Why wait to pursue net zero?

Build a sustainable business model now

centrica
Business Solutions

Contents:

Science tells us we need net zero emissions in order to limit temperature rises to 1.5°C, and the race to get there by 2050 has started.

Around the world, governments and businesses are realising that the targets they have announced are not good enough and they need to be bolder and take action sooner. Major economies such as the UK and the US now consider this decade to be decisive in the fight against climate change.

It comes, of course, against the backdrop of the COVID-19 pandemic, which brought economies around the world to a standstill. But instead of diverting attention from climate change and sustainability, the pandemic has done something surprising. It has shown organisations the importance of addressing sustainability and decarbonisation to ensure their future growth.

"People have been talking about the importance of reducing carbon for some 20 years. But in the past 12 months the conversation has shifted from being a tactical compliance thing to having strategic urgency."

JON SYKES
Executive Chairman, Carbon Intelligence

We go behind the scenes

In our third year of researching organisations about energy and sustainability, we have focused on what a sustainable business model looks like and what less-well-prepared organisations can do to catch up.

How are organisations balancing their environmental and financial responsibilities? What gains are sustainable organisations experiencing? And what new opportunities does the energy transition create?

The landscape has changed significantly since our last report, in 2019. A new administration in the White House is turning around US climate policy, and countries from Italy to China have adopted net zero targets. Consumers are becoming much more aware of environmental issues, and investors want companies to respond — for them, climate change is a key risk to returns.

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So what is stopping them?

"The marketplace is changing," says Sustainability Consultant Mike Barry. "And lots of businesses are struggling, because there is not one simple narrative that makes it really obvious how to go from here to net zero."

There are, however, more options than ever before, and our research finds that there are companies in all industries and of all sizes that are proceeding with a real sense of urgency, as are public sector organisations. We call them 'leading sustainable businesses', or just 'leaders'.

They are leading for two reasons:

1. By taking steps to pursue net zero now, they know they will make their organisations more resilient, competitive and sustainable in the long term.

2. They know that policy change is coming, and they are trying to get ahead of it.

"The clever businesses are not waiting for the perfect signal," says Barry. "Because if you wait for the perfect signal, it is too late."

This report will show you what sustainability leaders are doing to balance the demands of planet and profit. The measures they are taking are not revolutionary, but they do require commitment and, usually, a mindset shift. It can feel difficult to know where to start or how to progress, but this report provides practical advice about how to become more sustainable. Your path to net zero starts right here.

"The marketplace is changing. And lots of businesses are struggling, because there is not one simple narrative that makes it really obvious how to go from here to net zero."

MIKE BARRY
SUSTAINABILITY CONSULTANT

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About our research

We researched 1,000 executives in seven countries — the UK, Belgium, Ireland, Italy, Mexico, the Netherlands and the US — and nine sectors, including manufacturing, healthcare and education. Based on their responses, we divided respondents into two groups: leaders (20%), and the organisations that have yet to embrace sustainability fully, which we call followers (80%).

This year, we benchmarked these organisations' sustainability in five key areas:

1. Sustainable business focus
2. Policy-risk preparedness
3. Organisational capabilities
4. Technology adoption
5. Financial readiness

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Acknowledgements

We would like to thank the following people for their insights and contributions to our research:

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Sustainable business focus: It builds resilience

Leading sustainable businesses know that acting now, even if it incurs short-term cost, will leave them better off in the long term.

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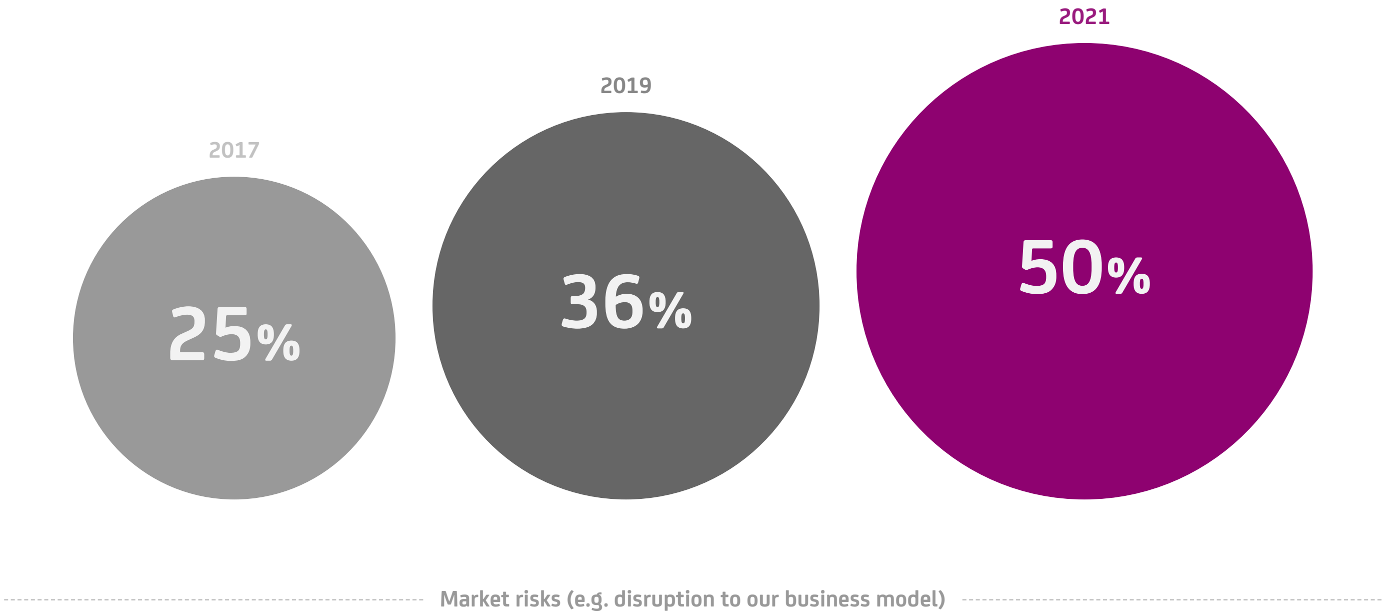
Disruption and uncertainty are keeping leadership teams awake at night. The COVID-19 pandemic and increased scrutiny of global decarbonisation efforts have made market risk and disruption to business models a bigger concern.

