Your partner
in progress

BSI Net Zero Barometer 2026:

Transport and mobility

The fragmented fleet

Sector perspectives on progress, priorities and trade-offs across the UK economy.

Take me back to the start ›

Rapid road electrification, complex heavy-transport challenges and the pivot to climate adaptation

Introduction

As we enter the sixth year of tracking UK business attitudes and progress towards net zero, transport stands out as presenting the least uniform picture in the survey. Progress is real across the sector, but some transport modes are progressing much faster than others.

Battery electric vehicle sales are increasing year on year, but with long asset lives, fuelling challenges, and safety cultures that won't trade risk for pace, it's a different story in shipping and aviation.

What connects the net zero transition is commercial logic. Transport firms are more concerned than most about the cost of failing to prepare for climate change, and the overwhelming majority say easing off now would strand the investment already made. Fleet transitions might be expensive, but half-finished ones are worse.

The barriers are physical as well as financial.

Charging and fuelling infrastructure lags vehicle design and there aren't enough technicians qualified to maintain batteries and fuel cells.

Despite that, this is a sector unusually positive about government policy and already committed financially.

What it needs now is infrastructure that keeps pace, and standards that make vehicles, charging and energy networks genuinely interoperable.

Nick Fleming
Director of Transport and Mobility, BSI

> "Transport is not one unified journey to net zero. It's lots of different parts moving forward at different speeds. Success will depend on treating transport as an interconnected system and working across sectors to build the infrastructure that makes change possible.

This report draws on research conducted for the 2026 BSI Net Zero Barometer, providing a sectorspecific analysis of the opportunities, challenges and priorities facing the UK transport and mobility sector on the path to net zero. A full report covering and comparing in detail multiple sectors and their progress to net zero is available here.

Take me back to the start ›

Sector snapshot: Where are we now?

Transport presents a highly fragmented picture, with different modes moving toward net zero at entirely different speeds. Road transport (specifically the passenger car market) is surging ahead, supported by expanding charging infrastructure and consumer demand.

Sales of battery electric vehicles (BEVs) continue to climb, capturing roughly 25% of the UK annual new car market. Public transport like bus and rail is also pushing forward, despite grid capacity constraints and only 40% rail network electrification. However, scaling a similar transition across heavy goods vehicles (HGVs), aviation, and maritime introduces considerable technical, infrastructural, and safety challenges.

While road fleets are transitioning, maritime and aviation lag behind. Both face long asset lifecycles (where retrofitting isn't commercially viable), slow commercialization of alternative fuels, and challenges in scaling production. Nevertheless, early R&D investments are beginning to flow, like the £448 million UK SHORE funding, which aims to accelerate zero-emission vessels.

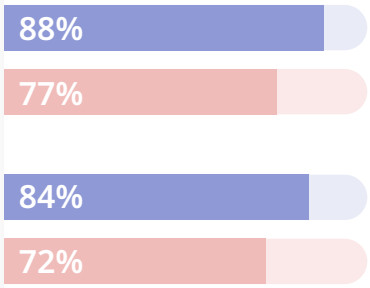
> "
>
> It's a fragmented picture. Road transport is absolutely out in front... but when you scale up to aviation and maritime, you face immense technical and safety barriers.
>
> **Nick Fleming**
> Director of Transport and Mobility, BSI

Take me back to the start ›

The data picture

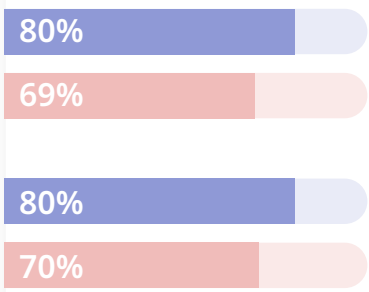
Transport and mobility businesses surveyed

Average across all sectors surveyed



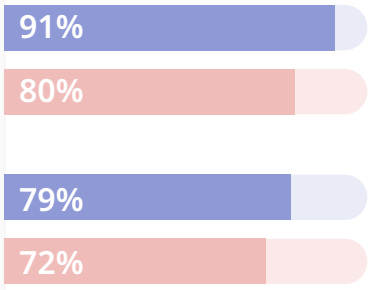
Above-average confidence

Transport is more confident than average in its emissions data (**88%**) and supply chain reporting (**84%**). This exceeds the total proportions of **77%** and **72%** respectively.



