KPMG 2024 Energy, Natural Resources and Chemicals CEO Outlook

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Foreword

Amid a turbulent landscape of regional conflicts, geopolitical friction, trade tensions and economic uncertainty, CEOs in the energy, natural resources and chemicals (ENRC) sector are responding with surprising confidence and optimism, as revealed in the 2024 Global CEO Outlook survey. Why is this? The simple fact is that ENRC CEOs have become well versed in navigating through change and challenge: it's what they do.

They are also buoyed by resilient energy prices — giving them the reassurance of healthy forward income streams. Over the past 12 months, every form of energy has been growing — not only renewables, but fossil fuel-based energies, too — and demand is riding high. Inflation has been falling globally and there is the prospect of interest rate reductions in key markets, including the United States, contributing to a more bullish outlook.

Nevertheless, the challenges are real. Geopolitical uncertainty requires constant agility and vigilance, while the big and complex supply chains involved in ENRC must be operationally resilient against unexpected events, including cyber-attacks. Tight cost management and operational efficiency remain key.

Alongside all of this, there are two major, strategic domains that are seen as both an opportunity and a risk: new technology — including the race to embrace generative artificial intelligence (Gen AI) — and the environmental, social and governance (ESG) agenda. The same was true last year — but where are things moving now? We explore them in detail in this report.

The prevailing mood in the boardroom may be positive, but there is no shortage of issues to test CEOs' mettle. They need focus, determination and strategic clarity. Successful organisations will be those who know exactly where they want to get to, and how they plan to get there.

Colm O'Neill

Partner
Global Head of Power & Utilities

Executive Summary

Amidst a turbulent landscape, energy, natural resources and chemicals (ENRC) CEOs remain optimistic about their growth prospects. This confidence is not born of complacency but rather from a deep well of experience in steering through change, combined with the enduring resilience of energy prices. Yet they remain attuned to the many challenges ahead — from geopolitical tensions and economic volatility to the emerging complexities posed by generative artificial intelligence (Gen AI).

ENRC CEOs are doubling down on an ambitious growth strategy that emphasises inorganic expansion, exceptional customer experience and heightened operational efficiency. They are proactively embracing advanced technologies such as Gen AI, recognising its transformative potential to redefine business models and unlock new avenues for growth. At the same time, they are aware of the inherent risks AI presents, from ethical dilemmas and technical intricacies to cost concerns and the complexities of fostering widespread employee adoption.

Environmental, social and governance (ESG) considerations are no longer peripheral; they are at the core of business strategy, with a distinct focus on value creation and the pursuit of net-zero targets. ENRC CEOs exude confidence in their ability to meet escalating ESG reporting standards and are taking personal ownership of driving progress in these critical areas.

Talent and workforce dynamics remain a top priority. CEOs are investing in upskilling initiatives and fostering diversity while also advocating for a return to in-office environments as a catalyst for collaboration and innovation.

In sum, while the future presents formidable challenges, ENRC leaders are unwavering in their optimism. By harnessing the power of new technologies, deeply embedding ESG into their strategic framework and nurturing their workforce, they are positioning their organisations to not only navigate the storm but to emerge stronger and more resilient.

> **“We are at a tipping point. The conditions are aligning for the ENRC organisations that get their strategy right around the key areas of their business — operating footprint, cost model, emerging technology, ESG — to forge ahead and realise even greater commercial returns.”**
>
> **Anish De**
> Global Head of Energy, Natural Resources, and Chemicals, KPMG International

Key findings

Economic Outlook

78%

of CEOs are **confident in the economy's growth** over the next three years — similar to last year.

Geopolitical complexities are now considered the **top of mind challenge** followed by economic uncertainty and the race to embed Gen AI.

Top growth strategies

01 Inflation proofing capital

02 Inorganic growth

03 ESG initiatives

Technology

Almost **2/3** View **Gen AI to be the top investment priority** for their organisations

Implementing AI

Top 3 obstacles include:

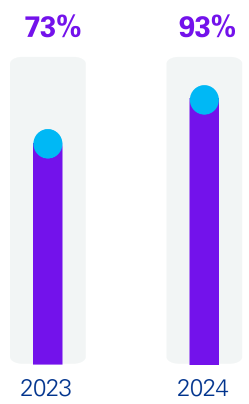
- Ethical challenges
- Cost of implementation
- Technical capability & skills

Over the next three years

79% believe **AI won't reduce jobs** in their organisation

72% Increasing investment in cybersecurity to **protect from AI threats**

Talent



Expectations of **returning to office** have increased

100% are likely to **reward employees** who come to the office

Almost **1/3** of CEOs are concerned about the number of **employees retiring**

ESG

Achieving net zero

Top 3 barriers include:

- **Supply chain complexity**
- **Lack of skills**
- **Cost of decarbonisation**

74% Adapted ESG language to meet stakeholder needs

ESG → **Sustainability**

Over **3/4 CEOs** would **divest a profitable part** of the business that damages reputation

Section 1

Navigating global shifts in the boardroom

As ENRC CEOs look to drive a growth agenda, they are nevertheless highly aware of the many risks that could blow them off course.

Geopolitical complexities are top of mind for ENRC CEOs, with 55 percent seeing them as their biggest challenge in the years ahead — appreciably higher than the all-sector average (47 percent). This is perhaps unsurprising given the Middle East crisis, cooperation amongst sanctioned states ("axis of rogue states") and the fight for critical minerals, which all pose significant challenges for energy markets and organisations. These factors — explored in more detail in KPMG's Energy & Natural Resources Top Risks Forecast — are unlikely to disappear any time soon, so CEOs should stay agile and responsive to shifting forces as they lead their organisations through a period of continuing unpredictability and change.

Economic uncertainty is the joint-second most prominent challenge (43 percent), given the potential impacts on demand and prices. But economic unpredictability has become the norm over the past few years, and ENRC businesses have been

Top of mind challenges

Geopolitical complexities	55%
Economic uncertainty	43%
Race to embrace and embed generative AI and other technologies	43%
Growth prospects or challenges of your organisation	29%
Competition for talent	24%
Changing working patterns including the long-term impacts of hybrid working	17%
Growing protectionist attitudes in some markets e.g., such as economic decoupling	16%

performing well despite it, with KPMG's Financial Performance Index finding that ENRC ranks solidly in the middle compared to other sectors.