In 2021, twice as many respondents say that disruption is a top business risk as in 2017 (50% compared with 25%). Financial risk has also grown in importance from being the third most pressing issue in 2019 to the second — because macroeconomic risk can have a big impact on financial performance.

And their fear of the unknown extends beyond the short-term pandemic fallout. Respondents' priorities for the next three years are being able to respond quickly to new customer and market requirements (47%), achieving a strong financial performance and profitability (46%) and operating a sustainable business model (44%).

Market disruption tops the list of risks in 2021 (all respondents)



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Take sustainability seriously

When times are uncertain and disruption from climate change is inevitable, what can organisations do to shore up their business resilience? For Bill Sisson, Executive Director for North America at the World Business Council for Sustainable Development, they need to take sustainability very seriously indeed. It is existential.

"Those that do not embed sustainability throughout their company will find themselves at a competitive disadvantage 10 years down the road," he says. "If they are able to do business at all."

On the flipside, organisations with strong environmental, social and governance (ESG) policies in place have been more resilient in times of market disruption. Asset management company BlackRock found that the majority of ESG-tilted indexes outperformed their non-sustainable counterparts during the market downturn in Q1 2020.

It is more than just a bolt-on

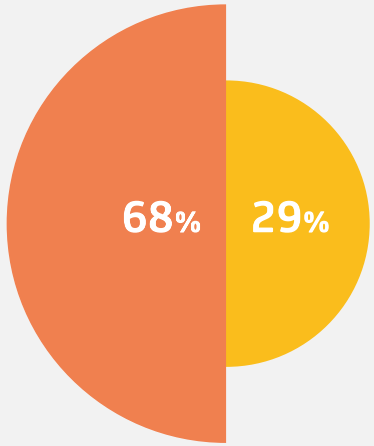
But what does it mean to operate a sustainable organisation?

Leaders have a much more well-rounded view of what the term means to their organisation than followers. For followers, reducing CO_2 emissions is the key feature (43%), but leaders look for more than that: they also want to ensure that their organisation remains profitable and succeeds in the long term (68%).

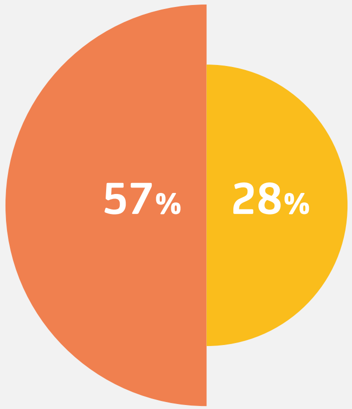
For them, the ability to handle and withstand risks, meet regulatory requirements, adapt to market and societal demands, make a positive contribution to local communities and use renewable energy are crucial to achieving sustainability.

Sustainability means...