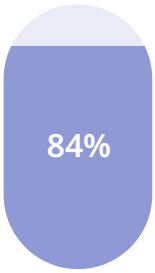
Policy optimism

Transport is more likely than average to share positive attitudes about government net zero policy and its ability to facilitate the 2050 goal. **80%** of firms agreed that the government has a clear, realistic plan versus a **69%** total average. **80%** also agree that government policies will make it easier to reach net zero versus **70%** of all sectors asked about the same point.



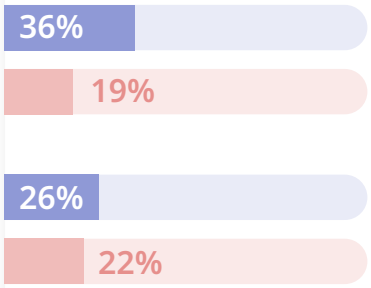
A heightened sense of risk

91% of transport firms surveyed are concerned about future costs and business resilience if they fail to prepare for climate change (compared to **80%** across all sectors surveyed). Additionally, **79%** believe climate change could actively disrupt their supply chains, again in excess of the **72%** recorded as an average across all sectors. This concern reflects the sector's extreme physical vulnerability to unpredictable and severe weather.



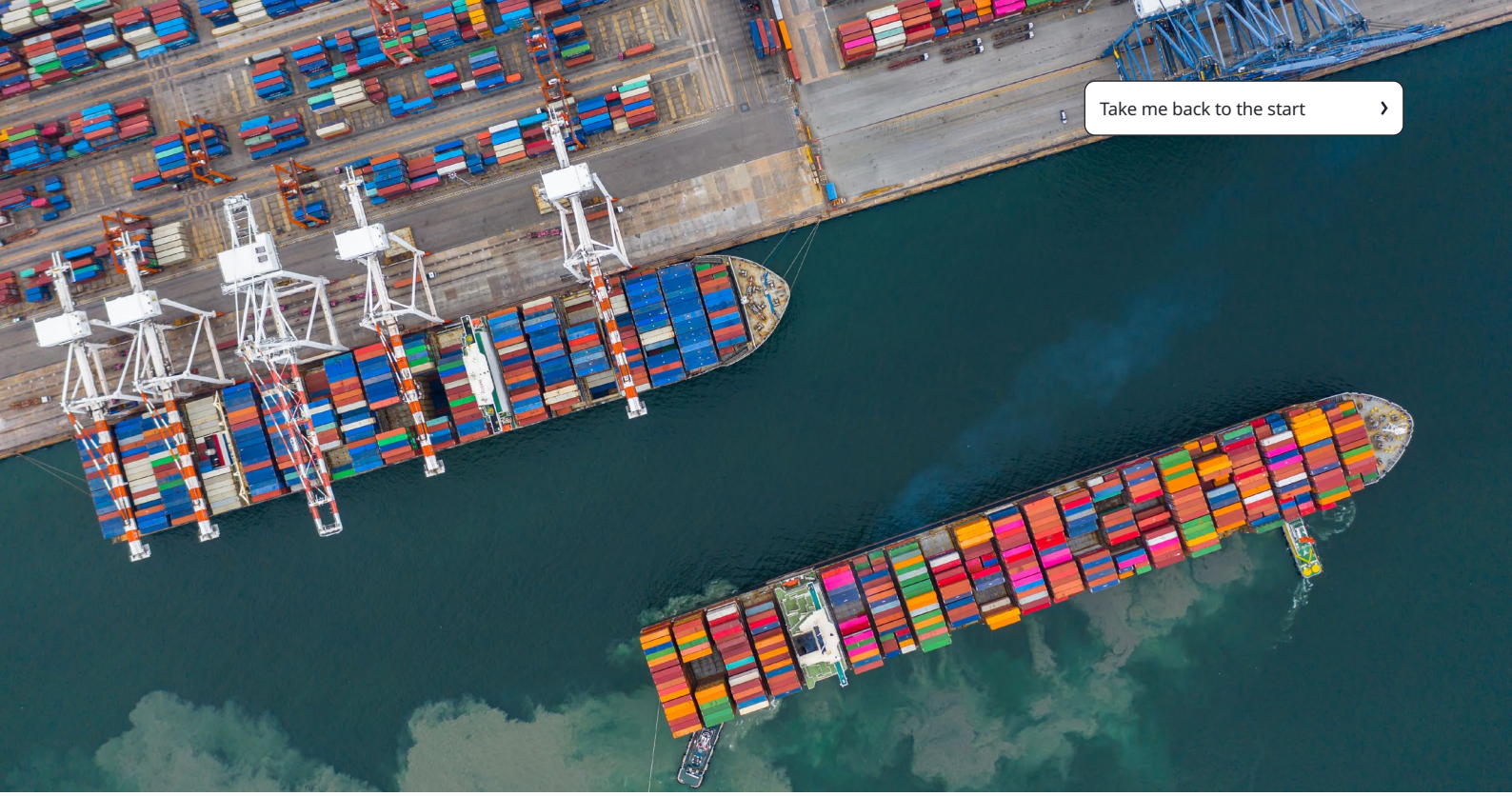
Protecting investments

84% of firms surveyed believe that reducing net zero efforts now means losing prior investments and wasting money. Transitioning fleets (e.g., electric buses or heavy goods vehicles) requires massive upfront capital expenditure; slowing down now would turn these multi-year outlays into stranded, costly assets before they can balance the books.



The data blind spot

While the sector is highly confident in its own emissions reporting at the moment, supply chain visibility and data availability are major future concerns. **36%** of transport firms expect supply chain visibility and data availability to impact their net zero progress over the next 12 months, versus **19%** across all sectors surveyed. **26%** currently cite a lack of visibility over supply chain partners' actions as a barrier to taking action (compared to **22%** total).