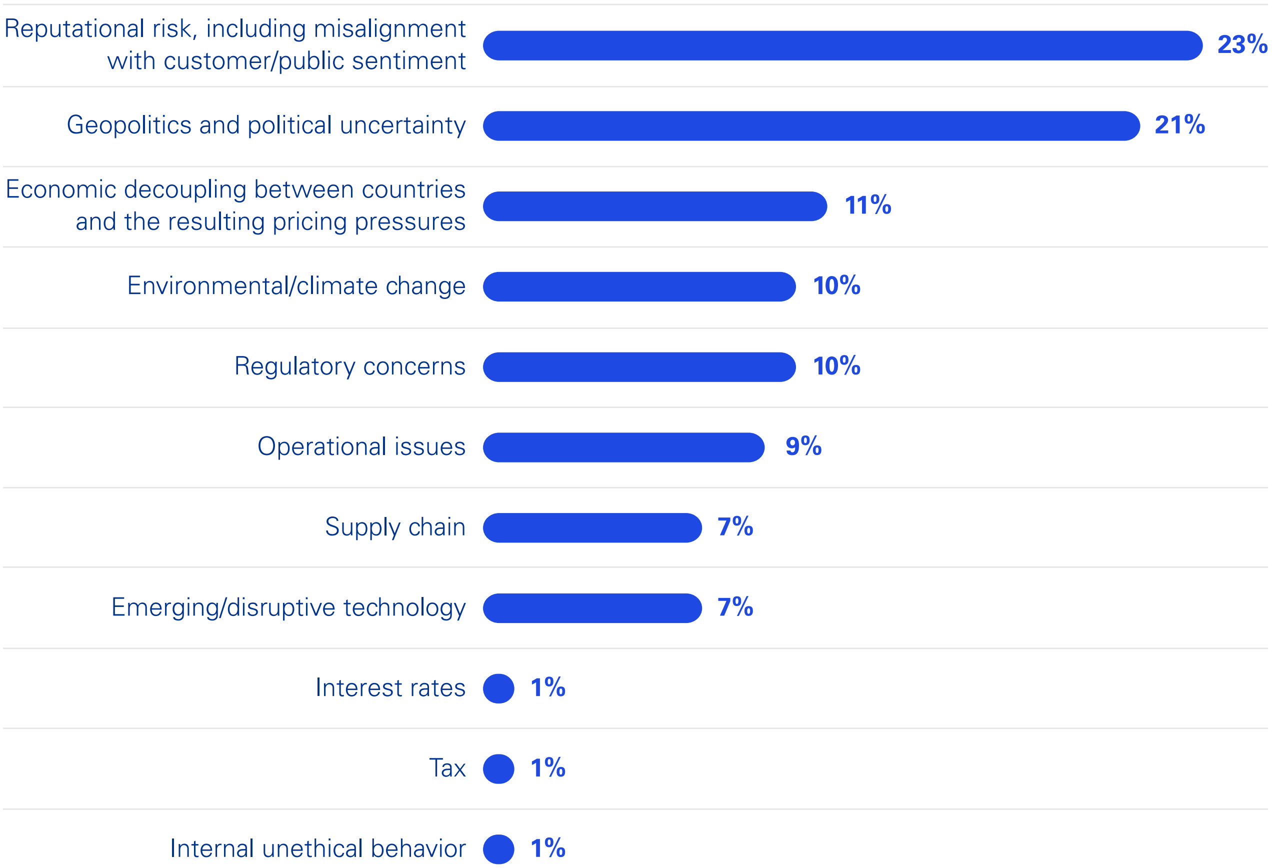
The risks posed by Gen AI are an equal concern (43 percent). This stems both from the fear of falling behind competitors — losing ground that could become increasingly hard to make up — and from other key hurdles, including ethical challenges, technical complexities, cost and achieving successful employee adoption.

Strategies for growth

Despite this array of potential headwinds, ENRC CEOs have committed to a growth strategy and are showing agility in pursuing it. Two-thirds of leaders say they have adapted their strategies in response to the interrelated challenges around them, with the remaining 33 percent planning to do so.

Operationally, ENRC CEOs see inflation-proofing their capital and input costs as the primary lever to achieving growth targets, followed by inorganic growth. Customer experience has dropped in priority compared to last year, perhaps indicating a shift toward a more internally focused strategy from which enhanced customer experience could emerge as an additional benefit.

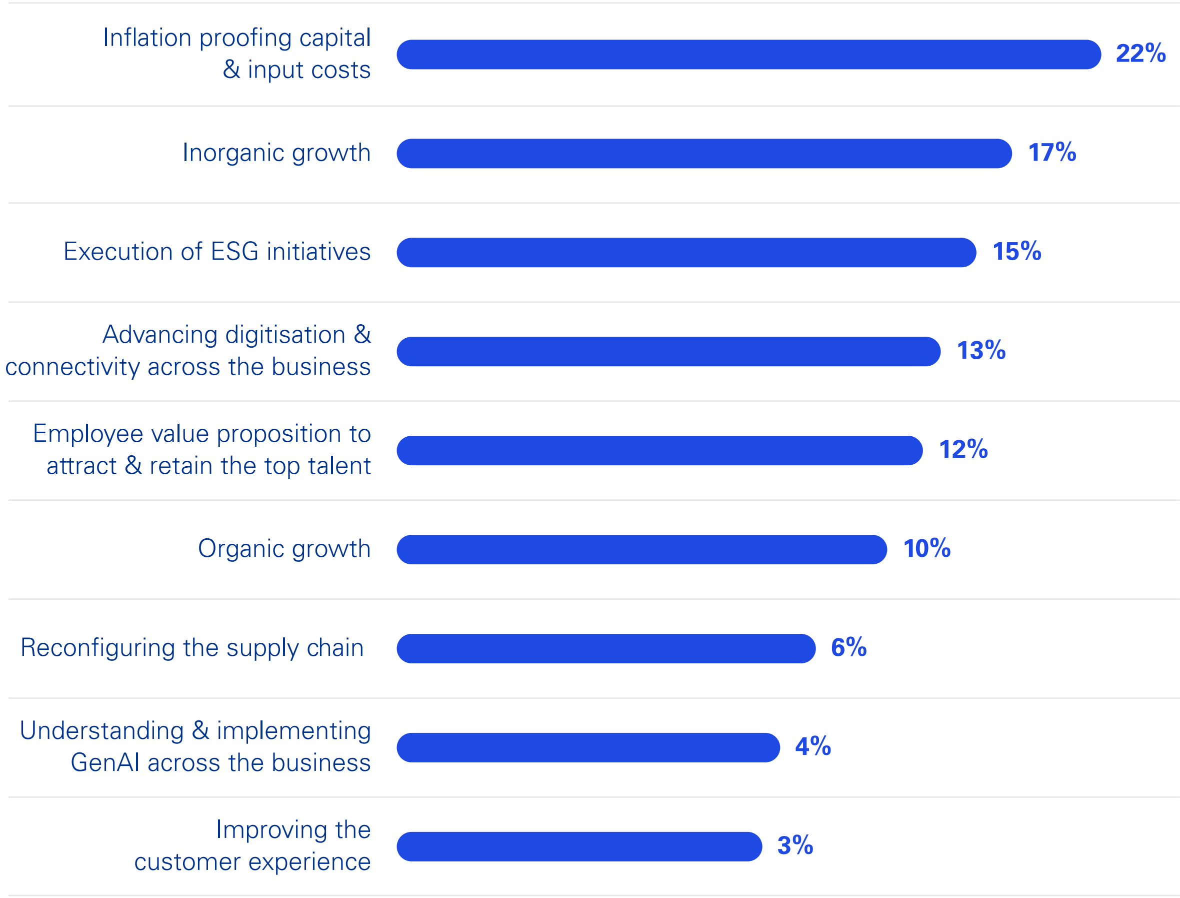
Threat to organisation's growth over the next three years



If they can manage the downside risks, ENRC CEOs are in a strong position to drive growth. While some risks like AI are quite new, others have become normalised as they've been on the agenda for a while. CEOs are taking a more intentional approach, and for those that can balance the risks and the opportunities, and keep tight control of costs, the outlook is good."