Leaders Followers



Ensuring that the company can continue to succeed in the long term



Having a source of potential competitive advantage

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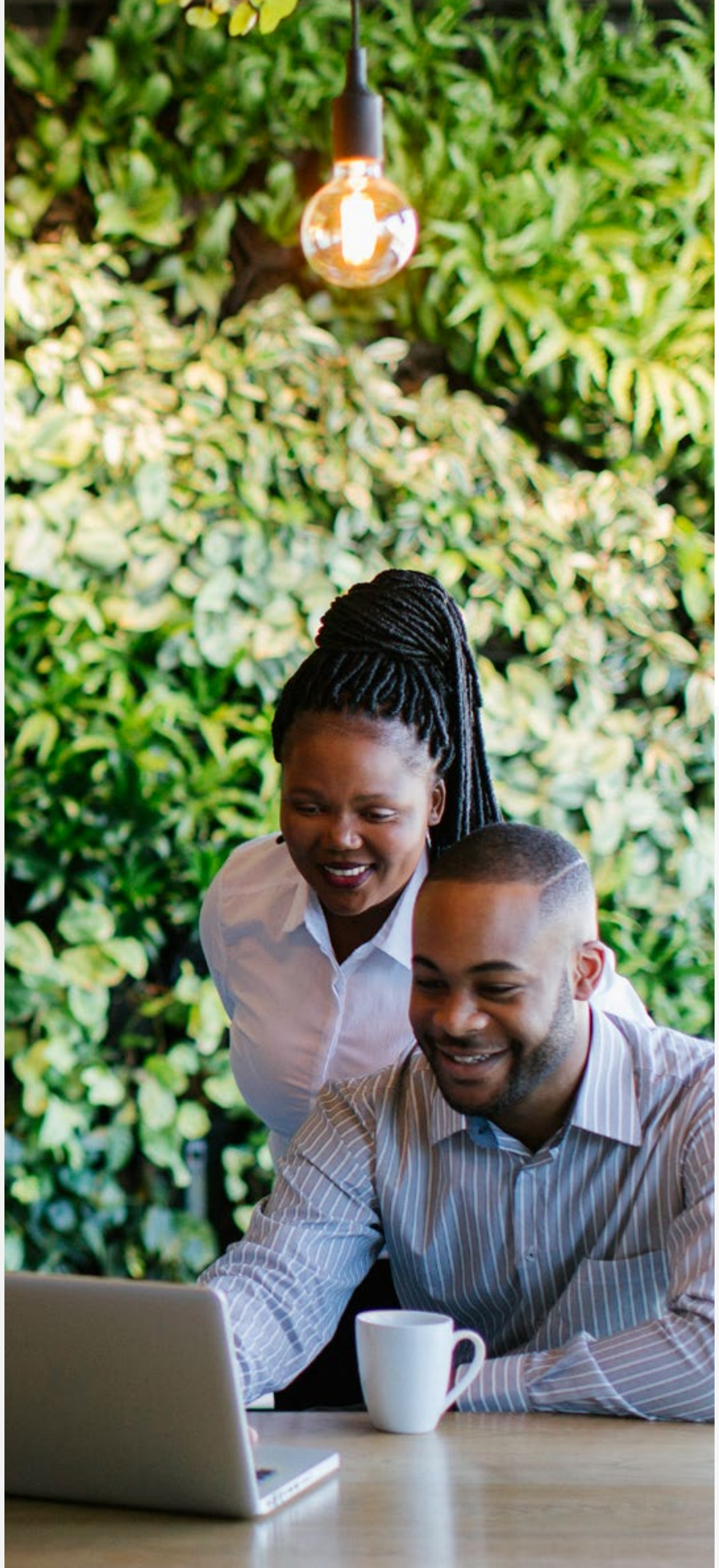

First-movers embrace change

Leaders also take a stronger position on growth in the face of climate change and its impact on technology and business models.

They are much more likely than followers (41% compared with 23%) to embrace an aggressive, 'high-risk, high-reward' growth strategy. This is good news, because sustainability requires trendsetters that are willing to pilot and invest in new technologies and business models.

"We need the 30% [of the S&P 500] who have drafted ambitious climate targets to be the drivers of change," says Sisson. "This will create a domino effect and influence the other companies to set their targets, or they will eventually be out of business."

Action points

- Identify what drives sustainability in your organisation and use it as your catalyst for change.
- Understand the links between sustainability and long-term business resilience to get one step ahead. You will need to embrace decarbonisation even as you grapple with an uncertain macroeconomic environment.
- Future-proof your organisation by adapting to market and societal change, staying ahead of regulatory shifts and using renewable energy sources and technologies. Sustainability is not an add-on — it is part of every operation.

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Policy-risk preparedness: Preparation meets opportunity

Leading sustainable businesses stay ahead of the curve on policy by having a decarbonisation strategy and knowing how to implement it.

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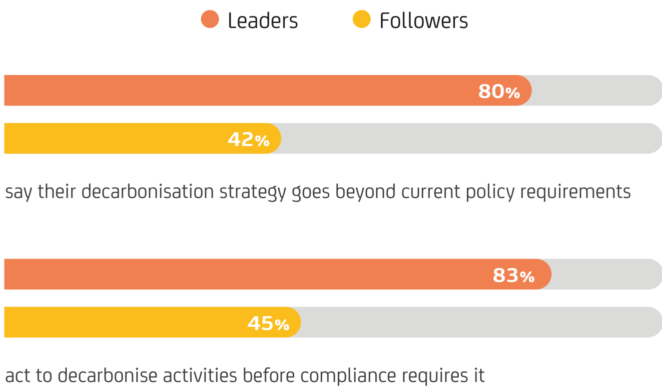
Those who plan to wait until 2050 are exposed to various policy risks, costs and missed opportunities.

We have seen over the past few years how rapidly and fundamentally political priorities can change. From the Green Deal in the EU, to the UK pulling climate change commitments forward to 2035, and the most recent shift in US policy following the US presidential election. And while political priorities change, regulatory demands are growing all the time, making it more challenging for organisations to keep pace.

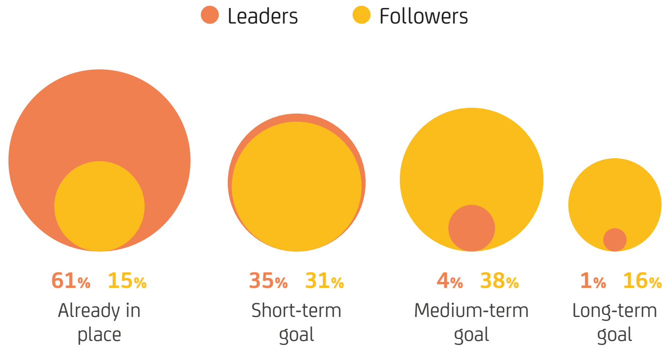
Get a strategy in place

Organisations, investors and employees, meanwhile, are here for the long term, and need to expertly navigate political shifts while outlining their commitment to decarbonisation and remaining profitable and effective.

