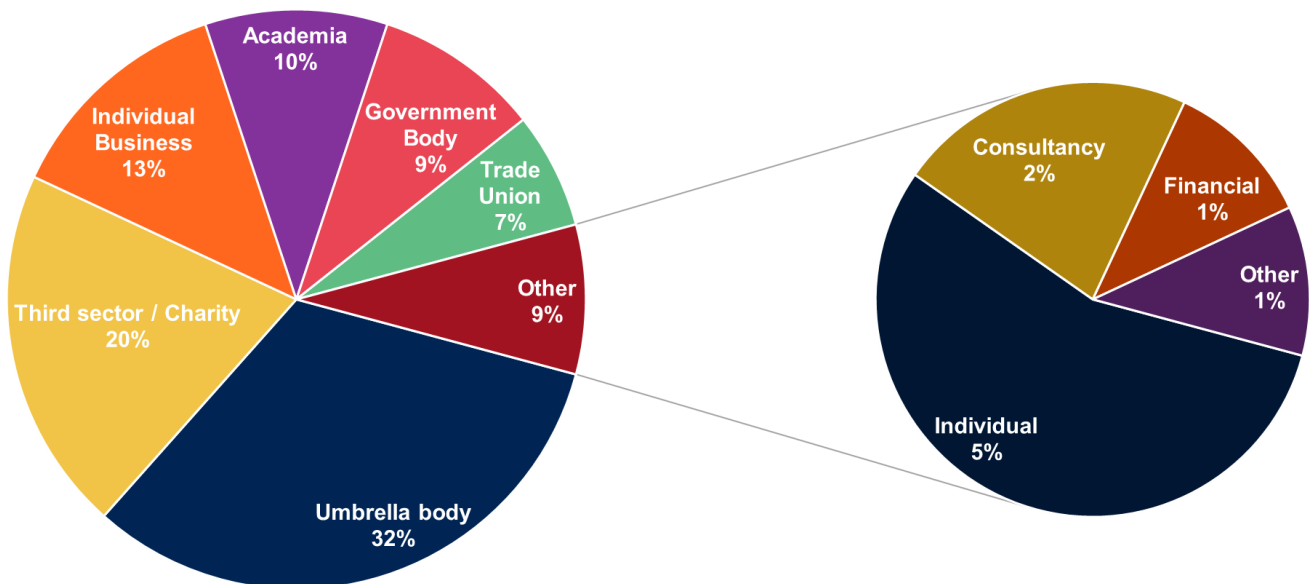


# Just Transition Evidence Synthesis: Executive Summary

In Net Zero Wales<sup>1</sup> (2021), the Welsh Government re-stated its commitment to affect a ‘just transition’ away from the fossil-fuelled economy of the past to a new low carbon future. In December 2022, the Welsh Government issued a Call for Evidence to help inform the development of Wales’ decarbonisation pathway to Net Zero by 2050 and inform the development of a Just Transition Framework for Wales. This Call aimed to gather evidence and insights from a wide range of stakeholders, including local businesses, third sector organisations, government agencies, industry experts, community representatives, and other key actors. The focus of the Call was to gain a comprehensive understanding of the governance, support, impacts, and opportunities associated with a Just Transition towards a Net Zero economy in Wales.

