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— FOR —



Industrial decarbonisation in Europe:

France, United Kingdom, Belgium,
Germany, Netherlands

Survey report – March 2025





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Methodology

Methodology

The following statement must be included in any publication, whether complete or partial:

“OpinionWay survey for Equans”

and any reproduction of the survey must not be dissociated from this title



A sample of **1,336 industry decision-makers** involved in decarbonisation-related issues in their company (private-sector companies with 50 to 4999 employees), distributed as follows:

- 509 respondents from France
- 218 respondents from UK
- 201 respondents from Belgium
- 208 respondents from Germany
- 200 respondents from Netherlands

The sample was weighted depending on the **number of employees**, the **sector** and the **geographic location** to make it representative of the population surveyed.



The sample population was interviewed via the **online self-administered questionnaire using CAWI** (Computer Assisted Web Interview).



Interviews were conducted from **3 to 13 March 2025**.



OpinionWay conducted this survey in accordance with **the procedures and rules of Standard ISO 20252**



The following margins of error must be taken into account when interpreting the results of this survey:

- a maximum of 3.0 points for a sample of 1,000 respondents.
- a maximum of 4.4 points for a sample of 500 respondents.
- a maximum of 6.9 points for a sample of 200 respondents.

Reading note

The **significant differences between sub-targets** (sector, number of employees, etc.) are represented by the colour codes below (95% significance):

xx% → significantly **higher** than the result obtained across the entire target

xx% → significantly **lower** than the result obtained across the entire target

The **significant differences** (95% significance) **between the individual countries and the overall results** are indicated as follows:

→ significantly higher/lower than the results of the overall results



The bases shown in the report indicate **total workforce**.

The display **of the significant differences between sub-targets** has been judged and is not exhaustive. The survey's findings complement this report.



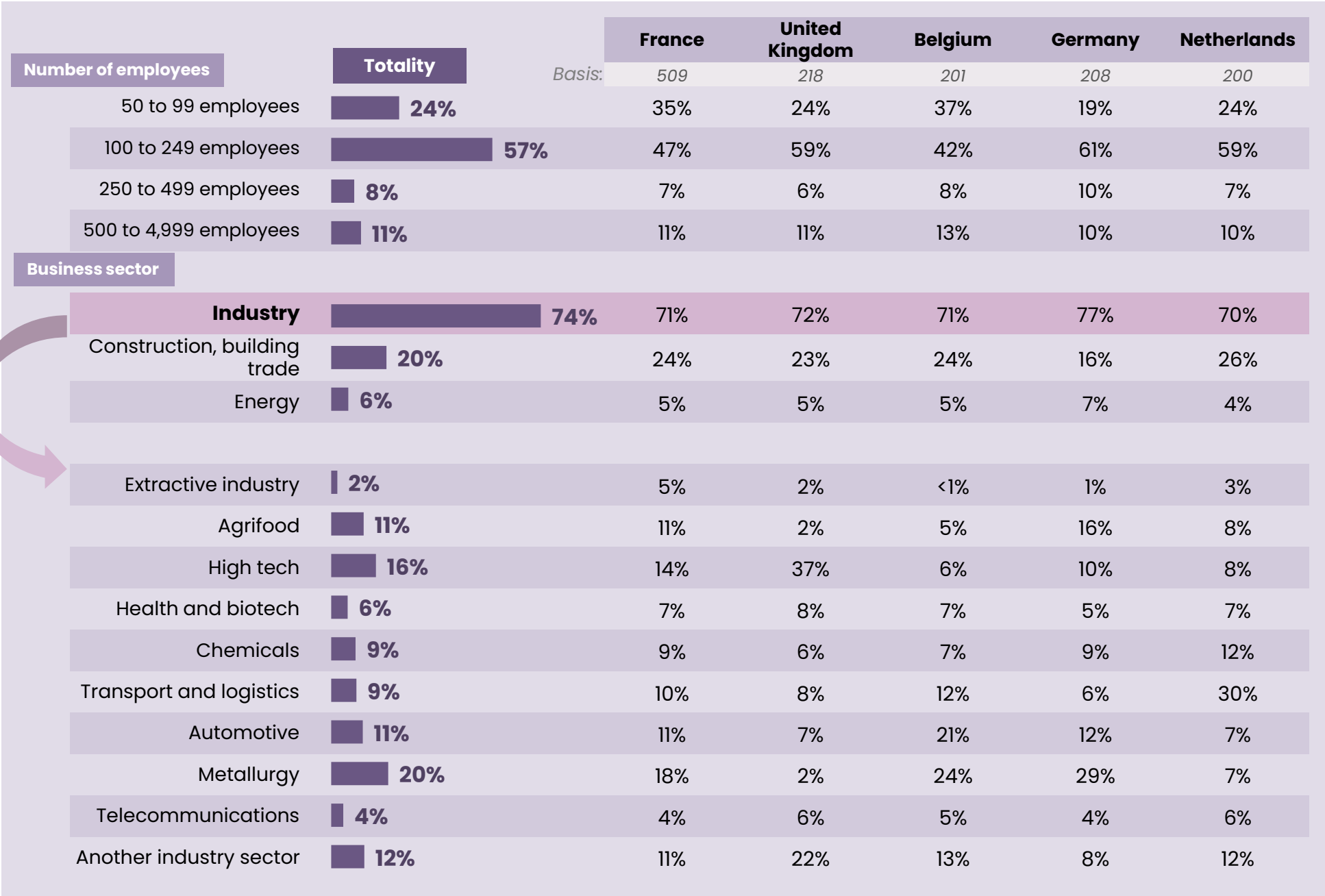
Profile of respondents

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Profile of the industrial decision-makers

Where is your company located?

- France: 18%
- United Kingdom: 19%
- Belgium: 4%
- Germany: 52%
- Netherlands: 7%



Profile of the industrial decision-makers

Role in decarbonisation-related decisions		France	United Kingdom	Belgium	Germany	Netherlands
Totality		Basis:				
		509	218	201	208	200
Main decision-maker	54%	44%	72%	46%	51%	58%
Co-decision-maker	38%	41%	26%	38%	41%	39%
Consulted but not decision-maker	8%	15%	2%	16%	8%	3%
Not involved in these decisions	-	-	-	-	-	-
Department						
CEO/Managing Director/Owner/General Manager	22%	17%	41%	21%	18%	16%
General management	17%	24%	12%	20%	16%	15%
Strategic management	6%	8%	4%	16%	4%	11%
CSR department	4%	4%	2%	6%	3%	14%
Administrative and financial department	4%	6%	4%	4%	2%	8%
Plant management	4%	9%	1%	5%	2%	4%
Department of operations	12%	11%	6%	13%	15%	17%
Logistics/supply chain department	4%	6%	1%	4%	4%	7%
IT department	12%	4%	24%	4%	12%	2%
Safety/QHSE department	3%	3%	2%	1%	4%	<1%
Purchasing department	2%	2%	<1%	2%	3%	<1%
Technology / R&D	3%	2%	2%	<1%	5%	<1%
Industrial maintenance department	5%	1%	-	2%	9%	4%
Legal/compliance department	<1%	1%	<1%	-	-	-
Human resources department	2%	1%	1%	<1%	3%	2%
Other	<1%	1%	-	2%	<1%	<1%



Results

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01



Perception of industrial decarbonisation



Definition of decarbonisation

Decarbonisation is defined in the Cambridge English Dictionary as “the process of stopping or reducing carbon gases, especially carbon dioxide, being released into the atmosphere as the result of a process, for example the burning of fossil fuels)”.

There are several pathways for decarbonisation, and they can be combined:

- Adopting an energy-efficient and energy-saving approach by reducing the amount of energy consumed for the same work, or only meeting essential needs that are deemed non-negotiable
- Storing and reusing energy in order to limit energy consumption
- Replacing fossil fuels with solutions that emit fewer greenhouse gases
- Reducing the consumption of raw materials, and reusing and recycling waste as much as possible
- Using carbon-capture techniques to prevent carbon dioxide from being released into the atmosphere



Although polluting, the European industrial sector *pays close attention to its emissions and is striving to reduce its impact* – a particularly popular opinion in the United Kingdom. In the Netherlands, almost all industrial companies state that the sector always favours decarbonised solutions. In Belgium too, people are more convinced that the industrial sector systematically favours low-carbon solutions and therefore perceive it as a lower CO₂ emitter.