Leaders are doing this in a strategic way, with targets and budgets in place to ensure they meet their net zero obligations. They are almost twice as likely as followers to have a decarbonisation strategy that goes beyond current policy requirements (80% compared with 42%), and to proactively decarbonise before compliance requires it (83% compared with 45%).



Leaders already base their decarbonisation strategy on scientific data, while the majority of followers plan to implement this in the medium to long-term



A decarbonisation strategy based on scientific data and targets

“As companies set out their net zero goals, the very best will already have a plan which outlines specifically how they will get there,” says David Holmes, CTO Energy at Dell Technologies.

“These commitments need to be science based, approved by organisations such as the Science Based Targets initiative, and supported by a clear plan of action.”

Our research shows that 61% of leaders already have in place a decarbonisation strategy based on scientific data and targets, compared with just 15% of followers. More than half of followers are not even working on a strategy — instead, they plan to defer it to the medium (3–5 years) or long term (6–10 years).

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Don't wait until 2050

There are organisations that believe they should not postpone efforts to outline and implement targets. Lotus is one of them.

"Who has got the time to wait? When I see some companies' goals, they are very long term and I think they can quite easily be pulled forward, especially if they enter good partnerships," says Uday Senapati, the carmaker's Executive Director, Corporate Strategy and Product Management. "If you believe in climate change, then you realise that we all have a bit of responsibility for making things happen quicker and turning the tide on climate change. We might not get there right away, but if we give it our best push, and even if we are 80% there in a decade, that is better than waiting until 2050."

David Croft, Sustainability, Environment & Human Rights Director at Reckitt, also warns that this is not the time to sit back and wait.

"We see a higher cost of carbon [in the future] coming from increased costs for non-renewable fuel," says Croft. "And I suspect that the whole life cycle [Scope 3] rather than just the manufacturing elements of a product [Scope 1 and 2], will also become more of the focus of environmental policy going forward," he says.

Worryingly, however, our research shows that only a third of followers have a full understanding of Scope 3 emissions (e.g. purchased goods and services and use of sold products).

For Jon Sykes, Executive Director at Carbon Intelligence, one of the problems organisations have is that they have neither fully understood the risks nor grasped the opportunities.

"If organisations are not aligned with a net zero pathway, then they are adding to unnecessary and unsustainable risk. There will be more compliance, there will be more regulation, but there will also be more incentives," he says, pointing to governments' recent commitments to 'build back better' and 'build back greener'. "All companies and our clients want to make sure they are able to take advantage of this and maximise the opportunity."

Action points

- Seek expert advice to ensure that you are on top of potential policy and regulatory risks, today and in the future. Leaders are far more concerned about policy uncertainty and potential regulatory changes, because they know these can seriously affect their performance.
- Create alliances. Align with partner organisations that can help you understand and support your net zero ambitions and help you execute your strategy with science-based data.
- Calculate the cost of carbon before you have to pay it. The best approach might be for the central stakeholder to set an internal cost of carbon, which each business unit has to factor into its business case.

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Organisational capabilities: Sustainability starts at the top

Leading sustainable businesses have a commitment to sustainability that is organisation-wide.

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Leaders set the tone from the top, manage performance carefully, and explore partnerships and recruitment strategies to upskill their workforces and value chains.

Without strong, consistent leadership and clear internal communication, efforts to embed sustainability will fail. So you need to set ambitious targets and look at every decision through a prism of sustainability — alongside the traditional business case. About 81% of sustainable business leaders (compared with 48% of followers) have achieved buy-in for their sustainability strategies from senior executives. These executives actively promote the organisation's approach and promote thinking about the issue throughout the organisation.

81% of leaders say their senior executives actively promote their company's sustainability aims

Make it everyone's business

But leaders also know that these issues must become part of the organisation's DNA. They need to be embedded in the way that, for example, health and safety guidelines have.

This is what sets leading sustainable businesses apart: they do not see sustainability as something that is owned only by senior management — it permeates everything they do.

"The only way you can perform effectively as a business in this changing environment is through establishing an organisational culture that prioritises climate and sustainability," says David Holmes, CTO Energy at Dell Technologies.

Take a three-stage approach

As organisations develop their governance model for sustainability, they will typically go through three stages.

Firstly, sustainability will be tactical and focused on single activities or departments. Secondly, they start to think about a more coherent sustainability strategy, driven by the board and senior management. Finally, this gets embedded at the business-unit level, so that everyone understands the overall goals but can act independently.

Followers are far more likely than leaders to have ownership of decarbonisation limited to one department (32% against just 7%). By contrast, leaders have an approach that is embedded in each business unit (42% compared with 28% of followers).

Uday Senapati oversees Lotus's net zero effort, and says it is a business target for his organisation. "Every stakeholder in the business has their own steps to take to get there," he says. "But it is a collective effort, and everyone reports into the target we have to get to net zero."

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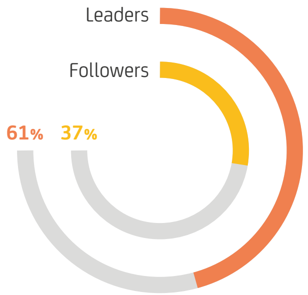
Look outside for skills and partners

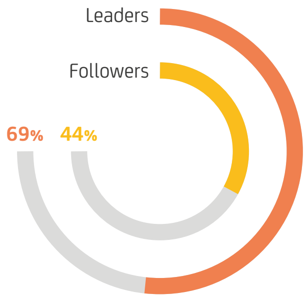
All of this will demand new knowledge and green skills. For leaders, this is an urgent priority: 80% are actively recruiting people with the skills that will help them to meet ESG standards.

