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Atreus Survey

“Energy Turnaround now” – Energy sector 2022

SUPPLY SECURITY, ENERGY PROCUREMENT AND INVESTMENTS IN “GREEN” TRANSFORMATION



The Global Interim Management Group

SUPPLY SECURITY, ENERGY PROCUREMENT AND INVESTMENTS IN “GREEN” TRANSFORMATION

Dear Readers,

Our current study shows that risk management related to supply security and investments in a faster green transformation has top priority in the energy sector and also in many (industrial) companies. The increased energy prices, the risk of non-supply and sustainable efforts to protect the climate, override many other business factors and are catalysts for accelerated transformation processes.

Around 700 top managers from the energy sector were surveyed between May and June 2022. The study gives important insights into which significant challenges are anticipated and reflected in the German economy in order to be able to successfully and sustainably implement this transformation process in the coming years. It also shows that innovations, especially in the areas of energy generation, storage, transmission/transport/distribution, flexibility and energy efficiency, are becoming increasingly important.

The main factors for accelerating the energy turnaround, according to the companies and decision-makers surveyed, are a massive improvement in the regulatory and general legal framework, the expansion of renewable and alternative energy sources, and the development and alternative energy sources, as well as the expansion and restructuring of transmission and distribution networks.

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The Survey Parameters

- + **Period of the survey:** May–June 2022
- + **Method:** Online-Poll using questionnaires with closed and open questions
- + **700 C Level Participants**



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“Risk management for energy procurement is currently considered a top priority. The gas emergency plan that has been put into effect and concerns about the situation deteriorating further is fueling this development. The topic of energy is now one of the top among the top issues for managing directors, board members and supervisory boards. managers, board members and supervisory boards for reasons of risk and investment. The transformation speed to a climate-neutral future is massively accelerated.”

MARTIN SCHULZ,

Partner & Director,

Head of the Solution Group Energy and Environment

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How do you assess the **current turbulence** on the energy markets for the **transformation of the energy industry?**

**CLEAR CATALYST FOR INCREASED
"GREEN" TRANSFORMATION.**

217

31,31 %

**BRAKES, AS SECURITY OF SUPPLY AND
RISK MINIMIZATION CURRENTLY HAVE PRIORITY**

136

19,62 %

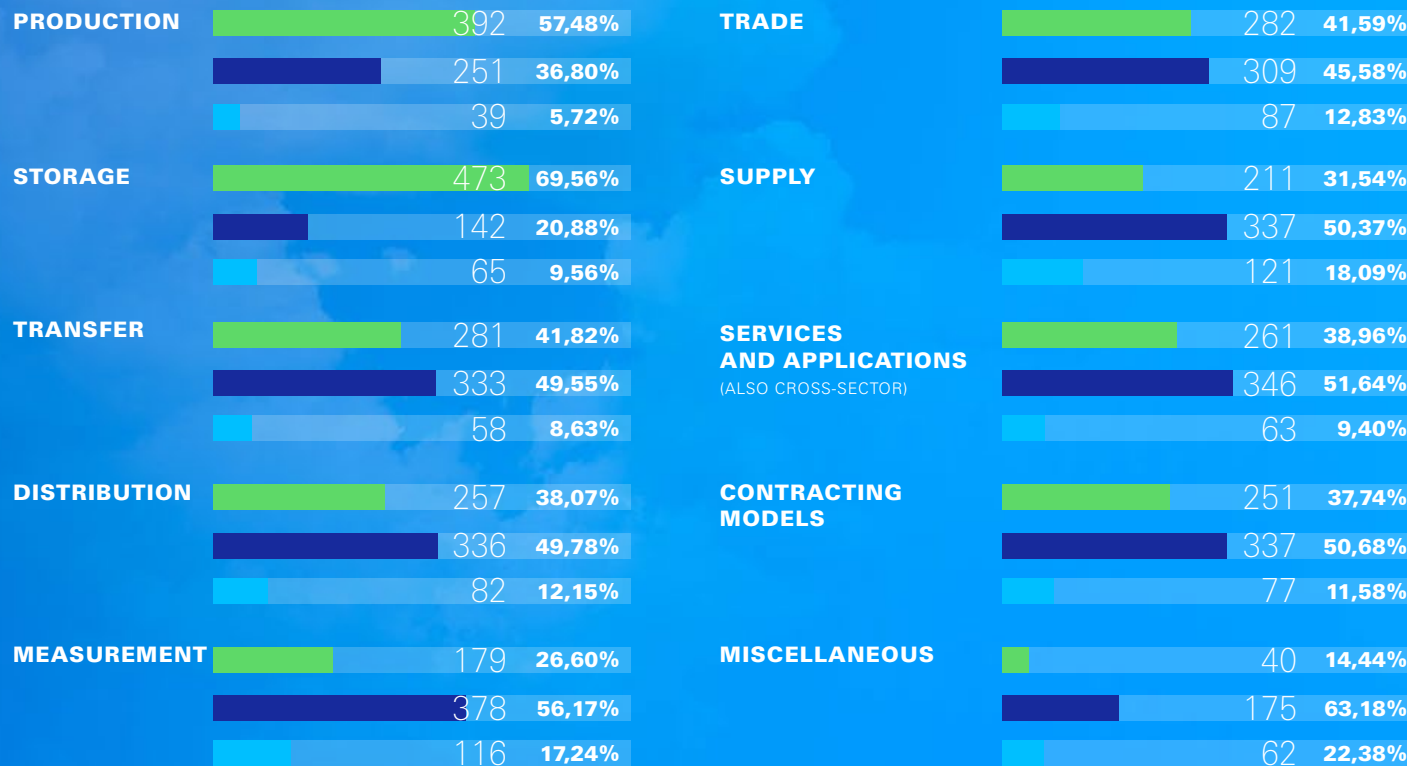
**BOTH AND -
WITH DIFFERENT TIME HORIZONS.**