Anish De
Global Head of Energy, Natural Resources, and Chemicals
KPMG International

Top operational priority to achieve growth objectives over the next three years



Section 2

Economic outlook and business confidence

ENRC CEOs are optimistic about the future and display confidence over their business prospects. In fact, 82 percent of them are confident about their organisations' growth prospects, which is higher than the all-sector average of 78 percent. It was a similar picture in our 2023 Global Energy CEO Outlook — suggesting that the strength of energy prices in markets around the world continues to underpin commercial confidence. But confidence about the future of the industry, while solid, was a little lower at 72 percent. This may be informed by the fact that there is some variation across the ENRC sector; for example, renewables are viewed very optimistically while the outlook for fossil fuels (although still secure in the short to medium term) may be more challenged over a longer horizon. Similarly, conditions are good in the mining and minerals industry but less positive in some areas of the chemicals sector.

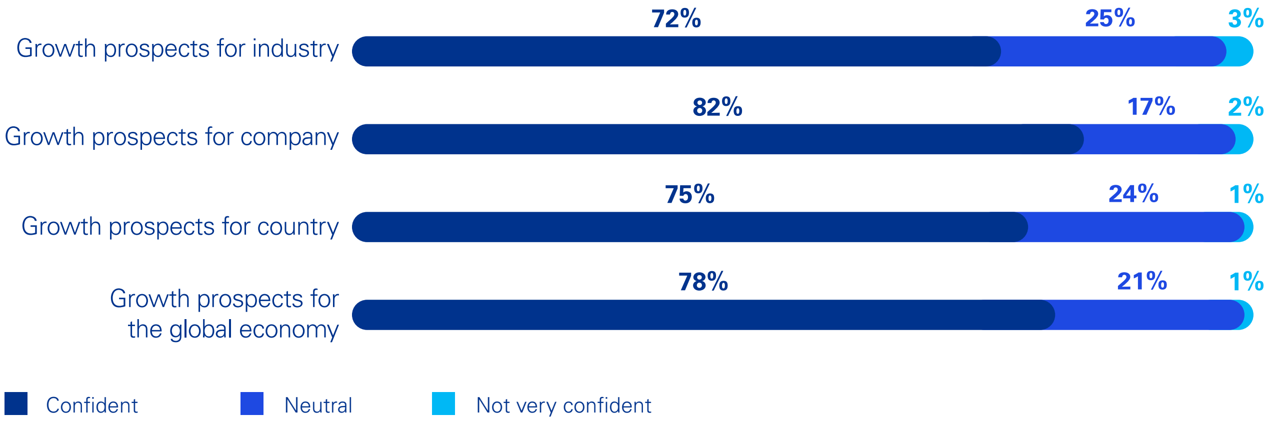
Overall, earnings expectations are solid, with the highest proportion of ENRC CEOs (43 percent) expecting growth between 0.01 and 2.49 percent over the next three years, while nearly a third (30 percent) are more bullish at 2.50 to 4.99 percent.

Inorganic growth is very much on the agenda, with three in ten CEOs highlighting it as a key lever — slightly ahead of organic growth (27 percent). Outsourcing, alliances and joint ventures are also expected to play a significant part in the growth story.

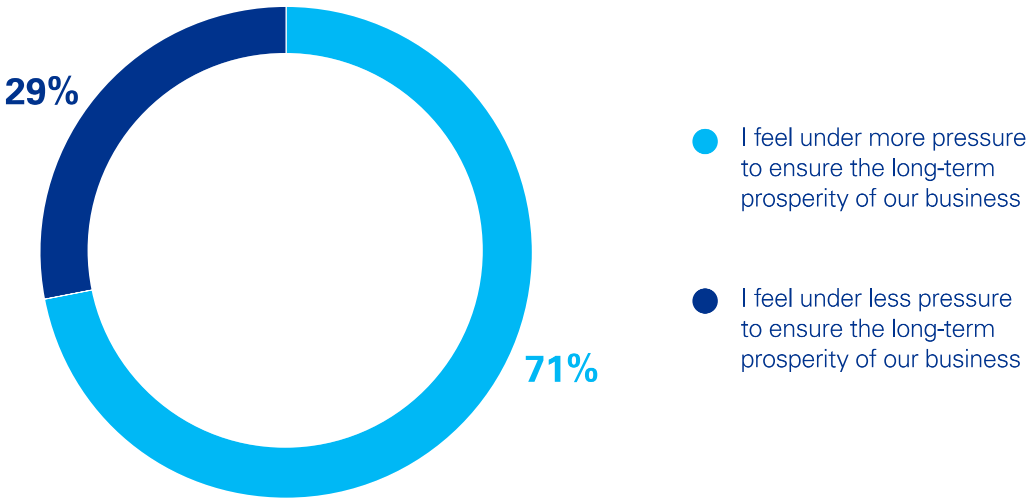
Trade risk factors

What could hold CEOs back from their growth ambitions? The biggest operational risk factor in ENRC CEOs' minds is trade regulation (73 percent). This relates to their heightened geopolitical concerns, which are resulting in increasingly restrictive trade regulations between jurisdictions, particularly in the sphere of critical minerals. For example, China imposed restrictions on export permits in October 2023 for specific graphite products, while the United States imposed new or increased Section 301 tariffs on Chinese imports in May 2024. Canada announced higher tariffs on Chinese steel and electric-vehicles battery components in August 2024. These actions reflect the challenges of creating globally integrated supply chains for critical minerals and green technologies at a time of increasing geopolitical competition — and ENRC CEOs should stay alert and agile to these regulatory shifts.

