuels distribution (in midstream by virtue of the [ATF Jersey](#) isotainer imports). A recent Jersey Competition Regulatory Authority investigation²² did not find any evidence of price collusion – the range of posted prices was considerable, but offset by loyalty schemes and, given low average consumption, price sensitivity is likely lower than in other markets.

Pricing in the heating market seems to be driven by cross-vector comparison – so kerosene pricing, electricity pricing and gas pricing show a degree of convergence on a pence per unit of energy output basis²³.

So far Jersey has not adopted mandates or other supply-side obligations (such as the Renewable Transport Fuel Obligation²⁴ in the UK and its equivalents in the US and EU) to force the adoption of lower carbon fuels. Fuel duty applies to road fuels but otherwise only a 5% GST is applied to energy (excluding aviation fuel).

Emissions (2022–2026 trend)

Transport

Transport emissions fell only 0.2% in 2023 after a 2.9% drop in 2022. This is far below the ~7% annual reduction required to stay on track for the 2030 target. Petrol and diesel vehicles alone produced nearly 97,000tCO₂e in 2023 (27% of Jersey's total emissions). Aviation-related emissions in Jersey are dominated by off-island travel. For the purposes of Jersey's greenhouse gas inventory, only emissions from outbound *domestic* flights (to the UK, Crown Dependencies and UK Overseas Territories) are included. These emissions are calculated based on fuel uplifted at Jersey Airport for those flights and are estimated to be around 47,000 tCO₂e per year. Emissions from international aviation are excluded from Jersey's territorial inventory, in line with

²² <https://www.jcra.je/media/eqoclgln/2025-06-13-decision-c-074-approved-publication-version.pdf>

²³ [Comparative-Running-Costs-JSY-20-Jan-2025.pdf](#)

²⁴ [Renewable Transport Fuel Obligation \(RTFO\) scheme - GOV.UK](#)

international reporting conventions.²⁵ On-island airport and ground operations emissions are comparatively small and already have planned reductions through electrification and efficiency measures. Domestic marine emissions account for around 10,000 tCO₂e per year.

Heating

Heating emissions have declined modestly since 2022, reflecting LCHI uptake and fuel switching in some public-sector operations. However, reductions remain well below the trajectory required for 2030.

Other Emissions

Water

The Aether [Jersey Greenhouse Gas Inventory Guide 1990-2023](#) does not specifically cover water supply emissions. Jersey Water began Scope 1 and 2 carbon accounting in 2024 (with backdated data to 2022). Total emissions for 2025 were 655 tCO₂e, up 46% from 2024, mainly due to higher electricity use for pumping during a dry year and extended desalination operation. Electricity accounts for 82% of water supply emissions, driven by Jersey's electricity emissions factor and ERF power contribution.

Other sources of emissions include vehicle and heating fuels which make up the Scope 1 emissions, these declined by 4% between 2023 and 2025, likely reflecting gradual electrification of the fleet.

Waste

The reporting on GHG emissions from waste management up to 2023 has been lacking in Jersey specific data on waste composition, meaning that there are potential inaccuracies in the electricity and waste factors used. The current 2024 reporting cycle however will benefit from a recently completed (internal) detailed study, a practice which should continue into future years to support accuracy in reporting and evidence-based policy.

Primary Energy Supply

Emissions vary significantly by fuel type. [Annex C](#) details Jersey's energy breakdown by fuel type and the resultant emissions.

Emissions per unit: Jersey's imported electricity is nuclear or hydro sourced and so is near-zero carbon. Locally produced electricity is predominantly generated from waste at the Energy Recovery Facility at La Collette. JE has some onshore solar capacity (with zero emissions) and annually a very small amount electricity is generated on-Island from a fossil-fired back-up generator at La Collette (with relatively high per unit emissions). ERF sourced electricity overwhelmingly dominates on-Island generation and thus the emissions per unit on-Island electricity generation of 782 gCO₂e emitted per kWh. Liquid fossil road and heating fuels all emit around 260 gCO₂e per kWh (Jersey is one of very few jurisdictions in Europe to retain 100% fossil transport fuel). Biofuel blends imported by ATF emit 230 – 250 gCO₂e per kWh, as does bottled LPG and gas. Bio-LPG and HVO are effectively zero carbon in terms of territorial emissions.

²⁵ [Jersey Inventory Guide Update 1990-2023_Final_v4.docx](#)

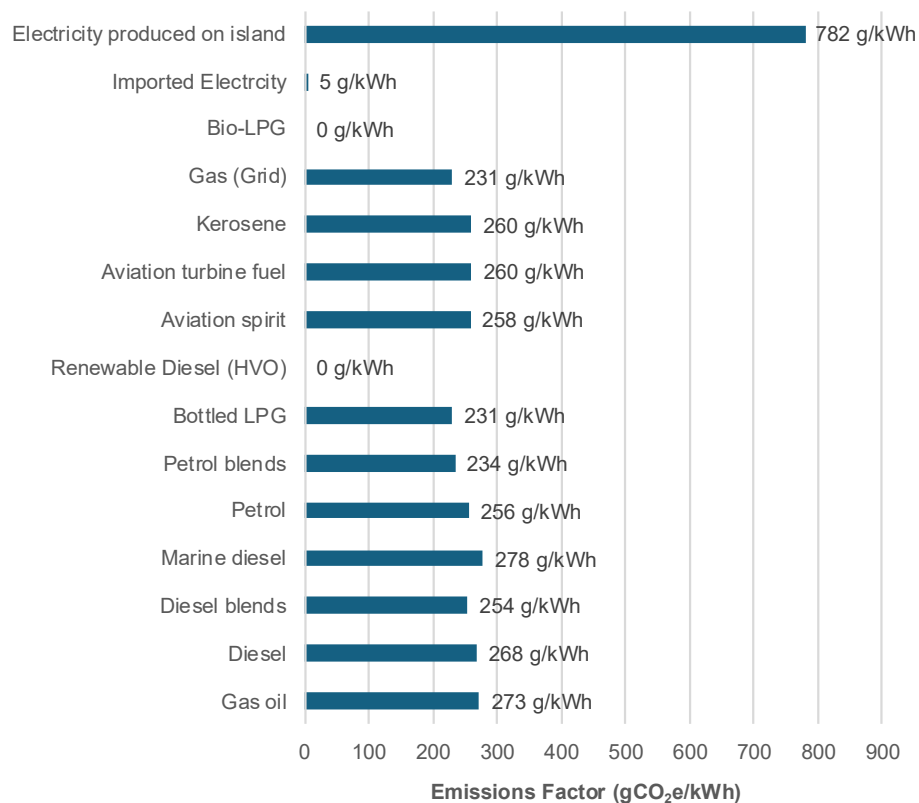


Figure 2. – Emissions per kWh of Jersey's fuels. Reference: see [Annex C](#) & [Table D3, Annex D](#)

Energy consumption and fuel costs: Figure 2. shows the breakdown of Jersey's energy consumption by fuel type and the resulting costs and emissions from these. For full assumptions, see [Annex D](#).

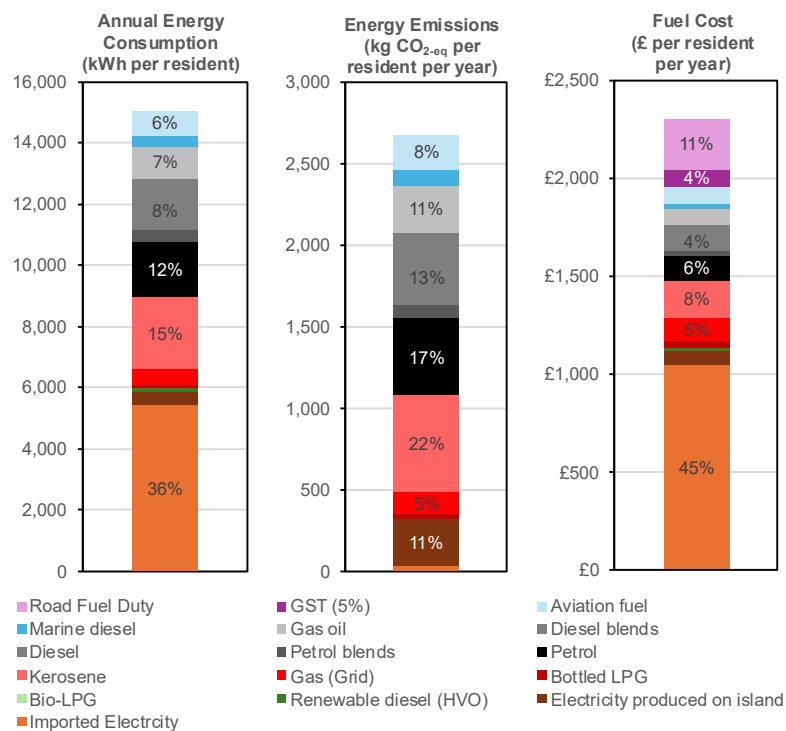


Figure 3. – 2023 break-down of Jersey's energy consumption, emissions from energy and fuel costs per capita. For full assumptions, see [Annex D](#). Percentage values not shown for fuels where the percentage is <4%.

The Systems and Stakeholders Shaping Climate Preparedness

Transport

EV Charging and Grid

EV charging capacity remains below requirements for mass uptake. While residential parking standards now mandate EV charging provision in new dwellings, much of Jersey's housing stock predates these standards, and home charging remains limited for flats and properties without off-street parking. and slow public-charger expansion. Public-charger expansion has also been relatively slow. The widespread deployment of smart meters and controllable loads allow dynamical electricity demand management even in an emergency. However, data on actual charging behaviour and utilisation of public and private chargers is limited. Formalising data-sharing arrangements with JE and charge-point operators will be essential to move from reactive to strategic infrastructure planning.

Bus Priority and Electrification

Many key transport corridors lack space for formal bus lanes, but targeted bus-priority points (signals, junction priority, short queue-jump lanes) are feasible and would improve reliability. Depot electrification and fleet procurement remain unplanned and unfunded. The new LibertyBus /Tower Transit contract provides a framework for progressive fleet decarbonisation and service enhancement, but delivery is currently constrained by congestion, limited road-space reallocation and the absence of a funded depot-electrification programme. Without multi-year capital commitments and a clear Bus Service Development Plan, operators cannot confidently sequence fleet renewal, depot upgrades and service expansion.

Market and Skills Capacity

Local dealerships have constrained EV availability and servicing capacity, while engineering and construction capacity limits active travel and charging roll-out. Skills shortages are also emerging in specialised areas such as high-voltage systems, hydrogen and alternative fuels safety, and airport and port decarbonisation projects. Stakeholders emphasised that, without a coordinated green-skills plan for transport – including mechanics, electricians, drivers and planners – the pace of infrastructure and fleet transition will remain limited.

Aviation and Maritime Sectors

[Ports of Jersey](#) has committed to achieving net zero emissions across its land-side operations (Scopes 1 and 2) by 2030, with a 2050 net zero target for its Scope 3 emissions, aligned with the UK Jet Zero Strategy²⁶ and the UK Department for Transport's Maritime Decarbonisation Strategy²⁷. Recent modest emissions reduction of 2% year on year; with expectation of larger reductions after current retrofit and infrastructure projects are completed. Ground operations are transitioning to Hydrotreated Vegetable Oil (HVO) and electrification, backed by LED lighting upgrades and planned conversion of airport boilers to HVO from 2026. Ports have introduced a private-aviation decarbonisation charge, with revenues earmarked for low-carbon infrastructure and fleet upgrades, although there has been limited uptake of Sustainable Aviation Fuel (SAF) offered under a mass-balance scheme. Looking ahead, a new [DFDS](#) ferry contract includes plans for a hybrid vessel by 2028/29, but this will require substantial shore-power and grid reinforcement at the harbour, and coordination with French ports which currently have no firm

²⁶ [Jet Zero Strategy, Delivering net zero aviation by 2025](#)

²⁷ [Maritime Decarbonisation Strategy](#)

plans for electric charging. These initiatives demonstrate leadership by Ports of Jersey but aren't embedded within a coherent island-wide aviation and maritime decarbonisation policy or linked to specific Roadmap milestones.

Data and Monitoring

Across the transport system there are significant data gaps that limit effective monitoring and policy evaluation. There is currently no robust estimate of vehicle-kilometres travelled (VKT) on the Island, limited open data on mode share and bus load factors, and only high-level information on fuel sales by grade and sector (road, marine, aviation). Freight movements by road and sea are poorly quantified, and while some air-quality monitoring exists, systematic coverage of pollution and noise near schools, main roads and in St Helier is lacking. The Council has identified these gaps as a core barrier to evidence-based policy and recommends the development of a transport data framework that links the Driver and Vehicle Standards department vehicle records, fuel-sales data, EV charging, traffic counts and survey information into a coherent emissions-monitoring system.

Heating

Evidence from installers, suppliers and housing providers indicates that supply-side capacity is not the primary constraint. Instead:

- Installer capability exists and can scale
- Fuel suppliers are ready to provide low-carbon fuels
- Jersey Electricity has strong system-level coordination advantages.

The dominant constraint is policy uncertainty, particularly around:

- Boiler phase-out timelines
- The future role of biofuels versus electrification.

Sustainable Finance

Key stakeholders and their actions so far include:

Jersey Finance Limited (JFL)

JFL is a not-for profit established to represent and promote Jersey as an IFC, locally and internationally. They engage with and represent nearly 200 member firms in Jersey. Their focus is broader engagement, providing support and guidance in relation to global standards and frameworks, enabling greater upskilling opportunities and developing Jersey's narrative and credentials, thereby improving visibility as a sustainable IFC.

A key target in OE6 in the Roadmap - Delivering a sustainable finance framework, is upskilling the workforce to ensure Jersey can become a leading sustainable finance centre. This is no mean feat given the complexities of this emerging area, as well as progress competitors are making. However, it is essential to maintaining Jersey's position as a 'jurisdiction of choice.' JFL aid in this by regularly running events, which include the sustainable finance summit, held in Q1 2025, which brought together various industry experts in the area and was free to attend for JFL members.

Lunch and learn sessions, podcasts, newsletters, a free-to-use tool, workshops, industry group meetings and roundtables were also held and thought leadership papers released. JFL are working to create a sustainable finance platform which will show data in relation to various FS sectors such as funds, banking and investment management.

JFL represented Jersey in the Inaugural UN-convened UK-Irish transition finance working group²⁸, which aims to foster greater links and knowledge-sharing in the transition. Internationally, JFL represents Jersey as a member of the United Nations Financial Centres for Sustainability (UNFC4S)²⁹, the World Alliance of International Finance Centres (WAIFC)³⁰ and the CityUK International Climate Finance Working Group³¹. They have a growing relationship with the Global Ethical Finance Initiative (GEFI)³². The breadth and depth of these relationships show the influence the Island can hold.

JFL have a four-year plan (due to end in 2027) which continues its current activities towards sustainable finance and wish to expand other initiatives. This includes [Greening Jersey](#), who's aim it is to support environmental recovery and the rewilding of Jersey. Through Greening Jersey participants, who must be JFL member firms, pool resources to help transform and rewild sites across the Island. As of February 2026, the initiative has raised £113,500, planted 1,155 trees and facilitated over 800 hours of people power, with currently 45 participating firms contributing as supporters in 2026.

JFL's commitment to OE6 and the future sustainability ambitions of Jersey is clear.

[Jersey Funds Association](#) (JFA)

JFA represents the Island's funds industry, working with industry, regulators and legislators. They have a sustainable finance sub-committee, though it has seen little recent activity.

JFA supports Jersey's ambition of becoming a sustainable finance hub but recognises there are unique nuances and context with Jersey's position as an IFC and a global client base, meaning proposals cannot be uniformly applied across the industry. The body believes that sustainable finance measures should remain optional in Jersey, given the client base and differing international regulation. This could leave Jersey as an outlier if uniform standards are applied, with higher regulation burdens - deterring global investors. They highlight staff training, skills and external expertise as lacking in Jersey, which would take significant sums to remediate, and cite this as a challenge to the Island's attraction amidst fierce competition amongst IFCs.

It is not clear how this overall view aligns with the ambition of OE6.

[Jersey Bankers Association](#) (JBA)

JBA represents Jersey's banking industry and aims to ensure a strong and effective banking centre. They work together with Government and regulators to shape a strong, efficient and responsible banking sector.

²⁸ [29-Transition-finance-emerging-practices.pdf](#)

²⁹ [UNDP launches global initiative to align financial centres with climate goals in NDCs | United Nations Development Programme](#)

³⁰ [News - World Alliance of International Financial Centers](#)

³¹ [Green and Sustainable Finance Group | TheCityUK](#)

³² [The Global Ethical Finance Initiative \(GEFI\)](#)

The observation of the sustainable finance committee within the JBA is that demand for, and awareness of sustainable finance is growing. This is due to factors such as more Government Arm's Length Organisations (ALOs) seeking to use sustainable finance in their own financing and greater understanding and clarity with the products. Furthermore, the market believes that 'political noise' is just that, and it is not impeding market progression. In the sector, sustainability-linked loans are considered difficult to deliver, resulting in limited adoption due to KPI monitoring and assurance obligations. For Jersey specifically, a lack of EPC ratings remains an issue for lending. This needs to progress to further the lending environment, and EPC register is vital for the built environment.

The JBA note the banks continue to invest in sustainability, for example, by enhancing capabilities, allocating capital and setting net zero emission targets, however much of that expertise is being established at Group and/or regional centres, which are off Island. For Jersey to diversify, it needs more of these skills on-island, including expertise in financing sustainable finance transactions. Firms should lead this training, with Government providing grants if required. However, training is only half of the story, learned experience of this area will aid putting training into action.

Training

[Chapter One](#) are one of the major professional training providers in the Island and hence have an impact on future training and skills needs. Accountancy qualifications are common in the Island. the Institute of Chartered Accountants (ICAEW) designed ACA qualification includes a sustainability and ethics related exam in its initial stage, with a high-level introduction of sustainable reporting concepts. The ACCA are redesigning their exam syllabus in 2027 and have stated sustainability will be a core part of this.

Governance is another major employment area in the Island with the Corporate Governance Institute (CGI) provides qualifications. Currently, there is very little in the syllabus regarding sustainability, however this is set to be updated.

There is currently little demand from FS employers in the Island for sustainable finance skills, likely reflecting limited demand for these services. Another factor could be the tight labour market in Jersey, with entry level staff particularly difficult to attract and retain. This could result in the impetus on employers being to ensure their staff get the relevant qualification, without an incentive to train them further in emerging areas such as sustainable finance, as longevity is not certain. However, the question remains that if employers were to increase their investment in employees, this could increase retention rates. There is also the issue of the infrastructure of the Island; is Jersey as a jurisdiction doing enough to retain working age staff?

Considering the infrastructure challenges, limited skillset in sustainable finance and diminished appetite from employers, OE6 becomes a difficult proposition to advance.

Primary Energy Supply

93% of electricity used in Jersey is imported from France by JE (under a contract with [EDF](#) that is due to renewed soon). Three transmission lines are used – providing some assurance of security of supply. The balance of electricity demand (6.5%) is generated in Jersey, overwhelmingly (97%) from the ERF facility at La Collette but with a very small, but growing, contribution from JE operated solar panels. Low voltage cables – most of which are buried –

are used to distribute electricity across the Island. JE report that distribution capacity is robust (in contrast to much of the UK) and, except for a small number of 'bottlenecks', sufficient to deal with any anticipated expansion of electricity demand (they are however, investigating whether to increase domestic capacity to 100A to support expanded future electricity demand). Grid connection, whether for both additional supply (e.g. rooftop or commercial solar generation), storage (e.g. grid scale batteries) or offtake (e.g. EV charging hubs) is presented by JE as relatively unproblematic. Jersey is well covered with smart meters (100% domestic coverage), JE has implemented a digital twin of the electricity system and system monitoring and modelling capability is regarded as very good. Security of supply has three key characteristics: multiple interconnectors with France underpinned by bilateral contracts, a diesel back-up power station and advanced load management capability.

Liquefied Petroleum Gas (LPG) is imported by Island Energy in dedicated vessels from Rotterdam (about 75% - 47 GWh – is then aerated and converted to gas for pipeline distribution at the La Collette terminal, the balance – 15 GWh – is supplied in tanks or bottles to commercial and domestic customers). Piped distribution is limited to parts of St Helier and some areas. There is a gradual process to replace legacy pipework of multiple material types, including but not exclusively cast iron and PVC, with hydrogen-ready polyethylene (PE) in anticipation of a hydrogen-based gas network. Trial volumes of bio-LPG have been imported by road tanker.

Most liquid fuels (petrol, diesel, heating kerosene, HVO and gas oil) are imported by Rubis through the La Collette terminal and distributed by road tanker by Rubis and other downstream distributors. Avtur (aviation turbine fuel) and some volumes of other liquid fuels are imported in ISOtainers by ATF, by-passing the terminal system. The petrol station network is very dense compared with most of Europe and average throughputs very low. Jersey is yet to see significant rationalisation of fuels forecourts.

Delivery Plan 1: Summary and Lessons

On any relative basis Jersey starts from a strong position. It could, if it chose, have an entirely decarbonised electricity system, with few of the connection and infrastructure expansion issues (pylons etc.) that we see in the UK and elsewhere. Overall, the on-island energy system is relatively stable (as should be expected in a limited geography) although the enduring viability of the gas network remains a concern.

Electricity infrastructure is in relatively good order and future proofed – at least against likely short to medium term requirements. Investment in network capacity expansion is likely to be modest and programmes to underpin supply security are budgeted and in hand. Monitoring and control capabilities are good, and the network has the unusual capability to switch loads if needed.

But while energy consumption overall has fallen, consumption per head is static. Fossil gas and liquid fuel consumption has declined while electricity use has grown slightly. There has been a shift in heating patterns, but it is difficult to draw conclusions around transport energy consumption – better fuel economy in modern vehicles should drive a reduction in fuel volumes, but without any mileage data (or even clarity on how many vehicles are operating in the Island) it is hard to identify the benefits of the growth of the EV fleet vs possible changes in travel patterns.

Gas volumes have declined by over 20% in the past 5 years and are falling faster than for any other energy vector. Decarbonisation efforts (bio-LPG and biomethane in the short term) are being made, but without any support the economics are challenging and scale up a concern. The pace of replacement of the pipe network has been slow.

Electricity generated at the ERF creates around four times the emissions per tonne of oil equivalent than any other source of energy used in Jersey³³.

The ERF facility alone generates emissions (31,000 tCO₂e) equivalent to more than half as much as is generated by all the petrol that is burned on the Island (57,000 tCO₂e).

Policy Interventions

Transport

- EV and e-bike incentives delivered modest emissions savings (~1,400tCO₂e per year), but too small to shift the wider system.
- Fuel duty freeze removed a critical price signal and undermined modal-shift objectives.
- Sustainable Transport Policy shifted from the Roadmap's quantified delivery model to principle-based guidance, weakening the carbon focus.