340

49,06 %

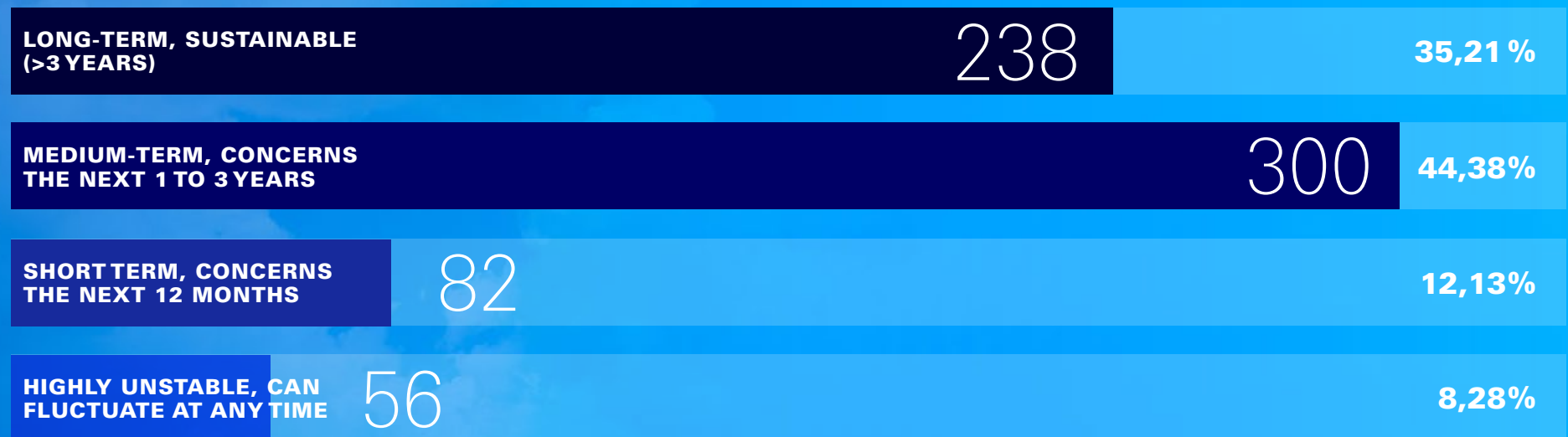
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How do you estimate the **development** (growth, incoming orders) of the **individual energy sectors** in the next 12 months?