Macroeconomic scenario and impact



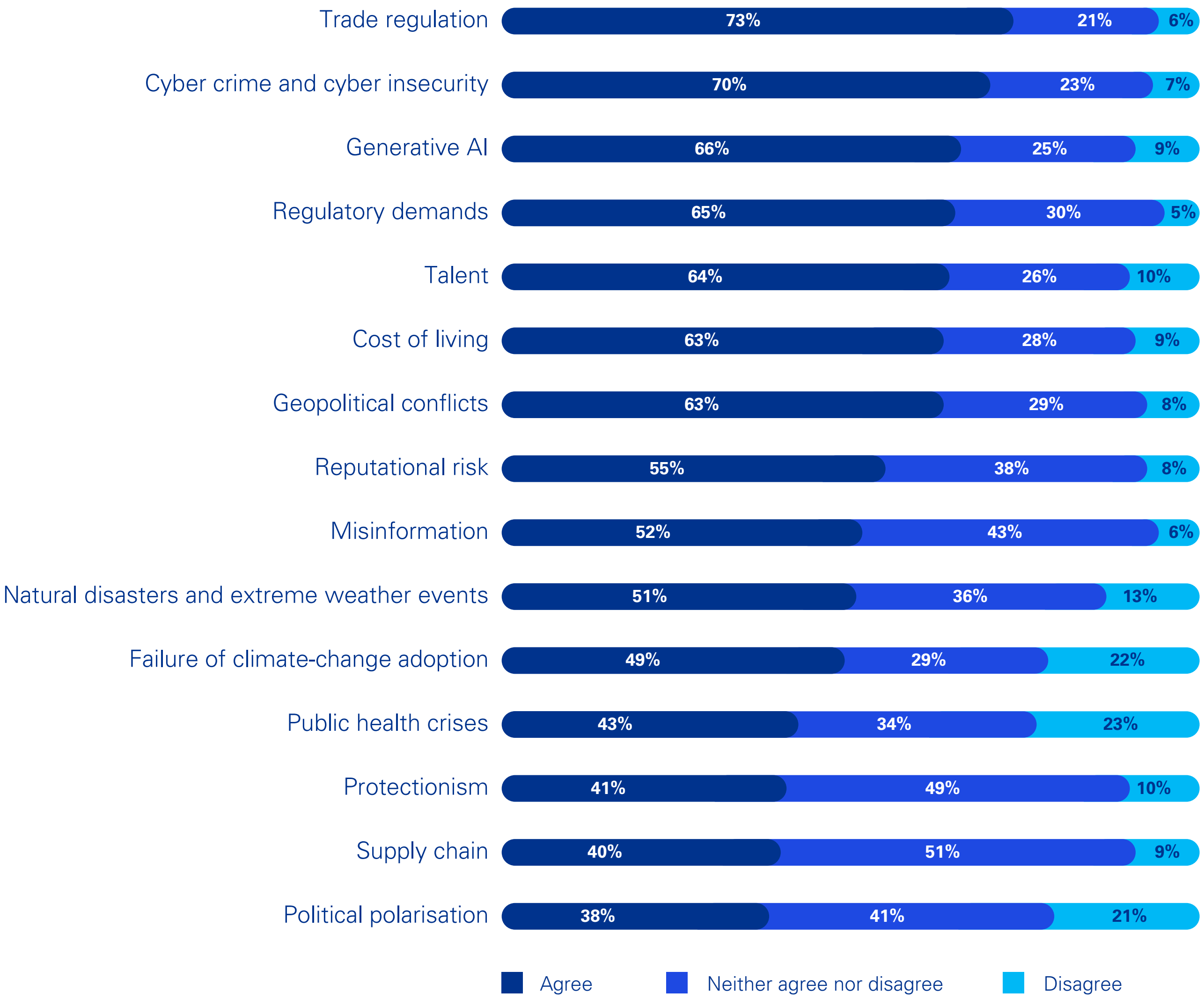
Emotional state of CEOs



CEOs in ENRC are feeling confident. The cash tills are ringing, and prices are high. It is notable that M&A is on the agenda. The deals market in ENRC has been soft for some time, but every cycle must eventually come to an end. The sector is ripe for deals and consolidation, and that's something we can expect to see."

Anish De
Global Head of Energy, Natural Resources, and Chemicals, KPMG International

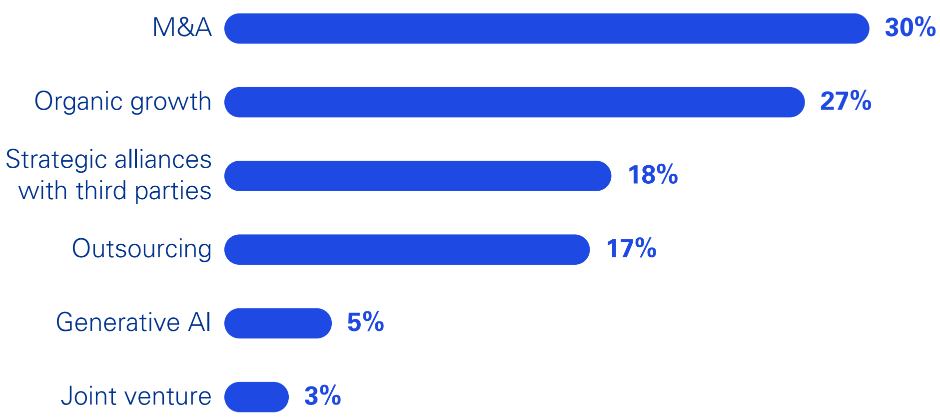
Trends impacting organisational prosperity over the next three years



We have already seen a spate of consolidation in Oil & Gas over the last couple of years and more recently in mining — and this will continue. M&A activity in chemicals has been depressed due to the recent recessionary factors, particularly in Europe. But for chemicals specifically, we expect an improvement in U.S. deal flow once the U.S. election has been decided and the Federal Reserve has decreased interest rates. Further, we expect private equity to play a key role in chemicals M&A deal activity going forward."

Gillian Morris
Lead of Global Chemicals
KPMG International

Key strategies for achieving organisational growth over the next three years



Section 3

Accelerating innovation and the race to embrace AI

Economic uncertainty continues to hang over the business environment — but ENRC CEOs are doubling down on Gen AI and technological advancements, signaling a decisive pivot away from workforce skills toward a future driven by digital innovation and growth.

Nearly six in ten CEOs (59 percent) say they are investing more in technology while 41 percent say they are investing more in workforce skills and capabilities — a swing from last year when the balance was almost equal, at 52 percent versus 48 percent. This perhaps reflects the recognition that technology is increasingly fundamental to how a business operates and runs — although upskilling people to use, monitor and control that technology will be key.

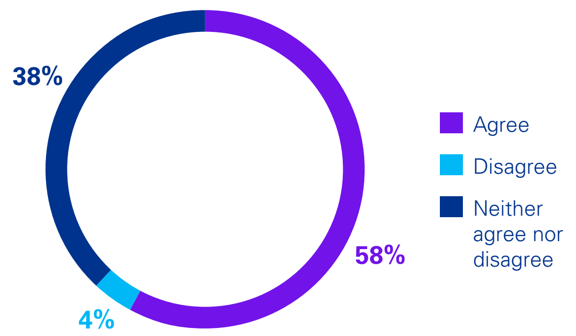
Generation Gen AI?