Q1: To what extent do you agree with the following statements? Today, the industrial sector...

Basis: all decision-makers (1336)

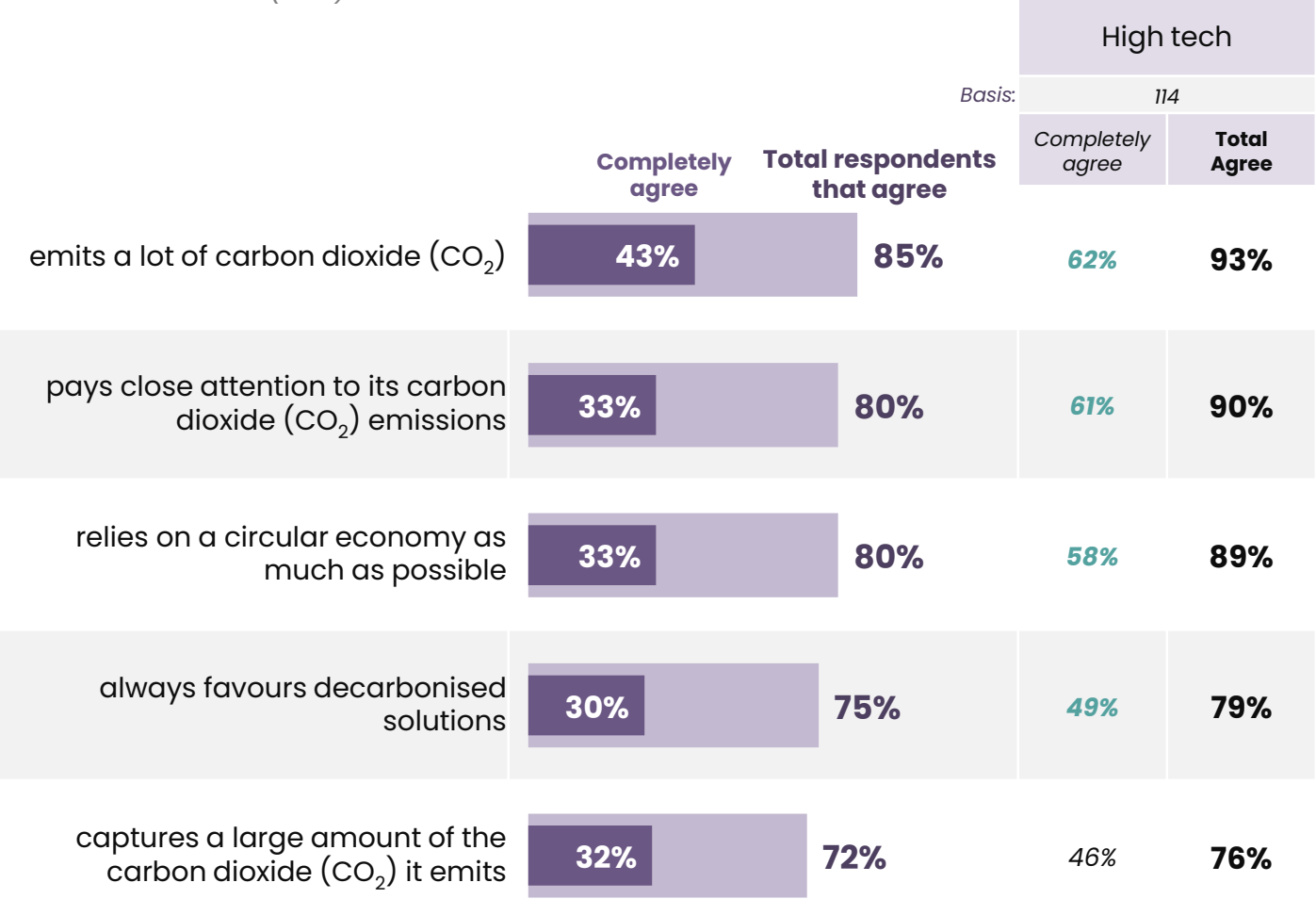
			France		United Kingdom		Belgium		Germany		Netherlands	
			509		218		201		208		200	
	Completely agree	Total respondents that agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree
emits a lot of carbon dioxide (CO ₂)	43%	85%	34%	85%	56%	89%	21%	76%	43%	84%	40%	87%
pays close attention to its carbon dioxide (CO ₂) emissions	33%	80%	35%	77%	45%	88%	29%	85%	28%	76%	38%	86%
relies on a circular economy as much as possible	33%	80%	25%	75%	46%	82%	35%	86%	29%	80%	37%	81%
always favours decarbonised solutions	30%	75%	31%	69%	40%	78%	41%	79%	25%	73%	34%	92%
captures a large amount of the carbon dioxide (CO ₂) it emits	32%	72%	25%	67%	35%	73%	32%	84%	32%	71%	34%	78%



European leaders in the *high-tech sector*, who are much more categorical than the average on the negative externalities of the industrial sector, are also more categorical in recognising the positive actions taken to mitigate their effects.

Q1: To what extent do you agree with the following statements? Today, the industrial sector...

Basis: all decision-makers (1336)

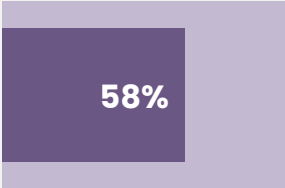




Industrial decarbonisation appears transversely as a real *environmental necessity*, even in Belgium and the Netherlands where leaders are more reserved about the measure.

Q2: Do you agree with each of the following statements regarding decarbonisation of industry in general? Decarbonising industry...

Basis: all decision-makers (1336)

	Completely agree	Total respondents that agree	France		United Kingdom		Belgium		Germany		Netherlands	
			Basis: 509		218		201		208		200	
			Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree
is necessary to respond to the climate emergency		90%	55%	90%	75%	94%	41%	88%	55%	88%	41%	91%



Undeniably valued, decarbonisation is creating *even more momentum in the United Kingdom*. This has been made possible because companies have a *clear vision* of the applicable solutions, it can generate *many positive impacts on the sector*, in particular when it comes to *innovation*. In the Netherlands, industrial companies are almost unanimous about the ability of the transition *to improve overall performance*.

Q2: Do you agree with each of the following statements regarding decarbonisation of industry in general? Decarbonising industry...

Basis: all decision-makers (1336)

	Basis:		France		United Kingdom		Belgium		Germany		Netherlands	
			509		218		201		208		200	
			Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree
drives companies in the sector to innovate more	Completely agree	Total respondents that agree	41%	93%	62%	95%	47%	88%	40%	94%	36%	91%
is possible because the applicable solutions are known	38%	87%	34%	88%	52%	90%	31%	87%	35%	86%	31%	91%
improves the sector's appeal	42%	86%	37%	87%	51%	95%	36%	82%	42%	83%	38%	90%
boosts the sector's independence with respect to other countries	37%	86%	34%	84%	49%	93%	29%	83%	33%	83%	38%	89%
is a step that is already well underway	31%	83%	28%	75%	41%	86%	26%	82%	28%	82%	33%	91%
improves the performance of industry	35%	80%	32%	84%	56%	89%	30%	75%	27%	74%	43%	90%



There is momentum for this in the United Kingdom that is shared by *high-tech* companies, contrary to companies in the *metallurgy* sector. Within the largest structures surveyed, there is a consensus on the climate emergency and the relevance of this approach.

