

Results of a survey of German chambers of commerce abroad, delegations and representative offices



German Chamber of Commerce and Industry



German Chambers of Commerce Abroad

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Methodology

The **AHK Climate Action Compass 2024** is based on a DIHK survey of the member companies of the German Chambers of Commerce Abroad, delegations and representative offices (AHKs). It records the feedback from more than 2,200 German companies, branches and subsidiaries worldwide, as well as companies with close ties to Germany.

The survey was conducted from 25 March to 9 May 2024.

38 per cent of the responding companies come from the industry and construction sector, 41 per cent from the service sector and a further 21 per cent are trading companies.

Smaller companies with fewer than 100 employees account for 48 per cent of responses. 21 per cent of companies employ between 100 and 1,000 employees. Large companies with more than 1,000 employees account for 31 per cent of respondents worldwide.

52 per cent are subsidiaries/branches of German companies, 37 per cent are local or (non-German) international companies without a branch in Germany and a further 11 per cent are local or (non-German) international companies with a branch in Germany.

Imprint

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German Chamber of Industry and Commerce Postal address: 11052 Berlin | House address: Breite Straße 29 | Berlin-Mitte Phone 030 20308-0 | Fax 030 20308-1000

DIHK Online : <u>Homepage</u> | <u>Facebook</u> | <u>X (Twitter</u>) | <u>LinkedIn</u> | <u>Instagram</u> | <u>Youtube</u>

Editor: Dr Gabriele Rose

Graphic: Sebastian Titze

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1. Significance of climate change and mitigation measures

The importance of climate change and measures to mitigate it have only increased very slightly on average in 2024 from the perspective of companies worldwide compared to the survey in 2022. While the mean value in the same survey in 2022 was 3.6, it now stands at 3.7 on a scale between 1 "the issue plays practically no role" and 6 "the issue dominates the public debate".

It should also be noted that - contrary to what we might expect in Germany - from the perspective of international and local companies, climate protection does not dominate the public debate as an issue in any country. On a scale of one to six, nowhere was climate protection ranked higher than 4.6 on average.

Companies in the eurozone attach the greatest importance to climate protection (mean value 4.1), and the least in Eastern/Southeastern Europe (3.1).

The greatest increase in importance was recorded in South and Central America, where the mean value rose from 3.5 to 3.9. However, companies in North America also see climate protection and measures to mitigate it as more important than two years ago (3.4), with a value of 3.7.

What importance do companies attach to climate change and measures to mitigate it?

Mean value on a scale between

1 (the topic plays practically no role) and 6 (the topic dominates the public debate)



With a mean value of 2.9, Malaysia and Bolivia are the countries in which climate protection is the least important issue. However, in Turkey and Vietnam, with a mean score of 3.1 each, and Thailand, Egypt and Belarus, with a mean score of 3.3 each, the issue does not play a significant role from the perspective of local companies either.

Norway and France, on the other hand, are the countries where climate protection is high on the agenda with an average value of 4.6, as are Chile and Colombia (4.4).

What importance do companies attach to climate change or measures to contain it?

Distribution of ratings in per cent and mean value on a scale between

1 (the topic plays virtually no role) and 6 (the topic dominates the public debate) by country and region.

	1	2	3	4	5	6	Average
Worldwide	7%	13%	22%	26%	20%	12%	3,7
Eurozone	4%	5%	17%	32%	31%	11%	4,1
France	0%	0%	11%	37%	30%	22%	4,6
Greece	4%	9%	17%	31%	30%	9%	4,0
Italy	1%	4%	18%	39%	32%	6%	4,2
Austria	3%	3%	9%	47%	25%	13%	4,3
Portugal	0%	3%	15%	49%	27%	6%	4,2
Slovakia	8%	20%	16%	12%	28%	16%	3,8
Spain	4%	3%	19%	24%	38%	12%	4,2
Other EU, Switzerland, Norway, UK	5%	10%	20%	29%	25%	11%	3,9
Bulgaria	6%	12%	47%	14%	6%	15%	3,5
United Kingdom (UK)	6%	24%	24%	28%	11%	7%	3,4
Norway	2%	0%	4%	37%	40%	17%	4,6
Sweden	7%	3%	10%	39%	38%	3%	4,1
Eastern/Southeastern Europe (excl. EU), incl. Turkey	12%	24%	28%	18%	14%	4%	3,1
Turkey	7%	25%	34%	21%	8%	5%	3,1
Belarus	20%	18%	16%	11%	30%	5%	3,3
Asia/Pacific (excl. CN)	6%	20%	24%	25%	16%	9%	3,5
Australia	3%	6%	25%	34%	19%	13%	4,0
India	9%	9%	18%	23%	18%	23%	4,0
Japan	4%	17%	27%	29%	19%	4%	3,6
Korea (South)	2%	23%	28%	19%	16%	12%	3,6
Malaysia	10%	31%	33%	14%	10%	2%	2,9
Philippines	6%	24%	18%	36%	8%	8%	3,4
Singapore	5%	9%	18%	36%	27%	5%	3,9
Sri Lanka	6%	18%	24%	25%	9%	18%	3,7
Thailand	5%	33%	26%	13%	16%	7%	3,3
Vietnam	14%	29%	20%	19%	9%	9%	3,1
Greater China	6%	14%	29%	22%	16%	13%	3,7
China, PR	8%	9%	38%	21%	13%	11%	3,6
Taiwan	3%	24%	17%	25%	17%	14%	3,7
North America	5%	12%	26%	27%	19%	11%	3,7
Mexico	10%	18%	14%	24%	18%	16%	3,7
USA	2%	8%	35%	28%	19%	8%	3,8
South and Central America	9%	8%	19%	26%	20%	18%	3,9
Argentina	4%	17%	25%	21%	8%	25%	3,9
Bolivia	28%	8%	31%	16%	11%	6%	2,9
Brazil	5%	10%	16%	32%	25%	12%	4,0
Chile	4%	2%	12%	31%	31%	20%	4,4
Costa Rica	0%	11%	20%	32%	14%	23%	4,2
Ecuador	6%	8%	20%	21%	24%	21%	4,1
Colombia	12%	3%	9%	19%	27%	30%	4,4
Paraguay	12%	16%	32%	12%	12%	16%	3,4
Peru	0%	12%	32%	36%	12%	8%	3,7
Uruguay	10%	0%	21%	32%	19%	18%	4,0
Africa, Near and Middle East	10%	18%	24%	19%	16%	13%	3,5
Egypt	15%	13%	38%	11%	10%	13%	3,3
Kenya	0%	19%	24%	28%	29%	0%	3,7
Могоссо	10%	6%	22%	18%	18%	26%	4,1
Saudi Arabia	8%	18%	35%	18%	13%	8%	3,4
Tunisia	11%	19%	22%	18%	11%	19%	3,6
United Arab Emirates	0%	33%	10%	28%	29%	0%	3,5

2. Energy transition on site ...

Over the past two years, some countries appear to have given strategic thought to how the transition to renewable energies can be achieved. Almost a quarter of all companies surveyed (24 per cent) believe that local decision-makers in their countries have a credible strategy in place. Two years ago, only a fifth felt this way.

Even though almost a fifth of companies (19 per cent) still state that local politicians continue to rely primarily on fossil energy sources, a slight improvement of three percentage points can be seen here compared to 2022, when 22 per cent still stated that politicians continue to rely on fossil energy sources.

The number of companies stating that there is an awareness of the need to transition to renewable energies on site is almost unchanged. 58 per cent of companies stated this in 2022, now it is 57 per cent. However, this is also accompanied by the assessment that, despite awareness, the necessary framework conditions for the transition are lacking.

In the opinion of the companies surveyed worldwide, which statement about the energy transition is true? Company responses in per cent



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If we consider the statement that politicians are continuing to rely on fossil fuels, this should not obscure the fact that the 19 per cent figure is an average. This figure is much higher in individual countries. For example, 67 per cent of companies in Mexico state that they continue to rely on fossil fuels, and almost half of the companies in Bolivia (46 per cent) believe the same. Countries such as the UK and Ireland with 42 per cent and Thailand and Malaysia with 38 per cent each are also well above the average of 19 per cent. Well over a third see Belarus (36 per cent) continuing on the fossil fuel path, as does the USA with 36 per cent.

The local companies see Morocco (65 per cent), Uruguay (54 per cent) and Kenya (52 per cent) as far above the average of 24 per cent in terms of a credible strategy. However, Greece (43 per cent), Portugal (42 per cent) and Taiwan (41 per cent) are also more credible than the average in the eyes of companies in these countries.

In the opinion of the companies surveyed worldwide, which statement about the energy transition is true?

- In Germany, politicians continue to focus primarily on fossil fuels.
- 1 = 2 = There is an awareness of the need to switch to renewable energy sources, but the necessary framework conditions are lacking.
- 3 = There is a credible strategy for the transition to renewable energy sources.