Take me back to the start ›

Key barriers & pressures

- **Infrastructure bottlenecks:** Designing an electric HGV is only half the battle. Scaling the supporting infrastructure and fuel supply presents huge hurdles. Across road transport, electrification is being constrained by infrastructure requirements: charging 20 electric double-decker buses simultaneously in a city centre requires significant grid capacity and robust fire safety measures. While for HGVs the lack of heavy-duty charging infrastructure on major routes is severely limiting adoption. Meanwhile, for aviation, the sheer volume of alternative fuels required is daunting. Current annual Sustainable Aviation Fuel (SAF) production of roughly 2.4 million tonnes is just 0.5% of the volume needed to hit 2050 net zero targets.
- **Safety vs. innovation:** In aviation and maritime, the safety culture is absolute. The transition to new propulsion systems or Sustainable Aviation Fuels (SAFs) must not introduce any new risk, which naturally delays adoption. Any fresh risks introduced by new technology are also affecting the speed of transition for buses and HGVs. Battery fire risks are one example.
- **The skills gap:** Maintaining an EV battery system or hydrogen fuel cell requires different skills to an internal combustion engine. This is creating a severe shortage of qualified aftermarket technicians.

> "You can throw a lot of money at designing electric ships or trucks, but if the infrastructure like port shore power or highway charging isn't there, you've only solved half the problem.