They are not stopping at the organisation's walls: leaders build a culture of sustainability across the supply chain, too. More than six in 10 establish partnerships by using contractors or third parties to upskill their workforces. They know they do not have all the answers, and can broaden their horizons by working with third parties and partners.



are using contractors or third parties to upskill the workforce

They choose their relationships carefully. Leaders select suppliers based on their ability to cut their carbon footprint (69% compared with 44% for followers).



choose supply chain partners based on their ability to reduce their carbon footprint

"For a lot of companies, especially the smaller and medium-sized companies in their supply chain, getting to net zero greenhouse gas emissions is about understanding how they can interact with and address the challenges that their supply chain is actually creating for them."

BILL SISSON
EXECUTIVE DIRECTOR NORTH AMERICA, WORLD BUSINESS COUNCIL FOR SUSTAINABLE DEVELOPMENT

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Sustainability performance needs to become a key part of supplier evaluation and procurement practice. This has implications for organisations who are in the supply chain themselves: if they are not already implementing sustainability measures and cutting their own emissions, they will come under pressure to do so from their customers. Or they will simply lose the business.

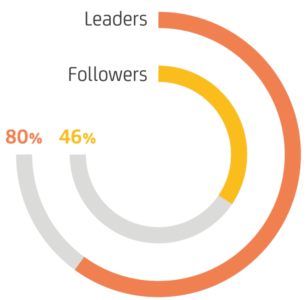
"And that is going to be the challenge," says Bill Sisson, Executive Director for North America at the World Business Council for Sustainable Development. "For a lot of companies, especially the smaller and medium-sized companies in their supply chain, getting to net zero greenhouse gas emissions is about understanding how they can interact with and address the challenges that their supply chain is actually creating for them."

Bringing in outside expertise and collaborating along the value chain and with partners is crucial to creating the right culture, skills and expectations. "Working with others is quicker, because when more people get together you get economies of scale and technology becomes more cost effective," says Lotus's Senapati. "You get double the benefits, in my view: you can reach net zero faster, and it might cost you less."

Set the right KPIs (and track them carefully)

With their sustainability efforts permeating the entire organisation and beyond, leaders make sure they have robust accountability and performance management.

Eight in 10 ensure that everyone is aware of their performance indicators on sustainability. So for leaders, sustainability KPIs are not just managed in the margins — they are part and parcel of how business performance is evaluated.



say that every part of their organisation is aware of the company's sustainability performance indicators

Action points

Think about the governance model for sustainability. Embed sustainability from the top down, with senior executives leading the charge; but also from the bottom up. At a business-unit level, everyone must understand what role they play.

Engage and inspire the people in your organisation. But also explain why sustainability is core to your mission, and why inaction is a serious business risk. By making sustainability KPIs a core part of management practice, you can carefully track performance.

You cannot do this alone — look out for collaboration opportunities and partnerships with your suppliers, customers, peers and outside experts to provide green skills.

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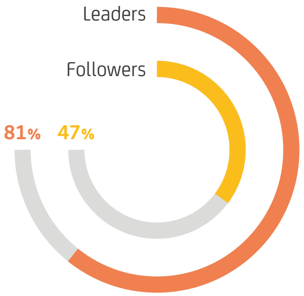
Technology adoption: Energy innovation brings rewards

There is no single way to decarbonise.

Leading sustainable businesses recognise that managing energy is a quick route to net zero targets, and they are investing in new technologies to get there.

Leaders are far more likely than followers (81% compared with 47%) to say that decarbonisation through energy management is a critical part of their sustainability plan.

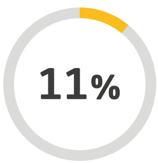
And they are right to do so: energy strategies to control Scope 1 and Scope 2 emissions through renewable energy sources and energy efficiency have an immediate impact on net zero targets.



say decarbonisation through energy management is a critical part of their sustainability plan

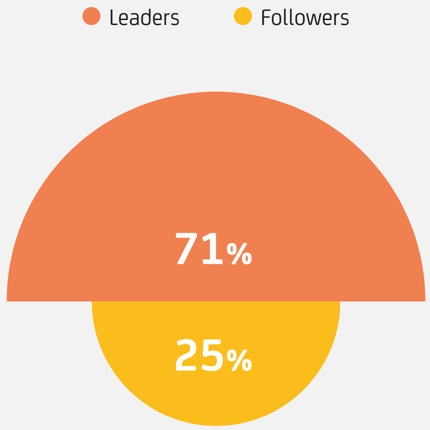
Move on from the planning stage

These leaders are already trialling and implementing new technologies to reduce carbon emissions in some or all of their operations (71% compared with 25% of followers).



But only 11% of followers say they have adopted renewable energy supply across most of their organisation.

Organisations using new technologies are already reaping the rewards



Using new technologies **in some** or **all areas** and **seeing gains**

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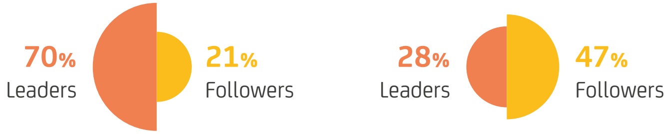
Decentralised energy system (with own renewable supply or shared renewable microgrids)



Already have this

Planning to implement this in the next 1-2 years

New technologies include decentralised energy systems (70%) and flexibly generating, using and managing energy through tools such as local energy markets, demand response markets and/or virtual power plants (60%).