Heating

Grants alone do not deliver system change. For instance, the LCHI has been effective at delivering some real, but limited, long-term carbon emission savings subsidised by Government, but struggles on a Just Transition front and is fiscally unsustainable at scale.

Return on Investment, Comparison to UK & Just Transition

CEF allocated ~£23m programme envelope (2022-25) across multiple sectors (around £220 per person). Much of the CEF has been spread across multiple small or short-term initiatives rather than long-term programmes. Figure 3. provides an estimated breakdown of the allocation of the CEF and an assessment of the Return on Investment (RoI) against each activity.

The most concerning insight is that while support for heat decarbonisation has provided good returns (if value is defined as emission savings) the other programmes, in most cases fully deployed and therefore rated as a 'success' in the Government's Progress Report, have been relatively inefficient in leveraging reductions (although they may have broader system co-benefits).

³³ [Energy Trends 2024](#)

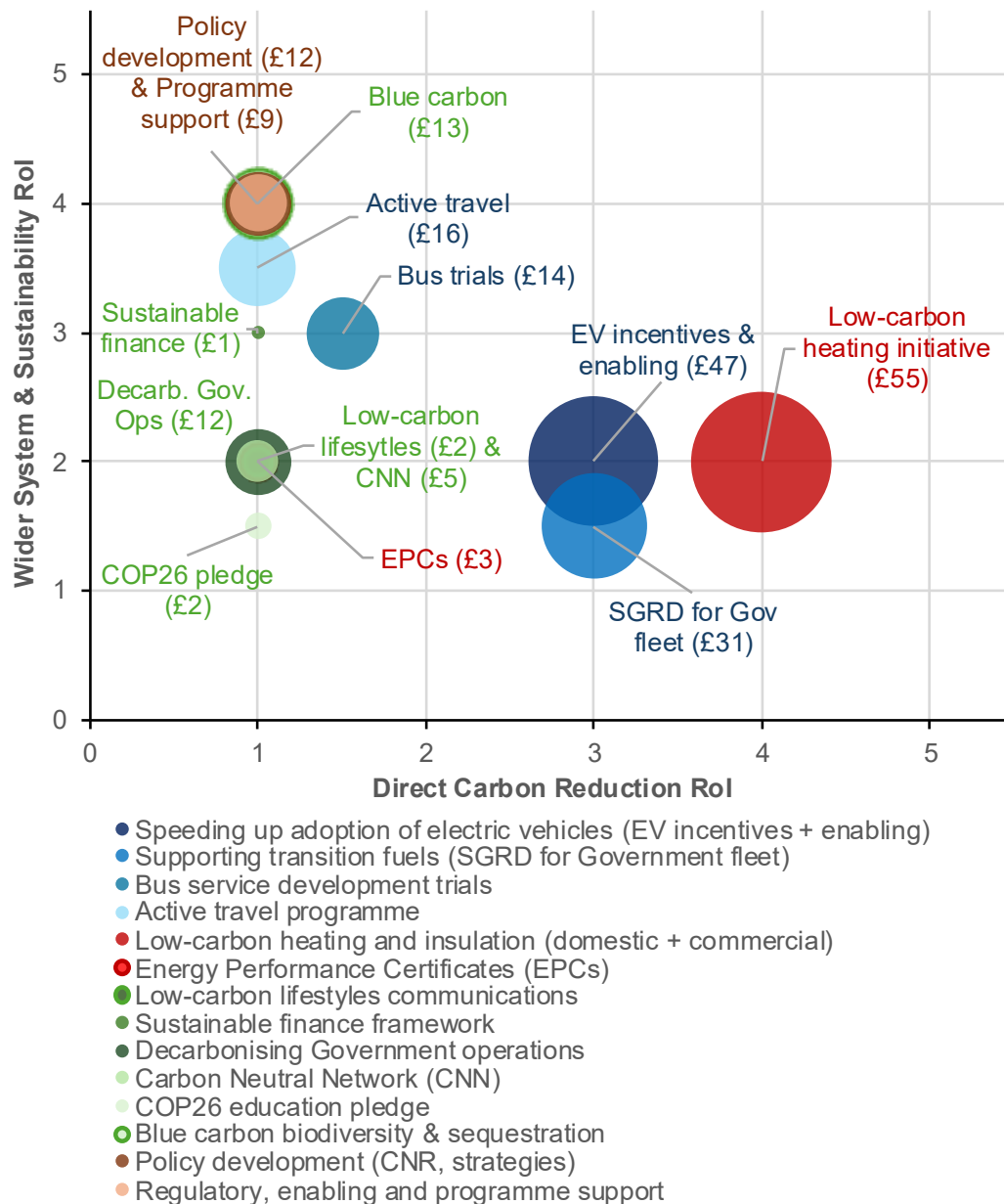


Figure 4. – Direct Carbon Reduction and Wider System & Sustainability Return on Investment of CNR policies. Fully justifications for scoring 1-5 of subjective Rol scores by the Climate Council can be found in [Annex B](#). Bubble area represents CNR budget for each policy. £ figures are £ budgeted for the policy from the CEF in the CNR per Jersey resident (for the entire 2022-2025 budget).

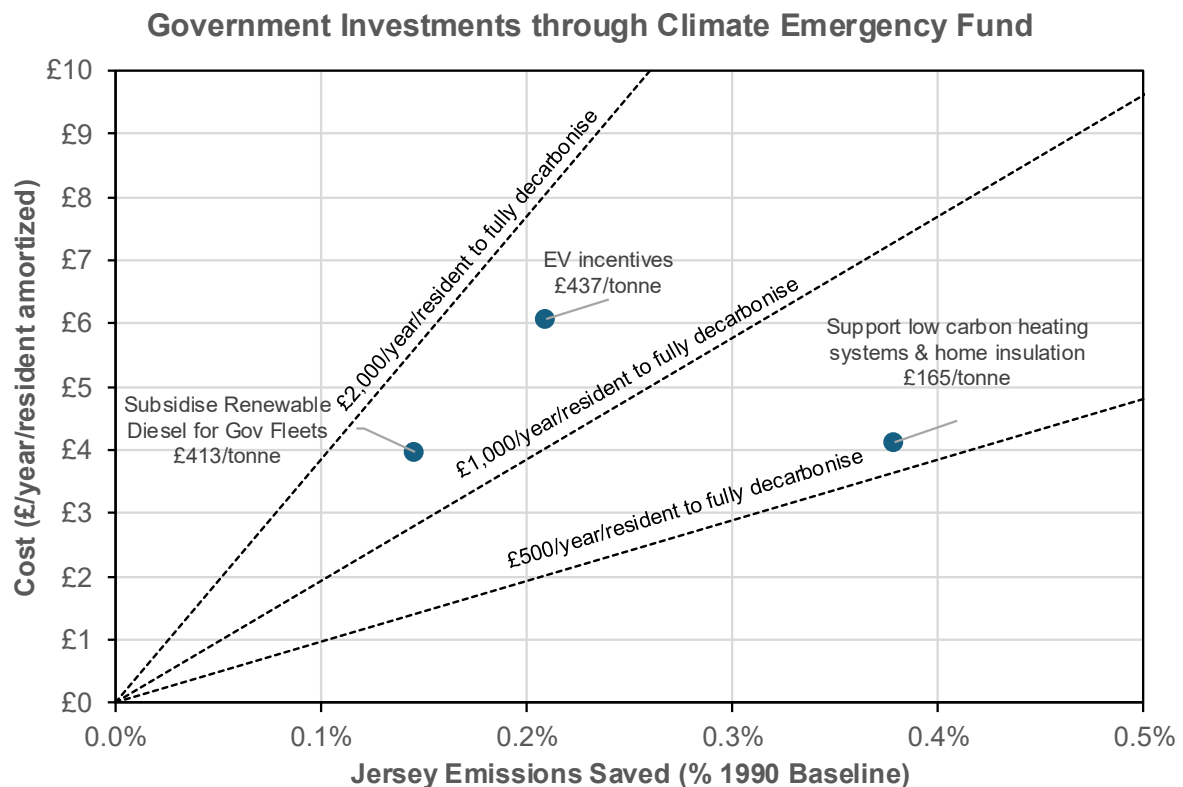


Figure 5. – Emissions saved (% of 1990 Baseline). Cost (per year per Jersey resident) and Abatement costs of CEF spend by Government in the three CNR policies where an attributable emissions saving was possible to match to spending. Capital cost in the LCHI and EV subsidies spending was amortized at a 5% discount rate over 10 years.

Figure 5. shows the emission saving, cost and abatement cost of the three Roadmap policies where attributable emissions were possible to link to spending. These three policies (EV incentives, LCHI and subsidising renewable diesel for Government fleets) comprised around 60% of the CEF budget, although around a third of the LCHI budget is yet to be spent. Together, they have directly reduced Jersey’s annual emissions by around 0.7% (relative to 1990 baseline used for targets) or around 1.4% relative to 2023 emissions. This has required a total of around £14 per Jersey resident per year. The overall carbon abatement cost of these three policies combined was £292 per tonne CO₂e.

The carbon abatement cost of the Government spend, versus the emissions saved of the largest policy, LCHI, was estimated at £165 per tonne CO₂e, around three times the current market price for carbon in the UK and EU Emissions Trading Schemes. If all emissions in Jersey cost the Government this carbon cost, it would cost around £550 per year per Jersey resident to fully decarbonise. However, the budget in this policy for the approximately 4 years of the Roadmap it was active (£55 per Jersey resident, Figure 4, or ~£14 per Jersey resident per year) was considerably higher (around 3 times higher) than the equivalent per capita budget in the UK’s equivalent scheme, the Boiler Upgrade Scheme (£4.70 per capita per year, based on original allocation of £450m in 2022 and further commitment of £1.5bn in 2023 confirmed to extend the scheme to 2028, *i.e.* 6 years).

Spending on transport was lower, but the Government abatement cost of these policies and incentives was far higher – around £400-£450 per tonne CO₂e, around 10 times the carbon market price. The spend on policies to speed up the adoption of EVs in the Roadmap was around £47 per Jersey resident for the 4-year Roadmap period 2022-2025 (Figure 4.), of which £42 per Jersey resident was purchase incentives for EVs. By comparison, the equivalent

incentive in the UK, the Electric Car Grant, is committed in the UK for a similar period of time (2025-2029), at a cost of £9.40 per capita is around a fifth of the allocation per capita.

As such the spending on subsidies for low carbon heating and EVs has been allocated at around four times the rate per capita as in the UK. Both schemes subsidised individuals to purchase EVs or install heat pumps at a similar rate as in the UK. Given a similar subsidy rate, this means that the subsidies in Jersey will have decarbonised Jersey's heating and transport emissions at 3-5 times the rate as the equivalent policies in the UK. However, it is worth noting that the scale of spend raises questions about a just transition, as the subsidies largely returned to higher income households, who were better placed to purchase an EV, or homeowners and have access to the capital or finance to invest in low carbon heating systems. Meanwhile, the lowest-income households transitioned earliest (*via* Andium's impressive electrification of heat 15 years ago), while middle-income renters and tenants are largely effectively excluded from the LHCI.

Supply-side levers are currently underused

'Supply-side tools' (tools that change the market itself) are not being fully used. In contrast, the EU and UK use both supply and demand side measures to encourage the uptake of cleaner but more expensive fuels (bio-LPG is currently 20-30% more expensive than fossil and HVO carries a 60 pence-per-litre premium at the pump and a 70 pence-per-litre premium vs. heating kerosene). Energy use in Jersey is overwhelmingly dependent on changes in demand (for example, modal shift, EVs or heat pumps). No supply-side levers are in place except for a lower rate of fuel duty for HVO. The "drop in" nature of bio-LPG and HVO provide an alternative to the higher upfront cost of buying an electric car, boiler or heat pump. The lack of supply side incentives (whether mandate, subsidy or differential duty rate) significantly diminishes the scope of very low carbon drop in fuels as realistic decarbonisation levers. For instance, heating policy focuses on end-use technology choice, rather than greening fuels and letting markets respond.

Behavioural Responses

Pilot schemes demonstrated latent appetite i.e. e-bike users notably reduced car trips, but lacked the supporting infrastructure and incentives needed for mass market behaviour change. Stakeholder feedback suggests that, while there is broad conceptual support for Jersey "doing its bit" on climate change, public acceptance of specific transport measures, especially fuel duty increases, parking reforms and road-space reallocation, remains low. Behaviour-change campaigns have been intermittent and are not strongly linked to these policy levers, leaving many residents uncertain about the rationale, timing and benefits of the transition. This has contributed to a perception that disruptive measures are optional or can be delayed without consequence.

Blockers and Opportunities

Transport blockers include: a lack of legislation (ICE phase-out³⁴, parking reform); limited bus priority, fragmented planning policies; insufficient delivery capacity; and high car-ownership. Additional blockers identified through stakeholder engagement include incomplete data on

³⁴ Note that the Government was consulting on the policy model for the 2030 ICE phase-out from November 2025 to January 2026 to help define legislation.

transport activity, limited freight and maritime policy development, and constrained skills and contractor capacity in key transition areas such as EV infrastructure and fleet electrification. A decision was taken by the Minister for the Environment during this term of Government not to mandate biofuel blending into petrol and diesel, and this position was shared with the Energy Suppliers Group. As a result, apart from volumes imported for aviation turbine fuel (ATF), Jersey's road fuels have a higher average CO₂e intensity per litre than fuels sold in the UK or EU, where biofuel blending is mandated. Although the difference in unit emissions factors is relatively minor this will be a more salient divergence as blending levels elsewhere increase.

Transport opportunities include high potential for EV adoption with stronger price signals; bus network modernisation and priority corridors can deliver quick wins; road-space reallocation feasible in St Helier and key corridors; growing appetite for shared mobility solutions; and closer collaboration with ports and airport decarbonisation frameworks. There is also significant potential to integrate transport and port strategies by expanding HVO and electrification of harbour and airport fleets, introducing shore power and SAF where viable, and using the Port of Jersey's emerging sustainability roadmap as a model for sector-specific transition plans.

Chapter 2: Future outlook to 2030

Introduction

This chapter assesses whether current policies, as set out in the Roadmap and implemented since 2022, remain aligned with the pace and scale of change required to meet Jersey's emissions reduction targets. Jersey has committed to reduce whole economy emissions by 68% by 2030 compared to 1990, implying around 7% annual reductions, versus the 0.2% achieved in 2023. It considers both delivery to date and the principal risks and dependencies that will shape outcomes over the remainder of the decade, focusing on transport, heating and waste as the largest emissions sources, while recognising that progress across all sectors remains essential to achieving net zero.

Transport

While the Roadmap sets clear ambitions, progress has been slow, EV uptake remains modest, policy implementation fragmented, and the Sustainable Transport Policy lacks actionable delivery mechanisms. Because transport is the largest emitting sector, its trajectory will determine whether Jersey meets the 2030 and 2035 targets. Although transport has no sector-specific target, it must decarbonise at least as quickly as the economy overall to keep the Island on track, and the Council recommends explicit transport emission reduction targets to provide clarity and accountability.

Heating

Heating presents a particular challenge in Jersey's decarbonisation pathway due to long asset lifetimes and a diverse building stock, meaning decisions in the 2020s have disproportionate implications for emissions well beyond 2030. Heating must decarbonise at a rate comparable to transport to support the 68% economy-wide reduction by 2030, and delayed action risks locking in emissions into the 2040s. Around half of Jersey's heating was already electrified prior to the Roadmap's publication, largely due to relatively low electricity prices, the limited local gas grid, and comparatively high imported gas and heating oil prices.

Other Emissions (waste, water and agriculture)

Water

For 2030, the major feature of JW's WRDMP is a 50% expansion of the Desalination Plant and updated drought management control curves. These measures will increase electricity consumption to manage climate and population driven water resilience challenges. Given the Island's electricity emissions factor, higher water related emissions are likely to be effectively "baked in" until the overall energy balance is improved by reducing reliance on the ERF element.

Waste

Current waste management has significant scope for improvement in policy, infrastructure, public awareness and enforcement. Jersey lags other advanced jurisdictions in waste management and recycling rates, and high waste generation and incineration keep the electricity emission factor higher than it could be, despite electrification being a prominent feature of the Roadmap. The existing ERF is due for replacement between 2035 and 2040, providing around a decade to establish an ambitious waste framework informed by other jurisdictions and underpinned by waste hierarchy principles.

Agriculture

To 2030, the farming and rural economy sector is positioned to build on early deliverables, with a more stable sector enabling targeted emission reductions. Albert Bartlett has committed to net zero by 2040, with a 30% reduction target by 2030 (42% by 2030 for non-packing and transportation elements). Recent growth in smallholders and regenerative producers, supported by the RSS, brings wider benefits for soil health, ecology and crop diversity, contributing to food security and resilience. Historical monocropping of new potatoes, with high nitrogen inputs and agrochemicals, has caused diffuse nitrate pollution and impaired water quality, further reduction in nitrate use could support water quality improvements and allow the ending of the longstanding nitrate dispensation for drinking water supplies. Reduced nitrogen inputs mean lower sectoral emissions and fewer import related transport emissions; combined with low carbon fertilisers produced via “green ammonia” processes, these changes can deliver significant emissions benefits.

Sustainable Finance

In financial services, a dedicated Sustainable Finance Action Plan³⁵ produced by Government and actively supported by JFL, aims to future-proof the industry and grow market share by building business capabilities. The plan sets 10 strategic priorities (five to protect the industry and five to promote its success), targeting three main areas: risk and governance, engagement and incentives, and includes an aim to introduce corporate sustainability disclosures by 2027. Success will be monitored through measurable outcomes such as new products, increased assets under management (AuM) and performance in global sustainable finance indices, although nonrevenue activities will be harder to assess.

Competitor jurisdictions show strong progress: Ireland has €1.2tn of ESG-revenue activities will be harder to assess. Competitor jurisdictions show strong progress: Ireland has €1.2tn of ESG compliant AuM-compliant AuM and Luxembourg €2.8tn, with Luxembourg also offering financial incentives to attract sustainable investment. The Luxembourg Stock Exchange launched the [Luxembourg Green Exchange](#) (LGX) in 2016 as the first global platform dedicated to green, socially responsible and sustainable securities, and now lists €1tn of securities.

The Isle of Man has produced a sustainable finance roadmap³⁶, with delivery dependent on skills development, while Asian centres such as Hong Kong and Singapore are building momentum in offshore sustainable finance; Hong Kong, a gateway to China and wider Asian and global markets, is the largest Asian hub for green and sustainable bonds, with \$175.1bn of ESG fund AuM. Given the mobility of capital, Jersey needs to track developments in these jurisdictions closely.

The current picture in sustainable finance

Jersey aims to develop and deliver a sustainable finance framework to support its 2030 decarbonisation targets. Despite the sector’s importance, only one Roadmap goal is dedicated specifically to financial services, and the Island’s aspiration to be a “fast follower” has been undermined as other jurisdictions, including the UK, have moved ahead rapidly with their frameworks. Within the industry, views are mixed; some stakeholders favour stronger action, others consider current activity sufficient, and some see sustainable finance as a passing phase - with the balance between market sentiment and politics unclear.

³⁵ [Sustainable Finance Action Plan](#)

³⁶ [isle-of-man-sustainable-finance-roadmap-november-2024.pdf](#)

A JFSC sustainable finance consultation³⁷ in 2025 was regarded as positive, indicating willingness in parts of the industry to develop this area, though it is unknown whether responses were dominated by existing practitioners, risking an “echo chamber.” The subsequent policy response was perceived as unusual, possibly reflecting political dynamics in the USA; however, aligning long term structural reform too closely with transient political rhetoric risks leaving Jersey behind market sentiment. Structural barriers such as skills, staff retention and investment conditions were also highlighted, reflecting wider Islandwide workforce constraints rather than sustainable finance alone. Jersey’s earlier decision to embrace robust “compliance” standards, despite concerns over competitiveness, ultimately strengthened its position through a strong regulatory and governance environment; a similarly bold approach could now be taken on sustainable finance.

Specific 2030 Roadmap targets

Transport

2030 target: 67% of vehicles decarbonised

Current EV share is around 3.5% of vehicles in use and needs to rise to more than 12,000 EVs per year versus the current level of about 1,000. Despite EV incentives, uptake remains low because of high upfront costs, modest and short-lived support, slow charging infrastructure rollout and policy signals, including frozen fuel duty, which weaken incentives to switch from fossil fuel vehicles. Combined with high car dependency and limited alternatives, this makes EV adoption appear risky or inconvenient for many households. Accelerating uptake will require stronger financial incentives, clearer and more consistent policy direction, expanded public and home charging infrastructure, and parallel investment in options that reduce overall car dependency. Decisive action early in the next Government term is imperative if the 2030 commitment is to be met.

1. Phaseout of petrol and diesel vehicles

The commitment to end new petrol and diesel registrations on the Island currently lacks legislation, clear timelines and effective communication, creating uncertainty for households and suppliers³⁸. Stakeholder sentiment is mixed: environmental groups support the phaseout, dealers highlight affordability and supply constraints, and many residents perceive transport decarbonisation as slow, poorly planned and too focused on cars, with the transition seen as premature without wider charging provision and cheaper EV options. Overall readiness is low, with no clear regulatory pathway, insufficient supporting infrastructure and limited public understanding of what the phaseout will mean in practice. Government’s strong performance with Hydrotreated Vegetable Oil (HVO) shows what coordinated action can achieve, but HVO is a subsidised transition fuel and cannot underpin long-term decarbonisation. Heavy reliance on HVO creates financial and market supply risks and delays the structural shift to full electrification where feasible, so broader islandwide measures are essential.

³⁷ [Sustainable finance consultation — Jersey Financial Services Commission](#)

³⁸ Note that the Government was consulting on the policy model for the 2030 ICE phase-out from November 2025 to January 2026 to help define legislation.

2. Infrastructure

Meeting the 2030 transport targets will not be possible without a step-change in infrastructure. EV uptake requires a three-to-four-fold increase in public charging, rapid chargers in key locations, and home or shared charging for MDUs and town-centre residents, alongside workplace and mobility-hub charging. Meaningful road-space reallocation is also needed, including protected walking and cycling routes on main corridors, safer school zones and targeted bus priority in and around St Helier to improve journey times and reliability. In parallel, Jersey needs a zero-emission-ready bus depot, grid upgrades where required, and clear standards for new developments (EV-ready, active-travel-first, reduced parking). Visible progress in decarbonising transport, particularly in high-profile areas such as buses, ports and the town centre, would signal effective leadership and help sustain public and stakeholder confidence in the Island's long-term climate strategy.

