LOT B, WORK PACKAGE 4.1

# Evaluation Framework Appraisal

OCTOBER 15TH, 2025

Sustainability is our business

# Agenda

# Executive Summary

# Executive Summary

**Context**

The Government of Jersey ("GoJ") is assessing the impacts of a potential Offshore Wind Farm ("OWF"). This engagement is intended to appraise proposed connection scenarios across a tailored evaluation framework to recommend the best way forward.

**Approach & Recommendation**

- ERM developed and finetuned an appraisal framework to assess the potential risks and benefits of the different connection scenarios proposed for the OWF.
- This included economic and non-economic considerations, which were weighted based on a prioritisation exercise with GoJ stakeholders.
- The connection scenarios were revised based on inputs from technical advisors and aligned with evaluation priorities.
- **Based on our assessment, the two connection scenarios without a Jersey connection scored the highest across the assessment criteria. However, the France with Jersey connection scenario had the same appraisal score as the UK-only scenario, with the marginal difference in LCoE (7% vs 9% above baseline) used as a tiebreak.**

**Next Steps**

1. Present the findings of the appraisal to the Jersey States Assembly.
2. Initiate meetings with France and UK representatives to explore feasibility of access to respective incentives/CfD schemes, opportunities for bilateral cooperation on offshore wind etc.
3. Conduct further investigations (as needed) to deepen the data underlying the assessment and identify the best way forward.

# Appraisal Approach

# Recap of Work Carried Out to Date

## ERM has completed all project phases through to the final report– now we consolidate our key findings, insights, and overarching conclusions.

### *Define*

**1 Identify key appraisal criteria**

- Brainstorm important factors to consider while comparing OSW project connection scenarios
- Ensure categories & criteria are mutually exclusive and collectively exhaustive

**2 Develop assessment methodology**

- Generate scoring rubrics tailored to each criteria
- Determine the most viable resources to enable comparison across connection scenarios (including results of work across lots A, B, and C)

### *Prioritise*

**3 Gather feedback from Jersey**

- Present initial view on which categories & criteria are most paramount to project success
- Engage relevant government stakeholders to ensure diverse viewpoints are considered

**4 Finalise quantitative weights**

- Leverage feedback from government stakeholders to assign overall weights to each category and sub-weights to each criteria

### *Assess*

**5 Score connection scenarios**

- Utilise assessment methodology to compare connection scenarios across economic and non-economic criteria
- Generate an overall quantitative score for each connection scenario

**6 Convey results in final report**

- Elaborate on key differences between connection scenarios that led to ultimate recommendations
- Indicate where data gaps exist, and further research may be required

# Context around Stakeholder Engagement

ERM regularly engaged key stakeholders from the Government of Jersey, primarily within the Energy and Sustainability core team

### Weekly Core Team Checkpoints

Periodic checkpoints between ERM management and Jersey core team to check-in on progress and ensure alignment of key deliverables.

**Key Outcome:** Iterative feedback, timing considerations, anecdotal resources and direction

### Methodology Working Sessions (Core Team)

Two deep dive meetings, during which ERM presented iterative versions of the methodology that was ultimately used to generate the results in this report

**Key Outcome**: Insights into proposed evaluation approach, targeted resources for consideration

### Prioritization Survey (Several Teams)

Asynchronous receipt of inputs (comparing evaluation categories & criteria) from:

- Energy & Sustainability Team
- Economy & Economic Programmes Team
- External Relations Team
- Marine Environment Team

**Key Outcome**: Initial category and criterion-level weights for refinement (see appendix)

### Final Lot B Review (Core Team)

Discussion of initial results of scenario scoring exercise, final feedback on recommended path forward ahead of final report submission

