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Index Net-Zero 2022

#ForACleanTomorrow

What do Germany's important industrial sectors think about decarbonization?

As the energy transition continues, governments and organizations across Europe are ramping up their decarbonization plans. But while the pace of change is increasing, the process of making change happen remains complex and requires careful thought and planning. Index Net-Zero, a survey of decision-makers and decarbonization leaders across German industry, conducted on behalf of Uniper, can help you better understand the attitudes, technologies, goals, and challenges that are driving the journey to net-zero. Following on from the 2021 Index Net-Zero survey, this year's research also examines how the understanding of and strategy around decarbonization has changed over the past 12 months, including further progress towards decarbonization targets, motives for decarbonization, and understanding of specific technologies and solutions.

About the research

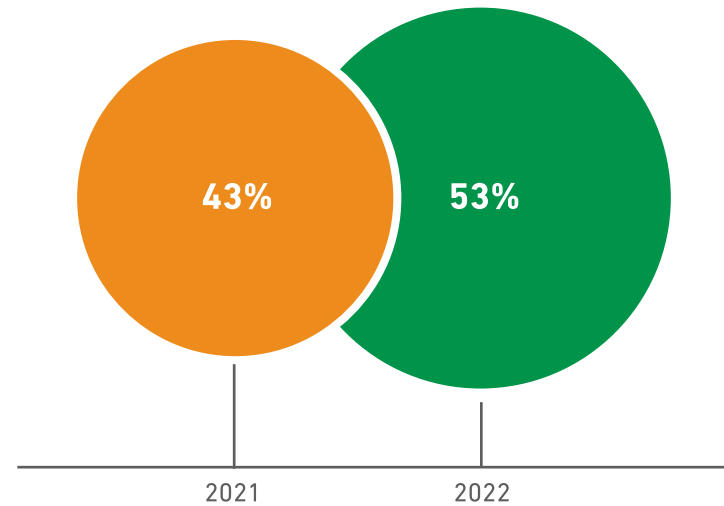
This report is based on a 30-question online survey fielded among 501 decision-makers in Germany between 11-18 January 2022 working within the following industries: Automotive, Chemicals, FMCG, Glass & Ceramics, Metal, Pulp & Paper and Stadtwerke.

German industrial companies are picking up the pace and increasing **decarbonization efforts** – they're looking to do more in the same space of time. While it is heartening to see more organizations commit to ambitious decarbonization goals and look to make impact sooner, there are still key uncertainties that need to be addressed if we are to **reach our destination.**



Net-zero is now the default and the pressure is on

More than half of companies now say their decarbonization goal is to reach net-zero – a 10-point YOY increase.

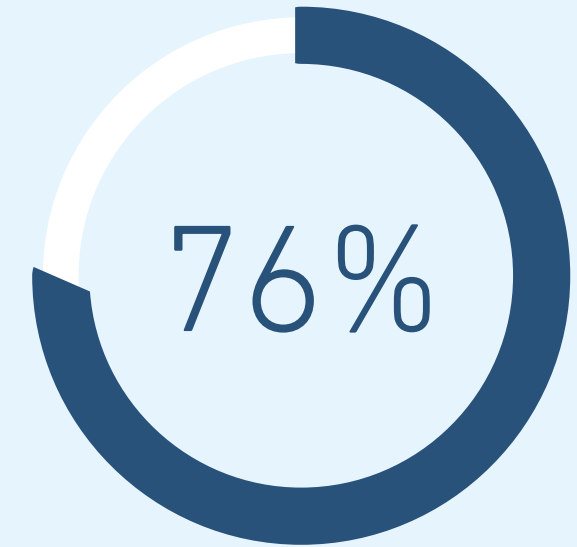
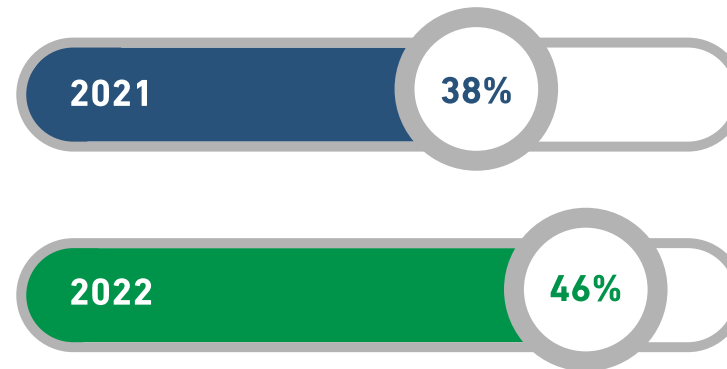


Alongside this, the number of organizations aiming to achieve their decarbonization targets within the next 15 years has also increased.