3. Behaviour change targets

Behaviour change will be essential to meet the 2030 emissions trajectory, supported by firmer policy tools, redesigned street space and stronger incentives, rather than encouragement alone. There are currently limited quantifiable baselines, milestones and consistent monitoring for ambitions to reduce vehicle kilometres travelled (VKT), increase active travel and shift mobility patterns. Measures implemented so far have had limited island-wide impact on car dependency because active-travel projects, campaigns and modest bus improvements have been delivered largely in isolation. The absence of regular, island-wide travel surveys and the lack of robust behavioural data make it difficult to set realistic behaviour-change targets and to identify which combinations of incentives, pricing signals and street-design changes are most effective.

4. Public transport network modernisation and decarbonisation

Jersey's bus network is central to reducing private car use and, despite recent improvements, requires transformational change. The existing service performs well on key routes, but coverage, frequency and journey times, particularly at peak periods and outside the south coast corridor, limit its ability to deliver significant modal shift.

There is a planned programme to transition the public bus fleet to electric vehicles, beginning in 2028 with the replacement of seven of the twelve double-decker buses, followed by the remaining five by 2030. The wider transition is constrained by current electricity supply limitations, and further vehicle electrification will only proceed once Jersey Electricity confirms sufficient capacity. Although the current plan envisages replacing 34 buses between 2030 and 2032, this timeline remains subject to both the resolution of power-supply constraints and the availability of suitable single-deck electric buses, which are not yet in production in a form compatible with Jersey's operational requirements.

Liberty Bus has purchased 22 Euro VI lower emission buses; these offer lower upfront costs, longer range and compatibility with existing refuelling infrastructure compared with electric buses, and can operate on HVO, which can deliver substantial lifecycle CO₂ reductions when sustainably sourced. However, they still emit CO₂ and air pollutants,

face future regulatory risk and offer limited long-term decarbonisation. Electric buses would provide zero tailpipe emissions, substantially lower noise, improved air quality and the strongest long-term pathway to net zero. Commitments to explore electric buses and expand services should be developed into a jointly funded, multiyear delivery programme with a clear procurement plan, charging infrastructure strategy and emissions pathway. To realise this potential, the bus contract's service and fleet milestones should be explicitly aligned with Jersey's transport sector carbon trajectory, with performance metrics that cover fleet emissions and modal share as well as ridership and punctuality. Major expansion in service levels, peak time priority on key routes and investment in a zero-emission fleet will be needed for buses to contribute meaningfully to the 2030 emissions goal.

5. Ports and airport activities

Aviation and maritime activities need to be integrated into the mainstream decarbonisation effort through the next Roadmap delivery plan, with binding targets and detailed policies. Ports of Jersey has already progressed sustainability measures, but long-term aviation and maritime strategies are needed to provide a clear framework for sustainable aviation fuel uptake, shore power, ferry fleet decarbonisation and emissions transparency. Stakeholder discussions highlighted several concrete initiatives: transitioning airport and harbour vehicles to HVO and electric pushback tugs; planned conversion of airport boilers to HVO in 2026; a private-aviation decarbonisation charge to incentivise lower-carbon operations; and a DFDS contract that envisages new vessels later this decade. These initiatives show that ports and airport operations can move faster than other parts of the transport system, but they remain isolated rather than part of a coordinated Island strategy. The next delivery plan should therefore set explicit aviation and maritime emissions targets, agree data-sharing on HVO, SAF, shore-power use and traffic volumes, and clarify how port-side investments will be co-funded with Government to de-risk major infrastructure upgrades.

Aviation travel in Jersey is currently under taxed, with no passenger duty, no GST on tickets and no fuel taxation. This includes private aviation, which - despite serving few passengers - has a disproportionately high and growing emissions impact. Introducing an appropriate form of aviation taxation, particularly in relation to private flights, would represent a visible and fair application of the "polluter pays" principle in a largely untaxed sector. Such a measure could support a just transition and is likely to be viewed as equitable by many Islanders. The Council emphasises, however, that any decision on aviation taxation must be taken in the round, carefully balancing Jersey's economic competitiveness, social outcomes and environmental sustainability. While the States Assembly has already adopted an amendment to the Government Plan 2024–2027 (P.72/2023 Amd.(32))³⁹ requiring investigation of a carbon tax or charge on private

³⁹ An adopted amendment to the 2024 Government Plan [States Assembly | P.72/2023 Amd.\(32\)](#) required the investigation of a carbon tax / charge on private aircraft. The Government concluded that the cost and timing of establishing a new tax mechanism were prohibitive in the short term, and instead supported Ports of Jersey in introducing an airport-level carbon charge on private aircraft, with revenues ring-fenced to support Ports of Jersey's own infrastructure modernisation and decarbonisation. This does not preclude the future introduction of a Government-led aviation tax or charge, for which established mechanisms exist internationally (for example, differentiated air passenger duties that are higher for premium or private jet travel).

aircraft. Ports of Jersey has since worked in collaboration with Government to introduced additional decarbonisation charges on private aviation, these airport-level charges are an internal mechanism to recover and fund Ports of Jersey's own infrastructure and decarbonisation costs, rather than a public tax. Although encouraging, this approach does not have the same distributive or signalling impact as a Government-led tax that directs revenues into the public purse, as seen in other jurisdictions such as the UK where Air Passenger Duty is significantly higher for premium and private aviation. Private aviation typically has emissions 5–10 times higher per passenger kilometre than commercial flights – a small number of private flights can account for a disproportionate share of Jersey's aviation emissions, making targeted taxation both impactful and equitable-kilometre than commercial flights – a small number of private flights can account for a disproportionate share of Jersey's aviation emissions, making targeted taxation both impactful and equitable.

6. Emerging technologies

The 2030 emissions targets should also consider emerging mobility technologies, including autonomous EV shuttles, on-demand electric micro-transit, publicly funded e-bike schemes and large-scale shared EV fleets. These options can reduce private car ownership, provide first-and last-mile connections to the public transport network and support mobility for non-drivers. Regulatory frameworks, safety standards and funding mechanisms for such technologies should follow structured exploration and pilot programmes. Other countries and cities have used small-scale autonomous vehicle pilots to cut congestion, improve first-and last-mile connectivity and built public acceptance of shared electric mobility; drawing on these experiences could help reduce VKT and improve accessibility through lower-emission shared transport. Positioning Jersey to adopt emerging technologies will require governance reform, dedicated trial funding and collaboration with industry partners.

Heating

The Roadmap does not set a single, binding numerical target for heating-sector emissions by 2030. Instead, it sets out a portfolio of policies designed collectively to deliver substantial reductions from buildings, primarily through electrification, efficiency improvements and the gradual phase-out of fossil-fuel heating. Key heating-related ambitions include: rapid scale-up of low-carbon heating technologies, particularly air-source and ground-source heat pumps, supported by the LCHI (HT1); progressive restrictions on new fossil-fuel heating systems (HT2) to prevent long-term emissions lock-in; expanded use of EPCs (HT3) to improve understanding of building energy performance and support both consumer decisions and future regulation; and decarbonisation of the public-sector estate, with Government expected to lead by example.

The Roadmap intentionally leaves several delivery aspects flexible, including the timing and scope of boiler-phase-out measures, the balance between electrification and alternative low-carbon fuels, and the relative contributions of efficiency versus fuel switching. This flexibility is intended to allow policy to adapt as technologies mature and costs evolve, but it also means progress towards 2030 depends heavily on the timeliness and credibility of subsequent policy decisions rather than predefined quantitative milestones. Assessing alignment with the 2030 target therefore requires consideration of both emissions reductions achieved to date and

whether the current policy trajectory remains consistent with the original ambition of the Roadmap.

Opportunities and blockers analysis

Meeting Jersey's 2030 emissions ambition requires rapid transformation across policy, delivery, investment and behaviour. The current position presents both challenges and clear opportunities, grouped into three overarching categories: policy alignment and investment, scaled delivery and investment, and behavioural and socio-economic engagement. The absence of a formal carbon budget means Jersey has yet to use one of the most powerful tools for strategic delivery. A carbon-budget framework would translate long-term statutory targets into clear, time-bound expectations for each sector, defining a multi-year emissions envelope to guide policy design, infrastructure investment and market planning. It would help align departmental strategies and funding with quantified outcomes, prioritise high-impact measures, and allow early identification of under-performance. Experience elsewhere shows that carbon budgets strengthen accountability, improve cross-government coordination and crowd in private investment, particularly when aligned with States Assembly terms. The Council therefore sees a major opportunity to shift to multi-year delivery and funding programmes explicitly linked to carbon budgets, creating a stable policy environment to sustain momentum to 2030 and beyond.

Policy opportunities

Policy opportunities arise where clearer rules, mandates and signals could quickly unlock market confidence, accelerate uptake and give delivery partners certainty. Jersey already has strong strategic intent; the gap lies in converting this into enforceable, measurable frameworks. A carbon budget would support this by clarifying expectations for each department and enabling political measures such as fuel-duty increases or heating regulation to be calibrated to sectoral contributions.

Transport

Near-term opportunities exist to strengthen Jersey's transport policy framework in ways proven internationally and suited to an island context: legislating a clear phase-out date for new petrol and diesel vehicle registrations, aligned with UK and European markets, would give certainty to households, dealers and infrastructure providers. Additional legislation for older, high-polluting vehicles – consideration of MOT type emissions standards, targeted scrappage schemes, expanded Vehicle Emissions Duty (VED) for imported older vehicles, and introduction of low-emission zones or clean-air areas, would accelerate fleet turnover. Reinstating effective price signals, including fuel-duty progression and optimised VED, would reinforce shifting away from fossil fuels while supporting a just transition via targeted support. Strengthening the Sustainable Transport Policy with delivery requirements, including road-space reallocation, bus priority and active-travel standards, would turn principles into action.

Publishing a Bus Service Development Plan and establishing a regulatory pathway for zero-emission bus procurement and depot electrification would unlock long-term operator investment. Embedding EV-ready standards in new developments and workplaces would future-proof growth and cut retrofit costs, while clear standards for mobility hubs, shared mobility and micro-mobility would support lower-car lifestyles, especially in urban areas. Bringing aviation and maritime emissions into the mainstream policy framework, with defined pathways and milestones, would tackle a significant share of transport emissions and align with international trajectories. Collectively, these measures would send consistent signals, enable infrastructure planning at scale and turn transport decarbonisation from incremental change into a managed transition.

Heating

A firm timeline for fossil-fuel boiler phase-out would provide the certainty needed to invest in skills and supply chains. Defining the role of renewable and transition fuels would broaden choice, particularly where immediate full electrification is not viable. Applying polluter-pays principles to fossil heating fuels, alongside targeted support for vulnerable households, would improve fairness and effectiveness. Clear transition plans for workers and infrastructure in oil and LPG supply would support a just, orderly shift. Together, these measures would give households, businesses and the heating industry clear direction to accelerate uptake, build market capacity and reduce long-term costs.

Delivery and funding opportunities

Delivery and funding opportunities relate to providing projects, infrastructure and services with sufficient investment, capacity and governance to operate at the required pace and scale.

Transport

Key steps include establishing a funded, multi-year public-charging programme to give the pace and confidence required for mass EV adoption and moving from pilot bus improvements to network-wide modernisation, including electrification, frequency upgrades and reliability measures. Equipping bus depots for zero-emission fleets and providing capital certainty would unlock operator investment.

Walking and cycling programmes need to be scaled up, supported by stable teams, specialist skills and long-term political backing. Piloting shared mobility, demand-responsive transport and micro-transit would position Jersey to adopt cost-effective innovations already proven elsewhere. These investments would deliver emissions reduction, congestion relief, air-quality improvements and greater transport choice; EV uptake would increase, buses would gain priority and ridership, and mode-shift opportunities would be realised as safety and convenience barriers are removed.

Jersey would keep pace with other jurisdictions using new technologies to cut private car use. Similar opportunities exist in aviation and maritime, where port and airport decarbonisation projects are currently progressing on an ad-hoc basis but would benefit from multi-year funding for shore power, SAF infrastructure and harbour-fleet transition.

Heating

In heating, providing predictable, multi-year demand signals would allow installer capacity to scale sustainably, while diversifying delivery beyond a single incentive programme would reduce risk and improve resilience.

Behavioural and socio-economic opportunities

Behaviour change is one of Jersey's largest untapped opportunities. The Island's compact geography and short journey distances mean small changes in travel and heating choices can yield disproportionate emissions savings.

Transport

Key measures include reducing car dependency by improving alternatives rather than relying on restriction alone, expanding access to affordable EVs, particularly via second-hand markets and shared vehicles, and ensuring equitable access to EV charging, especially for flats and lower-income households. Linking behaviour-change campaigns to visible policy action would reinforce credibility, while consistent political leadership and narrative should frame change

around health, cost savings and quality of life as well as carbon. Done well, these steps can build public confidence, reduce inequality and generate durable support for the transition.

Heating

For heating, priorities include addressing perceptions of unfairness by clearly separating fuel-poverty support from carbon pricing and offering credible transitional pathways rather than a single prescribed solution. Recent pauses to heating reform, often justified by the “cost of living crisis”, risk conflating climate policy with affordability: rising energy costs are fundamentally an inequality issue, best addressed through targeted redistribution and income support, rather than delaying long-term decarbonisation. Jersey can both accelerate electrification or transition fuels and ensure that low-income households and pensioners are protected from cold homes. This approach can improve equity and accelerate decarbonisation.

Some politicians, often with views opposed to decarbonisation or in denial of climate change, around the world (and likely within Jersey itself) use the concern around cost-of-living crises to argue that decarbonisation is fundamentally unfair, particularly in the use of carbon pricing in raising the price of fossil fuels and is incompatible with attempts to suppress the cost of living. Arguably, the cost-of-living crisis is where inflation swallows up all discretionary income of the lowest income segments, and threatens the ability to pay for essentials, like heating energy. However, the lowest income families in society are typically by far the lowest emitters, particularly in Jersey in heating due to high electrification of lower-income homes. If the lowest income families cannot afford fossil heating fuel with carbon taxes to fully socialise the cost of these products, this must be dealt with by other Government redistributions (e.g. low-income heating support allowance), not by scrapping the entire system of accounting for the true cost of fossil fuels, making biofuels competitive and electrification more attractive.

Other emissions (water, waste, agriculture)

Waste management

The fragmented nature of Jersey’s waste-management system and the lack of an Island-wide recycling framework are key blockers to rapid improvement. Parish control has produced a system that is complex, inconsistent and inefficient, and underperforms against modern standards and good practice. In the absence of regulation or financial drivers to minimise waste and maximise recycling, waste contributes disproportionately to the Island’s greenhouse-gas emissions. Measures to improve performance could include reducing general mixed-waste collection frequency, increasing collection of recyclables, introducing commercial-waste charging and stream separation, and applying domestic general-waste charging. These approaches are widely used elsewhere and can be simple to implement while delivering strong results. Waste management can be socially divisive and politically contentious, and difficult decisions have been deferred to the next political cycle.

Planning for a successor to the current ERF should be used as an opportunity for modernisation and system redesign; the omission of this issue from the Infrastructure Roadmap⁴⁰ was a concern but it is understood to be included in the departmental long term capital plan. Recent improvements in data on waste volumes and composition, if continued, will be valuable for future transformation, enabling measurement and target setting. The development of a circular-economy strategy is an objective within the Roadmap, but there is a risk it becomes an aspirational “on-the-shelf” document without a clear delivery mechanism. Supporting organisations already active in this space, sharing experience and expanding provision could

⁴⁰ [Investing in Jersey Document and Capital Investment Fund.pdf](#)

avoid this. Strong incentives for circular waste operations, paired with disincentives for high-waste activities, would send clear signals to businesses to improve practices and adopt waste-hierarchy principles. Government procurement could be used as a foundation and exemplar.

As part of a system-wide circular-waste approach and ERF-successor planning, the merits of a commercial-scale anaerobic digestion facility should be explored with the farming sector, energy companies and in the context of Guernsey's current practice of exporting food waste to the UK. Such a facility could process domestic and commercial organic wastes and farm slurry from across the islands, producing biogas, heat and digestate, each contributing to energy diversification, fuel transition, improved soil and slurry management and reduced fertiliser imports. A 2024 review concluded that a farm-scale AD plant was preferable to an Island-wide mixed-waste plant, and Trinity Manor, Jersey's largest dairy holding, has planning approval for such a plant. While this remains only one option, the long-term benefits of a larger facility should be reconsidered alongside ERF replacement, especially as haulage emissions can be reduced through electrification, transition fuels or biogas from the plant.

Water

Questions frequently arise about using solar power more extensively to meet pumping and desalination demand but given Jersey's land footprint and the area available to JW, solar can only make a fractional contribution to overall electricity use. There is some merit in exploring ground-mounted, roof-mounted and floating solar to help offset emissions from electricity use, but returns are generally low, and even large schemes would only modestly contribute to decarbonising the electricity supply; as an illustration, 1 hectare of solar generating about 750,000 kWh per year is small relative to JW total 2025 electricity consumption of 8,265,462 kWh. Other emissions-reduction opportunities include continued conversion of the vehicle fleet from ICE to transition fuels such as HVO, and conversion of fossil-fuel boilers across the property estate, though these will make only a relatively small contribution to overall emissions. In the short term, a simple carbon-budgeting approach within JW could improve discipline, focus and visibility of emissions performance, support KPI setting and help assess investment decisions against emissions impacts.

Across the wider water industry, decarbonising large, price-regulated infrastructure remains challenging. Where a utility combines water and wastewater operations, there are opportunities for biomethane management, utilisation and land management through renewable-power investments or land restoration (e.g. peatlands, wetlands) and offsetting (e.g. tree planting). While land management offers multiple natural-capital benefits, JW's limited landholding as a water-only utility means such options are not available at scale for emissions reduction. Since 2022, analysis shows that emissions from operating the drinking-water system are largely driven by rainfall levels and seasonal distribution, which determine the electricity needed for pumping and desalination to maintain supplies within an acceptable risk envelope. Wet years allow greater use of gravity sources and less desalination, while dry years require more energy-intensive production. Until the electricity emissions factor falls, the ability to reduce water-supply emissions will be constrained by rainfall.

A further driver is the anticipated tightening of Per- and Polyfluoroalkyl Substances (PFAS) regulatory standards in drinking water. If implemented, lower limits will necessitate additional treatment stages, yet to be defined, that will increase electricity use through additional pumping. Scope 3 emissions will also rise due to increased transport, handling and regeneration of treatment consumables such as granular activated carbon. The next WRDMP, due by 2030, is

expected to involve more challenging infrastructure decisions than the 2025 Plan. If Jersey pursues a net-zero water-management strategy, closer collaboration between Government and Jersey Water will be needed to understand WRDMP development and embed net-zero considerations.

Agriculture

Practices in the farming sector will ultimately be shaped by market demands, environmental pressures, commercial viability and regulation. Jersey can build on recent successes and industry developments to deliver greater carbon benefits and improve food security, but this will require increased financial support. The sector currently receives lower subsidy levels than counterparts in the UK and EU, so this imbalance will need to be addressed within the RSS credit framework by “dialling up” preferred outcomes. Given farming’s cultural importance, a system-wide assessment of how agriculture can support broader government objectives could unlock wider opportunities; the counterfactual to a thriving, diverse sector would be reduced food security, greater imports and food miles, more packaging waste and loss of skills, landscape and heritage.

Adoption of appropriate technology should be encouraged. Accurate local data and analysis are currently lacking and must be improved to track emissions, understand sequestration opportunities and monitor progress. In the marine sector, both opportunity and risk are significant. Understanding of “blue carbon” sequestration is growing but has not yet gained traction, despite Jersey’s extensive inter-tidal zone and territorial waters offering substantial potential, some of which depends on formal recognition under IPCC guidance. The marine economy and aquaculture have received less focus and support than terrestrial agriculture, leaving them exposed to existential risks similar to those faced by farming before the RSS was introduced.

Sustainable Finance

Immediate policy updates for the finance sector include following the UK’s lead on sustainability reporting, treating data disclosure as an opportunity to showcase best practice rather than a regulatory burden, updating JFSC codes on sustainability risk and implementing targeted upskilling programmes to support staff retention in local firms. Key risks include the current US administration remaining in place until 2028 and the danger of over-reacting to US political rhetoric, losing ground to competitor jurisdictions in a highly competitive marketplace, misreading market sentiment and becoming a “dumping ground” for brown or unwanted assets that are no longer accepted in leading offshore centres.

There is potential for green initiatives to prosper, which could in turn encourage the financial services sector to support greener-finance activity. While the sector primarily channels international capital, there is space for locally focused schemes. Engagement with local finance providers suggests demand from operators to fill this gap. Local schemes that support net-zero goals, such as rewilding and tree planting, could attract public interest and raise the profile of climate action. Despite limited evidence of market impact, these approaches merit consideration by Government and local finance providers, and their success will depend on coordinated efforts with energy suppliers and local communities.

Resourcing and funding needs (2026–2030)

Financing decarbonisation

Government estimates suggest implementing the Roadmap will cost around £300 million, equivalent to about £10 million per year over 30 years. Current financing falls well short of this level. The CEF, originally intended to be supported by above-RPI fuel-duty increases, has been weakened by a three-year fuel duty freeze, reducing the real cost of fossil fuel use and lowering revenues by an estimated £5 million per year relative to inflation indexed duty. CEF balances have declined and projected spending from 2026 onwards is around £4 million per year across all sectors, creating a structural gap between required investment and available resources. The Council recommends shifting to stable, multi-year, polluter-pays financing and strategic private-sector partnerships.

Transport

CEF funding has supported early measures such as EV incentives, HVO for the Government fleet and active travel pilots, but these have largely been short-term grants rather than the multiyear infrastructure investment needed for a lasting shift in transport emissions. While the CEF has played an important catalytic role, the scale of transport decarbonisation required cannot be delivered through the CEF alone, and the main capital investment levers for transport sit outside the Fund. Aligning financing with the 2030 target requires implementing polluter pays revenue streams, unlocking private investment and dedicating long term funding to high impact transport programmes. Without this, transport cannot deliver its required emissions reductions. In practice, this means committing to multiyear capital envelopes for bus fleet and depot electrification, harbour and airport decarbonisation projects and an Islandwide active travel network, allowing operators and contractors to plan investment and procurement over a 5–10 year horizon rather than one budget cycle at a time.

Aligning financing with the 2030 target requires implementing polluter-pays revenue streams, unlocking private investment and dedicating long-term funding to high-impact transport programmes. Without this, transport cannot deliver its required emissions reductions. In practice, this means committing to multi-year capital envelopes for bus-fleet and depot electrification, harbour and airport decarbonisation projects and an -wide active-travel network, allowing operators and contractors to plan investment and procurement over a 5–10-year horizon rather than one budget cycle at a time.