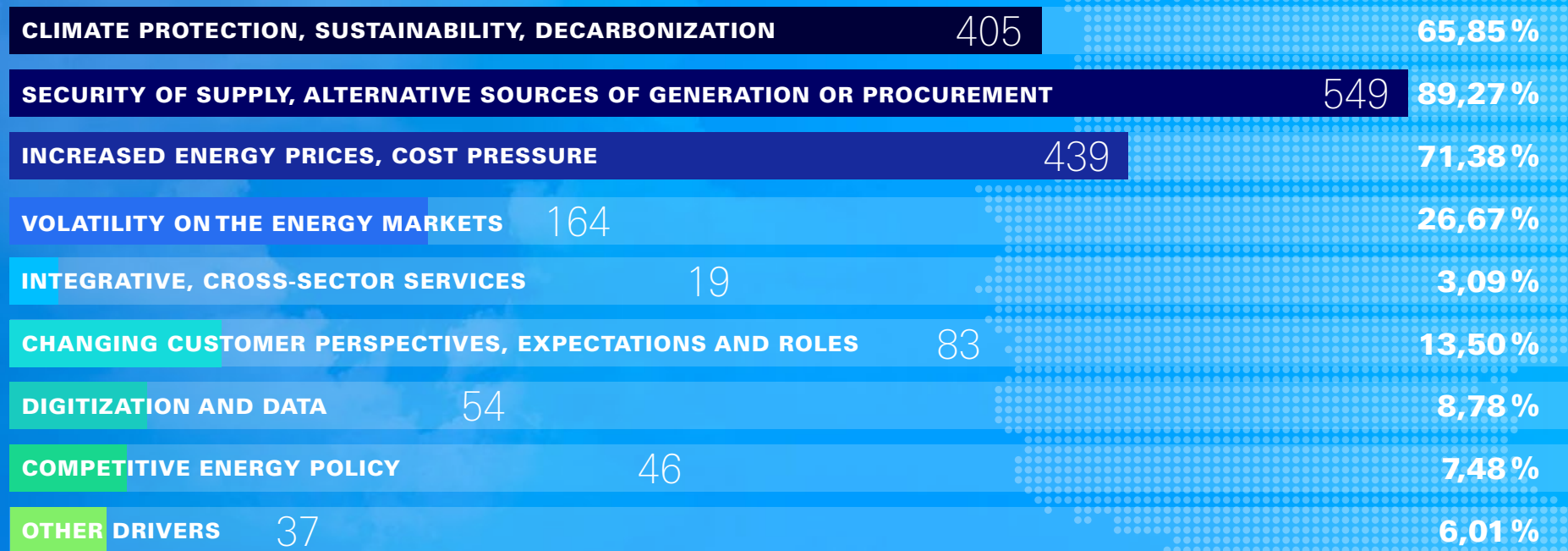
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How **sustainable** is the development according to your selection?



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What do you currently see as the **three main drivers of transformation** in the German energy industry?