**Key Outcome**: Feedback and questions on specific scores and comments within draft report

# Framework Overview

# The Set of Connection Scenarios being Evaluated

## Connection scenarios are distinguished based on technical priorities, ensuring differentiated scoring

| | | |
|---|---|---|
| French connection only | 1bi | **France without Jersey connection**<br>• OWF with an offshore substation (1GW power) that steps up and exports to France in 3 HVDC cables (each ~450MW)<br>• No energy delivered into Jersey<br>• Onshore substation in FR |
| | 1cii | **France with Jersey Connection**<br>• OWF with an offshore substation (1GW power) that steps up and exports to France in 3 HVDC cables (each ~450MW)<br>• 1 HVAC cable delivering 100MW to Jersey<br>• Onshore substation in FR and Jersey |
| English South Coast connection only | 2bi | **UK without Jersey connection**<br>• OWF with an offshore substation (1GW power) that steps up and exports to UK in 1 HVDC cable<br>• No energy delivered into Jersey<br>• Onshore substation in UK |
| | 2cii | **UK with Jersey Connection**<br>• OWF with an offshore substation (1GW power) that steps up and exports to UK in 1 HVDC cable<br>• 1 HVAC cable delivering 100MW to Jersey<br>• Onshore substation in UK and Jersey |
| English South Coast – French connection | 3bii | **UK, and France connections without Jersey Connection**<br>• OWF with an offshore substation (1GW power) that steps up and exports to UK in 1 HVDC cable and to France in 3 HVDC cables<br>• No energy delivered into Jersey<br>• Onshore substation in UK and FR |
| | 3cii | **UK and France connection with Jersey Connection**<br>• OWF with an offshore substation (1GW power) that steps up and exports to UK in 1 HVDC cable and to France in HVDC cables<br>• 1 HVAC cable carrying 100MW to Jersey<br>• Onshore substation in UK, FR, and Jersey |

### Rationale

- These six scenarios are streamlined to align with the specific aspects that the evaluation criteria aims to assess
- Scenarios are differentiated based on technical specifications of each connection type and not regulatory classifications
- The definitions align with the terminologies that are used by experts to describe technical aspects of OWF developments

# Evaluation Framework Appraisal: Overview

**The connection scenarios were evaluated using mutually exclusive, collectively exhaustive criteria (established at the outset of the project based on input from the GoJ Energy & Sustainability team).**

| Category | | Criterion |
|---|---|---|
| Economic Impacts | Project Costs | LCOE |
| | | Developer Costs (CapEx, OpEx, DevEx) |
| | | Grid Integration Costs |
| | Public Costs | Electricity Price Impact |
| | Economic Benefits | Performance Revenues |
| | | Lease Revenues |
| | | Direct Job Creation |
| | | Long-Term Economic Growth Potential |

| Category | | Criterion |
|---|---|---|
| Non-Economic Impacts | Public Effects | Environmental Impact |
| | | Social Impact |
| | Geopolitical Factors | Regional Influence and Relationships |
| | | Impact on Trade & Investment Relations |
| | | Impact on Security/Independence of Supply Standard |
| | Project Success Potential | Project Complexity |
| | | Market Access Conditions |

*This report focuses **on sharing the results of the appraisal of six offshore wind farm connection scenarios** for Jersey; it assumes that the impacts of the wind farm itself remain constant across all scenarios.*

# Scenario Appraisal Summary

# Summary View (Table)

Recommended Scenario (Current Hypothesis)

All scoring is done on a 1-5 scale; a score of 3.0 is considered the "baseline"

**Key takeaways**

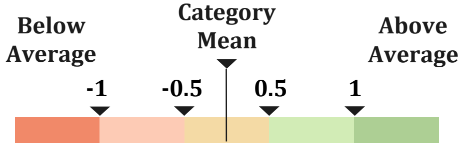
- Scores and ranks shown here reflect the assessment of the scenarios based on weights informed by the prioritization survey.
- Using current assumptions, scenarios may score the same due to perceived **trade-offs.**
- The weights of each category & criteria have a high impact on these results; weights should be **iteratively adjusted** to account for evolving priorities.