Heating

Heating decarbonisation has so far been financed mainly through direct capital subsidies, particularly the LCHI funded from the CEF. This has supported early adopters and helped build delivery capability but is not a scalable or sustainable model for whole-system transition. Because heating upgrades are capital-intensive, relying on grants alone would require substantial, ongoing public expenditure to deliver the uptake levels implied by the Roadmap. Stakeholder evidence suggests finance availability is not the primary constraint; rather, it is the lack of predictable policy signals that would enable households, landlords and businesses to use conventional borrowing, asset-replacement cycles and private capital. Future heating finance will therefore need to move away from broad capital subsidies toward mechanisms that

reduce reliance on public funding, enable greater private-finance participation and focus public support on equity and fuel-poverty challenges.

Major levers

Transport

Transport decarbonisation depends on coordinated investment across several capital-intensive levers, all requiring multi-year programmes rather than short-term schemes. For EVs, Jersey needs a four-fold expansion of public charging, rapid chargers in strategic locations, residential block charging and workplace infrastructure, alongside redesigned EV incentives and targeted support for the second-hand market. A step-change in bus network service quality and carbon performance across the Island will need capital investment far beyond pilot-scale trials. Meaningful road-space reallocation is required on several specific corridors and in key urban areas; Jersey's transport geography, short trip distances and dense patterns make reallocation feasible, with constraints driven more by political and social acceptability, limited funding and lack of a delivery framework.

A defined, multi-year Active Travel Investment Programme is needed to deliver infrastructure at scale and unlock behavioural change via safe, continuous walking and cycling routes. Demand-responsive electric shuttles, shared EV fleets, mobility hubs and autonomous vehicles could replicate successful international examples, but innovation will not occur without dedicated investment and risk-sharing mechanisms. Alongside these on-island actions, investment in port-side electrical infrastructure, SAF handling systems and lower-carbon harbour fleets will be critical levers for the aviation and maritime components of Jersey's transport emissions.

Heating

Heating policy has so far relied on a narrow set of levers, mainly incentives and information. Stakeholder evidence indicates this has limited public-spending effectiveness and slowed delivery. Under-used levers include price signals (particularly carbon-based pricing of fossil heating fuels), regulatory backstops (such as clear boiler phase-out timelines) and supply-side measures (including transitional decarbonisation of heating fuels). These tools can drive behavioural change across the whole market, including landlords and commercial actors, without proportionate increases in public spending. Continued reliance on voluntary incentives risks growing pressure on public budgets while delivering diminishing returns.

Long-term versus short-term

The tension between short-term grant-based interventions and long-term structural change is a defining feature of Jersey's decarbonisation pathway. Long-term measures deliver systemic, lasting emissions reductions, build market confidence, reduce reliance on grants and enable private-sector participation and investment.

Transport

Short term measures needed to 2027 include legislating a 2030 phaseout of new petrol and diesel vehicles, increasing fuel duty, providing small scale EV purchase incentives focused on the second-hand market, time limited subsidies for transition fuels such as HVO, bus service improvements and priority routes at peak times, and a move to multiyear delivery and funding aligned with carbon budgets. These deliver early wins but do not fundamentally change the transport system. Longterm, transformational measures are also required: a Transport Decarbonisation Investment Programme for 2027–2030 with guaranteed multiyear budgets; statutory phaseout dates and VKT or modal share targets; consistent price signals (fuel duty

and parking reform); full bus fleet electrification and long term public transport investment; major active travel network construction with dedicated capital; regulatory reform to support shared mobility, charging requirements and innovation pilots; and aviation and maritime decarbonisation pathways aligned with 2035 and 2050 goals.

Carbon budgets will be particularly important in managing this balance by setting emissions ceilings for each four year period and forcing decisions over how much of the limited budget can be “spent” on delay versus early structural investment in long lived assets such as depots, harbour infrastructure and active travel corridors. Short-term measures needed to 2027 include legislating a 2030 phase-out of new petrol and diesel vehicles, increasing fuel duty, providing small-scale EV purchase incentives focused on the second-hand market, time-limited subsidies for transition fuels such as -service improvements and priority routes at peak times, and a move to multi-year delivery and funding aligned with carbon budgets. These deliver early wins but do not fundamentally change the transport system.

Long-term, transformational measures are also required: a Transport Decarbonisation Investment Programme for 2027–2030 with guaranteed multi-year budgets; statutory phase-out dates and VKT or modal-share targets; consistent price signals (fuel duty and parking reform); full bus-fleet electrification and long-term public-transport investment; major active-travel network construction with dedicated capital; regulatory reform to support shared mobility, charging requirements and innovation pilots; and aviation and maritime decarbonisation pathways aligned with 2035 and 2050 goals. Carbon budgets will be particularly important in managing this balance by setting emissions ceilings for each four-year period and forcing decisions over how much of the limited budget can be “spent” on delay versus early structural investment in long-lived assets such as depots, harbour infrastructure and active-travel corridors.

Heating

In the short term, public funding will still be needed to support vulnerable households, seed and stabilise the low-carbon-heating supply chain and address information and coordination failures. However, analysis for this report suggests long-term heating decarbonisation does not require permanently higher energy costs; electrification and efficiency are likely to reduce total household energy expenditure over time. Public funding should therefore be seen as a transitional tool to overcome upfront barriers and enable market transformation rather than an enduring subsidy. Failing to move toward structural policy measures risks locking Jersey into repeated short-term funding extensions without addressing the underlying drivers of fossil-fuel dependence.

Tactical and operational readiness

Decarbonisation requires not only policy ambition but also a system ready to deliver change at pace. Jersey faces constraints across policy frameworks, delivery mechanisms, public behaviour and market capacity, all of which will shape prospects for accelerating emissions reductions between 2026 and 2030.

Policy readiness

Jersey has established strategic commitments through the Roadmap, but policy readiness remains incomplete in several critical areas. Ambition exists, but regulatory, fiscal and operational policies lag behind, creating uncertainty and slowing investment and delivery.

Transport

More binding frameworks and regulations would be beneficial. The 2030 phase-out of new petrol and diesel registrations is not yet legislated, generating uncertainty for consumers, suppliers and investors; the Council recommends legislating this date. The absence of statutory modal-shift or Vehicle Kilometres Travelled (VKT) reduction targets limits accountability for behaviour change and makes progress hard to track. Active-travel and bus-priority measures lack a regulatory framework compelling road-space reallocation or minimum service standards. Price signals are inconsistent: fuel-duty freezes since 2022 have weakened support for decarbonisation, and while VED does exempt zero-emission vehicles and imposes high one-off charges on the most polluting models, it provides a weak ongoing incentive for most vehicle buyers and does not strongly influence vehicle use or modal choice. Parking policies, among the most powerful behavioural levers, have remained largely unchanged.

The Sustainable Transport Policy lacks detailed actions, timeframes and mandated interventions, and there is no Bus Service Development Plan at the time of writing. Aviation and maritime transport have no defined decarbonisation pathway. Transport, energy, planning and behavioural policies are not yet integrated into a single coherent programme, and departmental budgets and planning policies constrain coordinated delivery and climate-aligned land-use decisions. A single coordinating delivery body with the authority and mandate to implement change at scale is recommended. Updating the Roads Law to reflect the mobility hierarchy and enable road-space reallocation and embedding transport-emissions objectives in planning and port policies, will be essential to close the policy-readiness gap.

Heating

At a strategic level, the heating direction is broadly understood: a shift from fossil-fuel heating toward electrification, supported by efficiency. However, policy readiness is weakened by a lack of binding implementation signals, particularly around boiler phase-out and future treatment of heating fuels. Consultations and indicative intent have not yet translated into confirmed timelines or regulatory backstops, limiting the effectiveness of existing incentives and undermining confidence among households, suppliers and installers. Heating policy is therefore directionally clear but operationally uncertain.

Delivery capacity

Delivery readiness is constrained by resource limitations, fragmented governance and the absence of multi-year investment frameworks.

Transport

While the CEF can roll funding between years, annual Budget approvals still constrain delivery certainty; aligning multi-year funding commitments explicitly with carbon budgets would strengthen planning, investment and emissions outcomes. The Sustainable Transport Policy does not offer enough actionable direction, time-bound measures or clear targets for mode shift, road-space reallocation and funded delivery, leaving departments without the operational guidance needed for meaningful change. Several Roadmap commitments remain undelivered or paused. High-quality real-time data on modal share, VKT, EV usage patterns and charging demand is lacking, reducing the accuracy and responsiveness of infrastructure and service planning. Governance and programme capability are major barriers: without stronger structures, multi-year funding and dedicated teams, Jersey risks failing to deliver at the required pace. Aviation and maritime decarbonisation face similar issues, as shore power, SAF logistics and hybrid-ferry infrastructure are large, complex projects needing specialist project management and engineering capacity that cannot be sustained on short-term funding.

Heating

Stakeholder evidence suggests heating delivery capacity is not currently a binding constraint. Installer capability exists and can scale with demand, fuel suppliers are prepared to provide low-carbon alternatives, and JE has strong system-coordination and planning capability. The main risk is stop-start policy and uncertain demand, which discourage firms from investing in workforce expansion and training.

Behavioural readiness

Transport

Behavioural readiness is a significant barrier, driven by entrenched travel habits, affordability concerns and limited public confidence in the transition pathway. While there is broad support for climate commitments, willingness to accept disruptive transport measures is much lower. Many people support climate action in principle but oppose interventions affecting driving, parking and fuel costs, creating a gap between ambition and acceptability. Households remain cautious about switching to EVs, changing commuting habits or relying on buses and active travel, and this risk aversion reinforces the status quo. Fuel-duty freezes, delayed decisions and stalled road-space reallocation have contributed to a perception that the transition is optional, with limited clear and sustained political messaging. Behaviour-change campaigns have been modest, intermittent and weakly linked to specific policy levers, and there is no unified narrative explaining why transport change is necessary or how statutory targets will be met. A comprehensive communications and behaviour-change strategy is required to build understanding, shift norms and prepare residents for change.

Evidence from other jurisdictions shows successful transformation depends on community co-design, local pilots, neighbourhood-level active-travel schemes and demonstration projects that show tangible benefits. Jersey has delivered isolated examples, such as School Streets, but these have yet to be scaled into a systemic, community-driven programme. Public resistance to increases in fuel duty and parking charges is recognised, and without social consent, high-impact measures are politically challenging.

Affordability remains a barrier for many households, particularly for EV purchases and where home charging is not available in flats or older properties; misperceptions about EV battery life, running costs and charging availability persist, and behaviour-change campaigns have not yet reached sufficient scale to shift norms. High car ownership, alongside convenience, habit and perceived status, make behaviour change difficult without strong incentives and high-quality alternatives. Behavioural readiness is therefore low, and without a coherent, community-centred strategy plus stronger incentives and visible alternatives, even well-designed policies will struggle to deliver the adoption needed for 2030.

Heating

Public awareness of low-carbon heating has grown since LCHI's introduction, but behavioural readiness is uneven. Uptake has been concentrated among motivated early adopters, often driven by property ownership, access to capital or natural replacement cycles rather than strong price or regulatory signals. Unlike transport, heating decisions are infrequent and path-dependent, making clear policy signals more important than ongoing campaigns.

Market and supply-chain readiness

Transport

The transport transition demands mature supply chains for vehicles, infrastructure, skills and services, but Jersey's small market size presents added challenges. Dealerships stock a limited

EV range, and some models have long lead times; specialist EV maintenance and repair capacity is still developing, raising concerns about reliability and cost. Charging-infrastructure deployment is constrained by the number of trained electricians and approved contractors, and grid reinforcement requires coordination with JE and long-term planning. Electric bus procurement requires early planning and long-term contracts, which operators cannot commit to without policy certainty; depot electrification (transformers, chargers, layout changes) has yet to begin, making 2030 targets unlikely without early action. Overall, market and supply-chain readiness are at an early stage, and without clear demand signals and long-term government commitments, the private sector is unlikely to scale capacity quickly. Aviation and maritime face comparable constraints, as the island's small scale limits bargaining power with technology providers and makes investment in specialised skills, such as SAF handling, hydrogen safety or large-scale shore-power systems, risky without careful timing and support.

Heating

The heating market is technically capable of supporting the transition but constrained by policy uncertainty. Stakeholders report that heat-pump and retrofit supply chains are sufficiently mature to expand, biofuel supply chains could be mobilised quickly if policy allowed, and financing products exist but are not closely aligned with policy. In the absence of predictable long-term signals, firms are cautious, often deferring investment decisions. As a result, market readiness exists but is not yet fully activated.

Priority actions to re-align sectors with 2030 pathway

Achieving Jersey's 2030 emissions target requires urgent, coordinated action across policy, investment, behaviour and data. The actions below represent the minimum necessary to restore a credible decarbonisation trajectory. The Council recognises that delivery capacity and staff resources within Government are constrained; however, this does not materially undermine the feasibility of the recommended actions, as the majority are regulatory or fiscal measures with minimal implementation cost beyond bringing them into force, and several are expected to be net revenue-generating rather than a call on public spending.

Immediate policy shifts (2026–2027)

A set of decisive measures is needed early in the next government term to signal commitment, correct course and unlock investment.

Transport

1. **Fuel duty reforms**

Increase fuel-duty and introduce a modest real-terms escalator to restore the polluter-pays principle and fund decarbonisation programmes.

2. **Parking pricing and allocation reform**

Modernise parking policy by increasing charges in central areas, introducing differential pricing for high-emission vehicles⁴¹ and reducing parking minimums in new developments.

⁴¹ Paris tripled the cost of parking for SUV's leading to a shift the market and behaviours. There are some nuances and exceptions for residents, but it is considered a bold and effective policy which has had the desired effect.

3. **Legislation for mobility hubs and shared mobility**
Create enabling legislation for shared EV fleets, micro-transit, car-clubs and e-bike hire schemes, supported by mobility hubs in key locations.
4. **New street-design and road-space standards**
Introduce statutory design standards mandating pedestrian- and cyclist-priority infrastructure, bus priority where feasible, and integration of low-carbon mobility.
5. **Phase-out of new petrol and diesel cars and vans**
Embed the 2030 phase-out date for new petrol and diesel car and van registrations in legislation to provide market certainty and align with the Roadmap commitment.
6. **Older, high-polluting vehicles**
Introduce MOT type emissions standards, a targeted scrappage scheme, expanded VED for imported older vehicles, and low-emission zones or clean-air areas around schools and St Helier.
7. **Aviation and maritime decarbonisation policy**
Bring forward an aviation and maritime framework setting interim emissions targets and expectations for HVO and SAF uptake, shore-power deployment and hybrid or electric ferry infrastructure, with clear roles for Government and Ports of Jersey in co-funding and enabling these transitions.
8. **Road laws review**
Complete Roads Law updates and associated guidance so the mobility hierarchy, road-space reallocation and active-travel priorities have a clear statutory basis, enabling parishes and central Government to deliver schemes with greater confidence.

Heating

1. **Timetable for fossil-boiler phase-out**
Confirm a staged timeline for restricting new fossil-fuel boiler installations, with clear milestones and limited, transparent exemptions. Policy certainty is more important than the precise end date and would immediately unlock private investment and supply-chain scaling.
2. **Carbon-based pricing on fossil heating fuels**
Apply a rising levy to heating oil, LPG and gas to align heating with polluter-pays principles. Revenues should be recycled to protect vulnerable households and support transition costs, not to offset general expenditure.
3. **Recognise low-carbon fuels as transitional**
Clarify the time-limited role of bio-kerosene and other low-carbon heating fuels, especially where near-term electrification is not viable, delivering early emissions reductions while maintaining momentum toward electrification.
4. **End new fossil heating in Government buildings**
Prohibit new fossil-fuel boiler installations in the public estate, except in narrowly defined emergencies, to demonstrate public-sector leadership.

Investment priorities

Transport

Decarbonising transport requires shifting from fragmented pilots to multi-year, capital-intensive programmes.

1. **Bus service expansion and zero-emission fleet transition**
Fund major improvements in frequency, coverage and operating hours, including new routes to underserved areas, and introduce bus-priority measures where feasible. Develop and co-finance an electrification pathway for the bus fleet, including depot upgrades and charging infrastructure, with procurement starting no later than 2026.
2. **Island-wide active-travel network**
Deliver a continuous, safe walking and cycling network with protected lanes on key corridors, Safe Routes to School and redesigned streets in St Helier.
3. **EV and e-bike charging infrastructure**
Work with JE to establish a multi-year charging programme covering rapid chargers, residential block charging, workplace provision and integration with mobility hubs.
4. **Shared EVs and low-cost electric taxis**
Implement shared EV and car-club schemes, and reform taxi regulations to enable affordable, electric, part-time and on-demand services.
5. **Freight consolidation and low-carbon logistics**
Invest in facilities and digital systems for freight consolidation, low-emission last-mile delivery and better freight-flow monitoring, ensuring freight decarbonisation keeps pace with wider transport changes.

Heating

1. **Reposition LCHI as a targeted accelerator**
Refocus public funding on low-income households, hard-to-treat properties and early market-building and skills development, rather than subsidising upgrades that would occur under clear regulatory and pricing signals.
2. **Prioritise insulation and heat-demand reduction**
Treat investment in insulation and demand reduction as core infrastructure: it lowers system costs, electricity requirements and long-run bills, regardless of the heating technology used. It lowers carbon emissions at very low abatement cost in fossil properties and makes biofuels and electrified heating more viable.
3. **Shift capital toward public and commercial buildings**
Prioritise public and large commercial buildings, which offer scale, visibility and learning benefits, accelerating properties and while supporting supply-chain maturity.

Behavioural and cultural change interventions

Behaviour change must accompany policy and infrastructure, so new options are widely adopted.

Transport

1. **Workplace travel planning**
Require public-sector bodies and large employers to implement travel plans that prioritise active travel, bus use and reduced commuting demand.
2. **School mobility plans**
Scale up School Streets, walking buses and safe-cycling programmes to cut car use on the school run and embed low-carbon habits early.
3. **Community mobility pilots**
Introduce local pilots such as car-free zones, neighbourhood mobility hubs and micro-transit trials to demonstrate practical alternatives.
4. **Incentives for low-carbon choices**
Pilot mobility credits, discounted bus fares, e-bike loans and reward schemes for reduced car travel.
5. **Island-wide communications and engagement**
Run a sustained, coordinated campaign explaining why transport change is essential, how it supports climate targets and what benefits communities can expect.
6. **Participatory design and citizen input**
Use participatory design for major schemes, active-travel corridors, bus-priority measures, parking reforms, drawing on citizens' assemblies, stakeholder panels and surveys to build trust, adapt designs to local context and improve social acceptability.

Heating

1. **Reframe heating around affordability and resilience**
Emphasise that long-run household energy costs are expected to fall under heating decarbonisation, focusing on reduced exposure to volatile fuel prices, improved comfort and health benefits, not only climate impacts.
2. **Separate fuel poverty from carbon-pricing debates**
Address affordability for vulnerable households via targeted social policy rather than using fuel-poverty concerns to justify broad fossil-fuel subsidies.
3. **Normalise electrified heating as the default**
Ensure clear policy signals at the point of boiler replacement so electrified heating becomes the default choice, recognising that replacement decisions are infrequent and path-dependent.

Data and monitoring

Robust, transparent data is essential to track progress and refine interventions.

Transport

1. **Expand transport data collection**
Improve measurement of modal share, VKT, EV usage, bus ridership and freight flows through regular household travel surveys, enhanced traffic counts and sensor networks, and data-sharing with operators and mobility providers.

2. **Transport emissions dashboard**

Publish annual, and where possible quarterly, data on transport emissions, fuel consumption, EV uptake and modal-shift indicators, including aviation and maritime emissions, HVO and SAF usage, shore-power kWh delivered, and key bus-network KPIs such as ridership, load factor, punctuality and emissions per passenger-kilometre.

3. **Mobility data framework**

Develop a framework with JEC, operators, parishes and private providers to share anonymised data on charging demand, parking patterns and road-use behaviour. Linking vehicle records, fuel-import data, charging-point utilisation and port-traffic statistics in one system will strengthen the evidence base for carbon budgeting and investment.

4. **Transport carbon budgets**

Introduce multi-year transport-sector carbon budgets aligned with the 2030 target, broken down by road vehicles, public transport, freight, aviation and maritime. This will enable early identification of under-performance, clear allocation of responsibility and transparent tracking.

Heating

1. **Unified dataset on heating systems and fuel use**

Develop an integrated view of fossil-boiler stock and age, heating-fuel consumption by end use, and low-carbon heating penetration to target policy and monitor progress effectively.

2. **Reform EPCs**

Improve EPCs so they provide decision-useful information for households, financiers and policymakers, rather than focusing primarily on assessment volumes.

3. **Track boiler replacement and fuel switching**

Monitor asset turnover and fuel substitution explicitly, not just aggregate fuel use, to understand the pace and direction of transition.

Risks, assumptions and dependencies

Delivering a credible 2030 transport and heating pathway is subject to multiple risks, assumptions and external dependencies that affect feasibility, cost, public acceptability and pace. Recognising these constraints is essential to assessing Jersey's ability to meet its climate commitments.

Key risks

1. **Political cycles and policy discontinuity**

Jersey's four-year political cycle creates a risk of delay, dilution or reversal of measures such as fuel-duty reform, parking-pricing changes and road-space reallocation, especially near elections. Without cross-party commitment and legislation, structural interventions may not endure long enough to deliver their impact. Uncertainty around fossil-boiler phase-out timelines also increases the risk that new fossil systems are installed during routine replacements, locking in emissions well up to and beyond 2050 given 20–30-year boiler lifetimes.

2. **Funding instability and revenue uncertainty**

The CEF is insufficient and depends on discretionary transfers; fuel-duty freezes

undermine predictable revenue. A lack of long-term, ring-fenced investment raises the risk of piecemeal or stalled programmes.

3. **Public resistance and behavioural inertia**

High car dependence and limited acceptance of demand-management measures mean policies such as higher parking charges, reallocated road space or fuel-duty escalators may face backlash. Without strong leadership and consistent communication, resistance may delay or weaken key interventions.

4. **Energy-strategy dependency**

Transport decarbonisation relies on wider energy-system decisions. Delays in energy planning, offshore-wind decisions or grid upgrades could constrain EV charging and bus-fleet electrification.

5. **Supply-chain and technology risks**

As a small market, Jersey is exposed to limited availability, long lead times, workforce constraints and global price volatility. Technology risks include slower than expected progress in autonomous or shared mobility and uncertainty over long-term availability of transition fuels. Heating transition assumes low-carbon supply chains can scale, but this is highly sensitive to policy certainty.

6. **Delivery-capacity risks**

The pace of required change exceeds current project-delivery capacity. Limited contractor availability, skills shortages and competing capital projects could create bottlenecks that delay infrastructure upgrades.

7. **Data and evidence risks**

If data improvements are not delivered, Jersey will continue to rely on lagged, high-level indicators, increasing the risk of overestimating policy impacts, under-detecting emerging problems and misdirecting scarce funding.

Key assumptions

1. **Cost per person per year**

The Roadmap estimate of £300 million over 30 years for the whole decarbonisation pathway, divided by a population of about 104,000, implies an illustrative cost of around £96 per person per year. This is a planning assumption, not a forecast.