Gen AI is a top investment priority for most ENRC CEOs (58 percent), and two-thirds of them say they have a clear view on how it will disrupt current business models and create new opportunities. This marks a drop from last year, when 64 percent flagged Gen AI as an investment priority — suggesting that while it remains high on the agenda, it is becoming more of a long-term focus.

ENRC CEOs recognise that patience will be necessary to realise the true benefits of Gen AI, with 65 percent anticipating it will take three to five years before achieving a return on investment (ROI). This is a significant rise from a year ago (48 percent), indicating that CEOs may have deepened their understanding of Gen AI and become more pragmatic about time to value. They are also realising that a significant staff upskilling effort will be needed: only 23 percent are confident their employees have the right skills to leverage the benefits of AI. Could it be time to appoint a [Chief AI Officer] to help lead the charge?

While today's AI use-cases generate plenty of buzz in the public discourse, CEOs recognise the need to seize the challenges that lie ahead, considering AI's potential to transform every aspect of our everyday life. In terms of where Gen AI will be applied within the ENRC sector, CEOs see potential across the enterprise.

Generative AI as a top investment opportunity



65% of the CEOs anticipate that it will take 3-5 years to see a return on their investment in the implementation of generative AI (compared to 48% in 2023).

79% of the CEOs anticipate that generative AI will not significantly impact the number of jobs, but will instead require upskilling and redeployment of existing resources within their organisation.

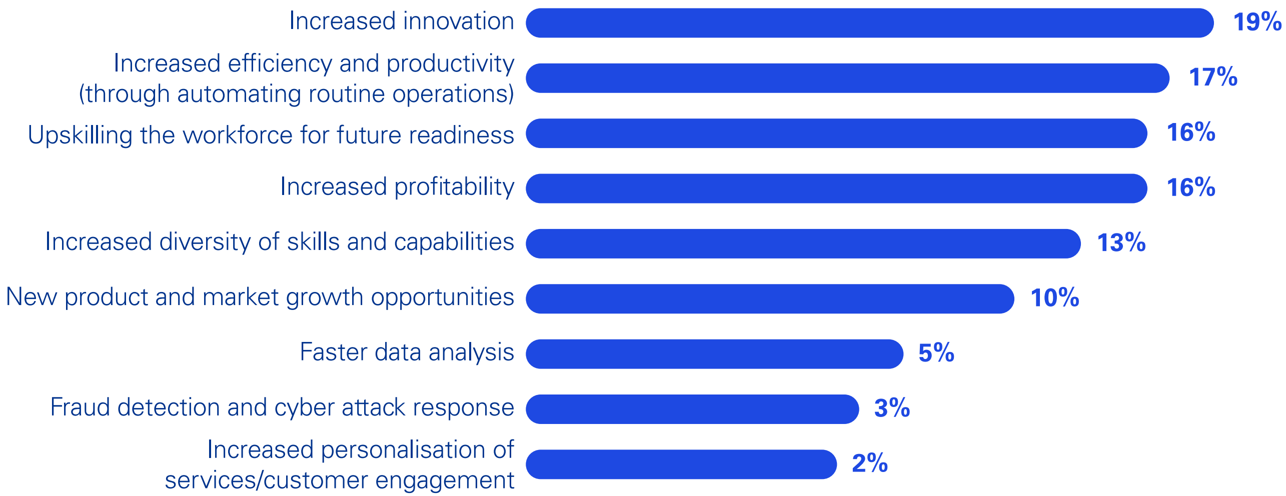
The IT function is the most widely cited (66 percent), but other areas including sales and marketing, research and development, finance, and strategy also feature highly. Given that Gen AI runs off the organisational technology backbone and data infrastructure, the focus on IT is well advised, allowing organisations to leverage Gen AI for tasks such as automation, data analysis and system optimisation. Indeed, embedding Gen AI within IT is likely to enable its successful integration into other areas such as finance and sales.

Implementing AI comes with several challenges — and ENRC CEOs are very aware of these. Ethical challenges (e.g. data privacy, algorithmic bias, responsible use of technology) top the list at 57 percent. Without doubt, a sound model based on trust, ethics and governance is essential, as set out in KPMG Trusted AI framework.

Meanwhile, technical complexity/skills required (46 percent), cost (44 percent) and environmental sustainability concerns (38 percent) are also front of mind. Nevertheless, while cost still features as a prominent concern, it has dropped significantly from last year (65 percent), suggesting that businesses have made progress in estimating and addressing the perceived cost barriers.

Looking at the benefits, there has been another interesting shift from 2023. Last year, increased profitability was the most widely anticipated benefit of AI — but this has fallen down the list. Now, increased innovation is seen as the biggest upside, followed by higher efficiency and productivity, and an upskilled and future ready workforce.