Q2: Do you agree with each of the following statements regarding decarbonisation of industry in general? Decarbonising industry...
Basis: all decision-makers (1336)

	Completely agree	Total respondents that agree	High tech		Metallurgy		500 to 4,999 employees	
			Basis: 114		120		478	
			Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree
drives companies in the sector to innovate more	45%	94%	63%	95%	36%	91%	51%	94%
is necessary to respond to the climate emergency	58%	90%	83%	96%	55%	87%	67%	96%
is possible because the applicable solutions are known	38%	87%	55%	91%	21%	75%	43%	89%
improves the sector's appeal	42%	86%	48%	90%	37%	74%	55%	92%
boosts the sector's independence with respect to other countries	37%	86%	56%	91%	25%	76%	43%	92%
is a step that is already well underway	31%	83%	59%	90%	20%	72%	36%	84%
improves the performance of industry	35%	80%	49%	81%	24%	63%	46%	91%



However, *its implementation takes time*, as it is relatively more difficult in this industry than in other sectors and represents too great a financial burden. Companies in the United Kingdom are significantly more divided on this last point, unlike in the Netherlands (where 2/3 of companies would go as far as to say that industrial decarbonisation is a pipe dream).

Q3: Using the same scale, do you agree with these statements? Industrial decarbonisation...

Basis: all decision-makers (1336)

			France		United Kingdom		Belgium		Germany		Netherlands	
			Basis: 509		218		201		208		200	
			Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree
is a long-term project	<div><div>52%</div></div>	92%	40%	91%	61%	97%	41%	84%	54%	91%	45%	86%
is harder than decarbonising other sectors	<div><div>31%</div></div>	72%	26%	71%	32%	70%	32%	84%	31%	71%	33%	78%
represents too great a financial burden	<div><div>30%</div></div>	72%	24%	72%	25%	58%	25%	75%	34%	76%	37%	85%
is an issue you are fed up of hearing about	<div><div>20%</div></div>	50%	20%	50%	22%	48%	19%	48%	19%	50%	23%	59%
is a pipe dream	<div><div>21%</div></div>	48%	17%	44%	28%	47%	13%	47%	21%	48%	21%	65%



Bucking the trend, agrifood companies are significantly more confident when it comes to the implementation of the industrial decarbonisation process and its timeline. In the high-tech field, there are still some doubts—more than elsewhere, a significant number of people see the task as both difficult and a pipe dream.

Q3: Using the same scale, do you agree with these statements? Decarbonising industry...

Basis: all decision-makers (1336)

			Agrifood		High tech	
	Completely agree	Total respondents that agree	51		114	
			Completely agree	Total Agree	Completely agree	Total Agree
is a long-term project	52%	92%	55%	76%	63%	98%
is harder than decarbonising other sectors	31%	72%	13%	32%	47%	80%
represents too great a financial burden	30%	72%	20%	67%	34%	73%
is an issue you are fed up of hearing about	20%	50%	3%	25%	33%	57%
is a pipe dream	21%	48%	3%	28%	48%	61%



Undeniably a priority for the government and for their company, for many leaders, decarbonisation is seen as a subject that is equally important for *the whole sector*. The French minimise the importance of industrial decarbonisation for suppliers, while the Netherlands highlight the importance of the transition for their clients.

Q4: How important do you think decarbonisation of industry is today for each of the following stakeholders?

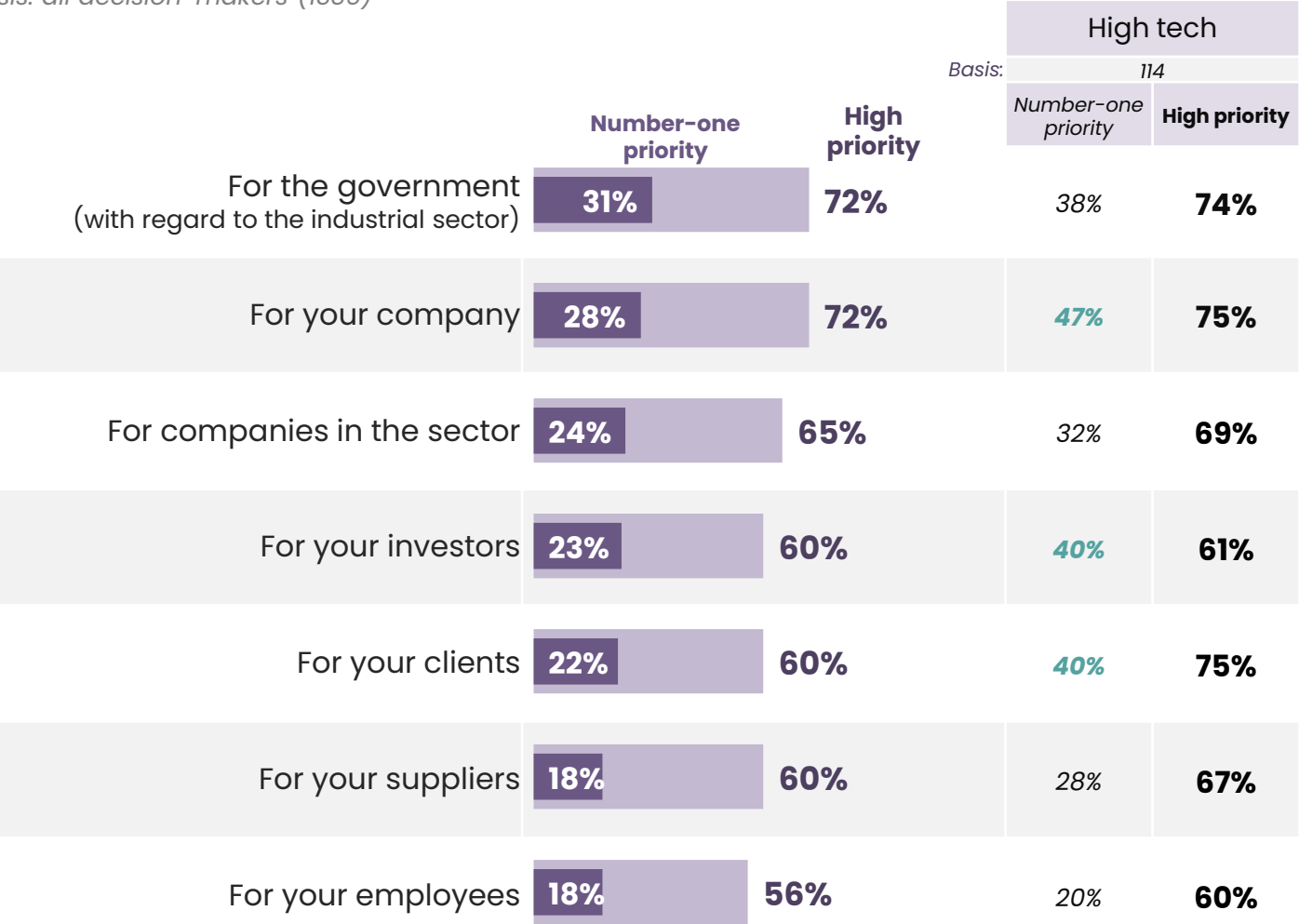
Basis: all decision-makers (1336)

			France		United Kingdom		Belgium		Germany		Netherlands	
			509		218		201		208		200	
	Number-one priority	High priority	Number-one priority	High priority	Number-one priority	High priority	Number-one priority	High priority	Number-one priority	High priority	Number-one priority	High priority
For the government (with regard to the industrial sector)	31%	72%	26%	66%	42%	77%	20%	63%	31%	72%	25%	81%
For your company	28%	72%	30%	75%	33%	81%	31%	70%	24%	67%	34%	70%
For companies in the sector	24%	65%	21%	62%	30%	74%	18%	66%	22%	61%	30%	75%
For your investors	23%	60%	20%	59%	31%	62%	22%	67%	20%	58%	29%	66%
For your clients	22%	60%	22%	61%	25%	62%	21%	66%	21%	58%	27%	74%
For your suppliers	18%	60%	15%	51%	24%	66%	23%	56%	15%	60%	19%	61%
For your employees	18%	56%	21%	64%	26%	62%	24%	64%	14%	52%	21%	53%

“ Almost half of all companies in the high-tech sector consider the issue to be a top priority, this distinguishes them from the average company, as well as their customers and investors.

Q4: How important do you think decarbonisation of industry is today for each of the following stakeholders?