2. **Behaviour-change rate**

The pathway assumes EV uptake accelerates significantly by 2027, bus ridership increases with service improvements, active-travel use rises after infrastructure upgrades and car use declines through pricing reforms. If behaviour change is slower, emissions may fall short of requirements.

3. **Alignment with Energy Strategy timelines**

It is assumed an Energy Strategy is published in 2026 and grid capacity is upgraded in time to support widespread EV charging and a zero-emission bus fleet; delays would reduce the feasibility of meeting 2030 targets.

4. **External stability**

The analysis assumes global EV supply, battery costs and access to electric buses remain stable or improve, noting medium risk due to global competition for supply chains. It similarly assumes stable costs and availability for newer heating systems

such as heat pumps, though risk is lower given other electrification options and the relatively mature global state of heat-pump technology.

5. **Ports and airports decarbonisation plans**

It is assumed that current Ports of Jersey decarbonisation plans, HVO rollout, ground-fleet electrification, efficiency upgrades and introduction of a hybrid ferry, are implemented broadly to schedule; otherwise, aviation and maritime emissions may exceed expectations.

Dependencies

1. **Whole-government coordination**

Transport decarbonisation depends on coordinated decisions across Infrastructure and Environment, including Planning and Treasury, alongside JE; without integrated planning and aligned budgets, progress will remain fragmented.

2. **Energy-system transformation**

EV and depot charging, electrified logistics and wider electrification depend on secure low-carbon electricity, grid upgrades, time-of-use pricing and smart-charging integration.

3. **Planning-system alignment**

Planning decisions on housing density, parking minimums, mixed-use development and urban design are critical enablers of mode shift; without reform, transport policy effectiveness is constrained.

4. **Public buy-in and communication**

Implementation relies on communications that build understanding, trust and consent, particularly for pricing reforms and road-space reallocation.

5. **Private-sector readiness**

Dealers, fleet operators, installers, bus operators and mobility-technology providers must scale in response to clear, credible policy signals.

6. **Skills and training ecosystem**

Delivery requires a pipeline of skilled workers in EV maintenance, electrical installation, civil engineering, transport planning and specialist areas such as SAF and hydrogen safety, requiring coordination with education providers, employers and professional bodies.

Conclusion

Jersey's commitment to reduce emissions by 68% by 2030 is a profound, economy-wide challenge, and current progress shows the island is not yet on a credible trajectory, with transport remaining the critical gap. Meeting the 2030 target will demand decisive system-wide intervention: immediate policy shifts, major investment programmes, integrated behavioural strategies and strong data governance.

Jersey's management of waste by incineration combined with very low levels of recycling underpins a significant contribution to the Island's emissions for what would otherwise be almost completely decarbonised electricity supply. Significant reform of waste management has the potential to unlock further decarbonisation across all sectors in their use of electricity and as broader electrification progresses.

Sustained political leadership, cross-government alignment, multi-year financing and public engagement are essential, with transport and heating as the highest priorities to avoid locking in emissions into the 2030s.

If Jersey adopts this package with urgency and discipline, a credible 2030 pathway remains achievable and will build momentum towards 2035 and net zero by 2050.

Chapter 3: Ambition to 2050: Does the Ambition Still Make Sense? (2030–2050)

Introduction

This chapter examines whether Jersey's long-term decarbonisation ambition to 2050 remains credible when assessed through a system-level lens. It does so by analysing how different decarbonisation pathways affect emissions, energy costs and electricity demand across the whole energy system. Unlike earlier chapters, which assess delivery against current policies and targets to 2030, this chapter focuses on longer-term outcomes. It tests whether commonly cited concerns, particularly affordability for households and constraints on the electricity system, represent genuine barriers to Jersey's climate ambition.

The feasibility analysis draws on quantitative scenario modelling covering heating, road and off-road transport, marine, aviation and waste-to-energy. Its purpose is not to prescribe a single preferred pathway, but to assess whether a range of plausible decarbonisation trajectories are compatible with stable energy costs, manageable infrastructure expansion and Jersey's emissions goals.

Whilst achieving Jersey's 2030 targets would require a radical and immediate change in pace, Jersey has several significant advantages in reaching its 2050 targets, as compared to other European jurisdictions. The geography of Jersey lends itself very well to electrification of vehicles, whilst off-Island road infrastructure in France and UK is developing rapidly to facilitate use of EVs on longer journeys when Islanders drive vehicles off-Island. The island boasts an almost fully decarbonised imported electricity supply, with some smaller development of on-Island solar to supplement. Around half of heating is already electrified through relatively low cost of electricity and high cost of imported fuels, and there is minimal heavy industry requiring complex new technologies to develop to decarbonise.

The reasons behind Jersey's declaration of a Climate Emergency and the development of the Roadmap remain unchanged. Jersey can indeed decarbonise, and whilst its own emissions are a very small proportion of global emissions, as Jersey has a very small population: per capita, Jersey's territorial emissions are of a similar magnitude to France's (Jersey, 3.5 tCO₂e per capita; France, 4.1 tCO₂e per capita). As a small island, Jersey is and will continue to be disproportionately impacted by climate change. It will not be possible for Jersey to call for bold action from other nations, or indeed ask for support through climate reparations, if it is not prepared to make the transition itself.

Most critically, the Roadmap was developed following an unusually high level of democratic engagement, starting with a unanimous declaration of a Climate Emergency by the States Assembly in May 2019, a detailed review by a Citizen's Assembly and consultation by Islanders on the Roadmap itself. It is difficult to conceive of a more democratic process. Perhaps most notably, the pathways developed in the Citizen's Assembly by a representative section of Jersey's population were more ambitious than the Roadmap delivered. As such, a reduction in Jersey's ambitions for net zero would go against the democratic and long-term views made by Jersey's population less than five years previous.

Feasibility analysis of Jersey's 2050 ambitions

Purpose and Scope

This analysis examines the long-term system implications of decarbonisation across Jersey's energy system, drawing on quantitative scenario analysis undertaken for this review. While earlier chapters assess progress against current policy commitments and delivery risks to 2030, this chapter explores how different decarbonisation pathways could affect emissions, energy costs, and system demand over the longer term.

The analysis is deliberately cross-sectoral, covering heating, road and off-road transport, marine, aviation, and waste-to-energy. Its purpose is not to prescribe a single preferred pathway, but to test whether commonly cited concerns, particularly around affordability and electricity system constraints, represent barriers to Jersey's long-term decarbonisation ambitions.

The scope of this analysis focuses on territorial energy emissions: those that result from the generation of electricity and use of fuels. These comprised approximately 85% of Jersey's territorial greenhouse gas emissions in 2023 (the base case used in the analysis). The remainder not included in this analysis, predominantly non-CO₂ greenhouse gas emissions from escape of F-gases, methane and N₂O (nitrous oxide) emissions from agricultural land and other processes, or carbon emissions accounted for under land use change. These non-energy emissions have a limited impact on energy usage, and often relatively disconnected cost implications for Islanders.

It is clear from the Council survey responses that whilst many policies are well known to Islanders, a common concern is the lack of knowledge of the costs for Jersey to achieve net zero. To the Council's knowledge, the only comprehensive assessment of the costs and trade-offs associated with decarbonisation was undertaken by economic consultancy Oxera for the Government in 2019–20⁴². That work explored the relative costs and benefits of different net zero target dates and quantified the implications of key policy options for heating and transport under a 2030 net zero ambition. This analysis highlighted the scale of investment required, including the costs of retrofitting buildings, electrifying transport and deploying low-carbon technologies. It emphasised the trade-offs inherent in accelerated pathways, including the potential need for offsetting residual emissions if targets were not otherwise met. It also stressed the importance of combining revenue-raising and expenditure policies in a way that supports affordability while achieving deep decarbonisation. However, further analysis of the cost of the transition is required, and must be communicated to Islanders, to gain sufficient support for the Roadmap.

Analytical Approach

The analysis begins with a representation of today's energy system in Jersey, including:

- energy use, split by use case,
- current fuel use and associated emissions,
- per-capita fuel costs borne by households and businesses.

'Today' is defined using 2023's energy flows (from Jersey's Energy Trend Reports) and 2023 emissions factors (based on Aether's Emissions Inventory for Jersey, with the last available year as 2023). More recent data suggests energy flows or emissions factors have not changed

⁴² [R-Oxera Quantitative analysis of carbon neutrality by 2030 20200401 HL.pdf](#)

sufficiently since 2023 to significantly impact this analysis. In terms of costs, latest available costs (January) 2026 for fuels were used in the analysis.

Building on this baseline, a set of long-term decarbonisation scenarios was developed, each representing progressively deeper reductions in fossil fuel use across multiple sectors. The scenarios explore combinations of:

- electrification of heating and transport,
- fuel switching to low-carbon liquid fuels,
- reductions in fossil fuel use in marine and aviation,
- elimination of waste-to-energy combustion and replacement with on-island solar & imported electricity.

The efficiency of energy-appliance combinations varies significantly, and thus different decarbonisation options can dramatically reduce total energy demand. As a rule of thumb, ICE vehicles are around 25% efficient on average on turning petrol or diesel into motive power, while a fully electric vehicle is about 80% efficient end-to-end at converting electricity into motive force. Therefore, an electric vehicle uses approximately a third of the energy of an ICE vehicle to travel the same distance. With heating, a resistive electricity system will convert all energy input to heat, while gas and oil systems are around 90% efficient, and so primary energy demand is similar. An electric heat pump, however, is around 300% “efficient” because it takes one unit of electricity to ‘move’ three units of heat ‘uphill’ from ambient temperatures to useful home-heating temperatures. The conversion to electricity-based systems therefore has the potential to reduce energy consumption by around two-thirds, whether on the road or in the home.

For each scenario, the analysis estimates:

- total territorial emissions,
- total fuel expenditure (expressed on a per-capita basis),
- total electricity demand and implications for system scale.

The analysis focuses on energy system outcomes, rather than detailed implementation pathways. Capital costs of conversion and infrastructure are not fully represented at this stage, allowing a clear comparison of fuel and operating costs across scenarios. The implications of capital investment are considered qualitatively and are identified as an important area for further work.

A full detailed set of assumptions used in the analysis is available in [Annex D](#).

Scenario Structure

The scenarios are structured to illustrate increasing ambition, rather than to represent forecast outcomes. Each successive scenario incorporates additional decarbonisation measures across sectors, allowing comparison of marginal impacts on emissions, costs and electricity demand.

Taken together, the scenarios are intended to answer three key questions:

1. How far can emissions be reduced through known technologies?
2. Do fuel costs increase materially as decarbonisation deepens?
3. Does electrification create unmanageable electricity system demands?

These questions are central to policy debates in Jersey and directly inform the assessment of delivery risks and priorities. The five scenarios modelled comprised:

Scenario Name	Scenario Details
Today	2023 fuel flows and emissions (2026 prices)
50/50 Biofuels & electrification	50% diesel use in internal combustions engines (ICEs) switched to renewable diesel. Remainder of ICEs of all fuels electrified. 50% of heating fuels switched to biofuel alternative, remainder electrified with resistive heating. Current HVO left as-is. ERF removed and replaced with import. Marine switched to biofuels
Basic electrification	Same as previous scenario, except ICEs electrified and heating all electrified with resistive heating. Current HVO left untouched
+ Heat pumps, electric marine & SAFs	As per previous but 50% of space heating converted from fossil is heat pump instead of resistive in previous scenario. Marine 100% electrified. Aviation 100% SAF based on HEFA (assumed HVO prices for ease)
+ Electric Aviation	Aviation alternatively 100% electrified in long run (short-haul basis).

Key Results and System-Level Findings

Figure 5. below shows the breakdown of energy consumption, energy emissions and fuel cost today and under Jersey's long-term ambitions for decarbonisation.

Across all scenarios, the analysis finds that deep emissions reductions are achievable using technologies that are already commercially available.

Emissions

All decarbonisation scenarios result in substantial reductions in territorial emissions relative to today's energy system. The largest reductions are achieved through:

- electrification of heating and road transport,
- reduction or elimination of fossil fuel and non-biogenic waste incineration to produce electricity,
- progressive reductions in fossil fuel use across marine and aviation.

Large emissions reductions are also achieved in the 50/50 biofuel/electrification scenario. This is partly because the territorial emissions of the bio-LPG and renewable diesel are assumed as zero in this scenario considering territorial emissions. This should be considered in further policy, as manufacturing emissions of these biofuels are in fact non-zero, and therefore consideration of territorial emissions only does not appropriately account for the true emissions when using these fuels.

These findings indicate that Jersey's emissions trajectory is not constrained by technological feasibility, rather by policy choices governing the pace and composition of transition.

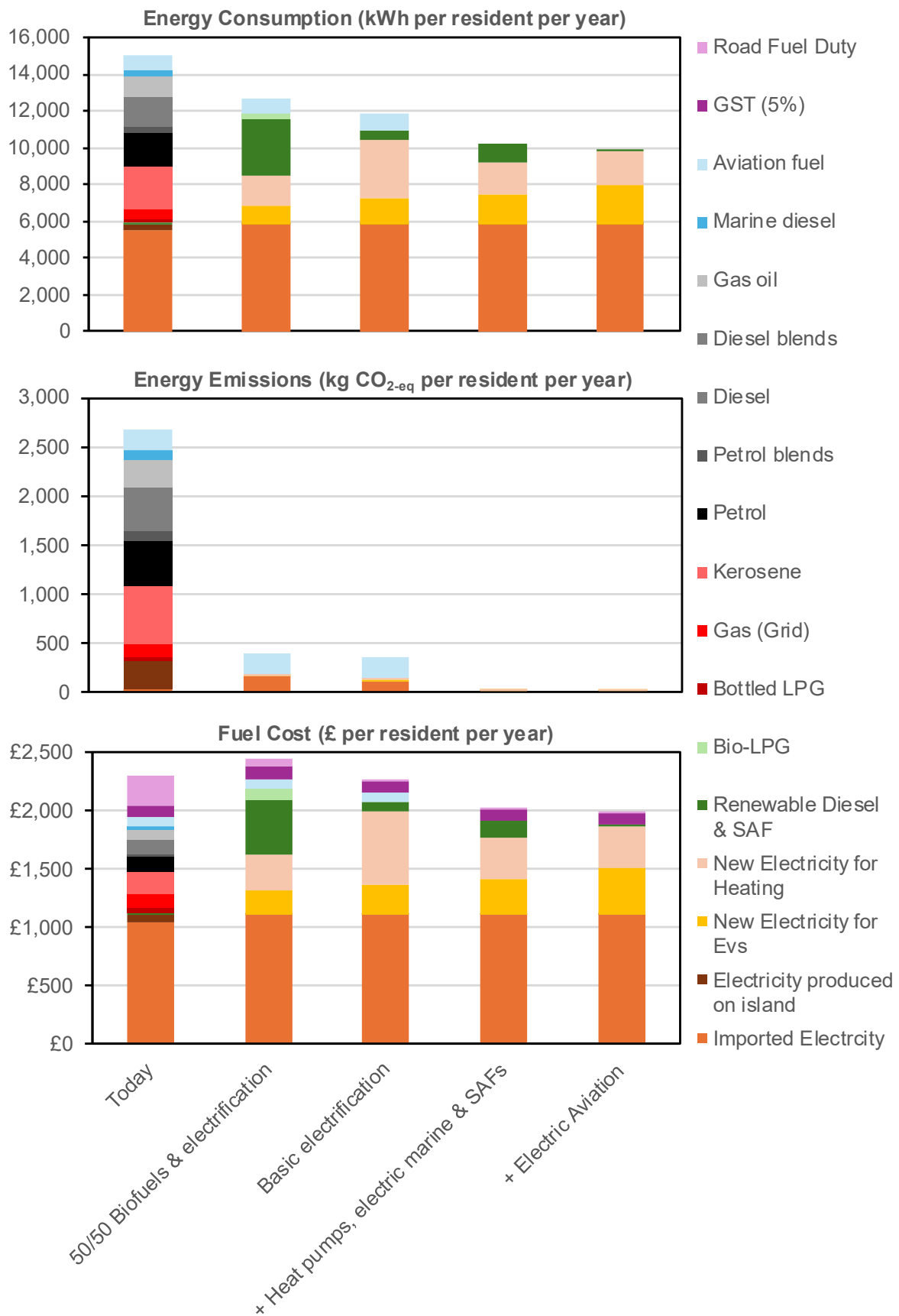


Figure 6. – Energy consumption, emissions & fuel cost for Jersey today and under long-term scenarios

Fuel Costs

Contrary to common perceptions, the analysis shows that total fuel costs per capita remain broadly stable across scenarios, even as emissions fall sharply.

In some scenarios, higher unit costs for low-carbon fuels are offset by:

- higher efficiency of electric technologies
- reduced overall energy demand
- lower exposure to volatile fossil fuel prices.

As would be expected, the 50/50 biofuel/electrification scenario pushes up average fuel costs, by £141 per Jersey resident per year (6%). However, it is worth noting that this increase is despite a reduction to Road Fuel Duty receipts by the Government due to loss of forecourt petrol and diesel sales, which arguably may need to be replaced by some other form of taxation. If tax and duty are ignored, this scenario raises fuel costs by £325 per resident per year (17%). It should be noted that this rise would fall more heavily on homes – e.g. rural, larger properties – that would be switching from fossil heating oil to more expensive biofuel. It should also be noted that this rise would take place over 2-3 decades, equating to around a modest additional 0.6% per year inflation on fuels.

Full electrification, but without heat pumps, approximately halves the fuel cost rise to around £200 per Jersey resident (10%, ignoring the reduction in tax and duty receipts in this scenario). A partial use of heat pumps in heat electrification in the remaining scenarios is predominantly responsible for the 2-4% reduction in pre-tax and duty per-resident overall fuel costs in these remaining scenarios relative to the base scenario due to the approximately 3 times lower energy demand of heat pumps versus fuelled boilers. However, it should be noted that 2-4% is likely well within the margin of uncertainty of this analysis.

This analysis suggests that long-run affordability is not a binding constraint on decarbonisation at island scale. Instead, the distribution and timing of costs (particularly upfront capital investment) are likely to be more important determinants of public acceptability and delivery. The capital costs (dominated by electrification of heat and of purchase of EVs) depend heavily on timing. Second-hand EVs for instance are currently often valued under their ICE counterparts in the UK market, whilst new EVs, driven by mandates in the UK – still attract a >20% premium over internal combustion engine equivalents at purchase price (albeit, with substantially lower maintenance and fuelling costs), but this is expected to fall, and potentially fall under ICE equivalents as the EV market matures. As such, it is plausible over a 25-year horizon that replacing end-of-life or end-of-use vehicles with EVs will not necessarily attract an additional capital investment.

In the case of heating systems, replacement of fossil boilers at end of use with direct heating does not necessarily attract an additional capital cost over business-as-usual, as evidenced by e.g. Andium's exemplary near-100% conversion to electric systems over a decade ago. However, it is likely that to achieve the significant reductions in on-going heating costs boasted by heat pump technologies that a noticeable additional capital investment over business-as-usual will be required for decades to come. The additional capital costs required to achieve the fuel transitions in the scenarios in this analysis (not included in this analysis) are highly dependent on how great the ambition is: faster uptake of electrification in the fleet of Jersey's vehicles and heating systems fundamentally requires disposing of a larger residual value of fossil-powered systems.

Electricity Demand

All scenarios involve significant increases in electricity demand, driven primarily by electrification of heating and transport. However, the scale of demand growth remains within plausible bounds when assessed against Jersey's existing electricity imports and system capabilities.

The analysis indicates that:

- electricity demand increases are substantial but not exceptional by international standards,
- phased transition allows infrastructure planning to keep pace with demand,
- delayed transition risks sharper demand increases later, with higher system costs.

Overall, electricity system requirements do not appear to represent a fundamental barrier to decarbonisation, if transition is managed proactively. Stakeholder engagement suggests that JE has extremely active engagement with this transition, and no major barriers were identified that suggest that the grid would be unable to develop to keep pace with increased demand through further electrification of heat and transport.

The modest increases in electricity demand are to be expected due to the vast efficiency gains of electrification, with heat pumps and electric vehicles typically requiring around a third of the energy as boilers and internal combustion engines need in fuel respectively. Furthermore, a substantial proportion of heating in Jersey is already loaded onto the electricity network. In the highest electricity scenario – no heat pumps, but full electrification of heat and ground vehicles – requires around a 91% increase in imported electricity (also assuming ERF is decommissioned and replaced with imported electricity), falling to 68% increase in a scenario where 50% of space heat electrification is via heat pumps.

Whilst these may sound like dramatic increases, Jersey has three separate connections to France, totalling 290 MW, of which around 165 MW could be considered peak available after losses and considering peak draw from the Guernsey next in the chain. Current average usage of this connection is around 42% and would notionally rise to 75% over 2-3 decades in the highest electricity demand scenario, although it is likely that peak demand – without any action at all – would exceed capacity. However, it is worth noting that the 3 connections of approximate equal size to France were installed in ~15-year spacings, which means – assuming Jersey sets out a clear transition plan for its electrification goals – there is sufficient time to install additional connections if required. Additionally, it should be noted that both electrification of heat and electric vehicles have substantial potential in terms of base load and smoothing demand respectively, meaning that this additional loading does not necessarily have to come with the same degree of intermittency that underlying power usage does.

Transport: Implications beyond 2030

The scenario analysis confirms that transport remains the single largest determinant of Jersey's long-term emissions trajectory. Without sustained action beyond 2030, transport emissions decline too slowly to align with 2035 and 2050 targets.

However, the modelling also shows that deep transport decarbonisation does not imply escalating system costs. As fleet turnover progresses and electric vehicles become cost-competitive, ongoing fuel expenditure stabilises or falls, while electricity demand growth remains manageable when transition occurs steadily.

The principal risk identified is therefore not technical feasibility, but delayed action and policy uncertainty. Deferring transport decarbonisation increases long-term cost, accelerates asset lock-in, and places greater strain on infrastructure by compressing change into a shorter timeframe.

Beyond 2030, ambition on transport continues to make sense for four reasons:

1. Transport emissions fall slowly without decisive action.

Fleet turnover, infrastructure delivery, and behaviour change all operate on long timescales. Without early action, Jersey risks locking in high-emission patterns into the 2030s.

2. Technology and market readiness will increase.

By the mid-2030s EVs are likely to be cheaper than ICE vehicles, electric buses will be standard, and the ports/airport decarbonisation technologies will have matured. Shared mobility and autonomous shuttles could reshape access for non-drivers

Planning is essential in the next few years to ensure Jersey maximises these benefits.

3. Ambition underpins investment confidence.

Long-term commitments attract private investors into charging, mobility hubs, e-taxis, microtransit and fleet services. Without ambition, the market will under-invest.