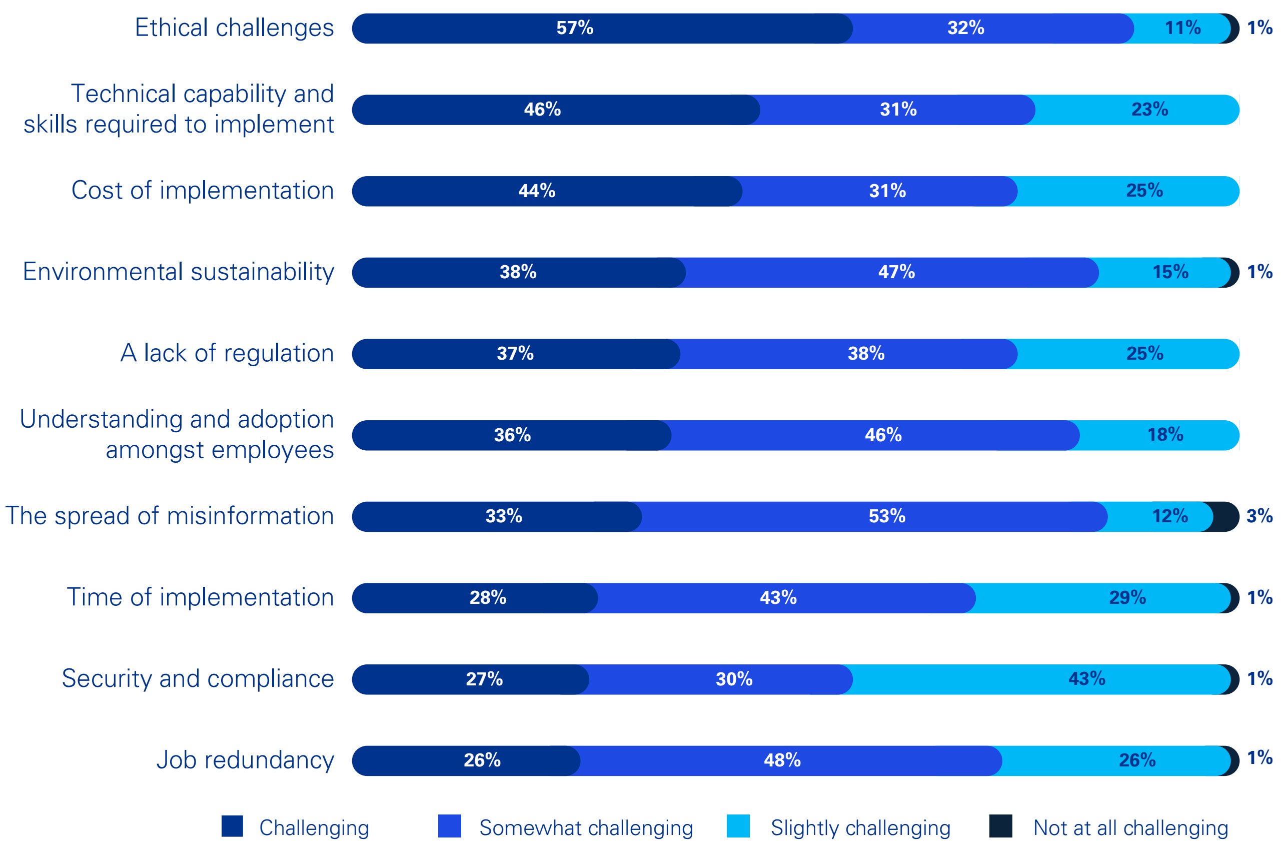
Impact of generative AI



> **“Working with data requires a fundamentally different approach than traditional technology systems. Businesses should adopt measures that ensure greater accountability and transparency throughout the entire data lifecycle — from collection to storage and analysis. Establishing guiding principles rooted in fairness, explicability, and purpose is essential to fostering the ethical use of enterprise AI assets. Effective monitoring systems are also critical, providing regular assessments to ensure compliance and maintain necessary checks and balances. Additionally, investing in initiatives that cultivate an AI-enabled workforce will embed a culture of ethical AI in the workplace. For ENRC companies, which naturally possess a higher degree of self-awareness, implementing these measures should come more seamlessly.”**

Sushant Rabra
Partner, Transformation
KPMG India

Challenges in implementing generative AI



Managing cyber risk

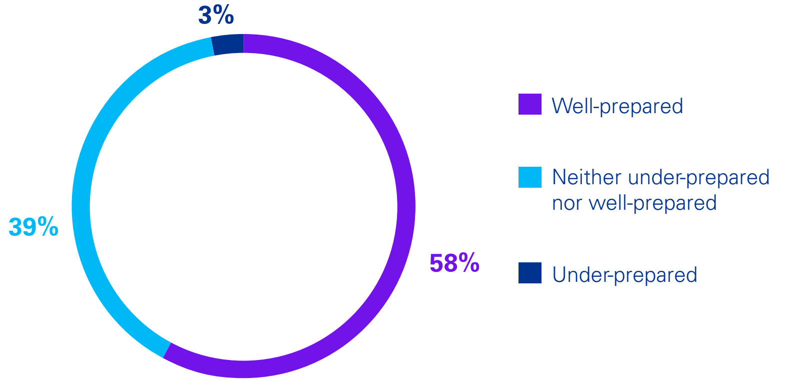
On the other side of the coin lies technology risk — most notably, cyber security. Here, we see a big statistical change this year compared to 2023, with a 12-percentage point increase in the number of ENRC CEOs who agree they are well-prepared for a cyber-attack, rising from 46 percent in 2023 to 58 percent now. It's a notable jump, perhaps reflecting the fact that 72 percent of CEOs say they have increased their investment in cyber security to protect operations and intellectual property from AI threats. Nevertheless, this is tempered by a much lower proportion (52 percent) who are confident in their organisations' ability to keep up with rapid AI advancements. With AI representing a new and potent attack vector for cyber criminals, there is clearly no cause for complacency — and CEOs are fully aware of this.

58% of CEOs agree that they are well-prepared for future cyber attacks in the organisation, 12 percentage points higher than in 2023.

ENRC CEOs view Gen AI as both a risk and an opportunity. But the risks — of falling behind and/or making a fatal error in terms of privacy, ethics or integrity — can be managed, while there is hardly an area of business where AI can't bring value. Integrating AI really comes down to change management, and that's something CEOs should feel confident about as long as they have the fundamental guardrails in place."

Anish De
Global Head of Energy, Natural Resources, and Chemicals
KPMG International

Preparedness towards cyber attacks



Section 4

Future landscape of ESG strategies

ESG has become a key strategic item for almost any business — and for the ENRC sector, it has several critically important dimensions.

The environmental and sustainability agenda — including the climate emergency and energy transition — is directly applicable to, and dependent on, the energy sector. This was borne out in the Statistical Review of World Energy published by the Energy Institute in association with KPMG, which showed that global primary energy consumption in 2023 was at a record absolute high and that fossil-fuel consumption and emissions reached new peaks. It's clear that energy firms should find ways to rapidly accelerate and scale renewable energy projects, as explored in the KPMG report Turning the Tide in Scaling Renewables.

Value creation and business benefits

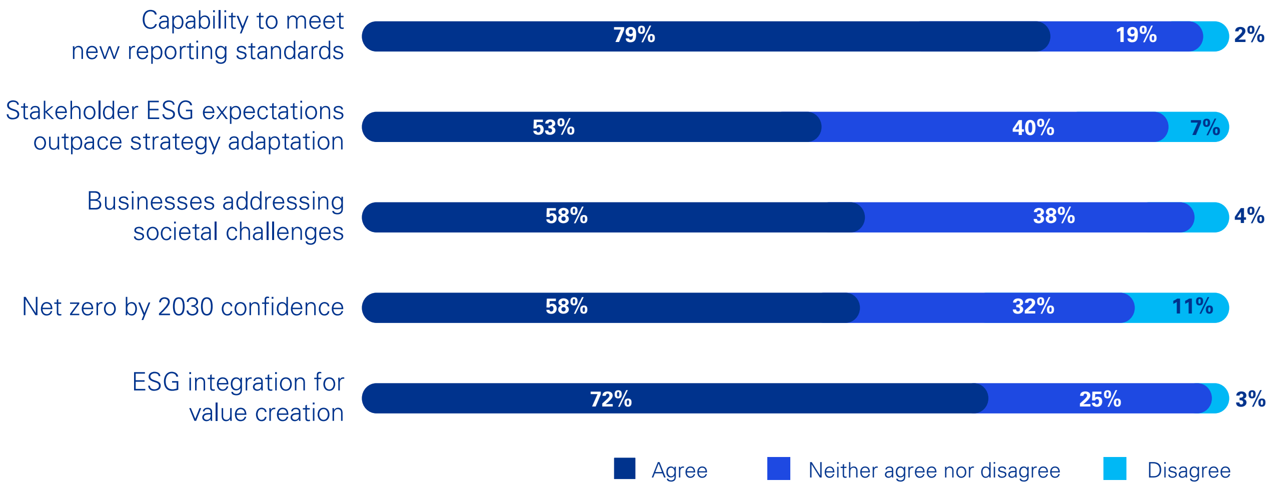
Overall, we see positive levels of confidence amongst ENRC CEOs around ESG. Nearly three-quarters (72 percent) have fully embedded ESG as a means to create increased value, while even more (79 percent) say they have the capability and capacity to meet increasing ESG reporting standards.