	1	2	3
Worldwide	19%	57%	24%
Eurozone	4%	71%	25%
France	0%	68%	32%
Greece	4%	53%	43%
Italy	4%	92%	4%
Austria	9%	60%	31%
Portugal	0%	58%	42%
Slovakia	16%	84%	0%
Spain	2%	69%	29%
Other EU, Switzerland, Norway, UK	17%	57%	26%
Bulgaria	3%	73%	24%
Great Britain and Northern Ireland (UK)	42%	23%	35%
Norway	5%	86%	9%
Sweden	11%	57%	32%
Eastern/Southeastern Europe (excl. EU), incl. Turkey	22%	64%	14%
Turkey	14%	68%	18%
Belarus (Belarus)	36%	60%	4%
Asia/Pacific (excluding CN)	24%	57%	19%
Australia	13%	67%	20%
India	17%	48%	35%
Japan	13%	79%	8%
Korea (South)	18%	64%	18%
Malaysia	38%	48%	14%
Philippines	35%	47%	18%
Singapore	30%	35%	35%
Sri Lanka	3%	67%	30%
Thailand	38%	55%	7%
Vietnam	31%	52%	17%
Greater China	16%	50%	34%
China, PR	17%	48%	35%
Taiwan	7%	52%	41%
North America	43%	38%	19%
Mexico	67%	22%	11%
USA	35%	41%	24%
South and Central America	19%	58%	23%
Argentina	8%	71%	21%
Bolivia	46%	51%	3%
Brazil	15%	54%	31%
Chile	4%	70%	26%
Costa Rica	9%	67%	24%
Ecuador	33%	56%	11%
Colombia	6%	81%	13%
Paraguay	16%	60%	24%
Peru	13%	62%	25%
Uruguay	5%	41%	54%
Africa, Near and Middle East	18%	50%	32%
Egypt	18%	56%	26%
Kenya	5%	43%	52%
Morocco	6%	29%	65%
Saudi Arabia	28%	41%	31%
Tunisia	19%	70%	11%
United Arab Emirates	14%	53%	33%
		OD 11 11 / AL 11 / OU	

3. ... and their impact on corporate strategies

The impact that local strategies have on companies is almost unchanged compared to 2022, with a mean value of 3.1. Two years ago, it was 3.0 on a scale of 1 "We can implement this without any problems and 6 "We feel overwhelmed as a company". This also applies to the individual regions.

Companies currently see the least impact of political initiatives on their own business in North America. Here, the mean value has fallen from 3.1 in 2022 to 2.5. Companies in Eastern and South-Eastern Europe (excluding the EU), including Turkey, are similarly unimpressed, with the value dropping from 2.9 to 2.6.

Companies in South and Central America in particular are reporting a greater impact on their own company than two years ago, with a current value of 2.9 (2.6 in 2022), as well as in Greater China, where the value has risen from 2.7 to 3.

Impact of the strategy in the country on your own company

Mean value on a scale between

1 (We can implement this without any problems) and 6 (We feel overwhelmed as a company)



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4. Impact of Carbon pricing in the EU on the market share in the host country

More than a third of companies (34 per cent) expect the market share of German/European products to increase in the host country due to the pricing of CO_2 in the EU. This is a significant difference to 2022, where only a quarter saw this effect.



How will the pricing of CO₂ in the EU affect the market share of German/European products in your host country? Company responses in per cent

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At present, companies in Africa, the Middle East, South and Central America and the rest of the EU, Switzerland, Norway and the UK in particular estimate that the market share will increase. In Greater China and North America, companies are forecasting a decline in the market share for German/European products.

How will the pricing of CO₂ in the EU affect the market share of German/European products in your host country? Company responses in per cent



The countries in which most companies anticipate a future increase in market share are Sweden (60 per cent), India (57 per cent), Bulgaria and Morocco (54 per cent each). In contrast, companies forecast a decline in Bolivia (54 per cent), Uruguay (47 per cent) and Thailand (45 per cent) in particular.

How will the pricing of CO₂ in the EU affect the market share of German/European products in your host country? Company responses in per cent

	will rise	will remain the same	will decline
Worldwide	34%	39%	27%
Eurozone	29%	50%	21%
France	19%	75%	6%
Greece	50%	33%	17%
Italy	23%	60%	17%
Austria	31%	27%	42%
Portugal	32%	50%	18%
Slovakia	0%	65%	35%
Spain	31%	50%	19%
Other EU. Switzerland, Norway, UK	38%	46%	16%
Bulgaria	54%	42%	4%
Great Britain and Northern Ireland (UK)	16%	75%	9%
Norway	41%	37%	22%
Sweden	64%	36%	0%
Fastern/Southeastern Europe (excl_EU) incl	31%	44%	25%
Turkey	34%	440/0	22%
Belarus (Belarus)	0%	61%	390/0
Asia/Pacific (excluding CN)	290/0	39%	32%
Australia	25%	50%	25%
India	57%	140/0	29%
lanan	190/0	61%	20%
Korea (South)	390%	220/0	390%
Malaysia	230/0	350/0	420%
Philippines	420%	35%	72%
Singapore	42%	25%	23%0
Sri Lanka	210/2	440/2	2506
Jii Lalika Thailand	100%	260/2	25%0
Vietnom	13%0	270/2	45%
Greater China	42%0	27%	31%0
China PP	210/2	200/2	200%
	220%	4206	240%
North Amorica	33%0 2006	43%0	24%
North America Maxiao	29%0	200/6	3 37%
	31%0	38%0	31%0
USA South and Control America	26%	36%	38%
	38%0	31%0	<u>31%0</u>
Argentina	44%	43%	I 3 %0
	23%	23%0	54%
	20%	53%	27%
	43%	22%	35%
	32%	36%	32%
	51%	21%	28%
Colomola	30%	48%	22%
Paraguay	38%	24%	38%
Peru	22%	39%	39%
Uruguay	29%	24%	4/%
Africa, Near and Middle East	41%	34%	25%
Egypt	48%	24%	28%
Kenya	42%	25%	33%
Morocco	54%	31%	15%
Saudi Arabia	18%	39%	43%
Iunisia	52%	41%	7%
United Arab Emirates	17%	50%	33%

5. Relocation of production processes due to Carbon pricing in the EU

On average, companies worldwide see the likelihood of production processes being relocated due to carbon pricing in the EU as virtually unchanged. The company responses in North America show a striking difference compared to 2022. While the mean value from 1 "A relocation of production processes to my country of domicile is highly unlikely" to 6 "My country of domicile is highly favourable for a relocation of production processes" in 2022 was still 3.0, the mean value of the company responses is now 3.4.

How likely do companies think it is that production processes will increasingly be relocated to your host country as a result of carbon pricing in the EU?

Mean value on a scale from 1 (relocation of production processes to my country of domicile is highly unlikely) to 6 (my country of domicile is highly favourable for relocation of production processes)



However, a look at the individual countries shows that there are significant differences from country to country in some regions.

The average value in Great Britain and Northern Ireland (UK) is 1.9, meaning that most companies there see no likelihood of production processes being relocated to their location due to carbon pricing in the EU.

In contrast, companies in India, with a mean score of 4.5, see a significantly higher suitability for relocating production to their country than elsewhere in the world. Companies in Morocco and Vietnam take a similar view, each with a mean score of 4.0 on a scale from 1 "Relocating production processes to my country of domicile is highly unlikely" to 6 "My country of domicile is highly suitable for relocating production processes."

How likely do companies think it is that more production processes will be relocated to your host country as a result of Carbon pricing in the EU?

Mean value on a scale from 1 (relocation of production processes to my country of domicile is highly unlikely) to 6 (my country of domicile is highly favourable for relocation of production processes)