| | 1bi | 1cii | 2bi | 2cii | 3bii | 3cii |
|---|---|---|---|---|---|---|
| **Geography** | France | | UK | | France & UK | |
| **Jersey Connection?** | No Jersey | Jersey | No Jersey | Jersey | No Jersey | Jersey |
| **Rank based on LCOE** | 1 | 3 | 2 | 4 | 5 | 6 |
| **LCOE vs. lowest scenario** | Baseline | + 9% | + 7% | + 17% | + up to 37% | + up to 45% |
| | | | | | | |
| **Project Costs** | 4.2 | 3.4 | 4.2 | 3.2 | 1.7 | 1.3 |
| **Public Costs** | 3.0 | 1.0 | 3.0 | 1.0 | 3.0 | 1.0 |
| **Economic Benefits** | 3.1 | 3.6 | 2.5 | 3.5 | 2.3 | 3.3 |
| **Public Effects** | 3.6 | 3.3 | 3.9 | 3.6 | 3.8 | 3.4 |
| **Geopolitical Factors** | 3.2 | 3.4 | 3.0 | 2.7 | 2.0 | 2.0 |
| **Project Success Potential** | 4.0 | 3.7 | 4.0 | 3.8 | 3.2 | 3.0 |
| | | | | | | |
| **Appraisal Score** | 3.53 | 3.41 | 3.41 | 3.28 | 2.65 | 2.67 |
| **Overall Rank*** | 1 | 3 | 2 | 4 | 5 | 6 |

** LCOE serves as a tie breaker*

# Relevant Scenario Deep Dives

# 1bi) France without Jersey connection

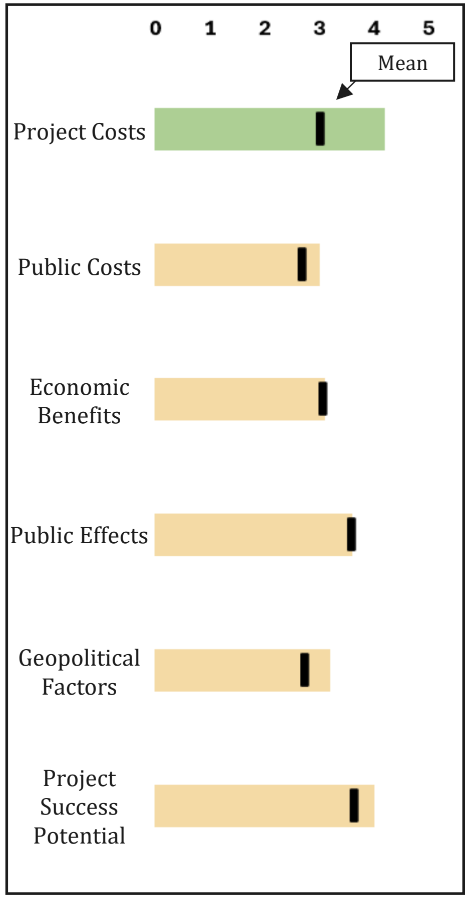



**LCOE Rank One: Lowest LCOE**
**Appraisal Scoring: 3.53/5**

| | Category | Assessment |
|---|---|---|
| Economic | Project Cost | [redacted] |
| Economic | Public Costs | [redacted] |
| Economic | Economic Benefits | [redacted] |
| Non-Economic | Public Effects | [redacted] |
| Non-Economic | Geopolitical Factors | [redacted] |
| Non-Economic | Project Success Potential | [redacted] |

[redacted]

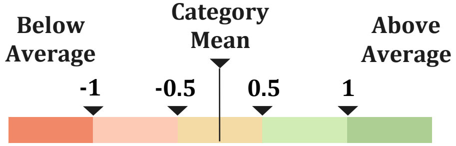
**Performance vs. mean category score across all scenarios**