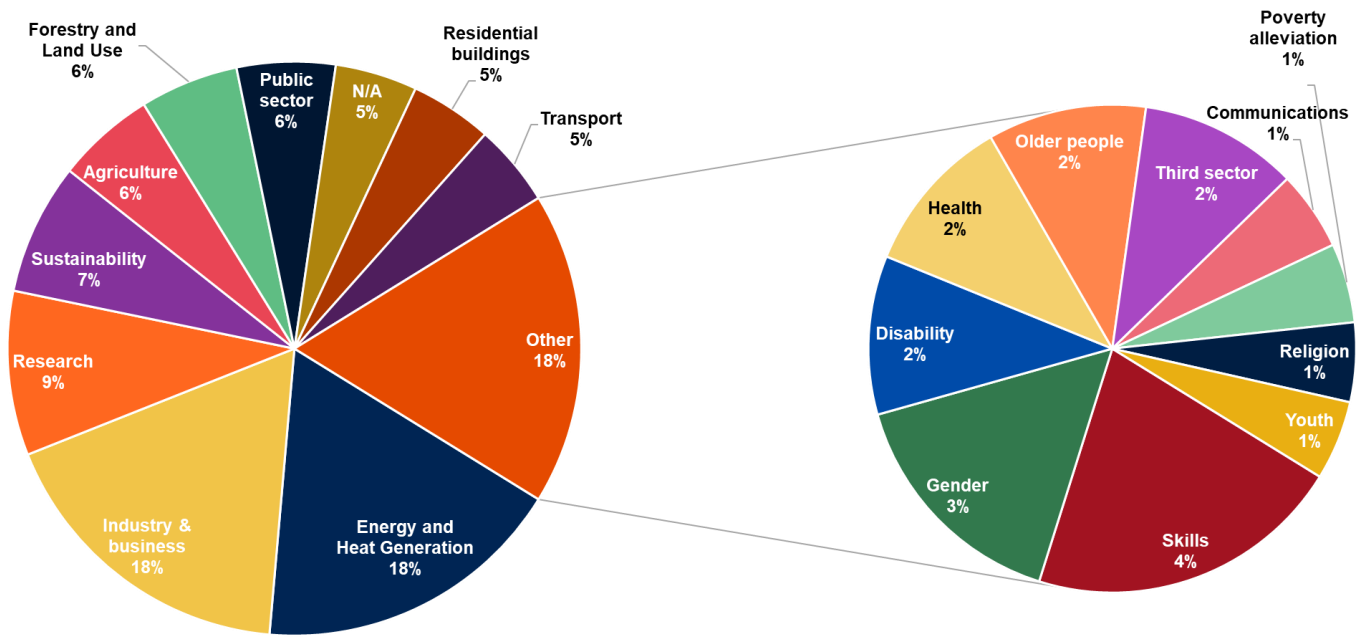
Welsh Government commissioned Ipsos, working with Sarah Toy, University of Bath, to conduct a synthesis of the evidence presented in the Call, the results of which are set out in the report. The Call resulted in 117 submissions from 108 organisations providing a range of verifiable evidence, views and lived experiences, with broad representation across the various emission sectors from a mixture of organisation types. There were some limitations to the findings of the Call. The findings are only a representation of those who submitted responses and do not represent a systematic review of all the governance, support and impacts and opportunities of a Just Transition to Net Zero in Wales.

**Figure 1: Call for Evidence respondents – Share of organisation types**



<sup>1</sup> Welsh Government, [Second All Wales Low Carbon Delivery Plan \(2021-2025\)](#)

**Figure 2: Call for Evidence respondents – Share of organisation sectors**



The evidence submitted was categorised against the key themes and questions set out in the call: governance, impacts and opportunities by emission sector, and support.

**Governance**

The evidence highlighted how the **Well-being of Future Generations Act (WBFGA)** provides a framework for a Just Transition and a means to guide the transition in practice. Responses noted that long-term decision-making that considers potential disproportionate impacts on different socio-economic groups is crucial. Collaboration among the public sector, businesses, and communities was also identified as necessary for decision-making, emphasising collaboration, equality, and local influence. Impact assessments, evaluating policies against relevant acts and duties were seen as beneficial in enabling fairness. Responses also set out how the **Public Sector Equality Duty (PSED)** supports a Just Transition, noting the importance of positive action and collaboration with a diverse workforce to achieve equitable outcomes.

**Impacts and Opportunities for Emission Sectors**

Regarding **electricity and heat generation**, the responses mainly focused on new technologies like Carbon Capture, Usage and Storage, wind farms, and hydrogen. Job losses in the oil and gas industry were identified as a concern, but job creation in the clean energy sector was also highlighted. Responses promoted opportunities for women in new energy technologies, but also noted their under-representation, meaning support needed to ensure a greater gender balance. Community benefits from wind farms were seen as an opportunity for a Just Transition. Transitioning to Net Zero in the energy sector was seen as a chance to achieve energy stability, security, and self-sufficiency, but responses highlighted the need for significant investment.

In the **transport** sector, job creation in the green economy was seen as a potential positive outcome, but skills shortages need to be addressed. Transport poverty, affordability challenges with electric vehicles (EVs) and public transport, and accessibility and affordability for older and disabled people were

important considerations. In addition, the lack of EV charging infrastructure and potential impacts on the grid were highlighted as challenges. Decarbonising the public transport system through rail electrification was seen as a challenge, and reliable and sustainable public transport in rural areas identified as needing improvement. Fuel efficiency and technological development into lower emission fuels were also noted.

In the **residential buildings** sector, responses predicted a rise in green industry jobs, with a skilled workforce needed. Energy efficiency improvements across Wales would be needed, with high costs for improvements. Retrofitting homes, particularly with insulation, could go some way to addressing fuel poverty. Affordability for vulnerable groups, including older and disabled people, and addressing the digital divide and lack of technological skills among older people were noted. Behaviour change, education, and awareness programmes were seen as crucial.

**Industry and business.** The Net Zero transition could create job opportunities, particularly in manufacturing and the development of 'green' technologies. Focus on fuel switching to low carbon fuels and efficiency savings and need for broad SME (Small & Medium Enterprise) support. Alongside potential for economic growth, need for upskilling in manufacturing, construction, electrical profession, plumbing, heating, ventilation, project management, and administration was noted.