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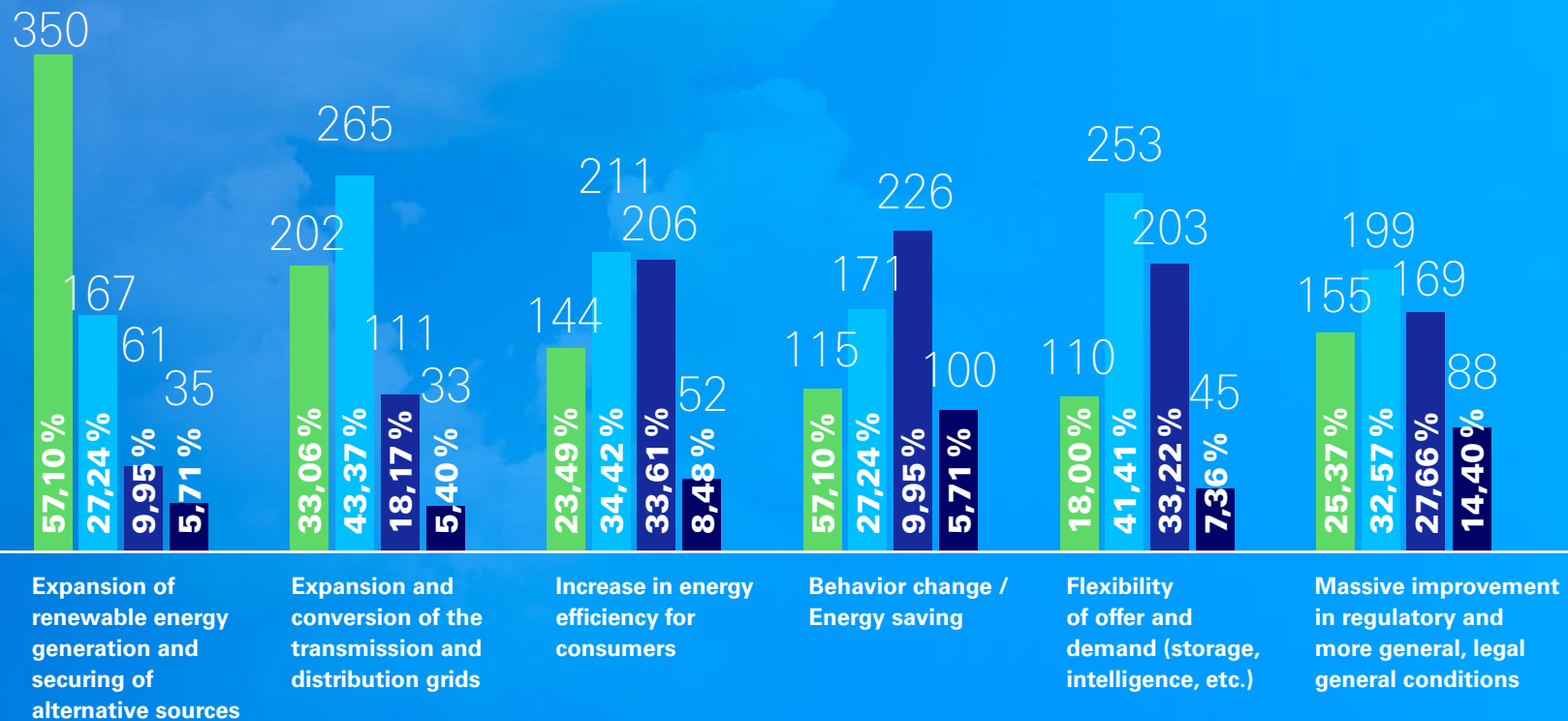


"It is safe to assume that the development of skilled labor in development of companies across all sectors will gain momentum for the energy sector in all industries."

THOMAS GLÄBER,
Director & Head of Solution Group
Infrastructure Major Projects

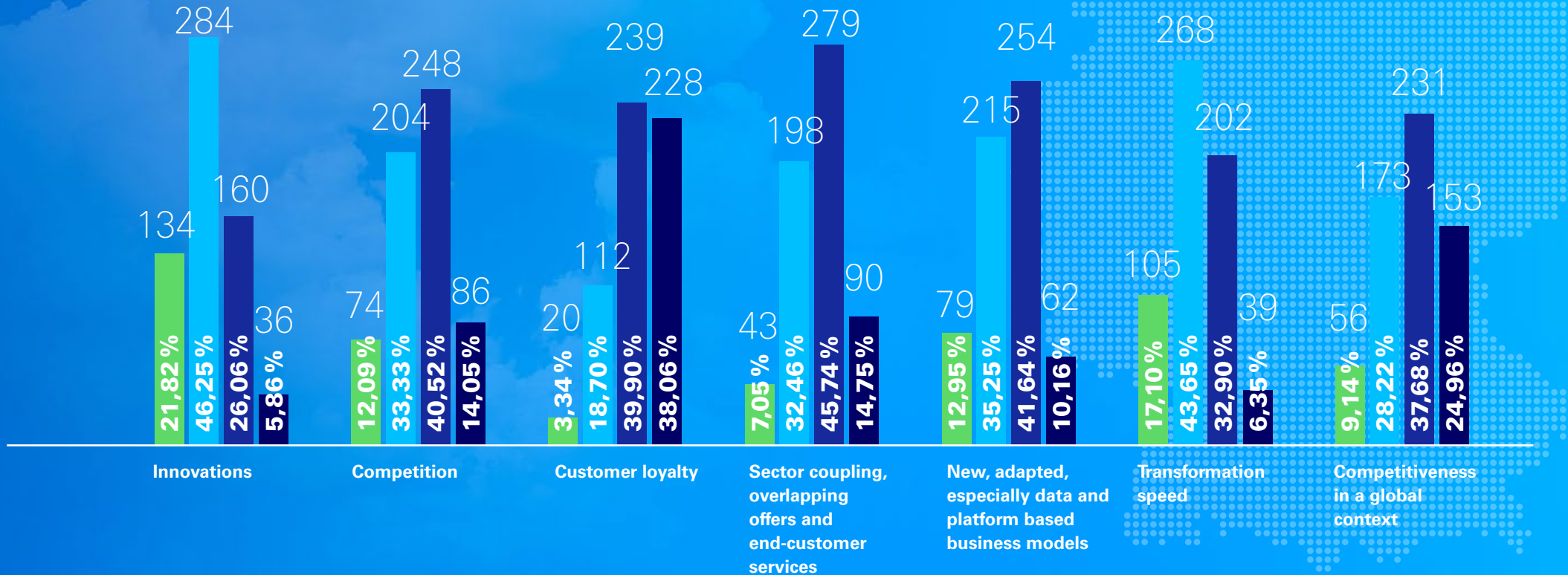
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In general, how do you rate **the impact of key levers** for accelerating the energy transition?