Basis: all decision-makers (1336)



02



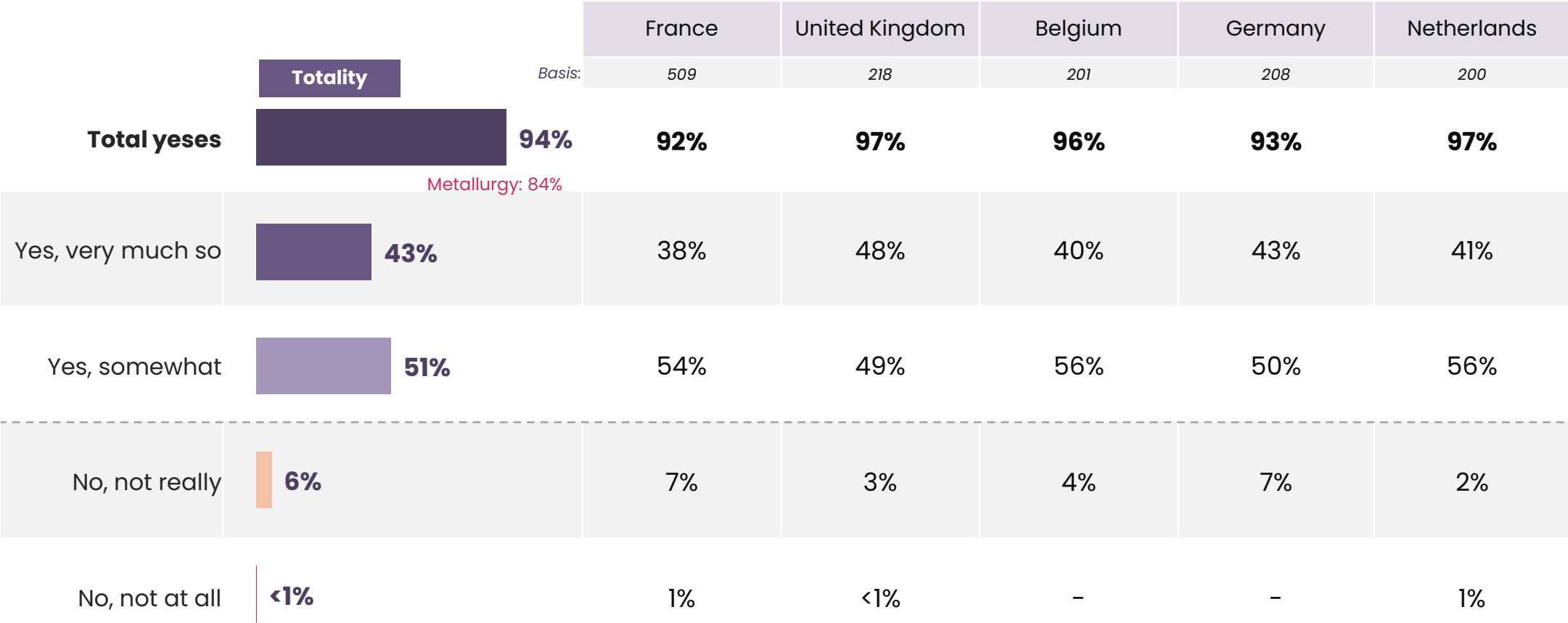
Perception of decarbonisation within the company



Whatever the country or the size of the small company, more than 9 out of 10 industrial companies in Europe believe that the *issue of decarbonisation is compatible with their company's business*! Only professionals in the metallurgy sector are slightly less convinced.

Q5: Is the issue of decarbonisation compatible with your company's business?

Basis: all decision-makers (1336)





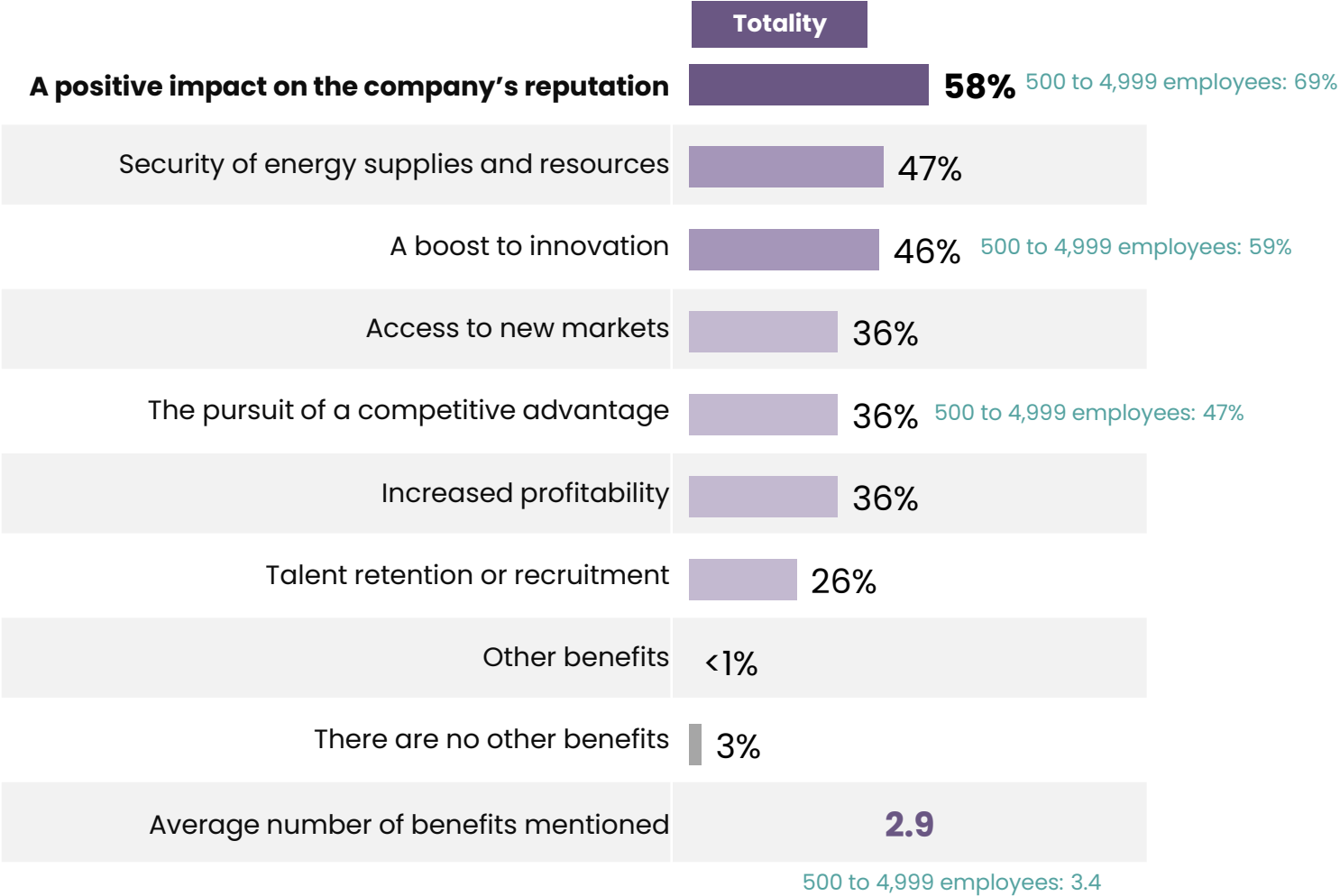
Beyond the participation in the environmental transition and compliance with laws, leaders are able to identify the advantages of decarbonising their company. Most importantly, they believe that it would improve the *reputation of their company* - a belief shared by slightly fewer leaders in the Netherlands. It would also help to secure resource and energy supplies and stimulate innovation. The search for a competitive advantage might be more present in the UK than in France.