In **agriculture**, responses noted that low carbon farming practices can create green jobs and lead to significant changes in land use and energy efficiency. The impact goes beyond just the agricultural workforce and can affect rural communities, language, and culture. Concerns were raised about the negative impact on small and medium-sized farms and demographic groups, including Welsh speakers, women, and young people. The shift away from livestock farming could also pose challenges for the existing food production and export economy. Responses noted that changing dietary preferences is a challenge that requires effective communication and targeted interventions.

With regards to **forestry and land use**, responses noted increasing woodland cover may pose risks to Welsh farming and socio-economic challenges to rural communities. Responses noted that job opportunities and upskilling in forestry and land management are needed. Short-term economic factors and existing funding arrangements were noted as barriers to achieving tree planting targets on farms.

In the **waste and circular economy** sector, job opportunities and gender disparities were highlighted. Measures to reduce emissions, including effective management of food waste, strengthening relationships between consumers and farmers within local food systems, and innovative uses of waste biomass were highlighted.

In the **public sector**, responses noted that public procurement can incentivise businesses to adopt environmentally friendly practices, with small and medium-sized enterprises benefitting significantly. The Social Partnership and Public Procurement Act was seen as important for ensuring a Just Transition and aligning local policies with global Net Zero goals. Responses noted that local authorities play a key role in promoting sustainability, both by reducing their own emissions and leading their communities.

## Support

Responses highlighted the need for an emphasis on **skills** development to achieve Net Zero, as current skills levels do not align with projected requirements. This skills gap can be addressed by leveraging transferable skills, optimising educational resources, and introducing new roles in the green economy. Gender disparities must also be considered to ensure inclusivity and support for women in the transition. Additionally, responses argued that the transition to Net Zero necessitates changes in **public**

**procurement processes**, with targeted funding and finance required for a just transition across sectors, including small businesses. Financial support, infrastructural changes, social infrastructure, and support services are essential for ensuring a fair transition for all groups, including those with low incomes. Finally, citizen participation and procedural justice were seen as crucial in making the transition to Net Zero just and fair.

## Conclusions and Recommendations

Overall, the responses identify a clear set of opportunities and threats for each area, with job creation and loss, economic development, health, and vulnerability being major areas of concern. Responses noted that decarbonising the transport, industry, energy, heat generation, and agriculture sectors, will likely lead to both job losses and job creation. The impacts of the transition go beyond just jobs and economic development, affecting communities, language, and culture. The development of social infrastructure and skill development, including closing the skills gap and upskilling the workforce, were seen as key enablers for a Just Transition.

Responses noted that public sector intervention and support are needed to mitigate any detrimental effects on vulnerable communities and that this can ensure those experiencing fuel, transport, food, and digital poverty are not further disadvantaged by the transition. Procedural justice was a common theme in the responses, emphasising the need for collaboration among public, private, and third sectors, as well as with communities, to enable a Just Transition. A rights-based approach with transparent, agile, and inclusive governance is advocated for, and the policy context, including the WBFGA and PSED, are seen as supportive but require further development to support the transition.

Eight recommendations are presented in the report, to support the Welsh Government in developing its Net Zero decarbonisation pathway to 2050 and its Just Transition Framework. They are as follows:

1. Welsh Government should focus its communication on the Just Transition to ensure that policy and decision makers, businesses, communities, workers and individuals have a good understanding of what this involves, how it may affect them and how they can influence positive outcomes and capitalise upon opportunities. The project team suggests that the use of the word fairness can be more effective than just in some instances.
2. More outreach and engagement is needed to connect with and engage Local Authorities (LAs) due to the lack of visibility in this Call. There are likely to be many examples of good practice that need better showcasing to raise awareness of their contributions to the Just Transition.
3. The Call received an excellent response rate from industry and businesses. Welsh Government should build on this engagement to maximise potential opportunities to collaborate and foster further ownership of the Just Transition by the private sector. More effort is needed to engage transport and waste/circular economy stakeholders.
4. Thought should be given to how best to engage with community groups, including Black Asian and Ethnic Minority, young people and transient communities, and the general public. Different approaches are likely to be required such as using social media to raise awareness via case studies and lived experience stories.
5. Positive responses regarding job creation provide an opportunity to provide positive communications on the Just Transition engaging wider sectors of society and the economy and encouraging greater commitment to the transition to Net Zero.
6. Welsh Government should identify opportunities to develop focused research projects with academic institutions who have done a lot of foundational work on what a Just Transition looks like to help inform the Just Transition Framework.

7. The findings highlight impacts for specific groups, industry, SMEs and agriculture, which should be investigated in more detail through focused discussion and exploration with relevant stakeholders.
8. Further investigations should be conducted in relation to the identified gaps in evidence (such as health and well-being, young people, transport, circular economy, role of LAs) including engagement with relevant bodies to identify if there is a genuine lack of evidence in these areas requiring additional research or if there is evidence available that was not provided as part of the Call.

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