	1	2	3	4	5	6	Average
Worldwide	23%	18%	22%	19%	11%	7%	3.0
Eurozone	18%	26%	23%	20%	10%	3%	2,9
France	13%	43%	27%	13%	4%	0%	2,5
Greece	18%	36%	18%	9%	14%	5%	2,8
Italy	19%	32%	25%	16%	8%	0%	2,6
Austria	29%	26%	19%	26%	0%	0%	2,4
Portugal	6%	9%	20%	31%	31%	3%	3,8
Slovakia	12%	16%	40%	24%	8%	0%	3,0
Spain	20%	25%	20%	18%	11%	6%	2,9
Other EU, Switzerland, Norway, UK	28%	18%	22%	17%	11%	4%	2,8
Bulgaria	12%	24%	31%	18%	6%	9%	3,1
United Kingdom (UK)	71%	0%	0%	29%	0%	0%	1,9
Norway	20%	22%	30%	13%	13%	2%	2,8
Sweden	14%	25%	25%	11%	21%	4%	3,1
Eastern/Southeastern Europe (excl. EU), incl.	27%	23%	17%	17%	10%	6%	2,8
Turkey							
Turkey	19%	31%	22%	19%	9%	0%	2.7
Belarus	56%	7%	8%	11%	16%	2%	2.3
Asia/Pacific (excl. CN)	23%	16%	24%	19%	11%	7%	3.0
Australia	47%	20%	13%	10%	3%	7%	2.2
India	5%	0%	14%	19%	43%	19%	4.5
Japan	35%	19%	23%	16%	4%	3%	2,4
Korea (South)	17%	20%	32%	24%	2%	5%	2.9
Malaysia	7%	17%	20%	27%	17%	12%	3,7
Philippines	19%	15%	30%	15%	17%	4%	3,1
Singapore	24%	24%	27%	10%	10%	5%	2,7
Sri Lanka	41%	10%	32%	3%	7%	7%	2,4
Thailand	10%	24%	20%	29%	12%	5%	3,2
Vietnam	3%	9%	28%	24%	18%	18%	4,0
Greater China	23%	23%	21%	21%	9%	3%	2,8
China, PR	16%	24%	20%	20%	14%	6%	3,1
Taiwan	26%	22%	26%	22%	4%	0%	2,6
North America	17%	14%	22%	16%	18%	13%	3,4
Mexico	18%	16%	17%	24%	18%	7%	3,3
USA	9%	9%	33%	11%	18%	20%	3,8
South and Central America	26%	14%	21%	19%	10%	10%	3,0
Argentina	50%	9%	18%	5%	9%	9%	2,4
Bolivia	44%	24%	23%	6%	0%	3%	2,0
Brazil	11%	11%	15%	30%	22%	11%	3,7
Chile	34%	24%	16%	16%	6%	4%	2,5
Costa Rica	26%	9%	12%	18%	6%	29%	3,6
Ecuador	23%	13%	29%	21%	8%	6%	3,0
Colombia	29%	16%	17%	19%	13%	6%	2,9
Paraguay	8%	8%	29%	21%	17%	17%	3,8
Peru	29%	21%	21%	21%	8%	0%	2,6
Uruguay	23%	13%	28%	18%	9%	9%	3,0
Africa, Near and Middle East	18%	18%	19%	22%	12%	11%	3,2
Egypt	13%	5%	29%	24%	13%	16%	3,7
Kenya	29%	29%	24%	19%	0%	0%	2,3
Morocco	9%	4%	24%	22%	18%	22%	4,0
Saudi Arabia	18%	28%	13%	18%	15%	8%	3,1
Tunisia	21%	15%	24%	21%	9%	12%	3,2
United Arab Emirates	10%	29%	10%	33%	14%	5%	3,3

6. Business opportunities due to climate protection / energy transition / mobility transition

More than 86 per cent of companies worldwide see business opportunities in connection with climate protection, the energy transition and the mobility transition in their country. Most optimists are located in the eurozone and in South and Central America, where 90 per cent of companies see business opportunities. Greater China is the region in which, in a global comparison, almost a quarter (24 per cent) say "rather no" when it comes to business opportunities in connection with climate protection, the energy transition and the mobility transition in their country.

Do companies see business opportunities in connection with climate protection / energy transition / mobility transition in their country? Company responses in per cent



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The business areas in which the companies see opportunities are almost unchanged in terms of their respective shares. The greatest opportunities are in energy generation from renewable sources and energy efficiency in industry.

And if so, which ones? Worldwide; in relation to the companies that see opportunities; multiple answers possible



When looking at the various countries and their most optimistic companies in terms of business opportunities, France (100 per cent), Portugal and Egypt (97 per cent), Slovakia and Chile (96 per cent) are at the top of the list with more than 95 per cent of company responses. In contrast, 40 per cent of companies in Belarus, 30 per cent in Taiwan and 30 per cent in Vietnam responded "rather no" when it comes to business opportunities.

Do companies see business opportunities in connection with climate protection / energy transition / mobility transition in your country? And if so, which ones?

Worldwide, in relation to companies that see opportunities; multiple answers possible)

	Pro- bably		Energy genera- tion from renewa- ble	High-vol- tage techno-	Hydrogen techno-	Energy efficiency in in-	Domestic technol- ogy / en- ergy effi- ciency in	E-mobi-	
	not	Yes	sources	logy	logy	dustry	buildings	lity	Other
Worldwide	14%	86%	67%	18%	47%	62%	45%	47%	3%
Eurozone	10%	90%	63%	11%	47%	67%	47%	52%	3%
France	0%	100%	48%	4%	43%	78%	61%	70%	0%
Greece	14%	86%	89%	16%	42%	32%	37%	37%	0%
Italy	10%	90%	65%	6%	26%	71%	55%	58%	8%
Austria	19%	81%	72%	16%	76%	76%	52%	44%	0%
Portugal	3%	97%	69%	16%	59%	72%	34%	59%	0%
Slovakia	4%	96%	54%	29%	38%	67%	50%	46%	8%
Spain	9%	91%	53%	8%	61%	68%	36%	51%	2%
Other EU, Switzerland, Norway, UK	21%	79%	67%	24%	47%	67%	38%	41%	1%
Bulgaria	9%	91%	72%	21%	48%	76%	59%	45%	0%
United Kingdom (UK)	28%	72%	85%	35%	41%	70%	33%	35%	0%
Norway	18%	82%	63%	19%	66%	59%	41%	34%	0%
Sweden	12%	88%	55%	32%	45%	82%	23%	45%	0%
Eastern/Southeastern Europe (excl. EU), incl. Turkev	19%	81%	71%	10%	24%	65%	44%	51%	0%
Turkey	11%	89%	84%	16%	27%	65%	47%	53%	0%
Belarus	40%	60%	33%	11%	30%	78%	78%	81%	0%
Asia/Pacific (excl. CN)	20%	80%	65%	19%	41%	59%	52%	44%	3%
Australia	7%	93%	74%	33%	70%	63%	63%	59%	4%
India	18%	82%	72%	17%	56%	72%	56%	61%	6%
Japan	22%	78%	60%	19%	40%	61%	40%	33%	2%
Korea (South)	17%	83%	77%	29%	49%	60%	49%	54%	0%
Malaysia	20%	80%	56%	0%	22%	72%	44%	28%	6%
Philippines	22%	78%	87%	29%	42%	53%	63%	53%	0%
Singapore	9%	91%	35%	20%	40%	65%	80%	60%	5%
Sri Lanka	16%	84%	74%	11%	44%	52%	52%	33%	0%
Thailand	19%	81%	62%	21%	38%	47%	56%	50%	0%
Vietnam	30%	70%	52%	13%	17%	52%	43%	26%	13%
Greater China	24%	76%	65%	26%	48%	69%	57%	55%	5%
China, PR	22%	78%	55%	35%	55%	73%	58%	60%	8%
Taiwan	30%	70%	89%	16%	42%	79%	63%	53%	0%

	Pro- bably		Energy genera- tion from renewa- ble	High-vol- tage techno-	Hydrogen techno-	Energy efficiency in in-	Domestic technol- ogy / en- ergy effi- ciency in	F-mobi-	
	not	Yes	sources	logy	logy	dustry	buildings	lity	Other
North America	16%	84%	63%	26%	42%	71%	49%	57%	2%
Mexico	15%	85%	69%	21%	33%	67%	41%	56%	5%
USA	17%	83%	60%	35%	50%	75%	54%	58%	0%
South and Central America	10%	90%	67%	15%	55%	60%	39%	47%	4%
Argentina	9%	91%	75%	10%	75%	55%	35%	35%	5%
Bolivia	21%	79%	62%	12%	31%	62%	23%	50%	0%
Brazil	5%	95%	74%	9%	51%	60%	31%	44%	5%
Chile	4%	96%	60%	17%	83%	63%	44%	65%	4%
Costa Rica	15%	85%	76%	14%	55%	72%	48%	52%	0%
Ecuador	7%	93%	62%	20%	42%	63%	44%	43%	6%
Colombia	13%	87%	67%	30%	74%	78%	41%	44%	0%
Paraguay	13%	88%	67%	29%	29%	43%	43%	48%	5%
Peru	8%	92%	70%	13%	65%	65%	22%	52%	4%
Uruguay	11%	89%	59%	2%	86%	43%	35%	59%	4%
Africa, Near and Middle East	11%	89%	74%	22%	54%	55%	41%	42%	3%
Egypt	3%	97%	60%	14%	60%	40%	31%	29%	0%
Kenya	19%	81%	76%	6%	47%	71%	53%	65%	6%
Morocco	6%	94%	72%	33%	74%	61%	35%	61%	2%
Saudi Arabia	11%	89%	76%	26%	74%	59%	56%	50%	3%
Tunisia	15%	85%	83%	14%	24%	45%	21%	24%	10%
United Arab Emirates	10%	90%	79%	11%	47%	53%	37%	53%	0%

7. Importance of sustainable finance

On a scale from 1 "We still hear next to nothing about this topic here" to 6 "Already plays a major role in corporate financing", the importance of sustainable corporate financing has increased worldwide from an average of 3.3 to 3.5. However, from the perspective of companies worldwide, the topic is still in the mid-field in terms of importance.