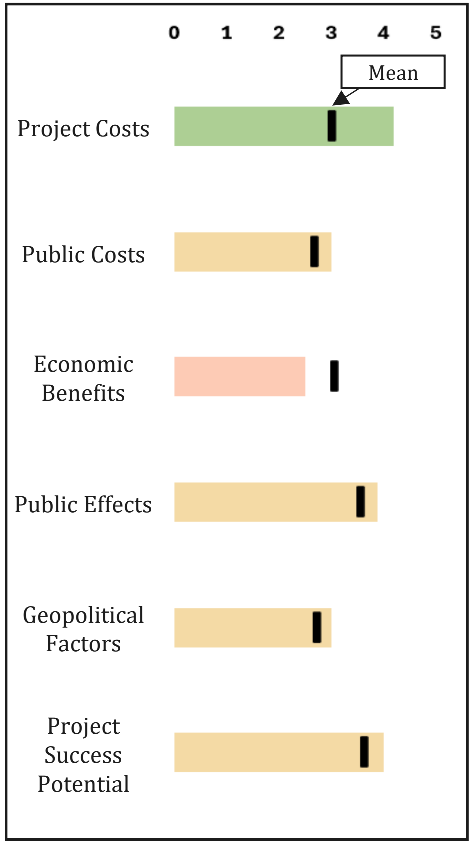
# 2bi) UK without Jersey connection

## LCOE Rank Three: 7% Higher than Lowest LCOE
## Appraisal Scoring: 3.41/5

| | Category | Assessment |
|---|---|---|
| Economic | Project Cost | [redacted] |
| | Public Costs | [redacted] |
| | Economic Benefits | [redacted] |
| Non-Economic | Public Effects | [redacted] |
| | Geopolitical Factors | [redacted] |
| | Project Success Potential | [redacted] |

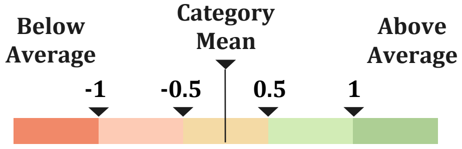



**Performance vs. mean category score across all scenarios**



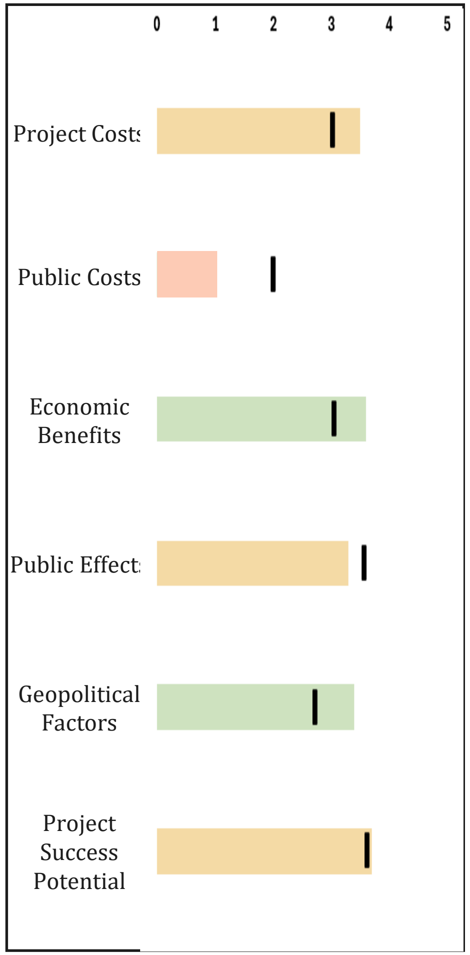
# 1cii) France with Jersey connection

## LCOE Rank Two: 9% Higher than Lowest LCOE
## Appraisal Scoring: 3.41/5




| | Category | Assessment |
|---|---|---|
| Economic | Project Cost | [redacted] |
| Economic | Public Costs | [redacted] |
| Economic | Economic Benefits | [redacted] |
| Non-Economic | Public Effects | [redacted] |
| Non-Economic | Geopolitical Factors | [redacted] |
| Non-Economic | Project Success Potential | [redacted] |

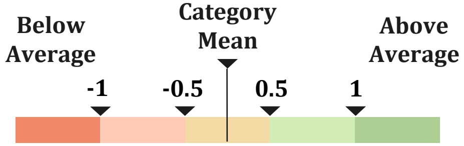
**Performance vs. mean category score across all scenarios**