Less planning, more action

Eight-point YOY increase among respondents who say that their company has a specific decarb goal and a strategy in place to achieve it.

In spite of mounting pressure and greater awareness from organizations around the need to move fast, still only 46 percent of companies have a goal and a strategy in place. The survey shows an eight-point year-on-year increase among respondents who say that their company has both a specific decarbonization goal and a strategy in place to achieve it. Those without firm plans in place need to act now if they hope to achieve their future decarbonization targets.



With most organizations still aiming to achieve their decarbonization goal within the next 15 years – 43 percent by 2030 in last year's survey, and 44 percent in this year's – it's no surprise that **76 percent of decision-makers** say their company is also **feeling more pressure than ever to decarbonize.**

*Proportion of respondents saying that they feel under more pressure to decarbonize now than at the same time last year.

Decision-makers are increasingly prioritizing innovative and customized solutions to outdated energy sources:

29%

are developing their own projects for renewable power

21%

are developing their own projects for renewable gas

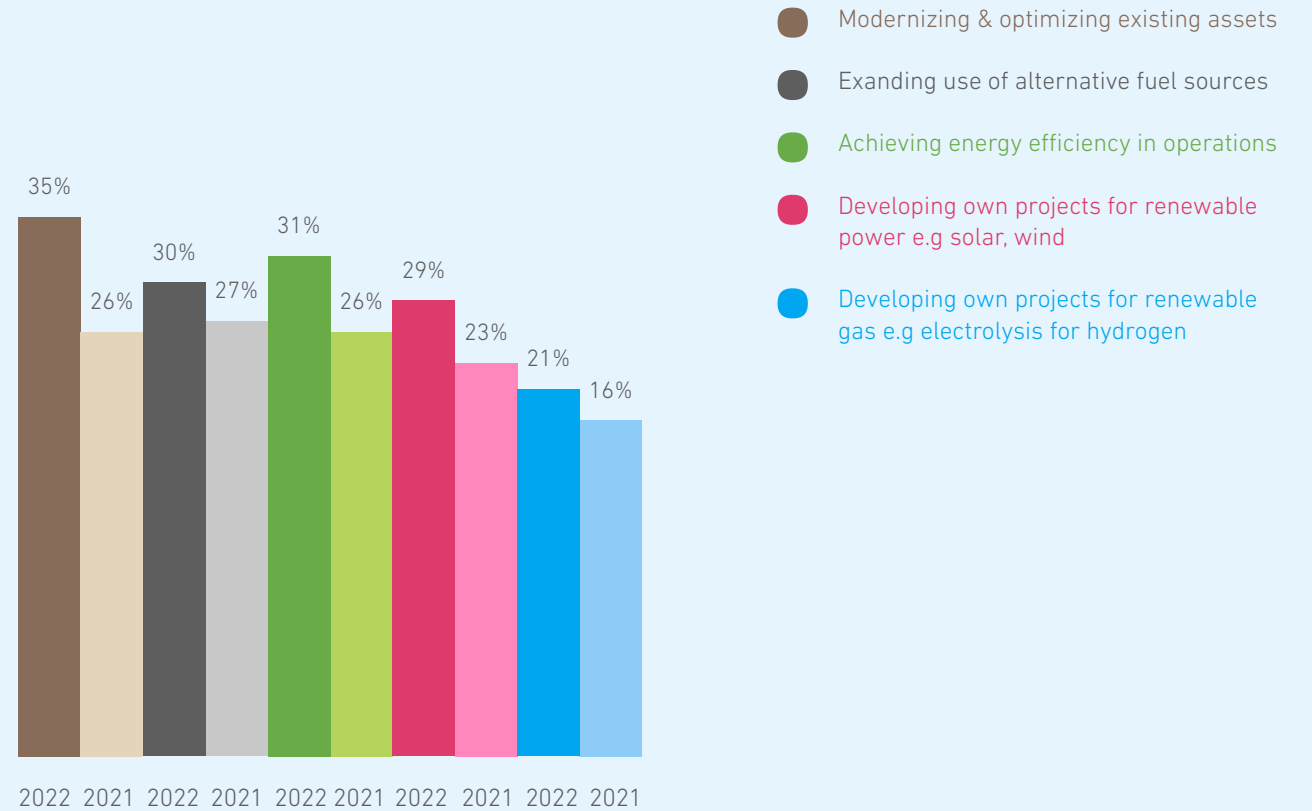
Increased focus on making tangible change