Only in South and Central America has sustainable finance experienced an increase in importance from a mean value of 3.3 in 2022 to the current 3.8, a value that is otherwise only achieved in the rest of the EU, Switzerland, Norway and the UK. The eurozone remains unchanged at 3.5.

How important is the topic of sustainable corporate financing ("sustainable finance") in your host country? (Mean value on a scale from 1 (this topic is still virtually unheard of here) to 6 (already plays a major role in corporate financing)



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Companies in the UK and Northern Ireland (UK) as well as Chile and Paraguay attach the greatest importance to sustainable corporate financing with a value of 4.3 each, followed by Costa Rica and Colombia with a mean value of 4.2 each and Ecuador with 4.1.

The companies see the lowest importance in the People's Republic of China (2.7) and Tunisia (2.7).

How important is the topic of sustainable corporate financing ("sustainable finance") in your host country? Average on a scale from 1 (you still hear almost nothing about this topic here) to 6 (it already plays a major role in corporate finance)

Work 12% 17% 2% 21% 16% 20% 7% 3,5 Eurozone 4% 6% 20% 20% 20% 3,5 3,5 France 4% 26% 9% 3,5% 9% 10% 3,5 Greece 4% 26% 9% 19% 19% 20% 10% 3,7 Iavi 3% 19% 19% 19% 40% 3% 3,7 Storakia 8% 9% 19% 19% 42% 11% 3,7 Spain 7% 20% 19% 40% 3,5 5 Other UL Switzerland, Norway, UK 9% 12% 18% 30% 24% 24% 3,4 United Kingdom (UK) 2% 17% 2% 10% 3,6 3,6 Sweden 18% 7% 28% 20% 9% 3,6 Sweden 18% 9% 23,4 23,6 3,6 <th></th> <th>1</th> <th>2</th> <th>3</th> <th>4</th> <th>5</th> <th>6</th> <th>Average</th>		1	2	3	4	5	6	Average
Eurozone7%16%26%24%20%7%3,5France4%8%32%36%9%0%3,6Greece4%26%20%10%17%3,7Italy5%20%20%10%6%3,3Portugal6%9%35%34%6%3,5Slovakia8%8%8%20%17%4%3,5Slovakia8%8%4%24%25%1%4%3,5Other EU,Switzerland, Norway, UK9%17%4%21%1%2%3,4United Kingdom (UK)2%7%1%4%21%1%3,4United Kingdom (UK)2%7%1%2%2%9%3,4Swach1%8%1%2%2%1%3,4Uniteg Kingdom (UK)2%7%1%2%2%9%3,4Swach1%8%1%2%2%1%3,4Lategr7%1%1%2%2%1%3,4Swach1%8%1%2%1%3,43,4Lategr1%8%1%2%1%3,4Swach1%2%1%2%1%3,4Swach1%8%1%2%1%3,4Swach1%2%1%1%1%3,4Swach1%1%2%1%1%	Worldwide	12%	17%	22%	21%	16%	12%	3,5
France 496 996 2260 6976 2076 1976 3,6 Greece 496 2660 996 3536 996 1796 3,7 Isly 500 2000 2000 2000 2000 300 3,7 Austria 900 1970 3490 2940 1796 490 3,5 Austria 890 840 3440 2900 1390 3,5 Other UL Switzerland, Norway, UK 990 1290 1890 2190 1290 3,8 Bulgaria 2100 2100 1970 2160 2960 2360 3,6 Sweden 1890 740 1796 2160 2960 3,6 3,2 Turkey 740 3670 2360 2360 296 3,6 3,2 Austraia 1196 940 2340 2240 2740 746 3,6 Sweden 1196 2690 2301 2746 </th <th>Eurozone</th> <th>7%</th> <th>16%</th> <th>26%</th> <th>24%</th> <th>20%</th> <th>7%</th> <th>3,5</th>	Eurozone	7%	16%	26%	24%	20%	7%	3,5
Greece 49% 26% 29% 29% 29% 17% 3,7 Italy 596 20% 20% 20% 19% 8% 3,5 Austria 39% 19% 35% 34% 66% 3,3 Portugal 60% 9% 19% 42% 21% 3% 3,7 Slovakia 8% 8% 9% 14% 42% 21% 3% 3,7 Slovakia 8% 8% 34% 24% 21% 12% 3% 3,5 Spain 7% 12% 49% 12% 23% 12% 3,4 United Kingdom (UK) 29% 17% 12% 24% 22% 3,4 United Kingdom (UK) 29% 17% 12% 26% 13% 8% 3,2 Virkey 7% 36% 13% 8% 3,2 13% 3,3 1 Asina 26% 16% 16% 1	France	4%	8%	32%	36%	20%	0%	3,6
Italy 5% 20% 28% 20% 19% 8% 3,5 Austria 3% 19% 3% 3% 3% 3,3 Portugal 6% 9% 19% 4% 2% 1% 3% 3,3 Slovakia 8% 8% 8% 2% 21% 4% 3% 3,5 Other EU, Switzerland, Norway, UK 9% 12% 28% 21% 21% 12% 3,4 United Kingdom (UK) 2% 2% 17% 5% 3,6% 24% 21% 20% 3,4 Sweden 18% 30% 24% 21% 20% 3,6 3,4 Eastern/Southastern Europe (excl. EU, incl. Turkey 11% 30% 23% 20% 9% 5% 3,0 Eastern/Southastern Europe (excl. EU, incl. Turkey 11% 36% 23% 13% 13% 3% 3% 3,0 Eastern/Southastern Europe (excl. EU, incl. Turkey 11% 20% 16%	Greece	4%	26%	9%	35%	9%	17%	3,7
Austria 3% 1% 1% 2% 1% 2% 2% 3% 3% Spain 7% 2% 2% 1% 2% 2% 1% 2% 2% 1% 2% 2% 1% 2% 3% 3% Bulgaria 21% 21% 24% 24% 24% 24% 24% 3% 3% Norway 2% 1% 2% 2% 1% 2% 3% 3% 3% Sweden 1% 7% 2% 2% 1% 2% 1% 3% <t< td=""><td>Italy</td><td>5%</td><td>20%</td><td>28%</td><td>20%</td><td>19%</td><td>8%</td><td>3,5</td></t<>	Italy	5%	20%	28%	20%	19%	8%	3,5
Portugal 6%0 9%0 13%0 42%0 21%0 3%0 3,7 Slovakia 8%0 34%0 23%0 17%0 4%0 3,5 Other EU, Svitzerland, Norway, UK 9%0 12%0 18%0 24%0 12%0 12%0 12%0 12%0 12%0 24%0 24%0 3,4 United Kingdom (UK) 2%0 17%0 25%0 21%0 24%0 24%0 3,4 Eastern/Southeastern Europe (excl. EU), incl. Turkey 11%0 23%0 26%0 9%0 3,6 Sweeton 11%0 23%0 26%0 9%0 3,6 3,4 Eastern/Southeastern Europe (excl. EU), incl. Turkey 11%0 23%0 22%0 27%0 7%0 3,6 Asia/Facific (excl. CN) 17%6 18%0 28%0 18%0 9%0 3,3 Japan 18%1 29%0 19%0 14%0 3,6 3,4 Singapore 29%0 19%0 14%0 19%0 23%0 15%0 3,6<	Austria	3%	19%	35%	34%	6%	3%	3,3
Slovakia 890 890 890 2490 1280 1780 290 1580 2500 930 1280 3,5 Spain 790 2290 1280 2508 2508 2508 2508 2308 1280 380 Bulgaria 2190 2190 2190 2190 290 780 290 290 630 290 3.4 United Kingdom (UK) 290 770 2590 2190 290 630 3.4 Eastern/Southeastern Europe (excl. EU), incl. Turkey 1190 2306 2690 1990 1906 546 3.0 Belarus 1190 990 2490 2205 270 706 3.6 Asia/Pacific (excl. CN) 1796 1896 2690 1996 1896 3050 130 3.3 3.3 Japan 2206 1390 1896 2490 1996 1496 3.1 3.1 3.1 3.1 3.1 3.1 3.1 3.1 3.1 3.1 3.1 3.1 3.1 3.1 3.1	Portugal	6%	9%	19%	42%	21%	3%	3,7
Spain 7% 22% 22% 15% 25% 9% 3.5 Other EU, Switzerland, Norway, UK 9% 12% 18% 21%0 21%0 12% 12% 12% 12% 12% 12% 12% 12% 12% 12% 12% 21% 12% 21% 12% 21% <td< td=""><td>Slovakia</td><td>8%</td><td>8%</td><td>34%</td><td>29%</td><td>17%</td><td>4%</td><td>3,5</td></td<>	Slovakia	8%	8%	34%	29%	17%	4%	3,5
Other EU, Switzerland, Norway, UK 996 1296 1896 26% 23% 12% 3.8 Bulgaria 21% 21% 21% 21% 21% 21% 21% 21% 21% 21% 21% 24% 4.3 Norway 290 17% 25% 21% 29% 6% 9% 3.8 Sweden 180% 7% 21% 29% 6% 9% 3.8 Sweden 11% 29% 28% 29% 9% 5% 3.0 Belarus 11% 9% 23% 28% 29% 27% 7% 3.0 Belarus 11% 9% 24% 24% 8% 3.0 3.0 India 22% 13% 8% 18% 9% 18% 9% 3.6 Australia 26% 13% 9% 14% 3.9% 15% 5% 3.6 Japan 16% 8% 18% <	Spain	7%	22%	22%	15%	25%	9%	3,5