4. Major infrastructure projects require multi-year funding and continuity.

Core transport decarbonisation assets, such as Island-wide active-travel corridors, and a fully electrified bus depot(s), cannot be designed, procured and delivered within a single political cycle. Sustained ambition beyond 2030 ensures such multi-year programmes are completed and deliver full emissions benefits.

Ambition beyond 2030 must also encompass those parts of the transport system that are only beginning their transition in the 2020s: aviation, maritime and freight. The next two decades will see rapid evolution in technologies such as SAF, hybrid and electric ships, electrification of airport infrastructure and low-carbon logistics. Battery-electric aviation is likely viable at some point over the next three decades for most of the flight distances taken from Jersey, and the development of this nascent industry is something Jersey could look to pioneer as a potential early adopter. A clear long-term ambition gives Jersey a basis on which to shape contracts with operators, invest in harbour and airport infrastructure at the right time, and ensure that skills, regulation and planning frameworks are ready when new technologies become commercially viable.

Finally, sustained ambition will be needed to build and maintain public support. Behavioural change on the scale required – reduced car dependency, greater use of buses and active travel, acceptance of new pricing structures – will not be achieved in a single electoral term. A long-term narrative, backed by visible progress, fair cost-sharing and meaningful engagement, will be critical if Jersey is to maintain social consent for the changes that lie ahead.

Heating: Implications beyond 2030

Heating is the second largest emitter on Island after transport. In addition, fossil asset lifetime in homes and businesses is extremely long and relatively capital intensive to electrify. To hit net zero targets in 2050, a change in pace of heating decarbonisation would be needed. The

ambition however of net zero is still very achievable, particularly if the electrification of heat policies are supplemented with some biofuel policies for heating, which can deliver rapidly.

Like the uptake of EV, decisive action must be taken to ensure decarbonised renewal of long fossil asset lifetimes in heating systems is achieved over the next 25 years.

The system-level analysis undertaken for this report indicates that, despite perceptions to the contrary, heating decarbonisation in Jersey is not constrained by affordability or electricity system limits in the long run. The analysis demonstrates that average household energy costs decline over time as heating systems transition away from fossil fuels, driven by higher efficiency and reduced exposure to volatile fuel prices. High imported fossil fuel prices mean that electrified heating, including direct electric and heat pumps, is already cost-competitive for many households, even without carbon pricing. As a result, long-run household energy costs fall under most decarbonisation scenarios.

Crucially, the modelling shows that delaying heating transition increases exposure to volatile imported fuel prices, while early electrification or fuel switching reduces long-term risk. Electricity demand increases are material but manageable, particularly given Jersey's decarbonised supply and existing levels of electric heating penetration.

The principal challenge in heating is therefore not long-run cost or system feasibility, but rather the short-term policy framework governing the significant capital outlay required in asset replacement and fuel choice. Without clearer direction, the risk is that economically rational long-term outcomes are delayed by short-term uncertainty.

These findings reinforce the importance of aligning heating policy with predictable regulatory and pricing signals, rather than relying predominantly on discretionary subsidy.

Other Emissions: Implications beyond 2030

The emissions pathway to 2050 for waste management is clearly dominated by the need to develop an ambitious strategy centred around the principles of the waste hierarchy and to replace the existing ERF incinerator. Whilst it is a critical facility for the current waste strategy, the electricity produced by the incinerator is not essential to the Island's overall energy balance, and burning of waste is a damaging form of energy production - producing high carbon emissions and air pollution.

The problem of waste generation and disposal on a small island needs to be embraced as a holistic challenge. Failure to do so will lock-in carbon emissions as a component of the electricity emissions factor for the long term. Net-zero waste management is an achievable goal by 2050 with current technologies and should be an explicit target in the Island's vision.

The circular economy and waste strategy is an admirable intention, but Jersey will remain a net-importer of goods. The rate of utilisation of returning sea cargo vessels has not been investigated as part of this review, but opportunities for circularity and waste export to responsible re-processing facilities should be explored and maximised. Every opportunity should be taken to embrace and support the skills and initiatives needed for community repair and re-use, but this should not detract attention from, or dilute funding for, the primary goals.

In terms of the water strategy to 2050, the planning and delivery of infrastructure to meet the Island's needs will be largely driven by population and climate change. An adaptive pathway has been set to 2065 as part of the last WRDMP with strategic decisions likely required in the 2030 – 35 timeframe. Ambitious targets for water efficiency (per capita consumption) could

feature as part of future water resource plans but whilst desirable, these are unlikely to negate the need for further infrastructure. As is the case currently, the emissions of the water sector will be “locked in” to the Island’s emissions factor for electricity. This provides further support for decarbonising that element.

Implications for Primary Energy Supply

Under current policy settings changes to primary energy use will be driven by the effectiveness of specific demand-side sectoral interventions – particularly the pace of adoption of EVs and heat pumps. On current trends, however, changes are likely to continue to be marginal at best.

However, there are some potential developments in energy supply that should be noted. The new contract with EDF will likely see more of the balancing risk taken on by JE. This creates the potential for innovative new customer propositions, potential investment in storage technologies and a broader range of tariff structures enabled by the universal application of domestic smart meters and potentially reducing the consumer cost (with smart charging, for example).

HVO and Bio-LPG provide an alternative decarbonisation pathway – minimising the need for upfront investment in new appliances but at greater ongoing operating cost. The underlying economics will depend on the evolution of global HVO economics – there is a risk that demand growth (for example from SAF) will outstrip the supply of EU-permissible “waste” feedstocks, although most analysts believe that this is likely to happen post 2030, once international SAF mandates start to bite. It creates the possibility of low (or zero) emissions drop in fuels working as an interim solution should uptake of heat pumps and EVs not meet the 2030 rAO targets, achieved through mandates or changes to taxation (possibly offset through support to less affluent consumers). A further option would be the adoption of UK RTFO compliant road fuel standards, with lower carbon biofuels (ethanol and biodiesel) blended into petrol and diesel. This would at least bring Jersey’s road fuel emissions into line with UK/EU standards.

The global development of green hydrogen is slowing – it will be expensive and scarce for the foreseeable future and so will not play a role in the energy mix pre-2030. The development of biomethane on island remains possible, but more needs to be done to assess scalability, comparative economics with electricity generation and, critically, testing on blending with propane in the gas grid.

The option of exploiting Jersey’s potential as an offshore wind resource is intriguing, although unless the competitiveness or security of the existing electricity supply arrangements with EDF deteriorates significantly future development is likely to depend on supply to the UK market, under a UK Power Purchase Agreement. Negotiating a “Jersey carve out” might be possible but would add risk and complexity to contract negotiations.

In assessing all of these supply options the adoption of a carbon budgeting approach alongside a transparent approach to the costing of emissions reduction choices will be critical. The decision to develop a Jersey energy strategy is welcome if it provides a clear, confident, long-term perspective on the development of the Jersey energy system.

Other Implications: Carbon Budgets

Adopting a carbon-budget model with multi-year emissions caps, would anchor future ambition in a clear, evidence-based pathway, ensuring continuity across political terms. Carbon budgets provide discipline, enhance transparency, and allow earlier correction when emissions drift off course. For a long-term sectors like transport and heat, carbon budgets are the key tool that

turns ambition beyond 2030 into delivery, ensuring Jersey stays aligned with its statutory 2035 and 2050 goals.

Conclusion

The results of the feasibility analysis of Jersey's 2050 ambition have several important implications:

- Decarbonisation does not inherently imply higher ongoing energy costs at the system level.
- Electricity demand growth is manageable, particularly if transition occurs steadily rather than being delayed.
- The most significant risks arise not from technology limits, but from policy uncertainty, delayed action and asset lock-in.

These findings reinforce the earlier conclusions that the principal challenges facing Jersey are how to manage the capital cost of transitioning energy systems and the residual value of fossil systems in a socially just manner, rather than technical or long-term economic concerns.

Chapter 4: Counterfactual: Implications for Jersey if it fails to meet targets

Introduction

This chapter looks at the potential outcomes if the recommendations of the Roadmap are not followed through. Whilst it has been pointed out that the macroeconomic environment can quickly change, the Council have attempted to paint an alternative picture, amidst a forewarning of the importance of carrying out the goals. Despite this being a prediction, the risks of predicted events occurring are too large to take no action against.

Transport

Transport sits at the centre of this challenge with significant and far-reaching implications, both for the Island's environmental trajectory and for its social, economic and political landscape.

In 2023, petrol and diesel vehicles alone produced almost **97,000 tonnes CO₂e**, accounting for **27%** of Jersey's total emissions. When combined with aviation and maritime activities, transport represents roughly **43–45%** of the Island's overall footprint. The scale of this contribution means that if transport decarbonisation stalls, Jersey's entire pathway to the 2030, 2035 and 2050 targets is fundamentally compromised.

Ultimately, the implications of missing the statutory targets extend well beyond emissions. They affect **Jersey's reputation, resilience, economic competitiveness, public health and environmental quality. The next five years are critical.**

Without decisive action, transport will remain the Island's largest barrier to achieving climate goals. But with strategic investment, clear policy direction and coordinated delivery, transport can enable Jersey not only to meet its targets but to realise the wider social and economic benefits of a clean, modern and accessible mobility system.

Failure to meet the transport milestones would have wide-ranging consequences.

Environmental and Health Impacts

Environmentally, failing to accelerate the transition away from fossil-fuel vehicles would lock Jersey into persistently high levels of carbon emissions at a time when steep reductions are required. Without a shift to EVs, shared mobility and active travel, emissions from road vehicles will remain largely unchanged. This would also prolong Jersey's exposure to air and noise pollution, particularly in densely populated parts of St Helier, near schools and along the main commuter corridors.

Policy and Economic Risks

There are also significant economic consequences. Progressing too slowly risks increasing the total cost of decarbonisation, as deferred action typically requires later, more urgent and more expensive measures. Jersey may face growing pressure to adopt stricter regulations with limited preparation time, creating financial shocks for households and businesses.

A clear example is the transition to low-emission vehicles: if Jersey delays legislating its phase-out date for petrol and diesel cars while the UK and EU continue to move forward, the Island

risks becoming a 'dumping ground' for old petrol and diesel vehicles. This would saddle residents with higher running costs, expose them to declining resale values, and further delay the turnover of the vehicle fleet.

Transport System Performance

From a transport system perspective, without significant, multi-year investment in infrastructure and modernisation and electrification of the bus network, public transport will struggle to provide a credible alternative to car use. Likewise, without meaningful expansion of safe walking and cycling routes, active travel will remain limited, and congestion, safety concerns and car dominance will persist. Opportunities to introduce shared mobility, low-cost electric taxis and innovative on-demand services would also be harder to realise, as the market depends on clear policy direction and stable demand.

There are also wider system implications. The Government of Jersey has demonstrated strong leadership in decarbonising its own fleet through the rapid adoption of HVO. However, if island-wide emissions continue to stagnate, this leadership example risks becoming symbolic rather than transformative. A successful demonstration within Government must catalyse wider systemic action.

If the new bus operating contract does not translate into a visibly improved, cleaner and more extensive service, because depot electrification, road-space reallocation and stable funding are not delivered, then public confidence in both the bus network and wider climate policy will suffer. Likewise, if DFDS and Ports of Jersey are unable to implement hybrid or low-emission vessels due to lack of enabling infrastructure, residents may question the value of transition announcements that do not materialise on the ground.

Missed Social and Economic Co-Benefits

The social impacts of missing the targets also deserve attention. Jersey's high reliance on private vehicles is already shaping health outcomes, travel inequality and household budgets. Failure to diversify transport options risks perpetuating this imbalance. Households without access to a car remain at a mobility disadvantage, while car dependency for short trips contributes to congestion, reduced road safety, increased air and noise pollution, and higher long-term costs for road maintenance. Conversely, investing in active travel, shared mobility and public transport would improve accessibility, create quieter, safer and healthier streets, support local economic vibrancy, and enhance quality of life.

Missed transport targets would also mean missed opportunities for high-quality 'green' jobs. A sustained programme of work to electrify fleets, expand charging, upgrade ports and modernise the bus network would support skilled employment across engineering, construction, operations and digital services. If these programmes are delayed or scaled back, Jersey risks losing talent and investment to other jurisdictions that move faster on clean transport, weakening the Island's longer-term economic resilience.

Government Leadership Implications

Politically, missing the 2030 milestone would weaken public confidence in Jersey's climate governance and raise questions about the Island's credibility in meeting its 2035 and 2050 commitments. It would also create a policy environment dominated by reactive decisions rather than planned transitions, as later political cycles are forced to implement more disruptive

measures under tighter timeframes. In contrast, a proactive approach, anchored in carbon budgets, stable multi-year investment, and clear sectoral targets, would help Jersey manage the transition in an orderly and socially equitable way.

Visible progress in decarbonising transport, especially in high-profile areas such as buses, ports and the town centre, would signal effective leadership and help sustain public and stakeholder confidence in the Island's long-term climate strategy.

Heating

Heating represents one of the largest and most persistent sources of territorial emissions in Jersey. In the absence of further policy action, emissions from heating would be expected to stall or decline only marginally, reflecting continued reliance on fossil fuel boilers and slow, voluntary uptake of low-carbon alternatives.

Emissions and Credibility

Failure to decarbonise heating would materially undermine Jersey's overall emissions trajectory. Given the sector's scale, stagnation in heating emissions would make it increasingly difficult for Jersey to demonstrate progress toward its statutory targets. As discussed, this would weaken Jersey's ability to credibly advocate for emissions reductions by others, despite the Island's high exposure to climate risks such as sea-level rise and increased storm intensity.

In this counterfactual, Jersey risks being perceived as out of step with international climate action, particularly in the context of its financial services sector, where climate alignment and credibility are becoming increasingly important.

Energy Security and Cost Exposure

A continued reliance on fossil heating fuels would increase Jersey's exposure to volatile and potentially rising fuel prices.

As Europe decarbonises and shifts increasingly toward electricity as the dominant energy vector, demand for heating oil and LPG is expected to become more geographically concentrated and structurally volatile. There are already well-established concerns around Jersey's exposure on, in particular, its imported gas systems.

In the counterfactual where Jersey fails to build a strong supply chain for low-carbon heating, a significant proportion of households and businesses risk becoming trapped in a cycle of rising and unstable heating costs, with limited ability to switch away from fossil systems. Even where some existing boilers transition to biofuels, prices are likely to remain linked to fossil fuel markets, limiting insulation from wider energy price shocks.

By contrast, investment in electrification, insulation and heat pump deployment reduces long-term exposure to imported fuel price volatility and lowers overall heating demand. Failure to pursue this pathway leaves Jersey structurally exposed to external energy market dynamics over which it has little control.

Asset Costs and Market Shrinkage

As fossil heating systems become less common in neighbouring jurisdictions, Jersey would increasingly be operating in a shrinking and higher-cost market for boilers, parts and specialist services. This creates a risk that households and businesses face rising capital and maintenance costs simply to maintain legacy systems.

In the counterfactual, this dynamic compounds affordability risks and further entrenches dependence on outdated infrastructure.

Skills, Workforce and Economic Resilience

A failure to decarbonise heating would also have implications for Jersey's workforce and economic resilience. Without a clear transition, skills development remains concentrated in increasingly archaic fossil-fuel technologies, while demand for insulation, heat pump installation, system optimisation and building retrofit skills remains suppressed. This limits the development of transferable, future-proof skills that are increasingly in demand in the UK, Europe and beyond.

Over time, Jersey risks maintaining a workforce trained in systems that are declining elsewhere, reducing employment mobility for Islanders and making it harder to attract or retain skilled workers. At the same time, as fossil boiler markets contract internationally, the cost and availability of replacement parts, specialist engineers and compliant equipment is likely to deteriorate.

Health and Local Environmental Impacts

Continued use of fossil fuel boilers also has direct local environmental and health consequences. Combustion of heating oil and gas produces nitrogen oxides (NO_x) and particulate matter, which have well-established links to respiratory conditions including asthma.

Unlike CO₂ emissions, these impacts are highly localised, and their cumulative effect is significant, particularly in residential areas. In the counterfactual, ongoing emissions from domestic and commercial boilers would continue to contribute to local air pollution, imposing avoidable health costs and undermining broader public health objectives.

Tourism and Perception

Finally, buildings and heating systems are part of the visible environment experienced by visitors, particularly in hotels, restaurants and residential accommodation. As low-carbon heating becomes the norm elsewhere, continued reliance on oil and LPG risks appearing increasingly unfamiliar, outdated and environmentally inconsistent with Jersey's positioning as a clean, high-quality destination.

In this counterfactual, fossil heating systems contribute to a perception of Jersey as lagging behind wider environmental norms, potentially undermining demand in a sector that is central to the Island's economy.

Summary

Taken together, failure to decarbonise heating would expose Jersey to a combination of emissions lock-in, energy price volatility, health impacts, skills stagnation and reputational risk. While heating decarbonisation is often perceived as difficult, the counterfactual suggests that inaction carries substantial long-term costs, both economic and social, which are likely to far exceed the costs of transition.

Sustainable Finance

Despite recent political rhetoric and an apparent stalling in growth, momentum towards the green and sustainable economy, and growth in it, has not stalled. The total green investments

market is worth over \$5tn a year,⁴³ the green economy is the most dynamic growth sector globally, after technology, showing the further potential in the market. Green revenues are, on average, growing twice as fast as conventional revenues. Entities in these markets typically benefit from cheaper capital and premium valuations on the markets. This shows there is an opportunity cost to green and sustainability finance inaction, with the global market predicted to exceed \$7tn by 2030. Jersey should aim to be placed to take advantage of this growth.

The alternative picture is not as rosy. In the years leading up to 2030 and beyond, there is potential that all finance becomes 'sustainable' finance, in that all forms of acceptable financial services activity is aligned to transition and other sustainable activities. If Jersey does not align its industry and supporting infrastructure, there is a risk it becomes a 'stranded' island or a dumping ground for dirty or brown assets. The Island risks becoming a place to park assets which do not fit the globally accepted regulatory framework and sustainability credentials of stronger and more competitive offshore jurisdictions. Given the huge impact the financial services industry has on the economy and quality of life of the Island, this seems to be an unfounded risk to take.

To realise the potential of sustainable finance, Jersey does not need to break new ground. Many competitor jurisdictions have mature sustainable finance offerings with the necessary legal, regulatory and reporting background to support the industry. Therefore, the delay in implementing this framework is clearly not due to concerns over first mover difficulties, as an established global baseline for reporting is already in place and in operation in many jurisdictions. Jersey can piggyback from this and learn implementation lessons to aid their own framework. The IFRS jurisdictional hub⁴⁴ shows the jurisdictions who have announced, or plan to announce, adherence with the [ISSB standards](#). These standards are widely recognised as the global baseline of sustainability reporting, as it can be seen, many jurisdictions have moved forward with their plans, giving Jersey many lessons to learn from as well as the risk of being left behind accepted international standards.

⁴³ [Already a Multi-Trillion-Dollar Market: CEO Guide to Growth in the Green Economy | World Economic Forum](#)

⁴⁴ [IFRS - Use of IFRS Sustainability Disclosure Standards by jurisdiction](#)

Chapter 5: Conclusions and Recommendations

Over the course of this review, the Council assessed progress against the Roadmap, examined the effectiveness of current delivery mechanisms, and considered realistic pathways to accelerate decarbonisation while protecting affordability and competitiveness. The conclusions below highlight opportunities for Jersey to move faster, to adjust policy balance and to reinforce the enabling governance and system level conditions needed to sustain progress. Recommendations are framed to be practical, proportionate to Jersey's context, and mindful of a just transition.

System-level and Governance

S1. Establish a predictable, enduring policy environment underpinned by carbon budgets with aligned funding.

Conclusion: A clear, costed multiyear carbon budget supports prioritisation and transparency. Large, multi-year investments (e.g., transport and heat infrastructure) determine emissions outcomes for decades. Annualised budgets constrain delivery and mask whole-life costs and benefits.

Recommendations:

- Develop a single carbon budget to provide visibility of a costed emissions reduction pathway. Adopt a multi-year programme funding aligned to multi-year carbon budgets, with clear cost transparency (CAPEX/OPEX and abatement cost ranges).
- Publish an annual Carbon Budget Statement showing spend, emissions delivered, variances, and re-profiling.

S2. Plan holistically across systems.

Conclusion: Energy, transport, buildings, finance, land use and skills are interdependent; decarbonisation can support—rather than trade off against—other strategic objectives (health, affordability, productivity, place-making).

Recommendations:

- Establish a whole-system analytical framework for major policy packages (e.g., road-space reallocation + bus electrification + parking reform), including social and economic co-benefits.
- Use joint Cabinet/Departmental gateways for cross-cutting programmes to prevent siloed decisions.

S3. Make climate advice permanent and commensurate with the task.

Conclusion: The scale and duration of the transition require consistent, independent advice and scrutiny.

Recommendations:

- Create a permanent Climate Advisory Body with a clear remit (advice, monitoring, public reporting), aligned with international best practice.

- Resource the body proportionately to deliver high-quality analysis and support.

S4. Organise climate delivery as a cross-cutting function.

Conclusion: Delivery requires both central strategic capability and embedded sector expertise.

Recommendations:

- Maintain a central climate delivery unit for strategy, data and programme management, while embedding specialist leads in key sectors (transport, buildings/heat, finance, agriculture).
- Formalise cross-departmental delivery boards with shared KPIs.

S5. Mainstream corporate climate reporting.

Conclusion: Climate reporting should extend beyond sustainable finance to the wider corporate base, creating local “champions” and market consistency.

Recommendation: Work with JFSC/industry on proportionate ESG disclosure pathways and capacity-building for local firms.

S6. Measure success by outcomes.

Conclusion: Counting spend or grants awarded can obscure real-world impact.

Recommendations: Define success by tonnes of CO₂e reduced, value-for-money (abatement cost), and distributional outcomes, reported annually.

Cross-Sector Themes

C1. Apply the Polluter Pays principle with protections.

Conclusion: Price signals are necessary to shift behaviour but must be designed with fairness.

Recommendations:

- Reinstate and index fuel duty, introduce MOT style emissions standards, modernise Vehicle Emissions Duty, and pilot targeted low emission/clean-emission/clean air zones (e.g., around schools and St Helier).
- Introduce proportionate aviation measures (with a focus on private aviation) and differentiated duties for fossil heating fuels, alongside targeted relief for low-income households.

C2. Provide clear phaseout dates and end-out dates and end-of-life pathways.

Conclusion: Certainty on the end of fossil systems reduces stranded asset risk and guides investment.

Recommendations: Confirm phaseout dates for sales of new ICE cars and for fossil fuel boilers; set out a managed end-out date for sales of new ICE cars and for fossil fuel boilers. Set out a managed end of life approach for ERF assets; plan for orderly transition where legacy gas/liquid fuel systems remain-life approach for ERF assets; plan for orderly transition where legacy gas/liquid fuel systems remain including the possible application of low carbon fuel mandates.

C3. Make low energy choices the easy choice-energy choices the easy choices.