Compared with our previous research, more organisations are now realising the benefits of energy as an asset. In 2019, only 5% of respondents regarded energy as an opportunity to generate additional revenue and a competitive advantage — this figure has now risen to 23%.[1]

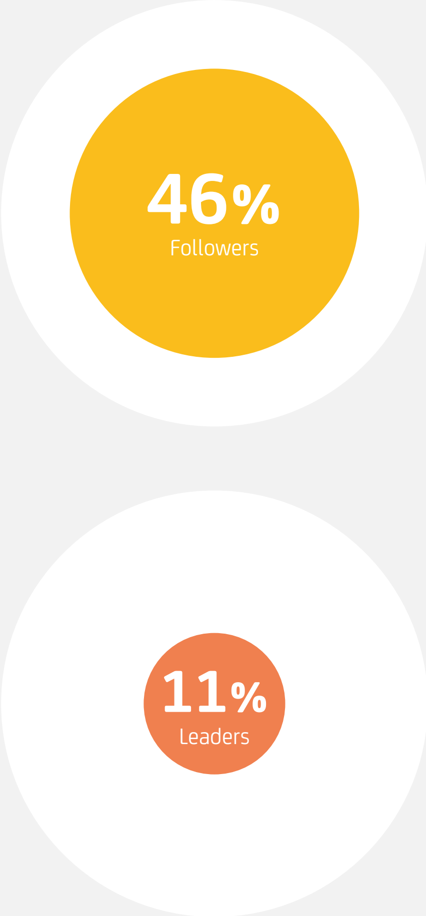
From installing solar panels on your own premises to a range of green tariff and power purchase options, there is no shortage of ways to decarbonise energy supply — a no-regrets option that can save you money and lower emissions and pollution in the wider community.

Leaders know there is no one silver-bullet technology, so they are exploring and implementing a broad range of technologies in order to hedge their bets and de-risk the uncertainty.

Followers are not embracing new technologies in the same way, in part because they do not know which technology to invest in: 46% cite this as a barrier, compared with just 11% of leaders. This means they are missing out on many 'low-hanging fruit' opportunities, such as greener energy supply arrangements.

"There is no one technology that is going to solve the problem," says Dell's Holmes. "Net zero requires an enormously complex and diverse set of solutions. But it is not a choice between technologies — we need everything and more if we are going to be successful on this journey."

[1] Out of 764 respondents in 2021



don't know what new technologies to invest in to reduce their CO_2 emissions

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The right time is now

Technology change is always going to happen, and it can be tempting to keep waiting for the next big thing or for current technology to improve or become less expensive. But de-risking energy in the short term by reducing fossil fuel use means less expense later on from tighter regulation and carbon taxes.

Sustainability Consultant Mike Barry says many organisations still don't feel a sense of urgency. "They think they just need to become 2% less bad every year to become sustainable," he says. "But cutting 50% of CO_2 requires fundamental change to how you run a business. You have to change your factories, farms, shops and lorries significantly."

Some organisations appear to be waiting for the 'right time'. But the right time is now: if boardrooms defer investments in renewable energy, their indecisiveness will expose them to future costs of carbon.

"We clearly see the need to drive towards delivery of the Paris Agreement [goals] and beyond," says David Croft, Sustainability, Environment and Human Rights Director at Reckitt. "Because otherwise, the penalties for inactivity will start to be more impactful on businesses as a whole."

But there is also opportunity for future cost savings. "We are seeing increasing availability of renewable energy technology, and anticipate increasing cost of inaction progressively appearing through carbon taxation," says Croft. "There will be a time when those two lines cross over. That is why it is important to try to find best-value routes to decarbonisation. But best value does not mean cheapest — it means best value over the period of time that we are targeting."

Action points

- Start now, even if you only take small steps. Signal to your supply chain that you are looking for partners that help you decarbonise your footprint. Use suppliers with good green credentials.
- Lead by example. Implement an energy strategy, with the necessary targets and resources to back it up. Introducing onsite renewable generation or optimising supply with renewable energy tariffs can produce quick wins.
- There are plenty of options, so do your research to find the right mix of technologies for your organisation — or call in the experts who can advise you on the right options.
- Improving your energy efficiency and using green power will not just cut your emissions — it could also save you money and improve your brand standing with customers, employees and in the community.

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Financial readiness: Sustainability as an investment

When it comes to sustainability, leading sustainable businesses know the difference between cost and investment.

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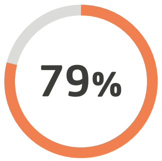
Sustainable business leaders recognise that short-term expenditure drives long-term benefits, but they also know that it achieves gains for the brand and competitive positioning in a more immediate timeframe.

They engage investors actively and know where their funding is coming from.

Cost is stopping many organisations from implementing energy management and emissions reduction technologies: 56% worry that cutting emissions will reduce their profitability, and 60% say that the pandemic has made it more difficult to justify capex on new low-carbon technology. Almost half (48%) say it is difficult to make the business case for acquiring low-carbon technology even if it creates savings in the long term.