Q6: Apart from being involved in the green transition and complying with the law, what are, or what would be, **the benefits of decarbonisation** for your company? *Basis: all decision-makers (1336)*

		France	United Kingdom	Belgium	Germany	Netherlands
	Totality	<i>Basis:</i> 509	218	201	208	200
A positive impact on the company's reputation	58%	59%	62%	57%	58%	48%
Security of energy supplies and resources	47%	41%	54%	39%	47%	42%
A boost to innovation	46%	40%	49%	51%	47%	40%
Access to new markets	36%	36%	42%	39%	34%	36%
The pursuit of a competitive advantage	36%	29%	46%	33%	35%	32%
Increased profitability	36%	31%	42%	26%	36%	31%
Talent retention or recruitment	26%	23%	25%	27%	27%	29%
Other benefits	<1%	<1%	-	<1%	-	-
There are no other benefits	3%	3%	<1%	1%	4%	2%
Average number of benefits mentioned	2.9	2.7	3.2	2.8	3.0	2.6

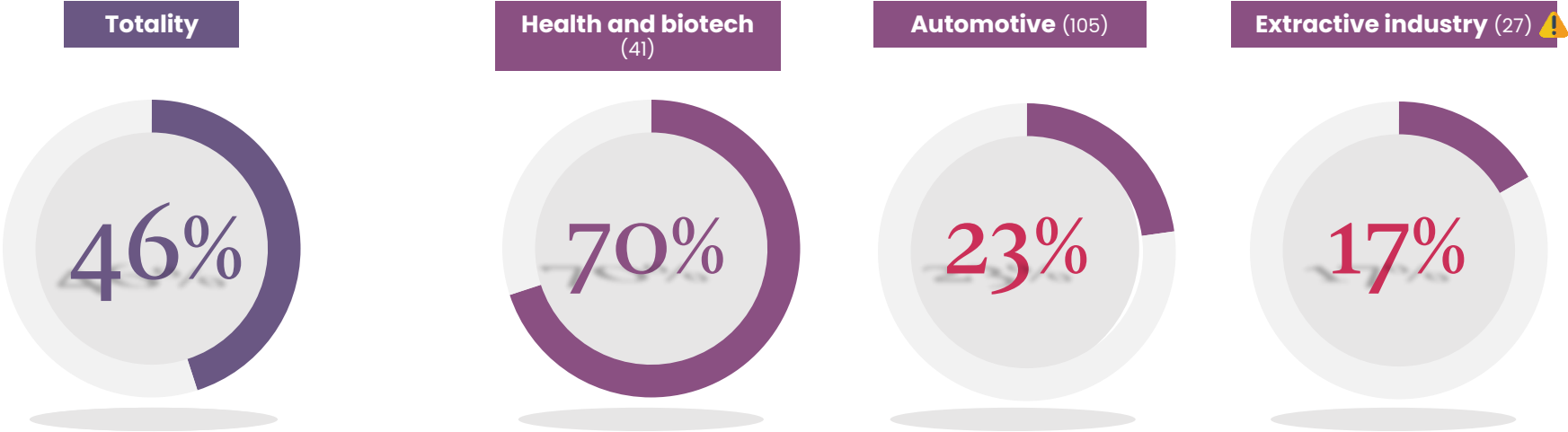
” The largest structures surveyed are able to identify the benefits even better.

Q6: Apart from being involved in the green transition and complying with the law, what are, or what would be, **the benefits of decarbonisation** for your company? *Basis: all decision-makers (1336)*



“Decarbonisation as a vector for stimulating innovation within the company - a polarising idea? Health and biotech industries tend to celebrate decarbonisation, while the automotive and extractive industries remain more sceptical.

Q6: Apart from being involved in the green transition and complying with the law, what are, or what would be, **the benefits of decarbonisation** for your company? *Basis: all decision-makers (1336)*
Small base, results to be interpreted with caution ⚠



Think that **decarbonisation would stimulate innovation within their company**



Even though *no major obstacle emerges*, the complexity of the proposed solutions comes in first place when talking about obstacles at a European level. The magnitude of the investments required is another one of the most mentioned obstacles. It is important to note here that companies in the *Netherlands feel less constrained* by these 2 notions. In the United Kingdom in particular, the complexity of the supply chain for decarbonised energies or biosourced materials is an even bigger problem.

Q7: And what are, or what would be, **the obstacles to decarbonisation** for your company?

Basis: all decision-makers (1336)

		France	United Kingdom	Belgium	Germany	Netherlands
	Totality	509	218	201	208	200
The complexity of the proposed solutions	32%	27%	39%	21%	34%	16%
The required investments exceeding your company's means	27%	30%	25%	26%	29%	14%
A lack of suitable infrastructure for the energy transition	25% <small>500 to 4,999 employees: 34%</small>	19%	28%	28%	26%	24%
The administrative and regulatory complexity	25%	25%	27%	22%	25%	24%
The complexity of the supply chain for decarbonised energy or biobased materials	25%	23%	38%	16%	22%	20%
The difficulty of finding channels for collecting, recycling and reusing materials that are suited to your needs	23%	24%	32%	26%	20%	23%
A lack of in-house skills for going through with the transition successfully	21%	19%	24%	27%	21%	19%
The difficulty of assessing the actual risk-benefit ratio of the transformation	21%	21%	24%	21%	20%	16%

Other possible responses on the next slide...



Specifically in the extractive industry, the main obstacles to decarbonisation are the lack of support from financial backers and the difficulty in choosing a service provider to support them through this process: these obstacles are not mentioned particularly frequently on the whole.

Q7: And what are, or what would be, **the obstacles to decarbonisation** for your company?

Basis: all decision-makers (1336)

... Other possible responses on the previous slide

			France	United Kingdom	Belgium	Germany	Netherlands
			Basis: 509	218	201	208	200
A lack of solutions for your business needs	<div></div> 21%		20%	18%	17%	23%	15%
A fear of jeopardising the quality of products/services	<div></div> 20%		19%	27%	20%	17%	26%
A lack of support on the part of your funders	<div></div> 20% Extractive industry: 47%		24%	19%	18%	18%	21%
The difficulty of choosing a provider to support you in the process	<div></div> 19% Extractive industry: 40%		21%	21%	15%	18%	13%
Resistance to change on the part of your shareholders	<div></div> 17%		18%	13%	12%	18%	19%
The difficulty of getting your teams to follow new models	<div></div> 15%		14%	17%	20%	15%	12%
A lack of differentiation in the eyes of your clients	<div></div> 13%		12%	13%	12%	13%	12%
Other obstacles	<div></div> <1%		–	<1%	3%	–	2%
There are no obstacles	<div></div> 3%		2%	3%	<1%	4%	1%



Country results higher than the entire target
Results from sub-targets higher than the entire target 26



Players in the agrifood industry are mainly bio sourced held back by the complexity of the proposed solutions, while in the health and biotech sector, the first obstacle for many companies is the difficulty in evaluating the specific risk-benefit ratio of the transformation.

Q7: And what are, or what would be, **the obstacles to decarbonisation** for your company?

Basis: all decision-makers (1336)

		Basis:	
	Totality	Agrifood	Health and biotech
		51	41
The complexity of the proposed solutions	<div></div> 32%	57%	21%
The required investments exceeding your company's means	<div></div> 27%	43%	13%
A lack of suitable infrastructure for the energy transition	<div></div> 25%	18%	31%
The administrative and regulatory complexity	<div></div> 25%	45%	13%
The complexity of the supply chain for decarbonised energy or biobased materials	<div></div> 25%	4%	37%
The difficulty of finding channels for collecting, recycling and reusing materials that are suited to your needs	<div></div> 23%	6%	33%
A lack of in-house skills for going through with the transition successfully	<div></div> 21%	17%	13%
The difficulty of assessing the actual risk-benefit ratio of the transformation	<div></div> 21%	15%	48%