ENRC CEOs are also stepping up and showing a willingness to take personal responsibility over issues. Eighty-three percent say they would take a public stance on behalf of the organisation on an issue even if it conflicted with their personal beliefs.

The benefits of a strong ESG approach are also widely appreciated, with the greatest proportion of ENRC CEOs (29 percent) highlighting its potential to play a crucial role in the shaping of capital allocation, partnerships, alliances and M&A strategy. Up from 17 percent in 2023, it's a sign that the commercial importance of a compelling ESG strategy is becoming clearer. The KPMG Global ESG Due Diligence+ study recently highlighted the increasing priority given to ESG due diligence in deal-making. Other high-ranking benefits are building customer relationships and positive brand association (25 percent) and attracting the next generation of talent (21 percent).

Similar to Gen AI, ROI is seen to be a medium-term game, with 56 percent of ENRC CEOs only expecting a significant rate of return within three to five years.

Confidence on ESG capabilities



Decarbonisation challenge

A majority (58 percent) of ENRC CEOs expect to achieve net zero by 2030, but they all acknowledge the barriers they face to achieve decarbonisation. The most prominent of these is the complexity of decarbonising the supply chain (35 percent), followed by a lack of skills and expertise (22 percent). This makes investing in talent development, upskilling around AI and new technologies, and strong knowledge transfer processes even more important.

The road to net zero is another evolving area as the climate crisis develops and new policies or targets emerge. Perhaps because of this, 74 percent of ENRC CEOs say they have adapted the way they communicate about the climate agenda (language and terminology) to meet changing stakeholder needs or expectations.

The risks of falling short are also on CEOs' minds. Their biggest concern is in fact the threat to a CEO's own personal tenure if their organisation is perceived to be lagging, closely followed by competitors gaining an edge. Recruitment challenges are another prominent concern.

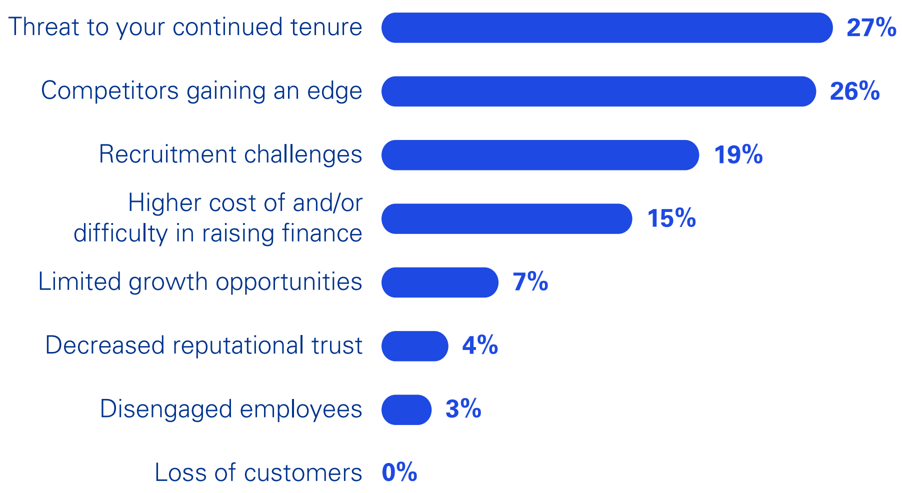
> **"The path to decarbonising supply chains is threefold: first, actively engage with your suppliers; second, clearly demonstrate the value of sustainable practices; and finally, develop centralised, scalable solutions that suppliers can effectively implement."**

Mike Hayes
Climate Change and Decarbonisation Leader
KPMG International

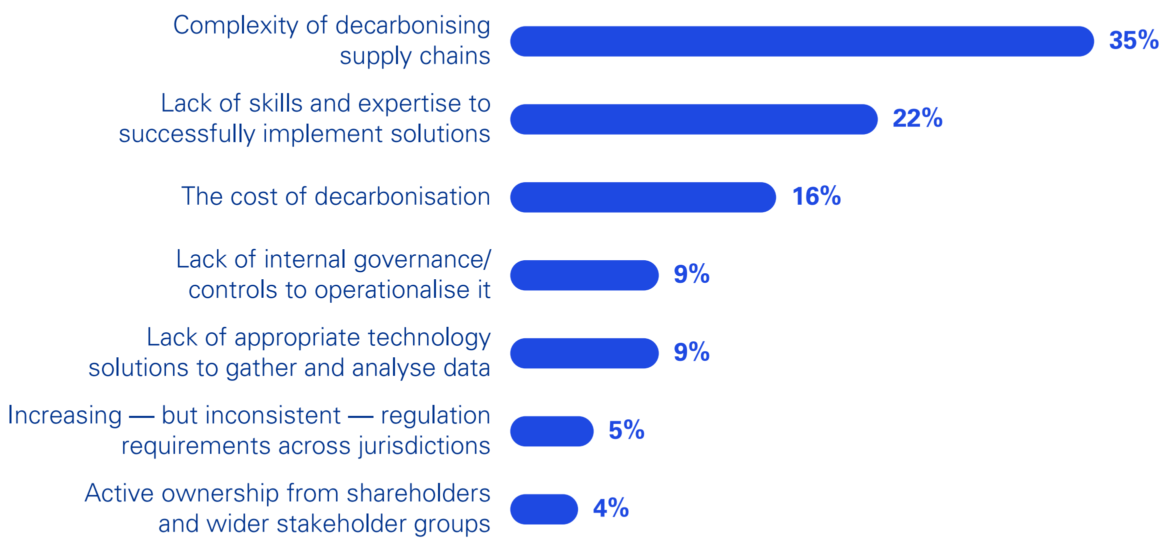
"While CEOs are certainly taking ESG seriously and embedding it deeper into their businesses, there is a sense that most of what they are doing is compliance driven. There is a cost to ESG, especially around net zero and the deep decarbonisation of the supply chain which that requires. But these things will have to be done — and those organisations that move further and faster toward an ESG-led transformation could gain a significant market advantage."

Anish De
Global Head of Energy, Natural Resources, and Chemicals, KPMG International

Major downside of failing to meet the expectations of stakeholders in ESG



Barriers to achieving net zero or similar climate ambitions



Section 5

Evolving workforce dynamics

Talent and workforce issues remain critically important. CEOs understand that their people are key to the organisation's future success.