Nick Fleming
Director of Transport and Mobility, BSI

Take me back to the start ›

Drivers and opportunities for progress

- **Carrot and stick policy:** The sector is making progress via a combination of strict regulation (e.g., the Zero Emission Vehicle (ZEV) mandate, International Maritime Organization framework) and powerful government subsidies (for example, the £1 billion grant for zero-emission trucks and fleet depot charging).
- **Climate adaptation:** Net zero is no longer just about mitigation; it's about keeping transport moving. Protecting transport networks from extreme weather is driving considerable investment into systemic infrastructure resilience.
- **Supply chain transparency and multi-modal freight:** Major manufacturers like Volvo and BMW now demand lower carbon across their supply chains. This turns Scope 3 emissions into a competitive advantage for suppliers. Consequently, many are rapidly adopting digital tracking across freight routes. Standards like BS EN ISO 14083 help freight forwarders accurately quantify carbon footprint across complex, multi-stage supply chains.
- **The circularity prize (recycling vs. remanufacturing):** The automotive and aerospace sectors are seizing the opportunity to increase their use of recycled materials. However, the ultimate commercial opportunity lies in true component remanufacturing. But taking a complex component apart and rebuilding it to be equally safe and reliable introduces profound safety challenges. Solutions through robust standards will unlock massive supply chain resilience.

Looking ahead: The next 12-24 months

Future success demands systems-thinking across all modes, including road transport with its infrastructure challenges. Transport, energy, and the built environment can no longer operate in silos. They must collaborate to ensure vehicles, charging infrastructure, and energy networks are genuinely interoperable. For road users, this means streamlining the consumer experience by resolving fragmented payment apps, ensuring physical accessibility, and unlocking vehicle-to-grid charging. Across maritime and aviation, the immediate future relies on cross-sector learning alongside pre-standardization work to de-risk investments into emerging fuels like methanol, ammonia, and hydrogen.

Take me back to the start ›

Key standards for net zero in the transport and mobility sector

Search by standard title on BSI Knowledge for more details.

Stay up to date with the latest developments in transport standards here.

Automotive

Standard	What it does
BS EN ISO 14083:2023 – Greenhouse gases. Quantification and reporting of greenhouse gas emissions arising from transport chain operations	This standard establishes a common methodology for calculating and reporting GHG emissions from transporting people and goods across road, rail, air and water, including transfer facilities. It sets clear rules for transport chains, system boundaries, activity and emissions calculation, and allocation between users, supporting consistent comparisons and helping organizations manage transport-related emissions. Read about the standard here.
PAS 7060:2021 – Electric vehicles. Safe and environmentally conscious design and use of batteries. Guide	Provides guidance on the design and use of traction batteries in electric and hybrid vehicles, covering manufacture, use, repair, disassembly and end-of-life. It addresses battery safety, crashes, battery management systems and reuse opportunities, helping organizations make EV battery development safer and more efficient while supporting reuse, recycling and confidence in EVs. Read more about the standard here.
PAS 7061:2020 – Batteries for vehicle propulsion electrification. Safe and environmentally conscious handling of battery packs and modules. Code of practice	Sets out guidance on the safe, environmentally-conscious handling and management of electric vehicle battery packs and modules throughout their life cycle. It covers failure, detection, fire management, handling, lifting, storage, servicing and disposal, helping organizations manage battery-related risks and build good practice as the sector grows. Read more about the standard here.
PAS 7062:2021 – Electric vehicle battery cells. Health and safety, environmental and quality management considerations in cell manufacturing and finished cell. Code of practice	Provides recommendations for the safe, consistent and environmentally responsible manufacture of battery electrodes and cells, covering sourcing, handling, assembly, testing, storage and end-of-life. It offers a common approach to quality, health and safety, and environmental risk management, helping organizations build expertise, support innovation and increase confidence in battery cell products. Read more about the standard here.
BS EN IEC 61851-1:2019 Electric vehicle conductive charging system – General requirements	Specifies the general safety, performance, and interoperability requirements for conductive electric vehicle charging systems, helping ensure the safe and reliable deployment of EV charging infrastructure. Read more about the standard here.

Take me back to the start ›

Automotive Cont.