03

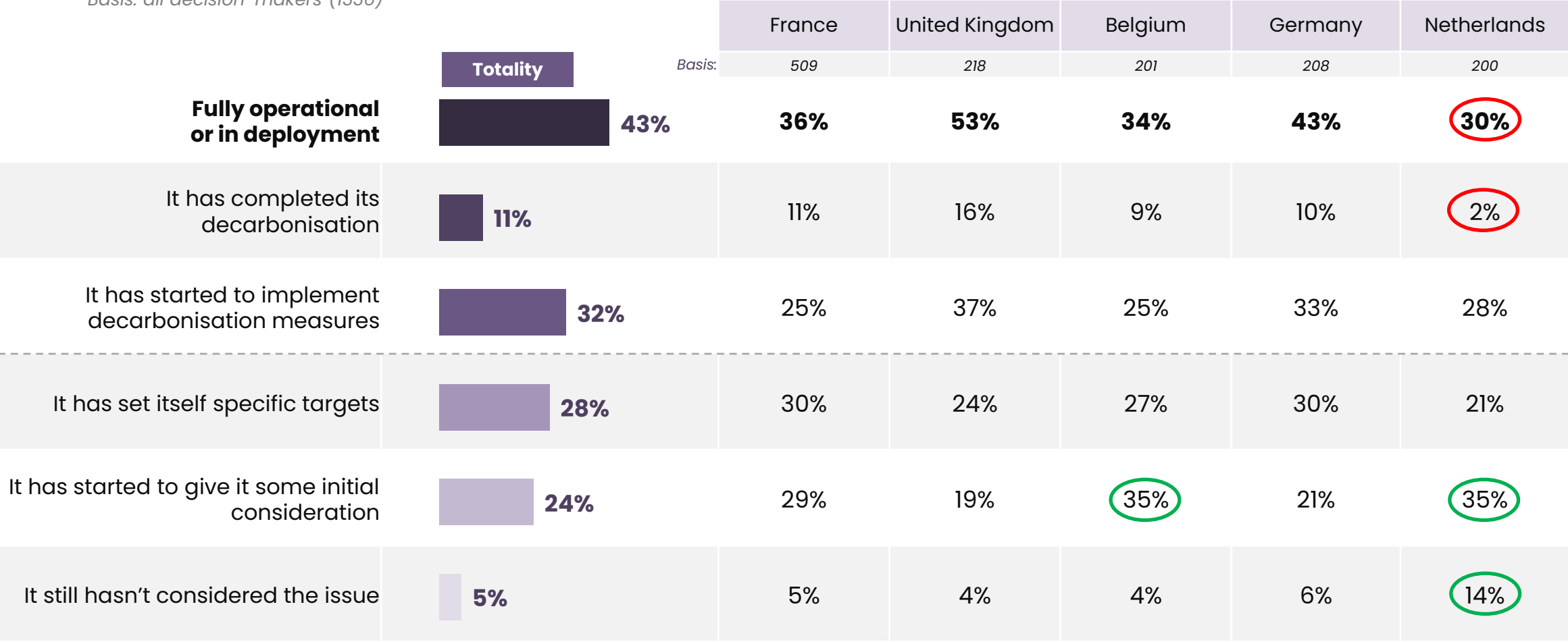
Decarbonisation
measures in the
company



Even though the subject *is discussed in almost all industries*, less than half of all companies have passed the discussion stage and have started to implement decarbonisation measures. Even though companies in the Netherlands find that the sector favours more decarbonised solutions than in Europe in general, industrial companies consider themselves to be less advanced when it comes to decarbonisation strategies.

Q8: In concrete terms, what stage is your company at in respect of decarbonisation?

Basis: all decision-makers (1336)

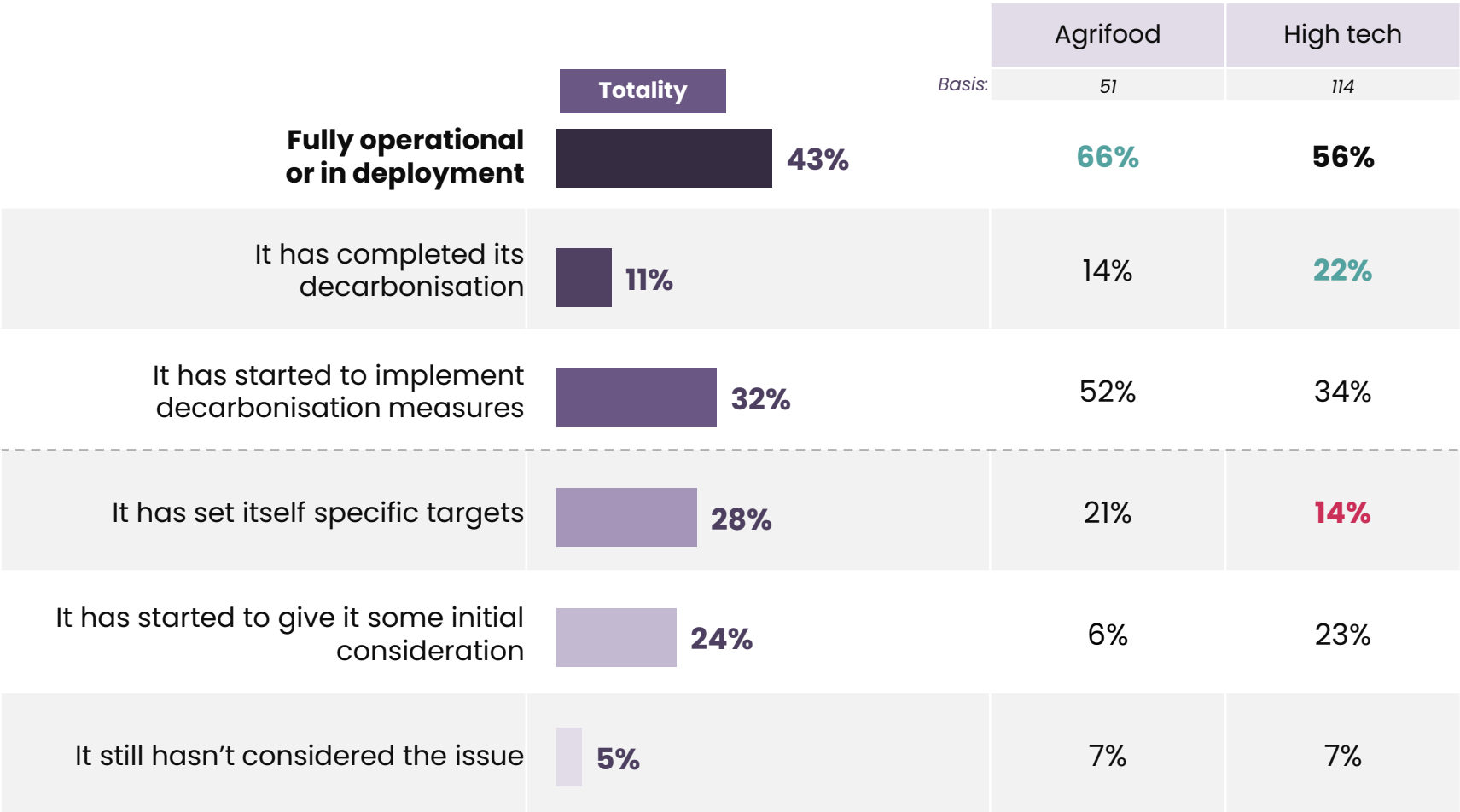




1 in 10 companies has completed its decarbonisation, a proportion that *doubles* in the high-tech sector. The agrifood industry also stands out with how *advanced* it is on this subject.

Q8: In concrete terms, what stage is your company at in respect of decarbonisation?

Basis: all decision-makers (1336)





It is primarily the *environmental convictions of leaders* that motivates them to take action within their companies. In France, *players involved in decarbonisation* stand out because of their remarkable effectiveness, while the government tends to be less of a driving force.

Q11: What or who prompted your company to implement decarbonisation measures?