Bulgaria 2190 2190 2190 2190 2190 1290 3,4 United Kingdom (UK) 290 7%0 15%0 20%0 24%0 22%0 4,3 Sweden 18%0 7%0 21%0 29%0 25%0 9%0 3,4 Eastern/Southeastern Europe (excl. EU), incl. Turkey 11%0 29%0 22%0 22%0 27%0 3%0 3%0 3,6 Aisal/Pacific (excl. CN) 17%0 18%0 26%0 18%0 13%0 9%0 3,3 Japan 18%0 26%0 18%0 13%0 9%0 3,3 Japan 18%0 29%0 19%0 19%0 19%0 3,3 Japan 15%0 18%0 39%0 18%0 20%0 8%0 3,0 Philippines 29%0 18%0 19%0 12%0 3,8 3,1 Singapore 9%0 14%0 19%0 12%0 3,4 3,2 Tokinan 15%0 0%0	Other EU, Switzerland, Norway, UK	9%	12%	18%	26%	23%	12%	3,8
United Kingdom (UK) 29b 79b 159b 309b 249b 229b 219b 229b 219b 229b 219b 229b 29b 99b 3,8 Sweden 189b 79b 239b 29b 199b 299b 299b 299b 39b 3,4 Eastern/Southeastern Europe (excl. EU), incl. Turkey 119b 239b 229b 139b 89b 3,2 Turkey 79b 369b 249b 229b 139b 89b 3,2 Australia 269b 169b 249b 249b 139b 89b 3,3 Japan 189b 269b 169b 169b 169b 139b 3,4 Siragapore 299b 189b 294b 249b 139b 3,4 Sri Lanka 159b 189b 294b 139b 294b 3,8 Thailand 149b 304b 249b 139b 3,4 3,1 Sri Lanka 159b <t< td=""><td>Bulgaria</td><td>21%</td><td>21%</td><td>4%</td><td>21%</td><td>21%</td><td>12%</td><td>3,4</td></t<>	Bulgaria	21%	21%	4%	21%	21%	12%	3,4
Norway 29% 17% 29% 21% 26% 99% 3.8 Sweden 18% 7% 21% 29% 25% 0% 3.4 Eastern/Southeastern Europe (excl. EU), incl. Turkey 7%6 36% 29% 9%6 9%6 3.0 Belarus 11%0 9%6 24%6 29%6 9%6 3.0 Australia 26%0 18%6 26%6 18%6 3.0% 3.0 Australia 26%0 16%6 16%6 6%6 3.0 3.0 India 22%2 13%6 24%6 24%6 9%6 3.0 Japan 18%0 26%0 24%6 18%6 5%6 3.3 Japan 15%0 18%0 31%0 23% 18%6 3.4 Singapore 9%6 14%6 19%6 5%6 3.4 Sri Lanka 15%0 9%6 3.1 23% 18%6 3.4 Singapore 21%0 14%6	United Kingdom (UK)	2%	7%	15%	30%	24%	22%	4,3
Sweden 18% 7% 21% 29% 25% 0% 3,4 Eastern/Southeastern Europe (excl. EU), incl. Turkey 11% 26% 19% 13% 8% 3,2 Iurkey 11% 9% 26% 28% 27% 7% 3,6 Asis/Pacific (excl. CN) 11% 9% 24% 22% 13% 8% 35% 13% 9% 3,0 India 26% 16% 20% 16% 16% 6% 3,0 India 26% 14% 8% 35% 13% 9% 3,3 Japan 19% 26% 24% 24% 8% 3,1 25% Malaysia 19% 18% 8% 18% 20% 8% 3,1 Singapore 9% 14% 30% 23% 18% 9% 3,1 Greater China 16% 28% 21% 18% 9% 3,2 Victnam 21% 2	Norway	2%	17%	25%	21%	26%	9%	3,8
Eastern/Southeastern Europe (excl. EU), incl. Turkey 11% 23% 26% 13% 8% 3,2 Turkey 7% 36% 23% 20% 9% 5% 3,0 Belarus 11% 9% 24% 22% 7% 5% 3,0 Australia 26% 16% 24% 24% 24% 24% 6% 3,0 India 22% 13% 8% 35% 13% 9% 3,3 Japan 22% 13% 8% 8% 3,0 2% 13% 8% 3,0 Singapore 29% 18% 8% 15% 5% 8% 3,1 Singapore 29% 14% 31% 23% 18% 5% 3,4 Victnam 14% 30% 26% 16% 7% 3,3 Inaka 15% 24% 24% 16% 7% 3,3 Greater China 16% 26% 21%	Sweden	18%	7%	21%	29%	25%	0%	3,4
Turkey 7% 36% 23% 20% 9% 5% 3,0 Belarus 11% 9% 24% 22% 27% 7% 3,6 Australia 26% 18% 28% 13% 8% 3,2 Australia 26% 16% 16% 16% 16% 6% 3,0 India 22% 13% 8% 35% 13% 9% 3,3 Japan 18% 26% 24% 24% 8% 3,1 3,5 Malaysia 15% 18% 39% 15% 5% 8% 3,1 Singapore 28% 18% 8% 18% 5% 3,4 Sinland 14% 30% 24% 10% 18% 5% 3,4 Grater Chia 15% 0% 34% 12% 15% 24% 3,3 China, PR 21% 22% 25% 17% 13% 6% 3,2	Eastern/Southeastern Europe (excl. EU), incl. Turkey	11%	23%	26%	19%	13%	8%	3,2
Belarus 1196 996 2496 2296 2796 796 3,6 Asia/Pacific (excl. CN) 1796 1896 2096 1696 2096 1696 696 690 3,0 Australia 2290 1396 846 3580 1396 996 3,3 Japan 1890 2690 2490 2496 896 006 2,8 Korea (South) 790 2996 1890 1890 1890 890 3,0 Philippines 2890 1896 890 300 990 3,1 Singapore 990 1440 3190 2290 1896 896 3,1 Thailand 1590 096 2496 1696 790 79 2,9 Victnam 2190 2496 2190 1696 796 490 3,3 Greater China 1696 2290 2190 1596 946 2,7 Taiavan 1190	Turkey	7%	36%	23%	20%	9%	5%	3,0
Asia/Pacific (excl. CN)17961896189618963.2Australia26%016%020%16%06%03.0India22%013%08%035%013%09%03.3Japan18%026%024%08%00%02.82.8Korea (South)7%629%019%014%019%012%03.5Malaysia15%018%039%015%05%08%03.0Philippines28%018%080%018%025%08%03.1Singapore29%018%030%026%016%7%05%03.4Sri Lanka15%00%024%010%021%015%09%03.1Thailand14%030%026%016%07%07%02.9Victnam21%022%011%019%09%03.1Crina, PR21%022%011%011%03.3North America13%020%023%011%011%03.4South and Central America9%014%020%013%025%013%03.6Bolivia14%020%023%011%010%03.42Chila6%023%011%010%03.422China, PR10%014%020%023%011%010%03.4South And Central America9%014%020%013%0211%03.1 <td>Belarus</td> <td>11%</td> <td>9%</td> <td>24%</td> <td>22%</td> <td>27%</td> <td>7%</td> <td>3,6</td>	Belarus	11%	9%	24%	22%	27%	7%	3,6
Australia26%16%16%16%16%6%3,0India22%13%8%35%13%9%3,3Japan18%26%24%24%8%0%2,8Korea (South)7%29%19%14%19%12%3,5Malaysia15%18%8%18%20%8%3,0Philippines28%18%8%18%20%8%3,1Singapore9%14%31%23%15%24%3,8Thailand14%30%26%16%7%7%2,9Vietnam21%28%21%15%9%3,1Greater China16%28%21%15%9%3,1Greater China19%22%25%13%6%3,2Taiwan11%22%23%22%11%11%3,3North America13%20%23%23%13%6%3,4South and Central America9%14%21%20%13%6%3,4South and Central America9%14%20%23%11%11%3,3Chile4%6%20%23%11%11%3,1Greater China14%20%23%11%11%3,3North America19%20%23%13%6%3,4South and Central America9%14%20%13% <td>Asia/Pacific (excl. CN)</td> <td>17%</td> <td>18%</td> <td>26%</td> <td>18%</td> <td>13%</td> <td>8%</td> <td>3,2</td>	Asia/Pacific (excl. CN)	17%	18%	26%	18%	13%	8%	3,2
India 22% 13% 8% 35% 13% 9% 3,3 Japan 18% 26% 24% 24% 8% 0% 2,8 Korea (South) 7% 29% 19% 14% 19% 12% 3,5 Malaysia 15% 5% 8% 30% 15% 5% 8% 3,1 Singapore 9% 14% 31% 23% 18% 5% 3,4 Sri Lanka 15% 0% 24% 10% 7% 24% 3,8 Thailand 14% 30% 26% 16% 7% 7% 2,9 Vietnam 21% 24% 10% 21% 15% 9% 3,0 Chian, PR 21% 27% 25% 17% 6% 4% 2,7 Taiwan 11% 22% 23% 22% 13% 20% 3,3 Mexico 22% 22% 17% 25% 13% 20% 3,4 South and Central America 9% 14% 21%	Australia	26%	16%	20%	16%	16%	6%	3,0
Japan18% Korea (South)18% 7% 29%29% 19%14% 19%8% 12% 12%2,8Malaysia15%18% 29%18% 80%15% 80%15% 80%5% 80%3,0Philippines28% 19%18% 19%18% 20%20% 80%8% 80%3,1Singapore9% 14%14% 31% 20%18% 15%5% 24%3,4Sri Lanka15% 16%0% 26%16% 15%7% 24%2,9Vietnam21% 21% 21%21% 21%15% 24%9% 3,13,3Greater China16% 29% 22%21% 21%15% 28%9% 3,03,0China, PR21% 22%22% 22%17% 11%11% 11%3,3North America13% 20% 20%22% 22%15% 21%15% 29%2,9USA10% 20%22% 22%11% 10%11% 3,13,4South and Central America9% 40%14% 20% 20%23% 23%11% 20%3,6Bolivia14% 20% 20%23% 23%11% 20%3,63,6Bolivia14% 20%23% 23%11% 23%3,63,6Bolivia14% 20%23% 23%11% 23%3,63,6Bolivia14% 20%23% 23%11% 23%3,63,6Bolivia14% 20%23% 23%11% 23%3,63,6Bolivia14% 20%<	India	22%	13%	8%	35%	13%	9%	3,3