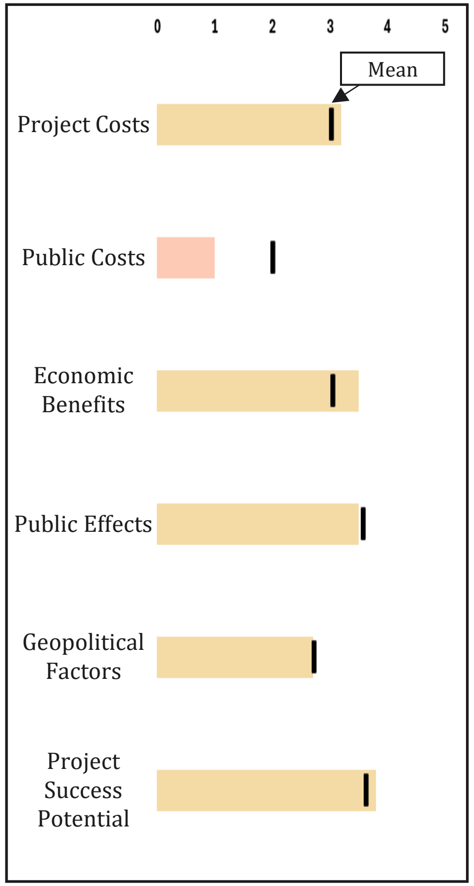
# 2cii) UK with Jersey connection

## LCOE Rank Four: 17% Higher than Lowest LCOE
## Appraisal Scoring: 3.28/5

| | Category | Assessment |
|---|---|---|
| Economic | Project Cost | [redacted] |
| | Public Costs | [redacted] |
| | Economic Benefits | [redacted] |
| Non-Economic | Public Effects | [redacted] |
| | Geopolitical Factors | [redacted] |
| | Project Success Potential | [redacted] |

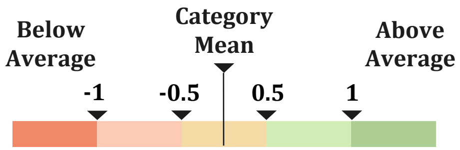



**Performance vs. mean category score across all scenarios**



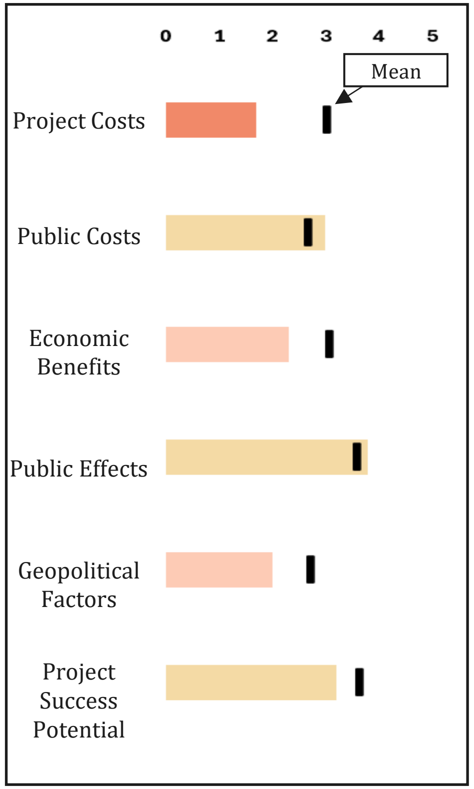
# 3bii) UK and France without Jersey connection

## LCOE Rank Five: Up to 35% Higher than Lowest LCOE
## Appraisal Scoring: 2.65/5




| | Category | Assessment |
|---|---|---|
| Economic | Project Cost | [redacted] |
| | Public Costs | • [redacted] |
| | Economic Benefits | • [redacted] |
| Non-Economic | Public Effects | • [redacted] |
| | Geopolitical Factors | • [redacted] |
| | Project Success Potential | • [redacted] |

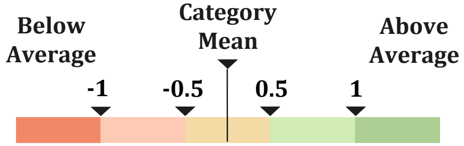
### Performance vs. mean category score across all scenarios