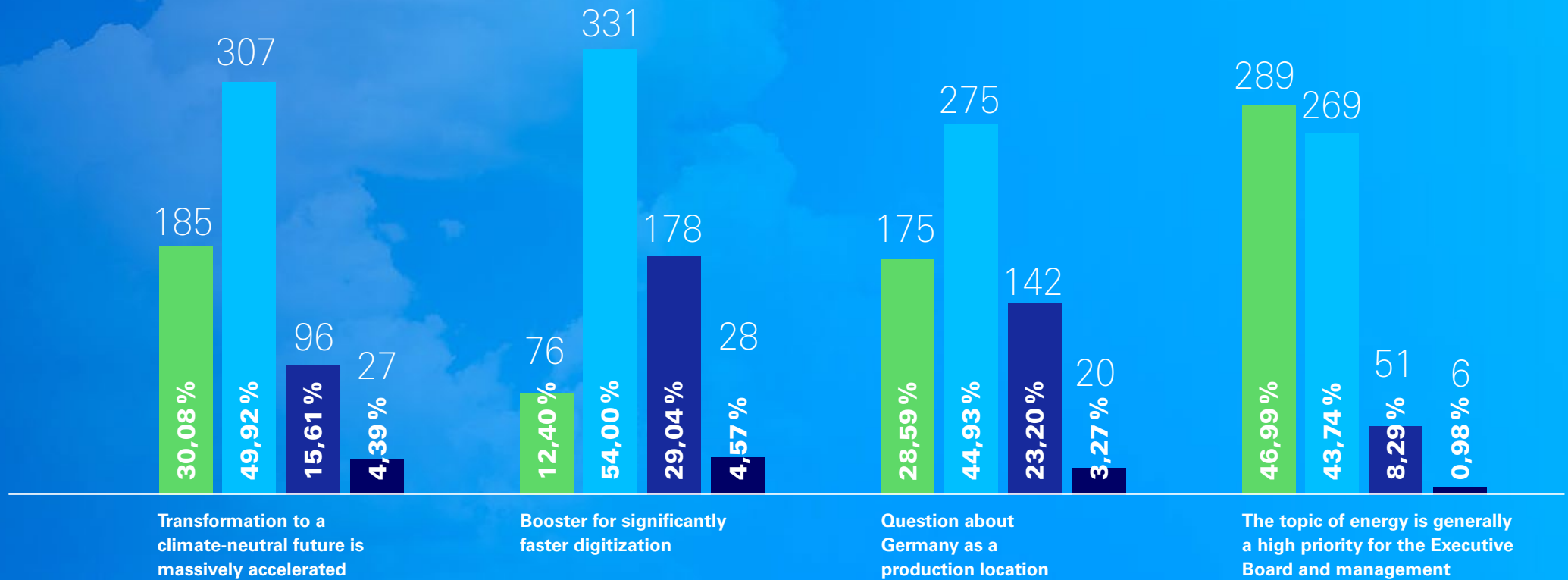
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What **consequences** do you expect from the current crisis for the **German energy industry** with regard to...?