Korea (South)7%29%19%14%19%12%3,5Malaysia15%18%39%15%5%8%3,0Philippines28%18%8%18%20%8%3,1Singapore9%14%31%23%18%5%3,4Sinlanka15%0%34%12%15%24%3,8Thailand14%30%26%16%7%7%2,9Vietnam21%24%10%21%15%9%3,1Greater China16%28%21%15%9%3,3China, PR21%22%23%22%11%11%3,3North America11%22%23%25%13%6%3,4South and Central America9%14%20%20%15%2%2,9USA10%14%20%20%16%20%3,6Bolivia14%20%20%36%11%3,1Brazil6%23%35%23%11%3,1Costa Rica11%11%20%23%36%11%3,1Colombia3%9%11%20%23%36%11%3,1Brazil6%23%35%23%11%3,13,1Brazil6%23%35%23%11%3,13,1Brazil6%23%35%23%11% <td>Japan</td> <td>18%</td> <td>26%</td> <td>24%</td> <td>24%</td> <td>8%</td> <td>0%</td> <td>2,8</td>	Japan	18%	26%	24%	24%	8%	0%	2,8
Malaysia 15% 18% 39% 15% 5% 8% 3,0 Philippines 28% 18% 8% 18% 20% 8% 3,1 Singapore 9% 14% 31% 23% 18% 5% 3,4 Sri Lanka 15% 0% 34% 12% 15% 24% 3,8 Thailand 14% 30% 26% 16% 7% 7% 2,9 Vietnam 21% 24% 10% 21% 15% 9% 3,1 Greater China 16% 28% 21% 18% 9% 8% 3,0 China, PR 21% 27% 23% 23% 23% 33% 6% 3,2 Mexico 22% 17% 22% 15% 13% 29% 2,3 USA 10% 19% 20% 23% 13% 5% 3,6 Bolivia 14% 0% 38% 12% <td>Korea (South)</td> <td>7%</td> <td>29%</td> <td>19%</td> <td>14%</td> <td>19%</td> <td>12%</td> <td>3,5</td>	Korea (South)	7%	29%	19%	14%	19%	12%	3,5
Philippines 28% 18% 8% 18% 20% 8% 3,1 Singapore 9% 14% 31% 23% 18% 5% 3,4 Sri Lanka 15% 0% 34% 12% 15% 24% 3,8 Thailand 14% 30% 26% 16% 7% 2,9 Vietnam 21% 24% 10% 15% 9% 3,1 Greater China 16% 28% 21% 18% 9% 8% 3,0 China, PR 21% 27% 25% 17% 6% 4% 2,7 Taiwan 11% 22% 23% 22% 11% 11% 3,3 North America 13% 20% 23% 15% 13% 6% 3,4 South and Central America 13% 20% 23% 15% 15% 2,9 15% 3,6 Bolivia 14% 20% 23% 3,6 <	Malaysia	15%	18%	39%	15%	5%	8%	3,0
Singapore 9% 14% 31% 23% 18% 5% 3,4 Sri Lanka 15% 0% 34% 12% 15% 24% 3,8 Thailand 14% 30% 26% 16% 7% 7% 2,9 Vietnam 21% 24% 10% 21% 15% 9% 3,1 Greater China 16% 28% 21% 18% 9% 8% 3,0 China, PR 21% 27% 25% 17% 6% 4% 2,7 Taiwan 11% 22% 23% 25% 13% 6% 3,2 Mexico 22% 22% 17% 22% 15% 2% 2,9 USA 10% 19% 20% 30% 11% 3,4 3,4 South and Central America 9% 14% 21% 20% 13% 25% 3,6 Bolivia 14% 20% 23% 35%	Philippines	28%	18%	8%	18%	20%	8%	3,1
Sri Lanka 15% 0% 34% 12% 15% 24% 3,8 Thailand 14% 30% 26% 16% 7% 7% 2,9 Vietnam 21% 24% 10% 21% 15% 9% 3,1 Greater China 16% 28% 21% 18% 9% 8% 3,0 China, PR 21% 27% 25% 17% 6% 4% 2,7 Taiwan 11% 22% 23% 22% 11% 11% 3,3 North America 13% 20% 23% 22% 15% 2% 2,9 USA 10% 19% 20% 30% 11% 10% 3,4 South and Central America 9% 14% 21% 20% 15% 2% 3,8 Argentina 4% 38% 12% 8% 13% 25% 3,6 Bolivia 14% 20% 23% 35% 23% 11% 4,2 Costa Rica 11% 11% 20% <td>Singapore</td> <td>9%</td> <td>14%</td> <td>31%</td> <td>23%</td> <td>18%</td> <td>5%</td> <td>3,4</td>	Singapore	9%	14%	31%	23%	18%	5%	3,4
Thailand 14% 30% 26% 16% 7% 7% 2,9 Vietnam 21% 24% 10% 21% 15% 9% 3,1 Greater China 16% 28% 21% 18% 9% 8% 3,0 China, PR 21% 27% 25% 17% 6% 4% 2,7 Taiwan 11% 22% 23% 22% 11% 11% 3,3 North America 13% 20% 23% 22% 15% 6% 3,2 Mexico 22% 12% 17% 22% 15% 2% 2,9 USA 10% 19% 20% 30% 11% 10% 3,4 South and Central America 9% 14% 20% 8% 13% 25% 3,6 Bolivia 14% 20% 23% 35% 13% 25% 3,6 Bolivia 14% 20% 23% 35%	Sri Lanka	15%	0%	34%	12%	15%	24%	3,8
Vietnam21%24%10%21%15%9%3,1Greater China16%28%21%18%9%8%3,0China, PR21%27%25%17%6%4%2,7Taiwan11%22%23%22%11%11%3,3North America13%20%23%25%13%6%3,2Mexico22%22%17%22%15%2%2,9USA10%19%20%30%11%10%3,4South and Central America9%14%21%20%13%20%3,6Bolivia14%20%35%23%31%4,2Chile4%6%20%23%31%4,2Chile4%6%20%15%2%3,1Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%27%4,3Colombia3%9%4%17%21%21%3,7Arrica, Near and Middle East16%20%8%23%25%3,6Bypt20%23%24%15%27%4,3Corombia3%9%19%20%15%3,6Golivia3%9%19%20%15%3,6Optimia3%9%19%20%15%3,6Optimia3%9%11%<	Thailand	14%	30%	26%	16%	7%	7%	2,9
Greater China16%28%21%18%9%8%3,0China, PR21%27%25%17%6%4%2,7Taiwan11%22%23%22%11%11%3,3North America13%20%23%25%13%6%3,2Mexico22%22%17%22%15%2%2,9USA10%19%20%30%11%10%3,4South and Central America9%14%21%8%13%25%3,6Bolivia4%38%12%8%13%25%3,6Bolivia6%23%35%23%11%3,1Brazil6%20%25%16%29%3,2Chile4%6%20%25%16%29%4,3Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%27%4,3Colombia3%9%19%27%15%27%4,2Paraguay8%4%17%21%29%4,3Colombia3%9%19%20%13%3,7Africa, Near and Middle East16%19%20%23%13%3,3Kenya14%10%23%24%13%3,3Kenya14%10%28%24%13%3,3Gold19%20% <td>Vietnam</td> <td>21%</td> <td>24%</td> <td>10%</td> <td>21%</td> <td>15%</td> <td>9%</td> <td>3,1</td>	Vietnam	21%	24%	10%	21%	15%	9%	3,1
China, PR21%27%25%17%6%4%2,7Taiwan11%22%23%22%11%11%3,3North America13%20%23%25%13%6%3,2Mexico22%22%17%22%15%2%2,9USA10%19%20%30%11%10%3,4South and Central America9%14%21%20%16%20%3,8Argentina4%38%12%8%13%25%3,6Bolivia14%20%23%3%11%3,1Brazil6%23%35%23%11%3,1Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%16%29%4,3Peru4%8%4%17%21%23%4,2Paraguay8%4%17%21%23%4,3Peru4%28%24%16%16%3,6Uruguay15%7%20%23%23%3,7Africa, Near and Middle East16%19%23%24%13%3,7Saudi Arabia10%10%23%24%24%5%3,3Kenya14%10%28%26%25%13%3,3Kenya14%10%28%26%25%13%3,3Kenya <td>Greater China</td> <td>16%</td> <td>28%</td> <td>21%</td> <td>18%</td> <td>9%</td> <td>8%</td> <td>3,0</td>	Greater China	16%	28%	21%	18%	9%	8%	3,0
Taiwan11%22%23%22%11%11%3,3North America13%20%23%23%25%13%6%3,2Mexico22%22%17%22%15%2%2,9USA10%19%20%30%11%10%3,4South and Central America9%14%21%20%16%20%3,8Argentina4%38%12%8%13%25%3,6Bolivia14%20%29%23%3%11%3,1Brazil6%23%35%23%11%2%3,2Chile4%6%20%25%16%29%4,3Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%27%4,2Paraguay8%4%17%21%29%4,3Peru4%28%24%12%16%3,6Uruguay15%7%20%15%16%3,6Uruguay15%7%20%15%13%3,7Africa, Near and Middle East16%19%20%14%10%3,3Egypt20%8%26%25%13%3,3Kenya14%10%16%16%3,6Uruguay15%20%8%26%25%13%3,3Egypt20%8%26	China, PR	21%	27%	25%	17%	6%	4%	2,7
North America13%20%23%25%13%6%3,2Mexico22%22%17%22%15%2%2,9USA10%19%20%30%11%10%3,4South and Central America9%14%21%20%16%20%3,8Argentina4%38%12%8%13%25%3,6Bolivia14%20%29%23%3%11%3,1Brazil6%23%35%23%11%2%3,2Chile4%6%20%25%16%29%4,3Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%19%28%4,1Colombia3%9%19%27%15%27%4,2Paraguay8%4%17%21%29%4,3Peru4%28%24%12%16%3,6Uruguay15%7%20%23%22%13%3,7Africa, Near and Middle East16%19%20%23%24%24%5%3,3Egypt20%8%26%25%13%8%3,33,3Kenya14%10%28%24%24%5%3,5Morocco18%10%16%16%20%3,73,3Egypt20%28%28%28%	Taiwan	11%	22%	23%	22%	11%	11%	3,3