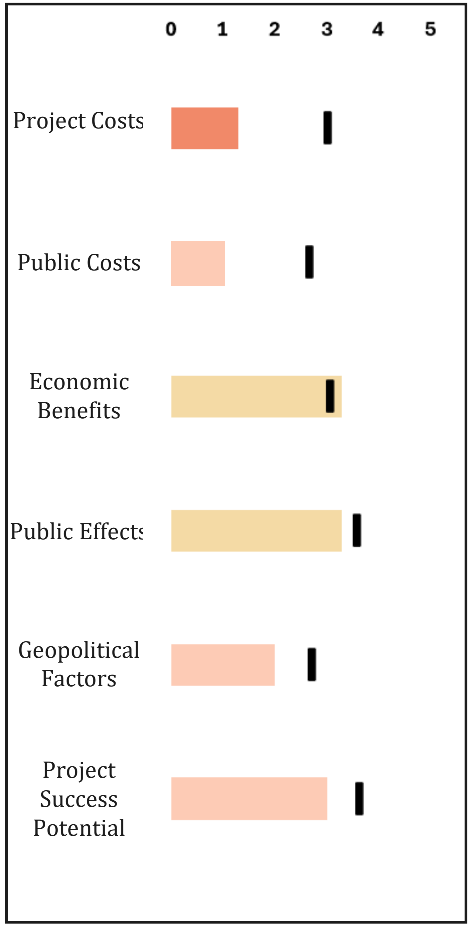
# 3cii) UK and France with Jersey connection

## LCOE Rank Six (Lowest Score): Up to 45% Higher than Lowest LCOE
## Appraisal Scoring: 2.67/5

| | Category | Assessment |
|---|---|---|
| Economic | Project Cost | [redacted] |
| Economic | Public Costs | • [redacted] |
| Economic | Economic Benefits | • [redacted] |
| Non-Economic | Public Effects | • [redacted] |
| Non-Economic | Geopolitical Factors | • [redacted] |
| Non-Economic | Project Success Potential | • [redacted]) |




**Performance vs. mean category score across all scenarios**



# Final Recommendations & Next Steps

# Recommended Scenario & Mitigating Challenges

## 1bi) France *without* Jersey Connection

1GW offshore wind farm with an offshore substation that steps up and exports all power to with an onshore substation in France.

### Positive takeaways:

1. Offers the **lowest Levelised Cost of Energy (LCOE)** but comes with the highest estimated grid connection costs.
2. France connection is likely more **appealing to developers** due to its single export market which reduces complexity compared to other scenarios.
3. Cooperation with France builds on **existing marine/energy relations.**
4. **Low technical barriers and distance** to French connection points.
5. **Negative electricity pricing is not a major concern**.

### Areas of Tension:

1. Significant **investment in new subsea cables** would be needed to support future energy demand.
2. Centralizing construction in a French port (e.g., Brest) **limits job creation opportunities for Jersey residents**.
3. Development phase jobs are likely to be led by French entities, resulting in **minimal employment benefits for Jersey**.
4. A single export route **limits perceived energy resilience for Jersey**.
5. There are **uncertainties around transmission costs and grid access** under current French regulations.

# Key Takeaways and Next Steps

1

**France scenarios with & without Jersey connection perform well, with the France only option being most financially attractive**

- France without Jersey has the lowest LCOE, making it the most attractive financial option for OWF developers.
- The Jersey connection adds ~9% to LCOE, making it less financially viable for OWF developers; however, interconnection adds reliability benefit, but potentially increases rate-payer costs (based on FR 2040 electricity cost)
- Any interconnection into Jersey must undergo rigorous environmental assessment.

2

**UK without Jersey Connection landed in 2nd place**

- Its LCOE is ~2% lower when compared to the cheapest scenario than the France with Jersey scenario, making it a good alternative option for developers. Connecting to southern UK offers a cost advantage, lowering the LCOE.
- UK connection has fewer regulatory hurdles than France, increasing the likelihood of project approval and timely execution.
- Energy resilience benefits from this scenario may be lower than the France & Jersey scenarios, limiting its strategic value for Jersey.

3

**Connection scenarios to UK & France, and UK, France & Jersey score the lowest overall**

- High LCOE values could make these options unattractive to developers.
- High LCOE values could generate negative impact on electricity prices for Jersey.
- Complex political and regulatory structures involved in multi-jurisdictional coordination also make these less viable options.

**Next Steps:**

1. **Engage with French and UK Authorities**: Initiate discussions to understand: (i) applicability of incentives and CfD schemes,(ii) permitting & compliance processes for foreign-led energy infrastructure projects to identify potential regulatory & timeline considerations; (iii) potential for bilateral engagement on Offshore wind.
2. **Potential assessments:** GoJ could consider performing: (i) targeted assessment of potential $CO_2$ emissions from proposed onshore substation in Jersey (ii) assessment of Jersey's workforce to determine capacity to support/participate in the OWF industry. (iii) Deeper dive into the top-ranking scenarios to further explore the potential positives/negatives of each.