Standard	What it does
BS EN 62196 – Plugs, socketoutlets, vehicle connectors and vehicle inlets — Conductive charging of electric vehicles	Specifies requirements for plugs, socket-outlets, vehicle connectors and vehicle inlets used for conductive charging of electric vehicles, supporting safe, compatible and interoperable EV charging connections. Read more about the standard here.
BS EN ISO 15118 – Road vehicles. Vehicle to grid communication interface	This standard specifies communication between electric vehicles (BEV/PHEV) and charging equipment (EVSE) to support power transfer, including bidirectional charging. It covers wireless and conductive charging requirements, automatic connection, and messaging between the vehicle and supply equipment controllers, defining data models, formats and protocols across the network communication layers. Read more about the standard here.
PAS 1899 – Electric Vehicles Accessible Charging	Specifies requirements for accessible public EV charging, primarily conductive charging for cars and vans. It covers the physical environment around chargepoints, placement and spacing, design factors (height, cables, bollards, interface, signage) and digital information provision, helping organizations build inclusive charging infrastructure usable by disabled and older people. Read more about the standard here.
Emerging standards for chargepoint interoperability, battery second life and circularity, smart mobility data and CAVs	Supporting low-carbon vehicle deployment, efficient transport networks and responsible battery lifecycles.

Stay up to date with the latest developments in automotive standards here.

Take me back to the start ›

Traffic Management

Standard	What it does
DATEX II	Data standard in Europe for road traffic and travel information, supporting interoperable exchange of traffic management data between systems and operators. Read more here.

Public transport

Standard	What it does
NeTEx – Network Timetable Exchange	CEN Technical Standard for exchanging public transport schedules and related data, supporting consistent timetable, network and service information across systems. Read more here.

Zero-emission road freight

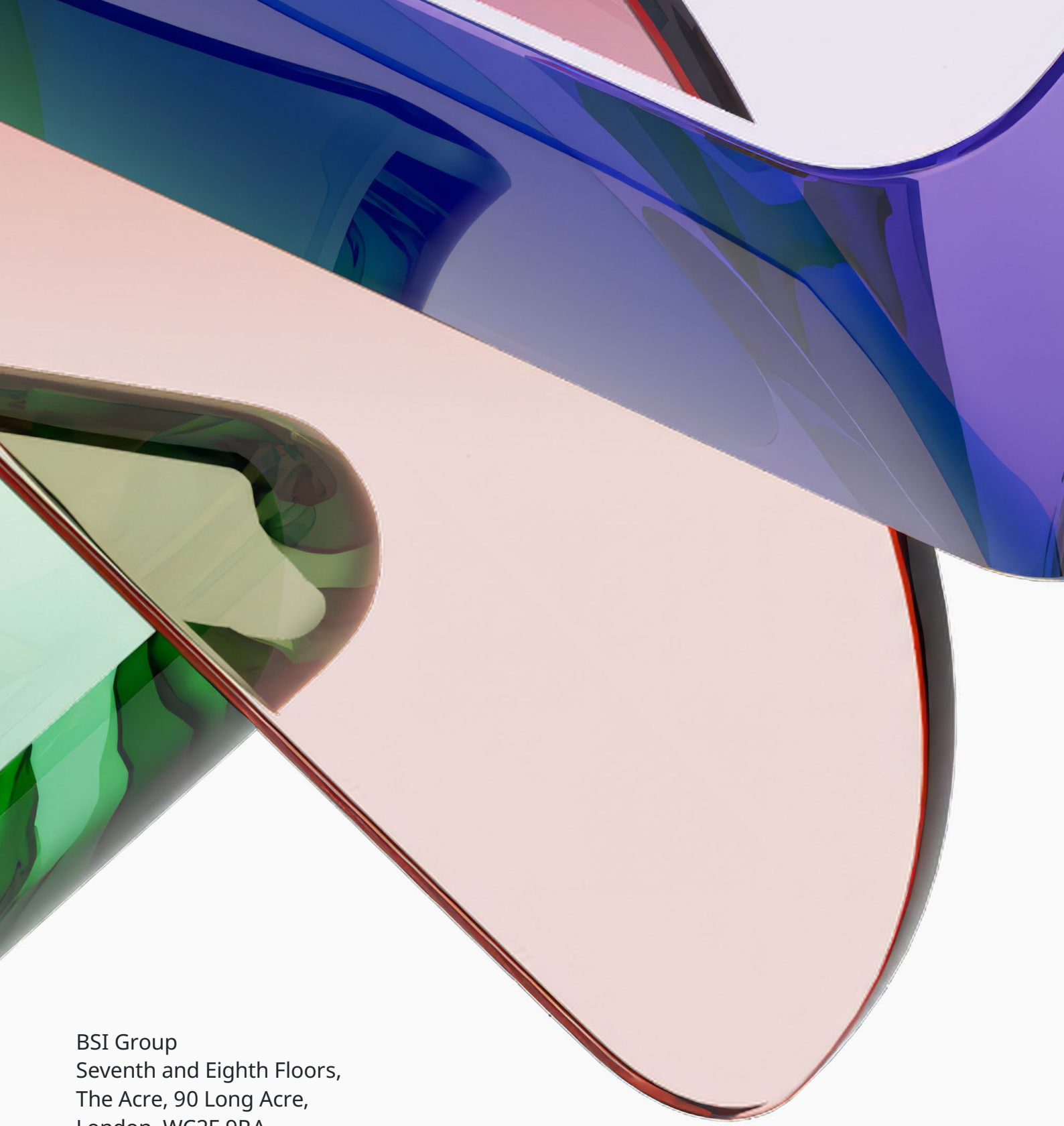
Standard	What it does
BSI Flex 2071 – Publicly Accessible Charging Sites for Battery Electric HGVs	Provides guidance for the safe design and operation of publicly accessible charging sites for battery electric heavy goods vehicles, supporting scalable zero-emission freight infrastructure. Read more about the standard here.
BSI Flex 2073 – Design and Implementation of Hydrogen Refuelling Sites	Provides guidance for the design and implementation of mobile and static hydrogen refuelling sites, helping support safe roll-out of hydrogen infrastructure for heavy-duty vehicles. Read more about the standard here.