Mexico22%22%17%22%15%2%2,9USA10%19%20%30%11%10%3,4South and Central America9%14%21%20%16%20%3,8Argentina4%38%12%8%13%25%3,6Bolivia14%20%29%23%3%11%3,1Brazil6%23%35%23%11%2%3,2Chile4%6%20%25%16%29%4,3Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%19%28%4,1Colombia3%9%19%27%15%27%4,2Paraguay8%4%17%21%21%29%4,3Peru4%28%24%12%16%3,63,7Africa, Near and Middle East16%19%20%23%23%3,33,3Egypt20%8%26%25%13%3,33,3Kenya14%10%23%24%24%5%3,5Morocco18%10%16%16%5%3,33,3Iunisia5%28%29%18%15%5%3,3Tunisia5%28%29%16%11%2,7	North America	13%	20%	23%	25%	13%	6%	3,2
USA10%19%20%30%11%10%3,4South and Central America9%14%21%20%16%20%3,8Argentina4%38%12%8%13%25%3,6Bolivia14%20%29%23%3%11%3,1Brazil6%23%35%23%11%20%3,2Chile4%6%20%25%16%29%4,3Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%19%28%4,1Colombia3%9%19%21%21%29%4,3Paraguay8%4%17%21%21%29%4,3Peru4%28%24%12%16%3,73,7Africa, Near and Middle East16%19%20%19%14%3,33,3Egypt20%8%26%25%13%3,33,3Kenya14%10%28%24%24%5%3,5Morocco18%10%16%16%20%3,73,7Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%16%5%3,3	Mexico	22%	22%	17%	22%	15%	2%	2,9
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Argentina4%38%12%8%13%25%3,6Bolivia14%20%29%23%3%11%3,1Brazil6%23%35%23%11%2%3,2Chile4%6%20%25%16%29%4,3Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%19%28%4,1Colombia3%9%19%27%15%27%4,2Paraguay8%4%17%21%21%29%4,3Peru4%28%24%12%16%3,63,7Africa, Near and Middle East16%19%20%13%3,33,3Egypt20%8%26%25%13%3,33,5Morocco18%10%16%16%20%3,33,7Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%3,3	South and Central America	9%	14%	21%	20%	16%	20%	3,8
Bolivia14%20%29%23%3%11%3,1Brazil6%23%35%23%11%2%3,2Chile4%6%20%25%16%29%4,3Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%19%28%4,1Colombia3%9%19%27%15%27%4,2Paraguay8%4%17%21%29%4,3Peru4%28%24%12%16%16%3,6Uruguay15%7%20%23%22%13%3,7Africa, Near and Middle East16%19%20%23%24%5%3,3Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%5%3,5Moroeco18%10%16%16%20%3,7Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%3,3	Argentina	4%	38%	12%	8%	13%	25%	3,6
Brazil6%23%35%23%11%2%3,2Chile4%6%20%25%16%29%4,3Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%19%28%4,1Colombia3%9%19%27%15%27%4,2Paraguay8%4%17%21%29%4,3Peru4%28%24%12%16%3,6Uruguay15%7%20%23%22%13%3,7Africa, Near and Middle East16%19%20%19%14%12%3,3Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%5%3,5Morocco18%10%16%16%20%3,3Tunisia30%27%16%11%5%3,3	Bolivia	14%	20%	29%	23%	3%	11%	3,1
Chile4%6%20%25%16%29%4,3Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%19%28%4,1Colombia3%9%19%27%15%27%4,2Paraguay8%4%17%21%21%29%4,3Peru4%28%24%12%16%16%3,6Uruguay15%7%20%23%22%13%3,7Africa, Near and Middle East16%19%26%25%13%8%3,3Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%5%3,5Morocco18%10%16%16%20%3,3Tunisia30%27%16%11%5%3,3	Brazil	6%	23%	35%	23%	11%	2%	3,2
Costa Rica11%11%7%17%23%31%4,2Ecuador7%11%20%15%19%28%4,1Colombia3%9%19%27%15%27%4,2Paraguay8%4%17%21%21%29%4,3Peru4%28%24%12%16%16%3,6Uruguay15%7%20%23%22%13%3,7Africa, Near and Middle East16%19%20%19%14%12%3,3Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%24%5%3,5Morocco18%10%16%16%5%3,3Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%3,3	Chile	4%	6%	20%	25%	16%	29%	4,3
Ecuador7%11%20%15%19%28%4,1Colombia3%9%19%27%15%27%4,2Paraguay8%4%17%21%21%29%4,3Peru4%28%24%12%16%16%3,6Uruguay15%7%20%23%22%13%3,7Africa, Near and Middle East16%19%20%19%14%12%3,3Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%24%5%3,5Morocco18%10%16%16%15%5%3,3Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%11%2,7	Costa Rica	11%	11%	7%	17%	23%	31%	4,2
Colombia3%9%19%27%15%27%4,2Paraguay8%4%17%21%21%29%4,3Peru4%28%24%12%16%16%3,6Uruguay15%7%20%23%22%13%3,7Africa, Near and Middle East16%19%20%19%14%12%3,3Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%24%5%3,5Morocco18%10%16%16%20%20%3,3Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%11%2,7	Ecuador	7%	11%	20%	15%	19%	28%	4,1
Paraguay8%4%17%21%29%4,3Peru4%28%24%12%16%16%3,6Uruguay15%7%20%23%22%13%3,7Africa, Near and Middle East16%19%20%19%14%12%3,3Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%5%3,5Morocco18%10%16%16%20%20%3,7Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%11%2,7	Colombia	3%	9%	19%	27%	15%	27%	4,2
Peru4%28%24%12%16%16%3,6Uruguay15%7%20%23%22%13%3,7Africa, Near and Middle East16%19%20%19%14%12%3,3Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%24%5%3,5Morocco18%10%16%16%20%20%3,7Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%11%2,7	Paraguay	8%	4%	17%	21%	21%	29%	4,3
Uruguay15%7%20%23%22%13%3,7Africa, Near and Middle East16%19%20%19%14%12%3,3Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%24%5%3,5Morocco18%10%16%16%20%20%3,7Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%11%2,7	Peru	4%	28%	24%	12%	16%	16%	3,6
Africa, Near and Middle East16%19%20%19%14%12%3,3Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%24%5%3,5Morocco18%10%16%16%20%20%3,7Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%11%2,7	Uruguay	15%	7%	20%	23%	22%	13%	3,7
Egypt20%8%26%25%13%8%3,3Kenya14%10%23%24%24%5%3,5Morocco18%10%16%16%20%20%3,7Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%11%2,7	Africa, Near and Middle East	16%	19%	20%	19%	14%	12%	3,3
Kenya14%10%23%24%24%5%3,5Morocco18%10%16%16%20%20%3,7Saudi Arabia5%28%29%18%15%5%3,3Tunisia30%27%16%11%5%11%2,7	Egypt	20%	8%	26%	25%	13%	8%	3,3
Morocco 18% 10% 16% 20% 20% 3,7 Saudi Arabia 5% 28% 29% 18% 15% 5% 3,3 Tunisia 30% 27% 16% 11% 5% 11% 2,7	Kenya	14%	10%	23%	24%	24%	5%	3,5
Saudi Arabia 5% 28% 29% 18% 15% 5% 3,3 Tunisia 30% 27% 16% 11% 5% 11% 2,7	Могоссо	18%	10%	16%	16%	20%	20%	3,7
Tunisia 30% 27% 16% 11% 5% 11% 2,7	Saudi Arabia	5%	28%	29%	18%	15%	5%	3,3
	Tunisia	30%	27%	16%	11%	5%	11%	2,7
United Arab Emirates 10% 19% 33% 19% 0% 3,3	United Arab Emirates	10%	19%	19%	33%	19%	0%	3,3