*Note: UK with Jersey connection scenario finished in 4th place with no unique highlights, hence this scenario has not been called out in the takeaways slide.*

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# Appendix

# Previous View of Criteria Weights

[redacted]

| [redacted] | |
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| [redacted] | [redacted] |
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# Changes to Category & Criteria Weights

These weights were initially based on prioritization survey results & have been minorly adjusted based on stakeholder feedback


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# Initial Set of Connection Scenarios Intended for Evaluation

## Preliminary list of scenarios did not reflect the evaluation's intended focus; led to repeated/similar scores

| | | |
|---|---|---|
| French connection only | 1bi | France and St Helier connection with Jersey transformation **at sea** with **uni-directional** export cables |
| | 1bii | France and St Helier connection with Jersey transformation **at sea** with **bi-directional** export cables to optimise infrastructure and avoid investment where possible |
| | 1ci | France and Jersey connection with Jersey transformation **on land** with **uni-directional** export cables |
| | 1cii | France and Jersey connection with Jersey transformation **on land** with **bi-directional** export cables to optimise infrastructure and avoid investment where possible |
| English South Coast connection only | 2bi | English south coast and St Helier connection with Jersey transformation **at sea** with **uni-directional** export cables |
| | 2bii | English south coast and St Helier connection with Jersey transformation **at sea** with **bi-directional** export cables optimise infrastructure and avoid investment where possible |
| | 2ci | English south coast and Jersey connection with Jersey transformation **on land** with **uni-directional** export cables |
| | 2cii | English south coast and Jersey connection with Jersey transformation **on land** with **bi-directional** export cables optimise infrastructure and avoid investment where possible |
| English South Coast – French connection | 3bi | English south coast, France and St Helier connection with Jersey transformation **at sea with uni-directional** export cables |
| | 3bii | English south coast, France and St Helier connection with Jersey transformation **at sea** with **bi-directiona**l export cables optimise infrastructure and avoid investment where possible |
| | 3ci | English south coast, France and St Helier connection with Jersey transformation **on land** with **uni-directional** export cables |
| | 3cii | English south coast, France and St Helier connection with Jersey transformation **on land** with **bi-directional** export cables optimise infrastructure & avoid investment where possible |

### Rationale

- Initial cut of 12 scenarios developed by Jersey Government's previous consultants
- Descriptions aligned with the Jersey Government's expectations
- Accounts for technical attributes of each connection scenario as well as regulatory considerations and classifications
- The objective was to evaluate all 12 scenarios across the economic and non-economic criteria to determine the recommended path forward

# Justification for Chosen Criteria

## ERM has finalised the scenario appraisal framework and methodology, overhauling the various criteria to ensure a Mutually Exclusive, Collectively Exhaustive (MECE) approach

### Previous Framework

| Category | Criteria Included |
|---|---|
| **Price** | LCOE, impact on domestic energy prices |
| **Costs** | CapEx, OpEx, environmental costs, social costs |
| **Benefits** | GVA, tax revenue, economic benefits, impact on supply standard security, strategic benefits (e.g., regional influence) |
| **Qualitative Assessment Criteria** | Project complexity, market access conditions, potential for energy access to enable long-term economic growth |

### Key Updates

| Change | Explanation |
|---|---|
| **Separation of economic vs. non-economic impacts** | Distinguishes quantitative analyses (economic) from qualitative analyses (non-economic) |
| **Conversion from GVA potential criterion to economic benefits category** | Revenues, long-term economic growth potential, and job creation (new criterion) are all benefits that contribute to GVA |
| **Addition of DevEx criterion** | Pre-development activities (such as community engagement) should not count towards CapEx |
| **Separation of tax revenues into performance revenues and lease revenues** | Input from the team working on Lot C (Leasing Analysis) |
| **Conversion from strategic benefits criterion to geopolitical factors category** | Regional considerations are a key metric across which connection scenarios will differ meaningfully |