Take me back to the start ›

Aviation

Standard	What it does
BS EN ISO 14064-1 – Greenhouse gases - Specification with guidance at the organization level for quantification and reporting of greenhouse gas	Quantification and reporting of greenhouse gas emissions for aviation operators, supporting CORSIA and ETS compliance. Read more about the standard here.
BS EN ISO 14064-3:2019 - TC Greenhouse gases - Specification with guidance for the verification and validation of greenhouse gas statements	Verification and validation of greenhouse gas statements used in aviation emissions reporting. Read more about the standard here.
BS EN ISO 14065:2021 General principles and requirements for bodies validating and verifying environmental information	Requirements for bodies validating and verifying environmental information, underpinning independent assurance of aviation emissions data. Read more about the standard here.
BS ISO 14066:2023 - TC Environmental information. Competence requirements for teams validating and verifying environmental information	Competence requirements for greenhouse gas validation and verification teams. Read more about the standard here.
ASTM D7566 - 26a - TC Standard Specification for Aviation Turbine Fuel Containing Synthesized Hydrocarbons	Specification for aviation turbine fuel containing synthesized hydrocarbons, supporting safe blending and use of sustainable aviation fuels. Read more about the standard here.
SAE AIR 6241A:2020 Procedure For The Continuous Sampling And Measurement Of Non-Volatile Particle Emissions From Aircraft Turbine Engines	Aircraft engine emissions computation, supporting consistent aviation emissions calculation and reporting. Read more about the standard here.
SAE AIR 5715:2009 Procedure For The Calculation Of Aircraft Emissions	Procedures for calculating emission resulting from the main engines of commercial jet and turboprop aircraft through all modes of operation for all segments of a flight. Read more about the standard here.

Stay up to date with the latest developments in aerospace standards here.



BSI Group
Seventh and Eighth Floors,
The Acre, 90 Long Acre,
London, WC2E 9RA
+44 345 080 9000
bsigroup.com

Your partner
in progress