8. Importance of Hydrogen

The importance of hydrogen technologies has increased slightly worldwide from 3.2 to 3.4. However, like sustainable corporate financing, companies tend to attach medium importance to this topic.

In some regions, the relevance of the topic has slipped somewhat further downwards: in Eastern/Southeastern Europe (excluding the EU), including Turkey, from 2.7 in 2022 to 2.4 currently.

How do companies rate the importance of hydrogen technologies in your host country?

Mean value on a scale from 1 (the topic plays practically no role here) to 6 (the topic is associated with great future opportunities)



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With a mean score of 4.9, Chile is the country in which future opportunities are associated with hydrogen technologies, on a scale from 1 "The topic plays practically no role here" to 6 "The topic is associated with great future opportunities." Companies are similarly optimistic about hydrogen technologies in Morocco with a mean value of 4.6 and in Australia and Uruguay with a mean value of 4.3 each.

On the other hand, companies based in locations with sea access see a rather minor role for hydrogen technologies in Vietnam (2.4), Malaysia (2.5), Taiwan (2.6) and Tunisia (2.7).

How do companies rate the importance of hydrogen technologies in your host country? (Mean value on a scale from 1 (the topic plays practically no role here) to 6 (the topic is associated with great future opportunities)

(wear value of a scale from 1 (the topic plays practical	1 1	2	3	4	5	6	Average
Worldwide	16%	- 18%	190/6	190/n	150/0	130/6	34
Furozone	90/6	20%	19%	25%	19%	80/n	3.5
France	12%	20%	20%	20%	24%	4%	3.4
Greece	12%	39%	1%	17%	13%	13%	31
Italy	5%	24%	27%	24%	15%	5%	3.4
Austria	13%	16%	21%	22%	25%	3%	3.4
Portugal	0%	12%	16%	33%	33%	6%	4.1
Slovakia	16%	20%	16%	28%	8%	12%	3.3
Spain	90/0	10%	27%	28%	13%	13%	37
Other EU. Switzerland, Norway, UK	9%	15%	24%	19%	20%	13%	3.6
Bulgaria	12%	29%	41%	6%	6%	6%	2.8
United Kingdom (UK)	6%	13%	18%	1.9%	19%	25%	4.1
Norway	40/0	11%	24%	15%	35%	11%	4.0
Sweden	25%	40/0	21%	25%	18%	7%	3.3
Eastern/Southeastern Europe (excl. EU), incl. Turkey	35%	22%	22%	11%	7%	3%	2.4
Turkey	21%	34%	21%	11%	9%	4%	2.6
Belarus	43%	14%	28%	11%	2%	2%	2.2
Asia/Pacific (excl. CN)	19%	21%	18%	19%	13%	10%	3.2
Australia	9%	6%	13%	19%	28%	25%	4.3
India	17%	13%	17%	22%	90/0	22%	3.6
Japan	5%	14%	15%	27%	28%	11%	3.9
Korea (South)	7%	21%	30%	21%	14%	7%	3.3
Malavsia	27%	22%	26%	20%	5%	0%	2.5
Philippines	28%	28%	12%	18%	6%	8%	2.7
Singapore	14%	27%	36%	14%	9%	0%	2.8
Sri Lanka	27%	9%	16%	15%	9%	24%	3.4
Thailand	2.3%	44%	5%	14%	5%	9%	2.6
Vietnam	32%	26%	18%	15%	6%	3%	2.4
Greater China	14%	25%	21%	19%	12%	9%	3.2
China. PR	12%	21%	19%	19%	17%	12%	3.4
Taiwan	21%	32%	22%	14%	7%	4%	2.6
North America	17%	26%	18%	20%	15%	4%	3.0
Mexico	28%	24%	13%	13%	15%	7%	2,8
USA	10%	27%	25%	24%	11%	3%	3,1
South and Central America	14%	14%	18%	16%	17%	21%	3,7
Argentina	13%	13%	12%	25%	8%	29%	3,9
Bolivia	25%	31%	24%	11%	3%	6%	2,5
Brazil	7%	14%	19%	24%	23%	13%	3,8
Chile	2%	2%	16%	10%	29%	41%	4,9
Costa Rica	11%	14%	24%	17%	11%	23%	3,7
Ecuador	21%	12%	21%	13%	14%	19%	3,4
Colombia	6%	12%	19%	18%	15%	30%	4,2
Paraguay	14%	27%	32%	9%	0%	18%	3,1
Peru	4%	24%	12%	16%	32%	12%	3,8
Uruguay	10%	5%	14%	17%	27%	27%	4,3
Africa, Near and Middle East	17%	14%	19%	19%	13%	18%	3,5
Egypt	8%	10%	31%	28%	5%	18%	3,7
Kenya	10%	29%	12%	29%	10%	10%	3,3
Могоссо	8%	4%	11%	18%	18%	41%	4,6
Saudi Arabia	5%	15%	21%	23%	18%	18%	3,9
Tunisia	36%	22%	17%	6%	0%	19%	2,7
United Arab Emirates	5%	10%	23%	24%	19%	19%	4,0

Questionnaire

1 In your opinion, how important is climate change and measures to mitigate it in your host country? Rate the importance of the topic at your location on a scale between 1 and 6.

- 1: the topic plays practically no role here
- 6: the topic dominates the public debate in the country

2. how would you rate the importance of hydrogen technologies in your host country on a scale between 1 and 6?

- 1: the topic plays practically no role here
- 6: the topic is associated with great opportunities for the future

3. how important is the topic of sustainable corporate finance in your host country?

- 1: We still hear next to nothing about this topic here
- 6: already plays a major role in corporate financing

4 In your opinion, which statement on the energy transition applies to your host country?

- [] In Germany, politicians continue to focus primarily on fossil fuels.
- [] There is an awareness of the need to switch to renewable energy sources, but the necessary framework conditions are lacking
- [] There is a credible strategy for the transition to renewable energy sources

Rate the impact of this strategy on your organisation on a scale of 1 to 6

- 1: We can implement this without any problems
- 6: We feel overwhelmed as a company

5. how will the pricing of CO₂ in the EU affect the market share of German/European products in your host country?

- [] the market share of German/European products will increase
- [] will remain the same
- [] will decline
- [] no assessment possible

6 How likely do you think it is that more production processes will be relocated to your host country as a result of CO2 pricing in the EU? (Scale from 1 to 6)

- 1: a relocation of production processes to my country of domicile is highly unlikely
- 6: My country of domicile is highly suitable for relocating production processes.

7. do you see business opportunities in your country in connection with climate protection / energy transition / mobility transition?

for German / European companies?

- [] rather no
- [] yes in the following sectors

(Dropdown menu with multiple choice)

- Energy generation from renewable sources
- High voltage technology
- Hydrogen technology
- Energy efficiency in industry
- o Building services / energy efficiency in buildings
- E-mobility
- o Other: (free text)