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Press

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Energy resilience and independence overtake climate confidence, study reveals ahead of COP30

- Siemens' biennial study of 1,400 global executives explores the state of the infrastructure transition across energy, industry and buildings
- Research shows national energy independence has become highly important, overtaking phasing out of fossil fuels
- Climate confidence is declining: 37% of executives expect to meet 2030 decarbonization targets vs. 44% in 2023
- Siemens urges policymakers to embed energy resilience, grid investment and digital technologies such as Artificial Intelligence (AI) into climate strategies

As world leaders prepare to gather in Brazil for COP30, a new major study from Siemens reveals geopolitics is reshaping infrastructure strategy, with national energy security overtaking global climate cooperation as the primary driver of the energy transition. The *Siemens Infrastructure Transition Monitor 2025* reveals senior leaders believe a resilient energy supply should be the top governmental priority among infrastructure transition goals – up from third place in 2023. Meanwhile, national energy independence and the proactive management of climate risks have seen the most significant growth in priority.

Rising global instability is intensifying market and supply chain volatility. To mitigate the use of energy as a geopolitical tool, governments are prioritizing security, independence, and preparedness alongside climate mitigation.

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The report, based on a global survey of 1,400 senior executives and government representatives in 19 countries, highlights a shift: from a multilateral vision of clean energy to one increasingly centered on sovereign resilience and regional production. With mounting pressure on public and private energy systems amid overlapping climate, geopolitical, and market challenges, it finds that energy resilience is now seen as a critical enabler of the clean energy transition – not a trade-off against it.

“The infrastructure transition is entering a new phase whereby national goals of energy security are overtaking global collaboration on decarbonization. As systems face mounting climate and energy disruptions, resilience is no longer optional - AI, technology, and digitalization are now critical to this shift. They can empower organizations and governments to manage the complexities of renewable-based systems, ensure reliability, and accelerate the clean energy transition smarter and more sustainably,” said Matthias Rebellius, Managing Board Member of Siemens AG and CEO of Smart Infrastructure.

From global transition to national resilience

Over three in five (62%) respondents believe future energy systems will rely more on local or regional production than global trade, with key enablers including renewable integration, storage readiness, and advanced grid systems. Already, over half say resilience (53%) and energy independence (52%) are reaching maturity or are advanced within their countries – signaling a shift in infrastructure priorities is already underway.

Confidence in climate targets is declining

With resilience and energy security now taking precedence, confidence in achieving global climate goals is starting to fall. More than half (57%) of global executives expect increased investment in fossil fuels over the next two years, and just 37% of businesses now believe they will meet their 2030 decarbonization targets – down from 44% in 2023.

A wake-up call before COP30

With confidence in climate goals declining and 2026 strategies in development, the report highlights that failure to embed resilience into energy planning risks both economic and environmental fallout. At a time when governments are recalibrating net zero strategies alongside welfare and growth agendas, Siemens underscores

that through grid investment and digital innovation, progress towards climate commitments as well as energy resilience can be accelerated.

Artificial Intelligence will accelerate the transition

As national energy strategies evolve, digital technologies remain at the heart of the infrastructure transition. Digitalization ranks as the second most important factor in accelerating the clean energy transition for industries – just behind expanding energy storage – with AI expected to have the greatest positive impact. Respondents believe that AI is helping to make critical infrastructure more resilient (66%) and report that their organizations are using AI to help decarbonize their operations (59%).

Notes to editors:

The *Siemens Infrastructure Transition Monitor 2025* is a biennial study commissioned by Siemens, surveying 1,400 senior executives and government representatives in 19 countries across energy, buildings and industries. The 2025 edition is the second in the series and launches ahead of COP30.

This press release is available here.

For more information on Siemens Smart Infrastructure, please see Siemens Smart Infrastructure.

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Siemens AG (Berlin and Munich) is a leading technology company focused on industry, infrastructure, mobility, and healthcare. The company's purpose is to create technology to transform the everyday, for everyone. By combining the real and the digital worlds, Siemens empowers customers to accelerate their digital and sustainability transformations, making factories more efficient, cities more livable, and transportation more sustainable. A leader in industrial AI, Siemens leverages its deep domain know-how to apply AI – including generative AI – to real-world applications, making AI accessible and impactful for customers across diverse industries. Siemens also owns a majority stake in the publicly listed company Siemens Healthineers, a leading global medical technology provider pioneering breakthroughs in healthcare. For everyone. Everywhere. Sustainably.
In fiscal 2024, which ended on September 30, 2024, the Siemens Group generated revenue of €75.9 billion and net income of €9.0 billion. As of September 30, 2024, the company employed around 312,000 people worldwide on the basis of continuing operations. Further information is available on the Internet at www.siemens.com.