But leaders rise above this short-termism because they know that pursuing short-term profits will end up costing them and the planet more in the long term. They recognise the cost of investing in new technologies and processes, but know that there are also benefits: 79% say they prioritise long-term gains over quick returns and low-risk strategies. They are more ambitious and strategic in their approach, and they can hold their nerve in the face of short-term pressures.



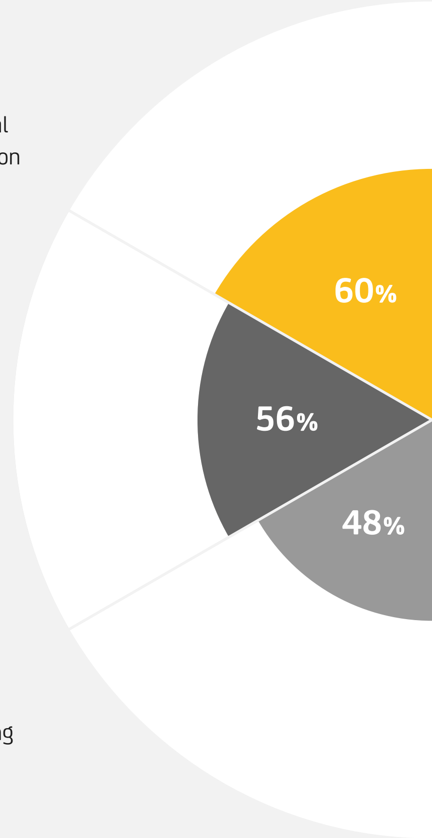
of leaders say they prioritise long-term gains over quick returns and low-risk strategies

Making decisions about long-term investments can be more challenging in times of market disruption

60%
say COVID-19 has made it more difficult to justify capital expenditure on new low-carbon or zero-carbon technology

56%
worry about what will happen to their profitability if and when they start to reduce emissions

48%
believe it is difficult to make the business case for acquiring energy technology, even if it creates long-term savings



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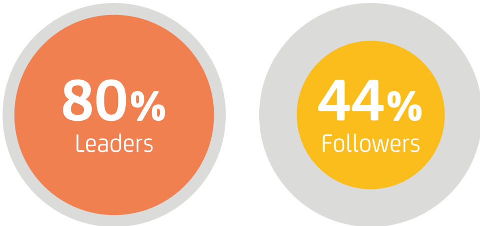
Seize the opportunity now

They might prioritise long-term investment, but leaders also benefit in the immediate term. Nearly three-quarters already save money with innovative energy management, compared with just 42% of followers. Their superior sustainability performance also creates new opportunities: eight in 10 say they are using energy-efficient technology to develop new revenue streams.



use energy-efficient technology, products and services to develop new revenue streams

“The risk of inactivity is one thing, but the other thing to consider is the risk of missed opportunity,” says Reckitt’s David Croft. “There is opportunity in developing products and working in a certain way that is part of the solution to the global challenge of climate change. I would much rather be part of the solution than part of the problem.”

Don’t just react to stakeholders — engage them in conversation

Shareholders or governing bodies are the chief influence on whether organisations pursue decarbonisation strategies. And leaders are almost twice as likely as followers (87% compared with 45%) to engage with investors to discuss their sustainability concerns and how to address them.

They are also more active and transparent. More than three-quarters include sustainability targets and outcomes in their annual reports and analyst presentations. This builds trust, which means that investors are more likely to respond favourably — even if there are short-term costs in driving long-term performance.

“The risk of inactivity is one thing, but the other thing to consider is the risk of missed opportunity. There is opportunity in developing products and working in a certain way that is part of the solution to the global challenge of climate change. I would much rather be part of the solution than part of the problem.”

DAVID CROFT
SUSTAINABILITY, ENVIRONMENT & HUMAN RIGHTS DIRECTOR, RECKITT

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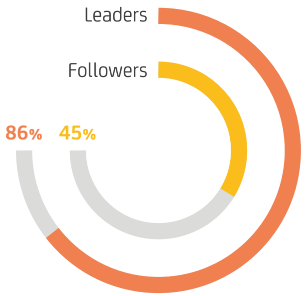
Look out for funding opportunities

Leaders use green finance opportunities to support their sustainability strategies. Their knowledge and resources allow them to access this funding, and the progress of their sustainability initiatives unlocks further financing opportunities.

The difference is stark: 86% of leaders say their sustainability initiatives help them to tap into green finance businesses, compared with 45% of followers. They make use of the full range of tax incentives, grants and other sources of government funding.



say their sustainability initiatives help them to tap into green finance opportunities

Many followers, which are also likely to be the organisations that need funding most, seem to be leaving free money on the table while leaders take advantage of the opportunities. It is not just about grants and tax breaks; there are a number of innovative options, such as energy-as-a-service models, that allow organisations to move green initiatives from their capex to their opex.

"Climate and sustainability are not about making investments in order to tick the green box," says Dell's David Holmes. "Smaller businesses can find this challenging, but I would encourage all of them to look at the opportunities. Many companies' sustainability journeys started by looking at opportunities to run cost-saving projects. For example, reducing your consumption of resources is also going to reduce your costs."