While all decarbonization priorities have gained greater traction, "Modernizing and optimizing existing assets" (26 percent to 35 percent) and "achieving energy efficiency in operations" (25 percent to 35 percent) now top the list in terms of companies' decarbonization priorities.

This shows that people are looking to make a tangible difference NOW and start to make changes that are having an impact on the numbers.

It's encouraging to see this focus on priorities that will have an impact on decarbonization in the relatively short term and this will go a long way in terms of maintaining momentum and focus as we plan for long-term success.

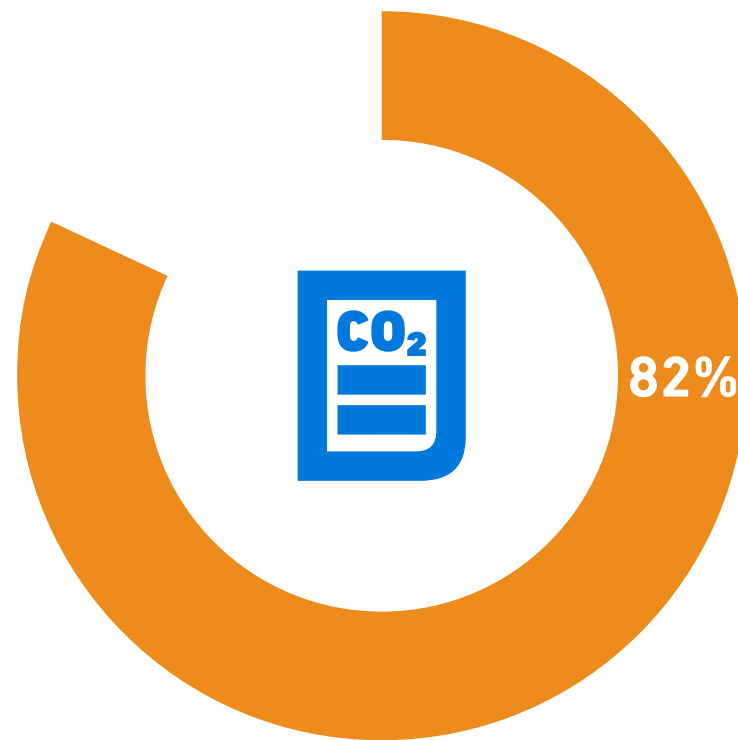
What are your company's immediate decarbonization priorities?



A regulatory environment for change

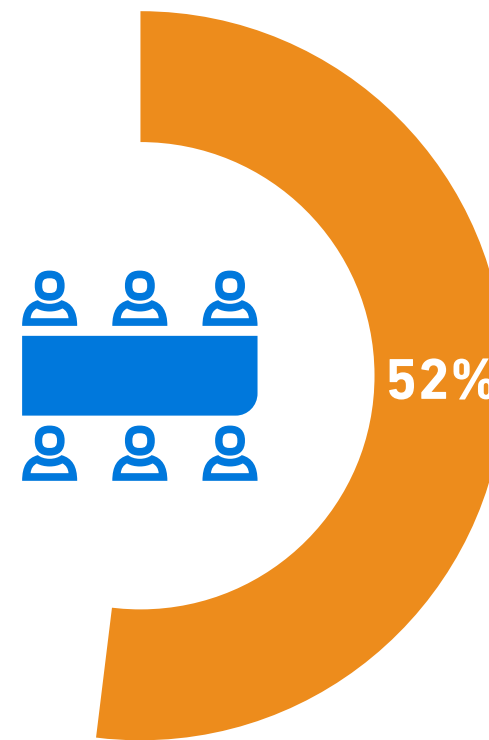
A changing regulatory environment is increasing complexity for decision-makers – but regulations can also boost companies' efforts if they can solve questions around the financing of decarbonization.