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What has **changed** for (industrial) companies with regard **to energy** (procurement, security of supply, risk minimization)?



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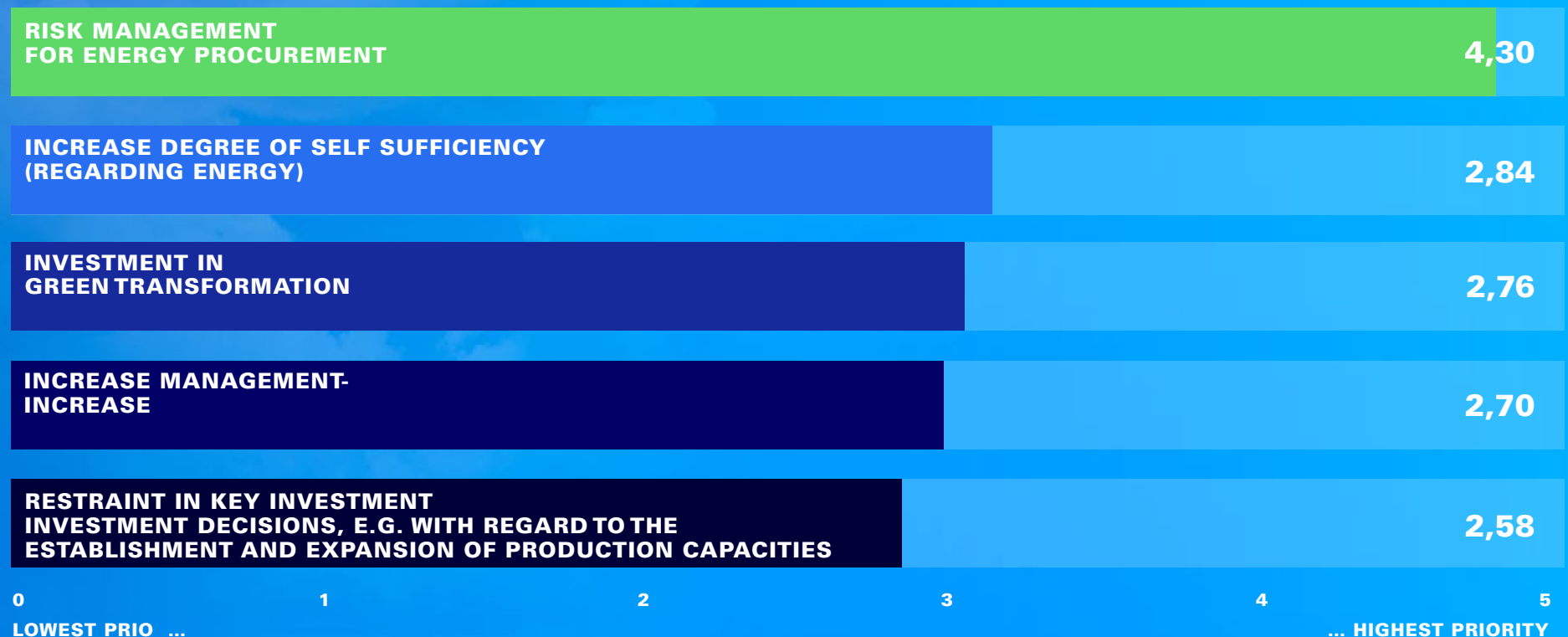


“What is surprising is the low impact of the energy turnaround through a change in behavior. It is in fact a mix of different measures for the overall impact on businesses. Even if current developments place the onus on German industry and in particular on energy service providers, producers and suppliers, households and society as a whole must also help to use energy sparingly and efficiently.”