Basis: Decision-makers that have already implemented decarbonisation measures (530)

		France	United Kingdom	Belgium	Germany	Netherlands
	Totality	<i>Basis:</i> 175	118	76	94	67
Your company management	44%	49%	51%	42%	40%	44%
The government	39%	28%	43%	54%	40%	35%
The geopolitical situation	34% <small>500 to 4,999 employees: 49%</small>	32%	30%	35%	36%	25%
The competition	30%	29%	28%	30%	32%	26%
Your investors	29%	23%	33%	32%	30%	12%
Your current or future employees	28%	28%	31%	25%	28%	14%
"Conventional" suppliers (not those already involved in decarbonisation)	27%	19%	21%	31%	32%	19%
Your customers or potential customers	25%	30%	30%	33%	23%	11%
Players already involved in decarbonisation	25%	42%	27%	24%	20%	23%
Other actors	<1%	–	–	–	1%	–
Average number of quotes	2.8	2.8	2.9	3.1	2.8	2.1

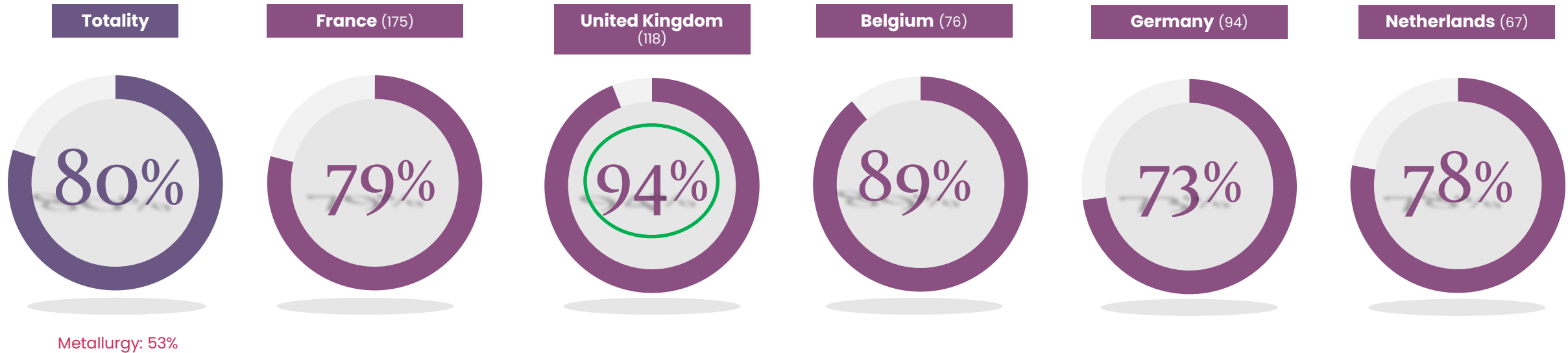
Companies that are already fully operational or in deployment



8 out of 10 companies have officially formalised their commitment to decarbonisation, more than 9 out of 10 in the United Kingdom. However, in the metallurgy sector this figure drops to just 5 out of 10 companies.

Q14: Finally, has your company officially formalised its commitment to decarbonisation (corporate purpose, master plan, approved trajectory)?

Basis: Decision-makers that have already implemented decarbonisation measures (530)



Has formalised **its commitment to decarbonisation in the form of an official commitment**

Companies that are already fully operational or in deployment



An energy-efficient and energy-saving approach on the one hand, reduction in consumption and circularity on the other: these are the pillars of decarbonisation for European industries. Companies in the United Kingdom and Belgium (respectively) in particular stand out due to their advanced positions when it comes to these two issues.

Q9: What type(s) of measure has your company implemented?

Basis: Decision-makers that have already implemented decarbonisation measures (530)

		France	United Kingdom	Belgium	Germany	Netherlands
	Totality	<i>Basis:</i> 175	118	76	94	67
Adopted an energy-efficient and energy-saving approach	57%	53%	74%	47%	52%	47%
Reduced consumption of water and raw materials and improved circularity as much as possible	52%	49%	46%	73%	54%	62%
Replacing fossil fuels with solutions that emit fewer greenhouse gases	40%	46%	44%	34%	38%	28%
Storing and reusing energy in order to limit energy consumption	39%	32%	46%	45%	37%	52%
Using carbon-capture techniques to prevent carbon dioxide from being released into the atmosphere	38%	28%	35%	48%	41%	37%
Average number of types of measures mentioned	2.3 ISE: 2.7	2.1	2.4	2.5	2.2	2.3

Country results higher than the entire target
Results from sub-targets higher than the entire target 33



*Solar power and storage are the most popular options for replacing all or some fossil fuels used. At the same time, half of these structures favour *heat pumps*. Smaller ISEs tend to opt for the electrification of processes, which is much more widespread.*

Q9bis: What solution(s) have you chosen to replace all or some of the fossil fuels you use?

Basis: Decision-makers that have already replaced fossil fuels with solutions that emit fewer greenhouse gases (229)

Small base, results to be interpreted with caution ⚠

		Totally	France	United Kingdom	Belgium	Germany	Netherlands
			84	59	28 ⚠	39	19 ⚠
Total Use of heat solutions		95%	92%	92%	100%	98%	91%
Heat pump		54%	53%	40%	74%	61%	51%
Geothermal		35%	30%	24%	10%	45%	20%
Waste heat recovery		28%	10%	28%	46%	33%	33%
Hydrogen		21%	23%	17%	17%	22%	12%
Electric boiler		14%	12%	29%	14%	6%	18%
Another heat solution		2%	5%	1%	–	2%	–
Total Solutions for renewable energy production		92%	96%	100%	100%	85%	100%
Solar and storage (battery)		80%	88%	79%	60%	79%	94%
Wind		28%	10%	34%	49%	30%	45%
Another renewable energy		11%	13%	6%	2%	14%	1%
Electrification of processes (electric furnaces for example.)		7% 250 to 499 employees: 28%	11%	10%	13%	5%	10%
Other solutions		6%	8%	1%	9%	8%	–
Average number of solutions cited		2.9	2.6	2.7	2.9	3.0	2.8

250 to 499 employees: 3.5

Country results lower than the entire target
Results from sub-targets higher than the entire target 34



To meet their decarbonisation goals, industrial players are implementing a wide range of practical measures. The most adopted initiatives focus on waste management, from collection through to recovery and reuse.

Q10: And more specifically, at what level(s) has your company implemented these measures?

Basis: Decision-makers that have already implemented decarbonisation measures (530)

		France	United Kingdom	Belgium	Germany	Netherlands
	Totality	<i>Basis:</i> 175	118	76	94	67
Reduction of industrial waste, and solutions for collecting, recycling and reusing materials	52%	45%	53%	58%	51%	64%
Optimisation of energy management	43%	45%	54%	32%	37%	51%
Decarbonisation of processes: production chain, equipment, recycling and reuse of materials	38%	40%	41%	46%	37%	31%
Optimisation of the logistics chain	34%	36%	30%	29%	36%	30%
Use of digital tools for smart management of buildings and processes	33%	23%	37%	39%	34%	33%
Insulation and thermal renovation of buildings	32%	36%	30%	35%	30%	43%
Electrification of the vehicle fleet	31%	31%	26%	36%	32%	49%
Product design: eco-design, use of biobased materials, lifecycle of materials	26%	37%	28%	37%	22%	13%
<i>Other actions implemented</i>						
Optimisation of water management	43%	38%	40%	51%	45%	36%
Cooperation with your suppliers and providers	25%	23%	41%	27%	17%	34%
Average number of quotes	3.6	3.5	3.8	3.9	3.4	3.8