Germany's new CO₂ tax



82%

say that it has increased their company's prioritization of decarbonization



52%

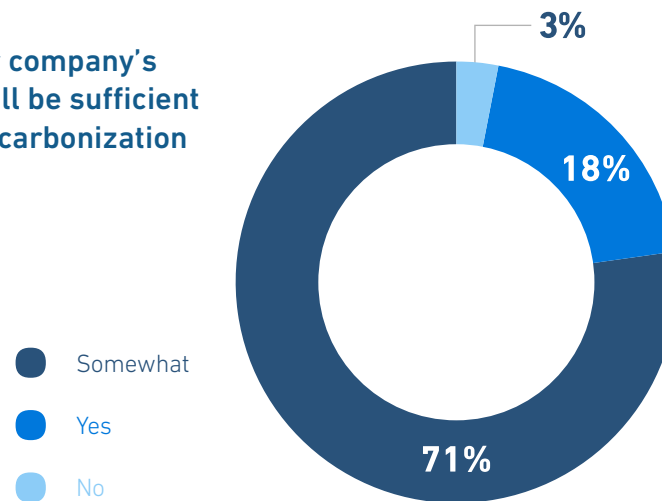
say the same about the new German government's impact on their decarbonization plans

Uncertainties persist about organizations' tech capabilities – we must all continue to think about decision-makers' unmet needs

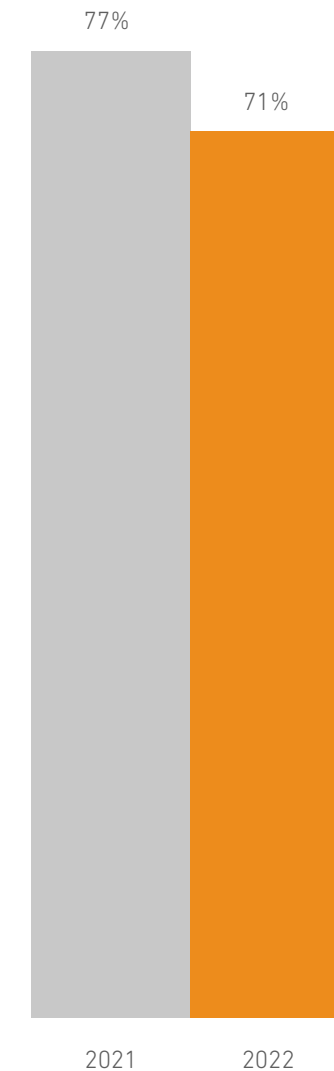
A majority of decision-makers are still looking for "game changing" innovation: **71 percent** are unsure whether their existing solutions will be enough to help them meet their decarbonization goals.

There is low confidence in the ability of existing technology to solve decarbonization challenges – the survey shows mixed feelings around the adoption and implementation of innovative technologies. Decision-makers know that there are solutions that can help, but they are not sure how to use them.

Do you believe that your company's existing technologies will be sufficient for you to reach your decarbonization goals?



How ready is your organization to take advantage of new technology/solutions when they come to market?



"Extremely" or "very" ready

The journey to net-zero

Accelerating the energy transition to meet the needs of our world today and tomorrow is complex. At Uniper we know that having a partner to advise and guide you on each step of your journey to a sustainable energy future can be the critical ingredient to achieving your goal.

We offer the full range of net-zero products and services from planning to execution, including shaping decarbonization roadmaps, improving energy efficiency, optimizing fuel supplies towards green gas and green power, enabling the use of hydrogen, and facilitating carbon compensation.

An aerial photograph of a dense, green forest with a winding asphalt road that curves through the trees. A bright yellow circle is overlaid on the right side of the image, containing contact information.

Contact us
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to accelerate your energy journey