That is why investing in the workforce through learning and development, including upskilling around AI, remains a strategic priority. Balancing generational factors is crucial, as experienced talent nears retirement and younger entrants tend to have different approaches to work models, career paths and social value. Almost all ENRC CEOs (93 percent) believe these factors will have an impact on their organisations' recruitment, retention and culture.

But despite the younger generation's embracing of remote and hybrid working, ENRC CEOs are increasingly in favor of an in-office approach over the coming three years, with 93 percent backing it as the dominant model. What's more, 100 percent say they are likely to reward employees who make the effort to come into the office with favorable assignments, raises or promotions. Of course, for many ENRC businesses, the industrial environment necessitates on-site and in-person working.

> **"Technology has become the fabric of every business — but people remain the lifeblood. Managing the changing workforce, unlocking more diverse and inclusive talent streams, and upskilling people with data and digital capabilities are all essential ingredients for future success."**
>
> **Anish De**
> Global Head of Energy, Natural Resources, and Chemicals, KPMG International

Diversity agenda

The diversity and inclusion agenda remains a central feature of ENRC CEOs' workforce approaches, with two-thirds agreeing that scrutiny of organisations' diversity performance will continue to increase. Leaders don't only see diversity as something for the general workforce, either: 77 percent agree that achieving gender equity in the C-suite will help ensure the organisation meets its growth ambitions.

But significant progress is still needed, as nearly six in ten (58 percent) of ENRC CEOs agree that advancements in diversity and inclusion in the business world have been too slow. They also recognise social mobility as an important piece of the puzzle — and 77 percent of leaders agree that they have a responsibility to help drive it.

"As leaders, we must make inclusion and diversity a priority to speed up the rate of change within the energy sector. By embedding these principles into company culture, business strategies and decision making, we create a foundation for long-term change and meaningful progress. This not only drives impactful change today, but also shapes the development of future leaders who will likely be part of a diverse workforce. By holding ourselves accountable and setting measurable goals, we can help ensure that inclusion and diversity remains a core driver of the industry's transformation."

Franceli R. Jodas
Lead of Global ESG for ENRC
KPMG International

The way forward

How can ENRC businesses leverage all the opportunities they're presented with while also managing the risks? Here are points to consider across the key areas of Gen AI, ESG and talent:

Gen AI:

- **Don't be scared of Gen AI.** There is more to gain than lose. Take a structured approach, identifying the highest potential use cases as well as some easy wins to build momentum. The earlier your organisation gets started, the more time there will be to iterate the approach and learn from what you're seeing.
- **Manage the risks of Gen AI in three key ways.** Firstly, build your experience incrementally; don't bite off more than you can chew in the early phases. Secondly, put in sound governance and risk mitigation guardrails, including clear accountability and ownership of AI at the top, and well-communicated guidance and support for staff. Thirdly, take a "human in the loop" approach. Don't rush into unsupervised execution of critical processes by AI. A human being should always have the final sign-off to "press the button".

"When it comes to new technologies, including Gen AI, take their help — but don't let them take over," Anish De counsels. See this KPMG paper for more advice on board strategies for enhancing AI.

ESG:

- **Look beyond mere ESG compliance.** Try to look further than the minimum regulatory requirements and ask yourself how ESG can integrate with business strategy to enhance value creation. See outside the jargon and focus on a few areas where you want to do better which are meaningful for your business.
- **See the whole agenda.** Environmental and carbon-related performance is critical, of course, but also consider the social and people-related aspects that can unlock value in the workforce and enhance wider stakeholder engagement and trust.

Talent:

- **Take an upskilling lens.** Your people are critical for future success — but they are also faced with considerable change as Gen AI and other new technologies become increasingly embedded. Give them the upskilling and training support they need so that they are confident about how to use new digital tools — and understand that these are an ally, not a threat, helping them to get more done, faster.
- **Bring the strategy together.** The ENRC businesses that can communicate a clear strategy across operations, technology and ESG and that will aim to drive growth, innovation and values-driven enterprise will likely be the most attractive places for talent to work. With the generational shifts that we are seeing, bringing this together into a compelling central vision is becoming more important than ever.

Methodology

About the KPMG CEO Outlook

The 10th edition of the KPMG CEO Outlook, conducted with 1,325 CEOs between 25 July and 29 August 2024, provides unique insight into the mindset, strategies and planning tactics of CEOs.

All respondents have annual revenues over US$500M and a third of the companies surveyed have more than US$10B in annual revenue. The survey included CEOs from 11 key markets (Australia, Canada, China, France, Germany, India, Italy, Japan, Spain, the U.K. and the U.S.) and 11 key industry sectors (asset management, automotive, banking, consumer and retail, energy, infrastructure, insurance, life sciences, manufacturing, technology and telecommunications). NOTE: Some figures may not add up to 100 percent due to rounding.

How KPMG can help

Driving transformation for a resilient future

In an era where transformation is no longer optional but essential, KPMG professionals understand that achieving meaningful change demands the right technology, optimised processes, and people with deep, broad expertise. As highlighted in the 2024 KPMG Energy CEO Outlook, energy sector leaders are navigating unprecedented challenges, from geopolitical uncertainty to rapid technological shifts, and they need trusted partners to help them succeed. For decades, KPMG firms have been at the forefront, helping clients unlock the full potential of their people and technology to drive real-world, sustainable outcomes. Because when people and technology work in harmony, great things happen.

Empowering your transformation journey

KPMG professionals can help make the difference in navigating your transformation journey. In alignment with the current landscape, we help energy companies reimagine their business models, optimise operations for resilience, address risk and regulatory changes for a safer future, and unlock new levels of value creation. Together, we can build businesses that are agile, intelligent and resilient — prepared to seize opportunities and tackle challenges head-on.

Building a sustainable and digital future

KPMG firms are at the heart of digital and sustainable transformation, helping clients build modern, intelligent organisations that deliver outstanding results for both people and the planet. Our approach focuses on creating businesses that thrive in a constantly evolving environment, leveraging digital innovation to drive sustainability, resilience and growth.

Innovating for long-term value

KPMG firms' suite of business transformation products and services is tailored to meet the unique challenges of the energy sector. With insights drawn from extensive experience and a leading transformation methodology, our offerings help drive continuous innovation and create lasting value beyond implementation. We help clients navigate the complexities of today's market, helping to ensure they are positioned for a more productive, sustainable and valuable future.

Contacts

Colm O'Neill
Partner, Management Consulting,
Global sub sector Head for Power and Utilities
KPMG Ireland
E: colm.oneill@kpmg.ie

Rodney Doyle
Managing Director
Energy Transition for KPMG consulting
KPMG Ireland
E: rodney.doyle@kpmg.ie

Des Sherwin
Director
KPMG Ireland
E: des.sherwin@kpmg.ie

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