Recommendations: Prioritise modal shift, active travel, public transport, and demand reduction (fabric first, behaviour change, product standards), ensuring schemes are islandwide and social-wide and social equity aware.

C4. Upgrade datatype, granularity, cadence.

Recommendations:

- Transport: develop timely, emissions focused datasets for benchmarking and monitoring VKT and fleet mix.
- Heating/buildings: adopt modern data approaches beyond EPCs leveraging smart-meter and supplier data to inform targeted action (see H4).

C5. Upskill and retain talent.

Recommendations: Co-design a green skills plan covering finance, construction, engineering and operations, using training grants, bursaries and structured placements, aligned with regional benchmarks.

Sectoral Conclusions and Recommendations

Transport

Emerging recommendations:

- Shift from incentive-led to system-led transport policy.
- Introduce carbon budgets for transport sub-sectors.
- Reinstate polluter-pays mechanisms (fuel duty, parking reform).
- Prioritise buses, active travel, and demand reduction alongside electrification.

T1. Legislation needs completing and aligning with UK legislation on petrol and diesel vehicles.

- Legislate 2030 phase-out of new petrol and diesel vehicles.
- Legislation for older, polluting vehicles through
 - introducing tighter emissions standards for older cars.
 - targeted scrappage scheme for high-polluting vehicles.
 - expanding Vehicle Emissions Duty for older imports.

- introducing low-emission zones or clean-air areas around schools and St Helier.

T2. Infrastructure.

- Support investment ahead of need to deliver a 3 to 4-fold increase in public charging, rapid chargers in key areas, and home or shared charging solutions for flats and town-centre residents, alongside workplace and mobility-hub charging.
- Meaningful road-space reallocation is also essential: protected walking and cycling routes on main corridors, safer school zones, and targeted bus priority in and around St Helier to cut journey times and improve reliability.
- A zero-emission-ready bus depot.
- Clear standards for new developments (EV-ready, active-travel-first, reduced parking).

T3. Public and Active Transport.

- Public transport – electrification of bus, Island wide service, priority for buses. Trial publicly funded e-bike hire schemes and on-demand electric microtransit and explore future technologies (autonomous EV shuttles, and large-scale shared EVs) with the potential to reduce private car ownership, offer first- and last-mile connections, and improve mobility for non-drivers).
- Reallocate road space for buses, walking, cycling and safer streets.
- Set binding transport carbon budgets and vehicle-kilometres-travelled targets.
- Invest in island-wide active-travel networks and School Streets.
- Integrate aviation and maritime emissions into binding decarbonisation pathways.

T4. Transition Fuels.

- Combine the phase out of new electric petrol and diesel vehicles with a clear plan re. HVO as a transition fuel, deploying appropriate duty or mandate mechanisms, especially if electrification targets are unmet.

Heating

Emerging recommendations:

Rebalance policy away from narrow electrification subsidies towards:

- Fuel taxation,
- Transitional fuels,
- Insulation and demand reduction as enabling measures.

H1a. Combine a fossil-fuelled boiler phase out with duty on fossil heat fuels to give certainty as to Jersey's future.

H1b. Biofuels for heating should urgently be included in Jersey's plan: their exclusion is counter-productive even to Jersey Government's preferred electrification transition.

Subsidy alone is unlikely to be scalable and equitable when applied only to electrification. An approach beyond subsidisation must now be taken to decarbonise heating.

Implement a fossil-fuelled boiler phase out. It may ultimately represent the only lever by which some property owners, in particular landlords, are likely to make the necessary investments to electrify heating systems.

Conversion of oil-fired boilers to renewable heating oil (biofuel), and use of bio-LPG should be supported. Add biofuel conversion to the LCHI allowing those undertaking a £500 conversion to a biofuel burner, to look at increasing grants to support upgrades to insulation.

Duty on fossil heating oils and gas would render back-conversion less likely by making biofuel use more economically competitive and making electrification even more economically attractive to property owners.

Assess utilisation of revenues from new fossil heating fuel duties, or other revenues, to create heating fuel benefits for those least able to afford essential living costs.

H2. Insulation needs to be considered regardless of heating type.

Leverage the relatively good returns on investment from insulation improvements, to develop finance mechanisms where upfront costs for insulation improvements are loaned based on receiving a portion of the savings as pay-back (this predicates better data collection on such properties, contributing to recommendation H3).

H3. A more holistic approach should be taken to improving data on heating on the island, rather than focussing on increasing Energy Performance Certificates (EPCs).

Focus first on ensuring a robust and suitable EPC system exists for Jersey, before setting targets and incentives to increase their application.

Exploit the almost 100% roll-out of smart metering in homes, singular suppliers of gas and electricity, and a very small number of suppliers of heating oil, to utilise energy supplier data to accelerate understanding of building energy demand.

Access the heating oil and gas providers regulatory registers and datasets that would be necessary should biofuels be introduced at scale and work in partnership with JE to share insights on smart meter data.

Other Emissions

Waste

O1. ERF End of Life planning & Waste Strategy

- The management of Jersey's waste requires reform and strategic planning to reduce its contribution to the Island's emissions, a coherent long-term waste strategy, explicitly aligned with the waste hierarchy is essential.
- Greater recognition is needed of emissions from the Energy Recovery Facility.
- Data quality and transparency were identified as major weaknesses.
- All of the objectives identified in the Roadmap for waste management remain valid and should be prioritised for delivery in the next term of Government.

- Recycling programmes need to be refreshed, alongside charging mechanisms and the principle of “pay to take it away” may need to be part of that process.

O2. Agriculture – lean into good progress made in regenerative farming and sequestration in farming.

- Priorities include:
 - Better data.
 - Scaling up manure management and farm-scale initiatives.
 - Ensuring continuity and support for existing schemes.
 - Continued trialling of AD schemes.

Sustainable Finance

O3. Climate reporting is not a regulatory burden

Jersey-based entities, the regulator, industry bodies and Government should not look at mandating climate reporting as adding to the regulatory burden, rather an opportunity for entities to market themselves to a wider pool of stakeholders and keep up with globally accepted corporate reporting standards.

O4. Targeted upskilling for the green economy

For Jersey to keep pace, and ultimately prosper, in a world where sustainable finance is the norm, the skill base needs to be in place. To achieve this, Government and industry need to work hand-in-hand to identify where gaps are and put in place initiatives to fill them. Training grants, bursaries and periods of fixed employment are some ideas that could aid this.

O5. Enable market-driven finance options

As all financial services moves towards ‘sustainable’ - the market infrastructure of Jersey must evolve to allow providers of finance to deliver options such as green loans, bonds and mortgages. A focus on locally driven green finance options will drive Jersey towards its net zero ambitions and engage the public.

Closing statement

Throughout this review, industrial stakeholders consistently highlighted the need for policy certainty and a clear, fully costed approach that remains stable and predictable over time. The Council believes Jersey can move faster and more fairly by pairing long-term signals - such as phaseouts, carbon budgets and fuel duties - with practical enablers including infrastructure, data, skills, finance, and a governance model that measures success by emissions reduced per pound spent. The recommendations in this chapter provide a balanced route to deliver near-term progress while preserving flexibility where uncertainty remains.

With stable funding, transparent data and a permanent advisory function, Jersey can convert ambition into durable outcomes and maintain public confidence in the transition.

Appendices

ANNEX A: Roadmap Transport & Heating Policy Framework (2022)

Transport

CNR Transport Policy	Objective	Original Delivery Plan (2022–25)
TR1 – Speed up adoption of EVs	Accelerate uptake of electric vehicles and supporting infrastructure	Grants and incentives for EVs and charging infrastructure; optimise Vehicle Emissions Duty (VED). Launch EV purchase incentive and home charger grant (2023).
TR2 – Vehicle Emissions Duty optimisation	Discourage high-emission vehicles and incentivise cleaner alternatives	Review and reform Vehicle Emissions Duty to better reflect carbon and air-quality impacts.
TR3 – Support transition fuels	Reduce emissions from existing fleets where electrification is not yet feasible	Subsidise renewable diesel (HVO) for Government of Jersey fleet and potentially commercial fleets. Implemented May 2022.
TR4 – Low-emission vehicle standards	Improve emissions performance of vehicles in use	Explore tightening vehicle standards and complementary regulatory measures.
TR5 – End registration of new petrol and diesel vehicles	Accelerate fleet decarbonisation	End registration of new petrol and diesel cars and small vans by 2030 (policy commitment; legislation to follow).
TR6 – Parking and traffic demand management	Reduce car dependency and manage vehicle demand	Introduce pricing measures, review parking standards and manage traffic demand. Consultation expected by 2023.
TR7 – Freight and commercial transport efficiency	Reduce emissions from freight and commercial vehicles	Improve efficiency and explore lower-carbon alternatives for freight and commercial transport.
TR8 – Sustainable Transport Roadmap	Enable modal shift and reduce congestion	Bring forward a roadmap for mode shift, congestion reduction and road-space reallocation. Due Q4 2022.
TR9 – Bus service development	Increase public transport use and reduce private car trips	Fund trials for higher frequency and new routes. £1.5m allocation.
TR10 – Active travel	Increase walking and cycling	Expand walking and cycling infrastructure and pilot “School Streets”. 2022–23 pilots.
TR11 – Aviation and maritime emissions	Address emissions from aviation and maritime activity	Develop policies to manage and reduce emissions from aviation and maritime sectors, aligned with UK and international frameworks.

Heating

Main CNR Heating Policy	Objective	Original Delivery Plan (2022–25)
HT1 – Low-Carbon Heating Incentive (LCHI)	Accelerate the uptake of low-carbon heating systems and improve building energy efficiency, reducing emissions from residential and commercial heating.	Introduce a grant scheme to support the installation of heat pumps and associated insulation measures, covering a proportion of upfront capital costs. Scheme to run from 2022–2025, targeting early adopters and market seeding, with the expectation that costs would fall and uptake would increase over time. Deliverable of 1000 low-carbon heating system switches
HT2 - Phase-out of new fossil fuel heating systems	Prevent lock-in of new fossil fuel heating assets and ensure that replacement cycles align with Jersey's emissions reduction trajectory.	Consult on and implement a phased restriction on the installation of new fossil fuel boilers, initially in new developments and later in existing buildings. Phase-out to be supported by LCHI and other measures, with exemptions where low-carbon alternatives are not yet viable. Replacement fossil fuelled heating systems stopped from 1 January 2026.
HT3 - Energy Performance Certificates (EPCs) and building performance information	Improve information on building energy performance to support consumer decision-making, access to finance, and delivery of heating	Expand the use of EPCs across the housing stock, aligning methodologies with UK standards. EPCs to be required for participation in LCHI and property transactions, and to provide a baseline for future regulatory and policy interventions. 800 energy audit incentives completed by end of 2024.

Other Emissions

CNR Other Emissions Policy	Objective	Original Delivery Plan (2022–25)
OE1 – Promoting low carbon lifestyles	Education awareness programme on scope 3 emissions to help Islanders reduce global impact.	Sector analysis. Implementation and communications plan targeting priority sectors. Identify a suitable tool to measure scope 3. Increase locally sourced goods and services. (£200k Funding)
OE2 – Construction sector emissions	Drive down construction sector emissions and whole life carbon impact of buildings.	Work with the construction sector and architects. Develop policies to favour the adoption of sustainable construction practices. (BAU funding)
OE3 - Agricultural sector emissions	Reduce emissions from agriculture and aquaculture through the development of the Rural Economy Strategy	Complete and implement the Rural Economy Strategy and supporting schemes. (BAU funding)
OE4 - Water and Waste emissions	Reduce emissions from waste and water management	Develop a circular economy strategy, explore carbon capture from the incinerator, plan for net zero waste by 2040 and prepare a net-zero water management strategy. (BAU funding)
OE5 – F-Gas Emissions	Reduce emissions from F-Gases and HFCs. Seek extension of Kigali Amendment to Jersey	Policy, law, and compliance matter. BAU funding)
OE6 Delivering a sustainable finance framework	Develop a sustainable finance framework.	Improve the sustainability of Government investment and debt. Develop options to increase support for overseas climate mitigation and adaption. Support the Island's industry to become a leader in sustainable finance.

ANNEX B: CEF Allocation and Climate Council Rol Scores

CEF Allocations, as set out in the Roadmap, equating to approx. £23 million programme envelope (2022–25), or **£222 per Jersey resident** (assumed 2023 population of 103,650⁴⁵). Values are calculated using actual and estimated data.

***Climate Council have assigned Rol scores on a 1–5 scale:** 1 = low impact, 2 = low-moderate impact, 3 = moderate impact, 4 = high impact, 5 = very high impact.

CEF Programme Area	Allocation (£ total per Jersey resident)	Direct Carbon Reduction Rol (1–5*)	Wider System / Sustainability Rol (1–5*)	Climate Council Scoring Justification & Notes
Speeding up adoption of electric vehicles (EV incentives + enabling) TR1, TR7)	£4,855,000 (£47 per Jersey resident)	3	2	Direct carbon impact moderate due to relatively high abatement cost (~£440 per tCO ₂ e). Limited fleet penetration (~3.5% of vehicles in use by 2024) with an estimated annual emissions saving of ~1,440 tCO ₂ e (EV and e-Bikes). Modest systemic effect in seeding EV market but scheme too short-lived to shift fleet turnover.
Supporting transition fuels (HVO for Government fleet) TR3	£3,189,000 (£31 per Jersey resident)	3	1 - 2	>93% reduction in Government transport emissions; saves ~1,000 tCO ₂ e per year, which is impactful for the public sector slice, but small relative to Island-wide transport. Direct carbon impact moderate due to high abatement cost (£413 per tCO ₂ e) Modest systemic ROI because not scalable island-wide and transitional in nature.
Bus service development trials TR9	£1,500,000 (£14 per Jersey resident)	1–2	3	Minimal measurable emissions impact; trials did not deliver structural change. However good enabling value if informing future network expansion/zero-emission bus strategy.

⁴⁵ [Jersey population and migration statistics 2023.pdf](#)

CEF Programme Area	Allocation (£ total per Jersey resident)	Direct Carbon Reduction Rol (1–5*)	Wider System / Sustainability Rol (1–5*)	Climate Council Scoring Justification & Notes
Active travel programme TR10	£1,700,000 (£16 per Jersey resident)	1	3-4	Direct emissions reduction extremely small at current delivery scale. High long-term ROI if expanded because active travel is critical for VKT reduction.
Low-carbon heating and insulation (domestic + commercial) HT1	£5,706,000 (£55 per Jersey resident) £3,309,979 (£32 per resident) spent so far (as of Sept 2025)	4	2	Direct emissions savings estimated to be annually 2,603 tCO ₂ e (for grants up to end of Sept), a little under 0.5% of 1990 baseline emissions. Wider System ROI lower as mostly house-by-house conversion, although uptake increases use of skills for installation and understanding.
Energy Performance Certificates (EPCs) HT3	£355,000 (£3.40 per Jersey resident)	1	2	No direct emissions savings – gains better understanding of challenges. Most EPC demand is on new builds (no subsidy) and homes undergoing LCHI incentive – actual subsidised insulation and heating system changes are under LCHI.
Low-carbon lifestyles communications	£200,000 (£1.90 per resident)	1	2	
Sustainable finance framework	£60,000 (£0.58 per resident) Delivered for £0	1	3	GoJ state policy delivered at no cost, although presumably some Civil Servant time required (but not at cost to CEF).
Decarbonising Government operations	£1,260,000 (£12 per Jersey resident)	1	2	System benefits modest because mostly internal to Government although learnings will help wider

CEF Programme Area	Allocation (£ total per Jersey resident)	Direct Carbon Reduction Rol (1–5*)	Wider System / Sustainability Rol (1–5*)	Climate Council Scoring Justification & Notes
				policy making. Some EV switching (e.g. police cars) but unclear what proportion of CEF funds. Unclear on overlap with TR3.
Carbon Neutral Network	£500,000 (£4.80 per Jersey resident)	1	2	Low direct impact: modest system benefit depending on engagement outcomes (not clearly evidenced).
COP26 education pledge	£200,000 (£1.90 per Jersey resident)	1	1 - 2	Educational and awareness benefits; no measurable emissions reduction.
Blue carbon biodiversity & sequestration	£1,325,000 (£13 per Jersey resident)	1	4	No measurable emissions reductions; high long-term ecosystem value and sequestration potential beyond 2030.
Policy development (CNR, strategies)	£1,200,000 (£12 per Jersey resident)	1	4	Essential enabling work underpinning regulations, targets, and future infrastructure plans; indirect but high strategic value if followed by implementation.
Regulatory, enabling and programme support	£950,000 (£9.20 per Jersey resident)	1	4	Strengthens delivery capacity; critical enabler though not emissions-reducing in itself.

ANNEX C: Primary Energy Supply Data (2023)

Table C1 – Fuel & Electricity Consumption and Emissions in 2023 (Jersey Energy Trends Report 2023 and Aether reporting)

Fuel	Volume (2023)		Emissions Factor	Emissions (2023)	
	Total (GWh)	kWh /resident	gCO ₂ e/kWh (tCO ₂ e/GWh)	Total (tCO ₂ e)	kgCO ₂ e /resident
Gas oil	110	1,058	273	29,904	289
Diesel	131	1,265	268	35,127	339
Diesel blends	43	415	254	10,919	105
Marine diesel	36	343	278	9,897	95
Petrol	190	1,833	256	48,564	469
Petrol blends	37	358	234	8,675	84
Bottled LPG	13	128	231	3,063	30
Renewable diesel (HVO)	11	107	0	0	0
Aviation spirit	2	17	258	450	4
Aviation turbine fuel	85	820	260	22,128	213
Kerosene	240	2,313	260	62,205	600
Gas (Grid)	58	557	231	13,302	128
Bio-LPG [1]	0	2	0	0	0
Imported electricity	568	5,476	5	2,929	28
Electricity produced on island	39	379	782	30,730	296
Total	1,562	15,069	178	277,891	2,681

[1] Bio-LPG estimate for comparative purposes based on Climate Council discussions.

For full assumptions and breakdown, see [Table D3](#), [Annex D](#).

ANNEX D – Assumptions in long-term (2050+) scenario modelling

Table D1 – Fuel & Electricity Consumption by Sector in 2023, MWh/year (Jersey Energy Trends Report 2023 and 2024)

Fuel Consumption (MWh) [1]	Commercial	Residential	Road	Marine	Air	Agriculture	All sectors
Gas oil	91,610	2,663	233	0	0	15,142	109,648
Diesel (100%)	9,758	12	121,371	0	0	0	131,128
Diesel blends	0	0	42,973	0	0	0	42,973
Marine diesel	0	0	0	35,553	0	0	35,553
Petrol (100%)	1,105	0	183,219	5,664	0	0	189,988
Petrol blends	0	0	35,762	1,314	0	0	37,088
Bottled LPG	977	12,305	0	0	0	0	13,293
HVO	1,733	954	8,397	0	0	0	11,083
Aviation spirit	0	0	0	0	1,745	0	1,745
Aviation turbine fuel	0	0	0	0	84,969	0	84,969
Kerosene	21,108	218,597	0	0	0	0	239,706
Gas Grid	31,610	26,074	0	0	0	0	57,685
Electricity [2]	257,732	349,109	0	0	0	0	606,842
Total	415,633	609,714	391,954	42,531	86,713	15,142	897,161

[1] As per standard DESNZ reporting practice, Energy Trends data assumed all fuels quoted on a net CV basis.

[2] Assumed to be 93.5% imported and 6.5% on-island production, based on Jersey Energy Trends report split of total production in Energy Balance.

For per Jersey resident metrics, a population for 2023 assumed as 103,650 ([Jersey Statistics](#)).

Table D2 – Jersey Climate Council assumptions for use of fuels within sector

Fuel & Sector	Space Heating & Hot Water	Cooking & Light Industrial Heating	Internal Combustion Engines	Notes
Commercial				
Gas oil	40%	20%	40%	Split over work vehicles and some space heating, some light industrial heating
Diesel	0%	0%	100%	Assumed to be generators & off-road vehicles
Petrol	0%	0%	100%	Assumed to be generators & off-road vehicles
Bottled LPG	70%	30%	0%	Mainly space heating in off-grid buildings, but some significant cooking & light industrial use
HVO	50%	0%	50%	Unclear, but some commercial users for heat, some off-road use
Kerosene	100%	0%	0%	Commercial kerosene used for heating
Gas Grid	80%	20%	0%	Commercials have higher use for light industrial
Electricity	50%	50%	0%	Doesn't matter for calculations
Residential				
Gas oil	95%	5%	0%	Cooking minor (5%), mostly hot water & space
Diesel	95%	5%	0%	Cooking minor (5%), mostly hot water & space
Bottled LPG	50%	50%	0%	Bottled LPG used a lot more for cooking
HVO	95%	5%	0%	Cooking minor (5%), mostly hot water & space
Kerosene	95%	5%	0%	Cooking minor (5%), mostly hot water & space
Gas Grid	95%	5%	0%	Cooking minor (5%), mostly hot water & space
Electricity	50%	50%	0%	Does not matter for calculations
Agriculture				
Gas oil	20%	20%	60%	Best guess - significant machinery use, but some heating of greenhouses, spaces and equipment

Table D3 – Fuel GHG Emissions Factors

Fuel	Emissions Factor (gCO ₂ e/kWh net)	Source
LPG	231	Aether's Jersey GHG Emission Factors (01/05/2024) used for Jersey 2023 Emissions Inventory emissions factors. Where multiple applications for Jersey Inventory Factors by use for a given fuel, average across applications used (minor variation). Where Jersey Inventory Factor unavailable, UK factor used as per Aether dataset.
Aviation spirit	258	
Aviation turbine fuel	260	
Burning oil (Kerosene)	260	
Diesel (average biofuel blend)	254	
Diesel (100% mineral diesel)	268	
Fuel oil (used for marine diesel)	278	
Gas oil	273	
Petrol (average biofuel blend)	234	
Petrol (100% mineral petrol)	256	
Renewable Diesel SAF	0 [1]	Territorial emissions (upstream excluded)
Bio-LPG	0 [1]	Territorial emissions (upstream excluded)
Electricity (Imported)	5.2	Aether's Jersey GHG Emission Factors
Electricity (on-island production) N.B. This is dominated by ERF electricity production but also contains some small amount of on-island solar and back-up generation from fossil fuels.	782	Back-calculated from Aether's Jersey GHG Emission Factors 2023 grid factor (55.5g/kWh), removing 2023 Imported Electricity (5.2g/kWh) at 93.5% of 2023 electricity supply (based on Energy Balance in Jersey Energy Trends 2023), leaving 6.5% of electricity supply as on-island production (93.5% x 5.2g/kWh + 6.5% x 782g/kWh = 55.5 g/kWh)

[1] This is an issue that should be considered in further policy, as manufacturing emissions of these biofuels is non-zero, and therefore consideration of territorial emissions only does not appropriately account for the true emissions when using these fuels.