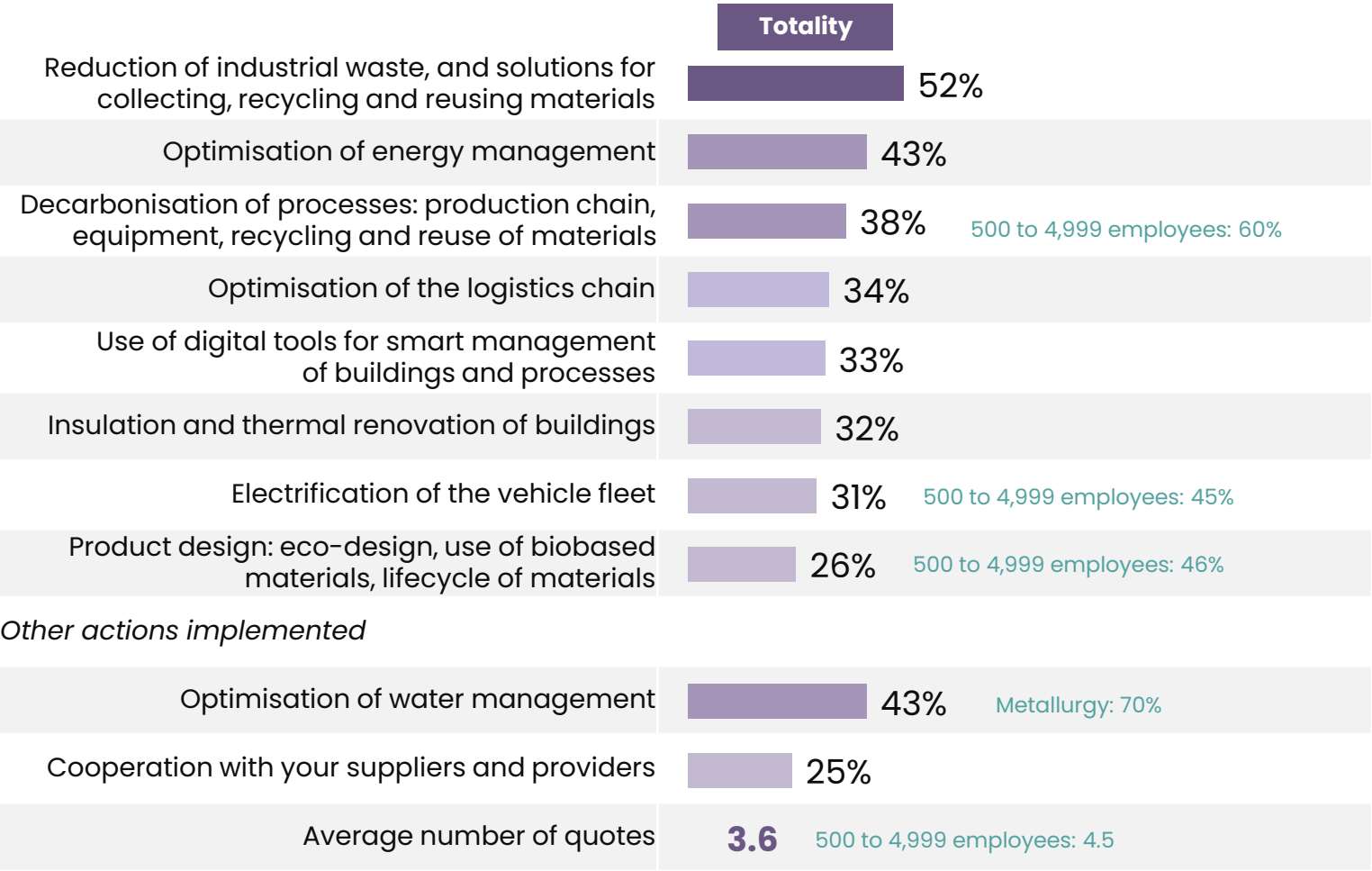
Companies that are already fully operational or in deployment



The biggest industries surveyed act on even more fronts simultaneously, implementing more measures concerning the decarbonisation of processes, the electrification of vehicles and a product design focused on the challenges of the transition.

Q10: And more specifically, at what level(s) has your company implemented these measures?

Basis: Decision-makers that have already implemented decarbonisation measures (530)



Companies that are already fully operational or in deployment



Decarbonisation is almost systematically part of a *wider transformation of the sector as a whole*, with Germany and the agrifood sector being the exceptions here. The range of different partners involved is diverse, with the most in-demand being energy transition consultants, providers of multi-technical services or suppliers of low-carbon energy and local authorities / public bodies.

Q12: Is the decarbonisation of your company part of a wider transformation of your industrial sector?

Q13: Which partner(s) is your company collaborating with for this decarbonisation?

Basis: Decision-makers that have already implemented decarbonisation measures (530)
including through the overall decarbonisation of their sector (462)

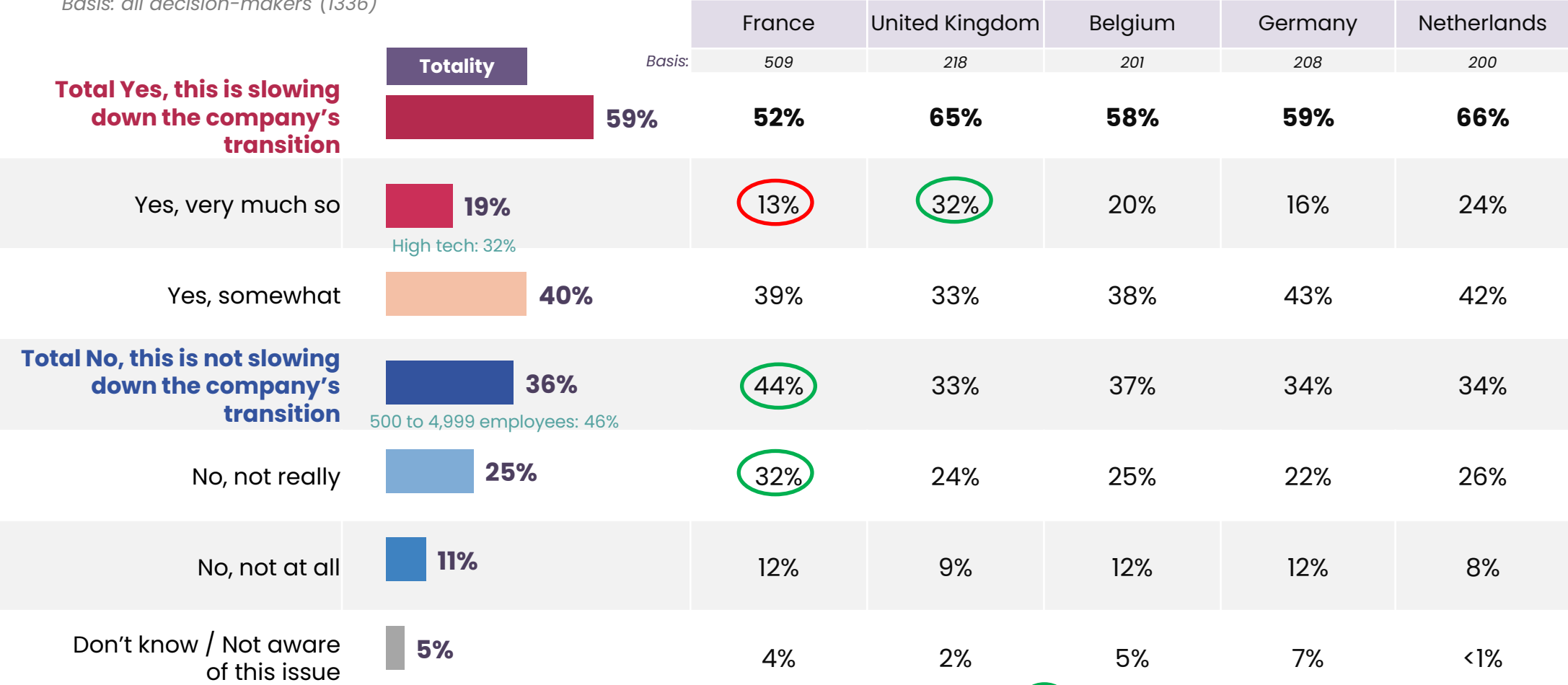
		France	United Kingdom	Belgium	Germany	Netherlands
	Totality	175	118	76	94	67
Yes, the decarbonisation is part of a wider transformation of their industrial sector	78%	91%	93%	91%	66%	87%
	Construction, building trade: 92% Agrifood: 47%	157	111	73	69	52
Energy transition consultants	46%	35%	49%	54%	48%	38%
Local authorities and public bodies	39%	43%	26%	34%	45%	40%
Providers of multi-technical services	38%	35%	49%	37%	33%	30%
Suppliers of low-carbon energy	38% ISE: 53%	40%	50%	54%	29%	22%
Circular economy protagonists	30%	32%	24%	46%	31%	33%
Public research	23%	12%	24%	15%	28%	12%
NGOs	17%	11%	21%	6%	17%	18%
Other private companies through a partnership	32%	24%	28%	32%	40%	25%
Other partners	<1%	<1%	-	-	-	-
Average number of quotes	2.6	2.3	2.7	2.8	2.7	2.2



The evolution of discussions around decarbonisation is slowing down the transition of more than half of the companies in Europe, with *a more pronounced effect being felt in the United Kingdom and in the high-tech sector*. Although affected, the largest structures surveyed seem to be more resilient.

Q15: To finish, politicians and some industry leaders are now emphasizing the need to slow the pace of decarbonisation of industries. Do you think this shift in discourse is slowing your company's transition?

Basis: all decision-makers (1336)



Country results higher than the entire target
Country results lower than the entire target
Results from sub-targets higher than the entire target

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