Action points

- Accept that sustainability requires investment. But this does not mean that your profitability needs to suffer: leading sustainable businesses prioritise long-term benefits, but still achieve short-term wins and unlock new opportunities in the immediate term.
- Embrace a long-term return on investment — you may not see the financial benefit in the first few years.
- Partner with organisations that can help you de-risk your financial investment and help manage costs over a long period.
- Proactively engage investors and be transparent with them through their reporting to create trust. Investors are the driving force behind sustainability.
- Invest in the knowledge and resources that allow you to accelerate your sustainability initiatives. Too many organisations fail to take advantage of green finance opportunities.

Contents:

No time to lose on a great investment

There is no time to waste in cutting carbon and addressing other sustainability issues. The science is clear, and the policy landscape has changed to reflect that. You need to act now to stay ahead of impending regulations, react to market and social demands, improve brand image and help to make a positive contribution to local communities.

All of these will help you succeed with your broader business objectives and enable long-term success.

It can be difficult, but help is out there.

- Seek out the experts and organisations that can help you — throughout your value chain and with your business objectives — to have the maximum impact.

But realise it will take:

- Time
- Planning
- Commitment

Implementing sustainability has to start at the top, but it also has to permeate throughout your organisation. You need a robust governance structure, clear goals and targets that are thoroughly embedded into everything you do.

There are a number of digital and renewable energy technology options to help you meet these targets (and possibly save money at the same time), so explore these to find the ones that work for you. There is also a range of ways to fund your ambitions — find out what is available, and go and get it.

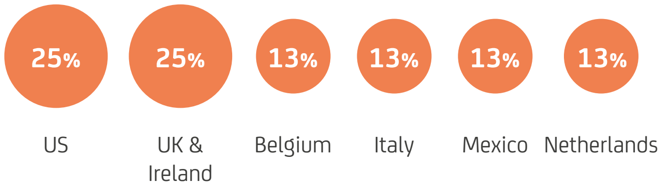
Far from being a cost, these steps are an investment. Yes, there can be significant outlay, but acting now can bring a range of short-term benefits as well as future-proof your organisation and create new opportunities.

So what's stopping you? There is no time to waste. Instead of getting stuck on the starting blocks or half way, take steps on the path to net zero now — and reap the benefits.

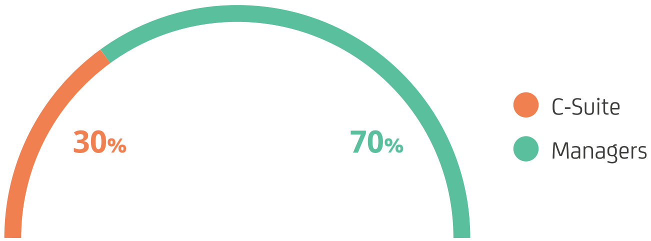
Contents:

Annex: Demographics

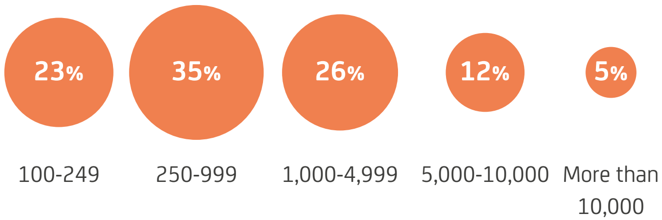
Countries



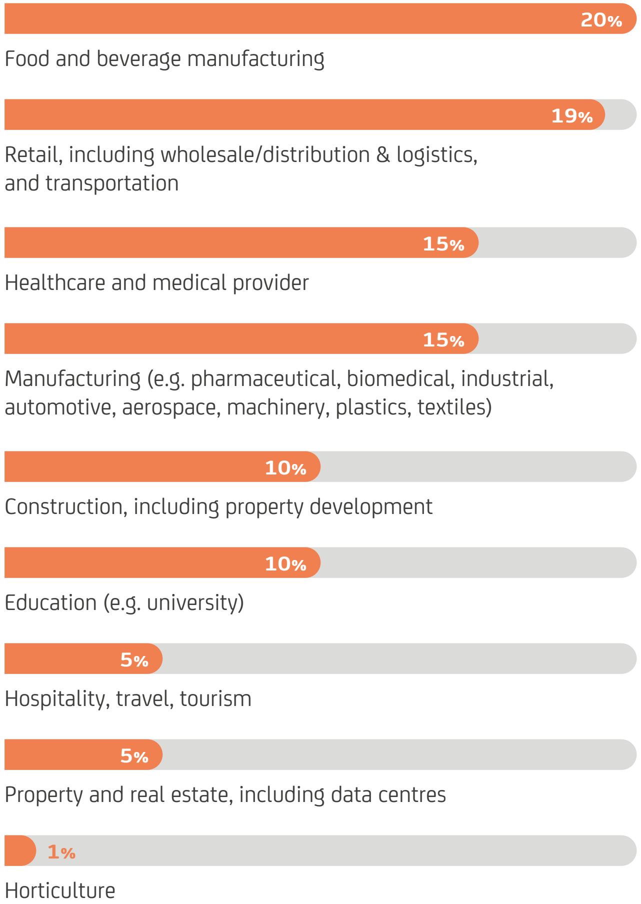
Job role



Number of employess



Sectors



About Centrica Business Solutions

Partner with us for integrated energy solutions that accelerate your journey to a low-carbon future, balancing commercial success and environmental responsibility.

We analyse, finance, install, operate and optimise energy, working across every energy source to deliver efficiency, resilience and sustainability. The result is the right energy at the right price – and vitally, the right balance between what's good for your business and the planet we share.

Together we are part of the solution.

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