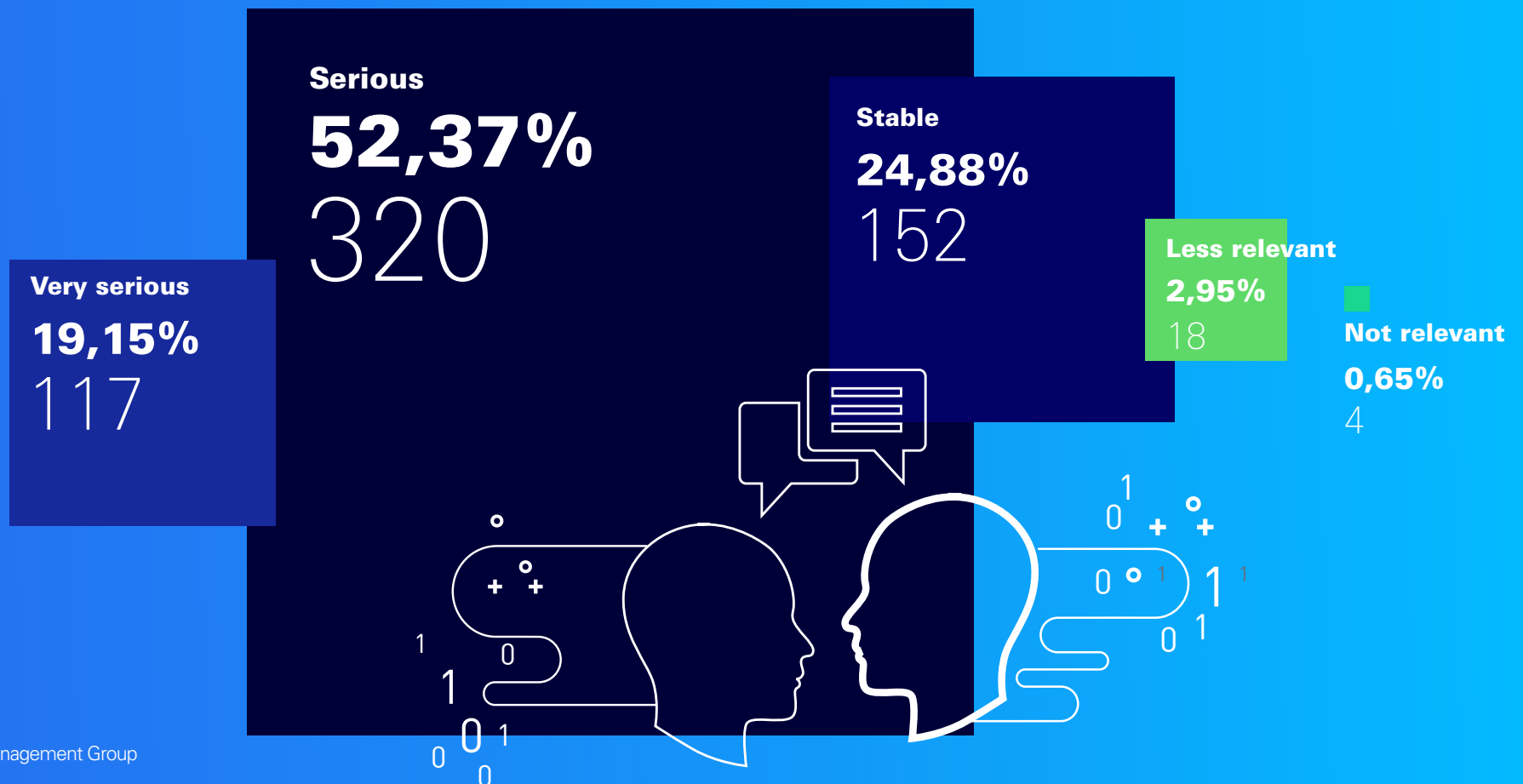
JESSICA BREUER,
Director Solution Group
Energy and Environment

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What are **important, current measures** for (industrial) companies as **a result of the current turbulences** on the energy markets?
(Sort by priority)



What **development** do you expect with regard to changed competencies and **need** for **external know-how** in the next 1 – 3 years?



Which **competencies** do you consider particularly relevant?



THE CHANGING ENERGY WORLD

How the transformation is affecting established
and new business models.

The survey was created by Atreus GmbH
in July 2022.

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