Table D4 – Scenario Assumptions on Use-Case Efficiencies

Use Case	Efficiency	Justification
Combustion Heating (gas & oil boilers, cooking)	90%	Rubis heating comparison 2024 (note, 85% is HHV basis, i.e. approx. 90% on LHV).
Electrical Heating (resistive / flow boiler)	100%	Rubis heating comparison 2024; assumption used by Jersey & JE for LCHI scheme assessment.
Heat Pump	300%	Assumption used by Jersey & JE for LCHI scheme assessment; reasonable SCOP based on Jersey climate.
Internal Combustion Engine (road/off-road)	25%	This is likely a high average for Jersey, given the average age of cars. Distances & speeds in Jersey mean relatively poor efficiency.
Electric Vehicle	80%	Charging efficiency & losses in battery to motor. Note grid distribution losses already accounted for.
Marine Combustion Engine	40%	Small boats will have lower efficiencies, but consumption dominated by large ferry operating at optimal efficiency for long periods.
Aviation Fuels Combustion (thermal)	50%	Again, fuel consumption dominated by single-aisle aircraft (A320(neo), B337(max)). Assuming propulsive efficiency of electric aircraft comparable (likely slightly higher) - only interested here in thermal efficiency to compare.

Table D5 – Cost assumptions used in scenario modelling for fuels and electricity

Fuel	Price, pre tax (p/kWh) [1]	GST (p/kWh) [2]	Road fuel duty [3] + duty GST (p/kWh)	Raw Price Source	Notes
Gas oil	8.1	0.4	0.0	ATF “Domestic heating oil” price (ATF Jersey)	Using domestic heating oil as proxy for gas oil in absence of data. 84.5p/L (inc. GST) on 8th Jan 2026 (ATF).
Diesel (100% mineral)	7.5	0.4	6.9	ATF forecourt diesel (ATF Jersey)	Using diesel blend (B7) price from ATF as proxy (price competitive). 146.9p/L (inc. 65.55p/L duty and GST) on 8th Jan 2026 (ATF).
Diesel blends	7.5	0.4	6.9	ATF forecourt diesel (ATF Jersey)	As per DESNZ (DUKES) assumption, B7 assumed to be same energy density as 100% diesel. 146.9p/L (inc. 65.55p/L duty and GST) on 8th Jan 2026 (ATF).
Marine diesel	8.5	0.4	0.0	ATF marine page	88.9p/L inc. GST as of 1st Jan 2026. Possible ferry has own cheaper supply (unknown).
Petrol (100% mineral)	7.1	0.4	7.5	ATF forecourt unleaded (ATF Jersey)	Using unleaded petrol blend (E5) price from ATF as proxy (price competitive). 137.9p/L (inc. 65.55p/L duty and GST) on 8th Jan 2026 (ATF).
Petrol blends	7.1	0.4	7.5	ATF forecourt unleaded (ATF Jersey)	As per DESNZ (DUKES) assumption, E5 assumed to be same energy density as 100% petrol ('motor spirit'). Unleaded price 137.9p/L (inc. 65.55p/L duty and GST) on 8th Jan 2026 (ATF). Unleaded petrol for marine is similar (89.90p/L inc. GST), which is slightly more expensive than forecourt petrol when duty removed, although marine petrol use is very low by comparison.

Fuel	Price, pre tax (p/kWh) [1]	GST (p/kWh) [2]	Road fuel duty [3] + duty GST (p/kWh)	Raw Price Source	Notes
Bottled LPG	26.7	1.3	0.0	Island Energy tariff 2025	Island Energy tariffs from January 2025 show metered cylinder LPG priced at 20.55–22.20p/kWh (inc. GST) for typical heating usage, with bulk LPG higher at 28.14p/kWh. "Gen Gas" bottles at 30.85p/kWh. Standing charge ignored.
HVO	15.6	0.8	5.8	ATF "GreenD" price (ATF Jersey)	Source is for 'GreenD' (renewable diesel) at forecourt (ATF, 219.9p/L inc. 54.89p/L duty and GST, 8th Jan 2026). Energy content assumed same as mineral diesel.
Aviation spirit	13.0	0.0	0.0	ATF aviation prices	Avgas. 116p/L (8th Jan 2026). No GST or duty on aviation fuels.
Aviation turbine fuel	9.6	0.0	0.0	ATF aviation prices	Avgas. 93p/L (8th Jan 2026). No GST or duty on aviation fuels.
Kerosene	8.2	0.4	0.0	ATF domestic heating oil (ATF Jersey)	84.5/L (ATF, 8th Jan 2026, inc. GST).
Gas grid	21.0	1.0	0.0	Island Energy tariff 2025	Island Energy tariffs from January 2025 show mains gas and metered LPG priced at around 21–22 pence per kWh (including GST) for typical heating usage, with bulk LPG higher at approximately 26–28 pence per kWh. Standing charge ignored.
Bio-LPG	29.4	1.5	0.0	Island Energy tariff 2025	Island Energy tariffs from January 2025 show mains green LPG priced at 30.85 pence per kWh (including GST). Standing charge ignored.

Fuel	Price, pre tax (p/kWh) [1]	GST (p/kWh) [2]	Road fuel duty [3] + duty GST (p/kWh)	Raw Price Source	Notes
Electricity	19.1	1.0	0.0	Jersey Electric Annual Report FY2025	JE 2025 report claims average price per unit sold is 19.1p/kWh (excl. GST confirmed by back calculation from balance sheet yields of units sold vs electricity business revenue). This is ex GST, inc. GST would be 20.1p/kWh. This compares to headline tariff of ~22p (with discounts at different times of day).

[1] To calculate p/kWh from liquid fuels and fuel duty quoted in £/litre, energy densities (GJ/tonne) and densities (L/tonne) from [Aether's Jersey GHG Emission Factors](#) (derived from UK DESNZ DUKES 2023) were applied.

[2] GST assumed at 5% of price. Not applied to Aviation fuels. For simplicity of use, GST in this column does not include GST applied on road fuel duty (this is included in the road fuel duty figure, which is only applied to fuels when used on the road).

[3] Column includes road fuel duty ([2026 rates](#)) and the GST applied on top of road fuel duty. Road fuel duty only added to road use of fuels in scenarios. Confirmation check of road fuel duty calculated in the 2023 scenario by fuel type checked against [annual excise volumes gathered in 2023](#) found less than 1% difference between scenario modelling and actual collections.

Table D6 – Long term (2050+) Scenario Results: Fuel demand (kWh per Jersey resident per year), broken-down by fuel type

Fuel	Today	50/50 Biofuels & electrification	Basic electrification	+ Heat pumps, electric marine & SAFs	+ Electric Aviation
Imported Electricity	5,476	5,835	5,835	5,835	5,835
Electricity produced on island	379	20	20	20	20
New Electricity for EVs	0	1,023	1,355	1,560	2,083
New Electricity for Heating	0	1,625	3,251	1,827	1,827
Renewable Diesel & SAF	107	3,042	517	944	107
Bio-LPG	0	342	0	0	0
Bottled LPG	128	0	0	0	0
Gas (Grid)	557	0	0	0	0
Kerosene	2,313	0	0	0	0
Petrol	1,833	0	0	0	0
Petrol blends	358	0	0	0	0
Diesel	1,265	0	0	0	0
Diesel blends	415	0	0	0	0
Gas oil	1,058	0	0	0	0
Marine diesel	343	0	0	0	0
Aviation fuel	837	837	837	0	0
Total	15,067	12,725	11,814	10,186	9,872

Table D7 – Long term (2050+) Scenario Results: Energy emissions (kgCO₂e per Jersey resident per year), broken-down by fuel type

Fuel	Today	50/50 Biofuels & electrification	Basic electrification	+ Heat pumps, electric marine & SAFs	+ Electric Aviation
Imported Electricity	28	165	111	6	0
Electricity produced on island	296	0	0	0	0
New Electricity for EVs	0	5	7	8	11
New Electricity for Heating	0	8	17	9	9
Renewable Diesel & SAF	0	0	0	0	0
Bio-LPG	0	0	0	0	0
Bottled LPG	30	0	0	0	0
Gas (Grid)	128	0	0	0	0
Kerosene	600	0	0	0	0
Petrol	469	0	0	0	0
Petrol blends	84	0	0	0	0
Diesel	339	0	0	0	0
Diesel blends	105	0	0	0	0
Gas oil	289	0	0	0	0
Marine diesel	95	0	0	0	0
Aviation fuel	218	218	218	0	0
Total	2,681	396	353	23	20

Table D8 – Long term (2050+) Scenario Results: Fuel costs (£ per Jersey resident per year), broken-down by fuel type

Fuel	Today	50/50 Biofuels & electrification	Basic electrification	+ Heat pumps, electric marine & SAFs	+ Electric Aviation
Imported Electricity	£1,046	£1,114	£1,114	£1,114	£1,114
Electricity produced on island	£72	£4	£4	£4	£4
New Electricity for EVs	£0	£195	£259	£298	£398
New Electricity for Heating	£0	£310	£621	£349	£349
Renewable Diesel & SAF	£17	£474	£81	£147	£17
Bio-LPG	£0	£101	£0	£0	£0
Bottled LPG	£34	£0	£0	£0	£0
Gas (Grid)	£117	£0	£0	£0	£0
Kerosene	£191	£0	£0	£0	£0
Petrol	£131	£0	£0	£0	£0
Petrol blends	£26	£0	£0	£0	£0
Diesel	£95	£0	£0	£0	£0
Diesel blends	£31	£0	£0	£0	£0
Gas oil	£86	£0	£0	£0	£0
Marine diesel	£29	£0	£0	£0	£0
Aviation fuel	£81	£81	£81	£0	£0
GST (5%)	£94	£111	£104	£96	£94
Road Fuel Duty	£260	£58	£6	£6	£6
Total	£2,308	£2,448	£2,269	£2,014	£1,982

Glossary

Term	Definition
Associate Chartered Accountant (ACA)	Globally recognised professional accountancy qualification offered by the Institute of Chartered Accountants in England and Wales (ICAEW).
Anaerobic Digestion (AD)	A natural, engineered process where microorganisms break down organic matter, such as food waste, manure, or sewage sludge, in the absence of oxygen within a sealed reactor. This process produces biogas (methane and carbon dioxide), used for renewable electricity or fuel, and nutrient-rich digestate, used as fertilizer.
Aether	Air Quality and Climate Change Emissions Consultants.
Agricultural Loans Fund	The Government of Jersey's fund that aims to support farmers and agricultural businesses.
Arm's Length Organisations (ALOs)	Public bodies that operate independently from government ministers, though government may set strategic direction or funding conditions.
Assets under management (AuM)	The total market value of financial assets managed on behalf of clients by an investment institution.
Avtur (aviation turbine fuel)	A refined kerosene-based fuel used to power turbine-engine aircraft.
Bio-kerosene	A renewable aviation fuel produced from biological feedstocks (e.g., waste oils or biomass) and used as a substitute for fossil kerosene.
Bio-LPG	Liquefied petroleum gas derived from renewable biological sources rather than fossil fuels.
Capital Expenditure (CAPEX)	Long-term investments in fixed assets.
Carbon Neutral Roadmap (the 'Roadmap')	Jersey's Carbon Neutral Roadmap that outlines the proposed policies to start the journey to net zero.
Citizens' Assembly	45 Jersey citizens selected by civic lottery who convened to explore key issues related to climate change and discuss and make recommendations on "the nature and pace of Jersey's transition to carbon neutrality". The

	Assembly met via 15 virtual meetings between March and May 2021 and presented a final report in June 2021.
Climate Council ('the Council')	Jersey's first independent Climate Council established following a successful amendment to the draft Carbon Neutral Roadmap in 2022, which called for the creation of an independent body to review progress and advise on future climate change mitigation action.
Climate Emergency Fund (CEF)	A fund established in the Government Plan 2020 to 2023 to provides an initial route of income and source of expenditure for projects tackling the climate emergency
Combined Heat and Power (CHP)	A system that simultaneously generates electricity and useful heat from the same energy source.
Corporate Governance Institute (CGI)	A professional body providing governance standards, education, and certification in corporate governance.
Department for Transport's Maritime Decarbonisation Strategy	The UK Government's strategy outlining measures to reduce greenhouse-gas emissions from domestic maritime transport.
DFDS	The Danish international ferry and logistics company operating passenger and freight services to and from Jersey.
E-bike Grant Scheme	Jersey's E-bike Grant Scheme that offered a grant toward the cost of buying a new electric bike (e-bike) through a registered supplier.
EDF	Électricité de France, the state-owned multinational energy utility that supplies electricity to Jersey under contract.
Electric Vehicle Charger Incentive (EVCI)	Jersey's financial incentive scheme supporting the installation of electric-vehicle charging infrastructure.
Energy Performance Certificates (EPCs)	Official documents rating a property's energy efficiency and environmental impact.
Energy Recovery Facility (ERF) Incineration	A plant that incinerates waste to recover energy, usually in the form of electricity and/or heat.
ESG	Environmental, Social, and Governance — a framework for assessing non-financial corporate performance and risks.

EVs	Electric Vehicles — vehicles powered wholly or partially by electric motors using electricity from batteries or fuel cells.
Financial services (FS)	The sector comprising institutions that manage money, including banks, insurers, investment firms, and related service providers.
Fluorinated Gas (F-Gas)	Synthetic greenhouse gases containing fluorine, such as HFCs, used in refrigeration and industrial processes.
Global Ethical Finance Initiative (GEFI)	An organisation promoting ethical, responsible, and sustainable finance globally.
Global Warming Potential (GWP)	A metric expressing how much heat a greenhouse gas traps in the atmosphere relative to CO ₂ over a specific timescale.
greenhouse gas (GHG)	Gases that trap heat in the atmosphere, including CO ₂ , CH ₄ , N ₂ O, and fluorinated gases.
GST	Goods and Services Tax, the broad-based consumption tax applied to goods and service.
GWh (Gigawatt-hour)	A unit of energy equal to one billion watt-hours, used for large-scale electricity measurement.
Hydrofluorocarbon (HFCs)	A class of synthetic greenhouse gases commonly used in cooling systems and with high global warming potential.
ICE	Internal Combustion Engine — an engine generating power through the combustion of fuel with air.
IFRS	International Financial Reporting Standards, global accounting principles governing financial statements.
Institute of Chartered Accountants (ICAEW)	A professional membership organisation for chartered accountants in England and Wales.
Intergovernmental Panel on Climate Change (IPCC)	The UN body responsible for assessing climate science and producing authoritative reports.
Internal Combustion Engine (ICE)	An engine where combustion of fuel occurs internally to generate mechanical work.
International Financial Centre (IFC)	A jurisdiction offering financial services at an international scale, often with specialised regulatory frameworks.

Island Energy	Islands Energy Group – supplier of energy to homes and business in Guernsey, Jersey and the Isle of Man.
ISSB standards	Sustainability disclosure standards issued by the International Sustainability Standards Board.
Jersey Electricity (JE)	The vertically integrated power utility dealing in the importation, generation, transmission and distribution of electricity in Jersey.
Jersey Financial Services Commission (JFSC)	The regulatory body for Jersey's financial sector.
Just Transition	A policy principle ensuring that the shift to a low-carbon economy is fair, inclusive, and socially equitable.
Kigali Amendment	The 2016 amendment to the Montreal Protocol mandating the global phase-down of HFCs.
kilowatt-hour (kWh)	A unit of energy equal to using 1 kilowatt for 1 hour.
Key Performance Indicators (KPIs)	Quantifiable measures used to evaluate organisational performance.
LibertyBus	The public bus operator in Jersey.
Low Carbon Heating Incentive (LCHI)	The Government of Jersey's subsidy scheme supporting installation of low-carbon heating technologies.
Liquefied Petroleum Gas (LPG)	A mixture of propane and butane used as a fuel.
Multiple Dwelling Unit (MDU)	A residential building containing several separate housing units.
Montreal Protocol	The 1987 international treaty designed to phase out ozone-depleting substances.
MOT	A vehicle roadworthiness test (from the UK "Ministry of Transport").
MW (Megawatt)	A unit of power equal to one million watts.
N ₂ O (Nitrous Oxide)	A potent greenhouse gas with significant global warming potential.
Net zero	A state where total greenhouse gas emissions are balanced by removals.

Nitrogen oxides (NO _x)	A group of reactive gases produced during combustion, contributing to air pollution and climate change.
The Organisation for Economic Co-operation and Development (OECD)	An intergovernmental organization with 38 member countries, founded in 1961 to promote policies that improve economic and social well-being worldwide
Operational Expenditure (OPEX)	Ongoing costs required to operate assets or services.
Oxera	An economics consultancy providing analysis in regulation, finance, and competition.
Per- and Polyfluoroalkyl Substances (PFAS)	A large group of synthetic chemicals characterised by strong carbon-fluorine bonds, persistent in the environment
Renewable Transport Fuel Obligation (RTFO)	A UK scheme requiring suppliers to blend a minimum share of renewable fuels into transport fuel.
Retail Price Index (RPI)	A UK measure of inflation tracking changes in the cost of goods and services.
Return on Investment (RoI)	A profitability indicator calculating the gain from an investment relative to its cost.
Rural Support Scheme (RSS)	The Government of Jersey's funding for the rural economy to support the economic, environmental and social sustainability of the sector.
Scope 1, 2 and 3 emissions	The ways of categorising the different types of greenhouse gas emissions created by an organisation. Scope 1: emissions from sources that an organisation owns/controls directly. Scope 2: emissions that an organisation causes indirectly. Scope 3: emissions that are not produced by the organisation itself and are not the result of activities from assets owned or controlled by them, but by those that it's indirectly responsible for up and down its value chain.
Sustainable Aviation Fuel (SAF)	Low-carbon aviation fuel produced from sustainable feedstocks.
Sustainable Transport Policy (STP)	A policy framework promoting transport systems that minimise environmental impact and improve accessibility.

tCO ₂ e / tonnes CO ₂ e	Metric tonnes of carbon dioxide equivalent — a standardised measure of greenhouse-gas emissions.
Total Net Asset Value (NAV)	The value of an entity's assets minus its liabilities.
UK Jet Zero Strategy	The UK Government's plan to reduce aviation emissions to net zero by 2050.
Vehicle Emissions Duty (VED)	A tax levied on vehicles based on their emissions or engine size.
Vehicle-kilometres travelled (VKT)	A transport metric measuring the total distance travelled by vehicles in a defined area.
Water Resource and Drought Management Plan (WRDMP)	A strategic plan outlining how a water utility ensures water supply resilience and manages drought risk.

Thank you to contributors

The Climate Council extend their sincere appreciation to all those who have contributed their time, expertise, and insight throughout the development of this report. The Council's work has been strengthened immeasurably by the willingness of individuals and organisations to engage openly, provide constructive challenge, and share knowledge to support a comprehensive and well-informed assessment within the time available.

The Council formally thanks the following contributors for their support:

- **Aether**
- **Albert Bartlett**
- **Andium**
- **ATF**
- **Chapter One Training**
- **Comité de Connétables**
- **Community members who completed the online survey**
- **Energy & Sustainability Team**
- **Environment & Climate Team**
- **Institute of Directors**
- **Island Energy**
- **Jersey Electricity**
- **Jersey Bankers Association**
- **Jersey Business**
- **Jersey Chamber of Commerce**
- **Jersey Construction Council**
- **Jersey Farmers Union**

- Jersey Finance
- Jersey Funds Association
- Jersey Financial Services Commission
- Jersey Water
- Infrastructure and Environment Department
- Le Gallais
- Policy Centre Jersey
- Ports of Jersey
- Rubis
- Rural Economy Scheme Team
- The Mortgage Shop
- Tower Transit (LibertyBus)

The Council is grateful for the openness, candour, and collaborative spirit shown by all participants. Their contributions have helped ensure the report is as robust, balanced, and valuable as possible, and their continued engagement will remain vital as Jersey advances its climate ambitions.

Process reflections

Throughout the review process, several operational challenges were evident. Limitations in data availability and quality, combined with the difficulty of securing stakeholder time at short notice, constrained the depth of analysis possible within the timeframe. Despite these pressures, Council members significantly exceeded the time originally allocated, reflecting both the complexity of the task and their commitment to delivering a robust assessment. Engagement also highlighted the need for stronger institutional arrangements: there was consistent and widespread support for establishing a permanent or standing climate advisory body, aligned with international best practice, to provide continuity, independence, and long-term strategic oversight.

Key Themes Identified:

- **Data limitations:** Ongoing issues with data availability, quality, and timeliness inhibited the ability to carry out more detailed assessment and modelling.
- **Stakeholder access:** Securing meaningful time with key stakeholders at short notice was challenging, further constraining analysis.
- **Resource pressures:** Council members worked far beyond the time originally envisaged, underscoring the scale and complexity of the work required.
- **Governance and continuity:** Strong support emerged for a **permanent or standing climate advisory body**, providing independent expertise, institutional memory, and alignment with international best practice.

Climate Council Members



Climate Council members as pictured from left to right:

Professor Liz Bentley

With a proven track record in senior leadership and executive roles, Professor Bentley has over three decades of experience in meteorology and climate science. As Chief Executive of the Royal Meteorological Society, Professor Bentley leads independent experts in weather and climate, was Chair of the Advisory Panel for the Jersey Citizens Assembly in 2021 and is the current President of the European Meteorological Society, working at the interface of science, policy and public engagement.

Dipak Vashi

Dipak brings extensive expertise in sustainability, ESG strategy, and sustainable finance. He has led the development of sustainability and ESG policies across cross-border business environments and has contributed to major UK Government taskforces, including the Green Finance Review and the Net Zero Review. His work in these national forums, combined with his professional leadership in shaping organisational sustainability policy, provides the Council with deep insight into international best practice and the evolving global landscape of sustainable finance.

Dr Paul Hodgson

With over a decade of experience spanning sustainable systems engineering, government advisory and innovation leadership roles, Dr Hodgson brings a wealth of experience with a research background in carbon capture, biofuels, hydrogen and sustainable aviation, both in

academia and industry. As Managing Director of pH [Shift], Dr Hodgson works in strategy and systems consultancy, working at the intersection of energy, climate and innovation.

Philip New

Philip New has over four decades of experience in the energy sector, working in consumer facing industry, decarbonisation and the energy transition. He was the CEO of BP's Alternative Energy business. In a previous role as CEO of Energy Systems Catapult Ltd, Philip provided independent and innovative support to the UK Government, to enable effective transition of the energy system in the UK to deliver affordable, reliable low carbon energy and clean growth. Philip now supports the industry through Boards and advisory roles.

Mark Bowden

Mark has over 28 years of professional experience in operational, scientific, technical and leadership roles within the water industry. As Head of Water Resilience and Emergency Planning at Jersey Water, Mark's career demonstrates a strong foundation in environmental science and management, climate adaptation and stakeholder engagement.