



**NET-ZERO
INDUSTRIES**
MISSION

Mutual Learning Exercise

White Paper #4

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Designing and Implementing RDI Policies and Incentivising Private Investments to Support Industrial Decarbonisation

1. Introduction

Knowledge transfer and learning are critical mechanisms for accelerating industrial decarbonisation and serve as an essential mechanism for stakeholders to drive and shape development progress. In 2024, the Net Zero Industries Mission (NIM) organised a Mutual Learning Exercise (MLE) to facilitate the exchange of experiences among national policymakers and other stakeholders in the design and implementation of research, development, and innovation (RDI) policies¹ and funding programmes to support industrial transformation. The MLE model, which has recently been successfully employed at the European level to advance industrial decarbonisation efforts², was adopted and tailored by NIM to address the specific challenges of its mission.

Two workshops were conducted under the MLE framework, each accompanied by background papers summarising findings from European-level MLEs and existing literature. The first workshop, held in June 2024, explored effective strategies for developing and aligning RDI policies. The second workshop in December 2024 concentrated on designing public RDI funding programmes and mobilising private investment for decarbonisation in energy-intensive industries. This initiative aligns with NIM's broader mission of advancing global industrial decarbonisation through three pillars: supporting demonstration projects, fostering international R&D collaboration, and harmonising enabling conditions. Industries like steelmaking, cement production, and chemicals are among the most challenging to decarbonise, making these efforts crucial to achieving the ambitious net-zero targets for 2030 and 2050. By engaging policymakers and public funding agencies, the MLE highlighted the critical role of collaboration, innovation, and effective policy design in driving industrial decarbonisation, offering practical insights for advancing global efforts.

In the following, we will discuss the main findings of the discussions during the two workshops with representatives from 15 institutions from the NIM member countries and partners.

¹ The NIM MLE has a broad understanding of the RDI process from the early stages of development to the full deployment of new technologies, i.e., Technology Readiness Levels (TRL) 3-9.

² The European Commission organised an MLE with 12 participating European countries running from April 2023 to March 2024. For more information see: <https://projects.research-and-innovation.ec.europa.eu/en/statistics/policy-support-facility/psf-challenge/mutual-learning-exercise-industrial-decarbonisation>

2. RDI Policy Design and Alignment

Concerning RDI Policy Design and Alignment, the NIM MLE addressed two questions: *What RDI instruments and policy mix (e.g., R&D funding, investment incentives, infrastructure, human resources, public procurement, cross-border cooperation) are needed at the national and international level for the development and deployment of low-carbon technologies?* Additionally, implementing RDI policies and realising a supportive policy mix requires alignment across several policy fields (e.g. R&D, industry, location, energy) and coordination between very different (policy) actors. The second question discussed was: *How can RDI policies be aligned with other key policies related to national and international framework conditions?*

The main findings of the discussion on RDI Policy Design and Alignment in support of industrial decarbonisation are as follows:

Comprehensive Funding and R&D Support

An effective transition to decarbonised industries relies on a broad mix of instruments throughout the innovation stages, particularly from Technology Readiness Levels (TRL) 4 to 9. This requires a diverse R&D portfolio that combines mechanisms for funding capital expenditure (CAPEX) and operating expenditure (OPEX), and sustained support for fundamental and applied research, such as that conducted by universities and research organisations. Robust infrastructure and investment in low-carbon technology infrastructure are essential for implementing decarbonisation technologies and bridging the so-called "valley of death" in innovation. In addition, structured designs incorporating high-level visions, sector-specific roadmaps, and targeted investment incentives ensure funding supports the entire innovation process, from early-stage R&D to large-scale demonstrations. This facilitates the smooth progression of technologies toward commercialisation. Beyond technological advancements, policies must support organisational, social, and business model innovations.

Development and Provision of Infrastructure

The development and provision of infrastructure for large-scale low-emission or demonstration plants are critical, particularly in electricity generation, networks and storage solutions such as hydrogen. More electricity is required as a decarbonisation approach, whether directly (e.g. electricity for heat pumps and furnaces) or to produce green hydrogen or power CO₂ capture plants. This type of infrastructure also includes transport infrastructure, such as port facilities. Adequate funding and research into technologies like hydrogen storage are imperative for achieving scalability and public acceptance. The government has a role to play in coordinating the development of this infrastructure.

Stakeholder Engagement and Roadmap Development

The early engagement of public and private stakeholders is vital for developing roadmaps involving diverse groups, including industry, academia, interest groups, non-governmental associations, and policymakers. Effective feedback mechanisms should be in place to inform stakeholders of outcomes, reducing participation fatigue and ensuring sustained involvement. Collaborative processes, such as local workshops, facilitate engagement between industry experts, community members, and businesses, fostering innovation and generating valuable input for R&D initiatives. By ensuring a wide range of participation, roadmapping can facilitate the coherence of the different funding programmes and encourage cooperation.

Political Commitment and Strategy Alignment

A strong and long-term government commitment to RDI must be embedded in national strategies. NIM partner representatives stressed that political cycles often hamper long-term policy implementation, creating potential misalignments between national energy priorities and overarching objectives, – while keeping bureaucracy to a minimum. Well-defined objectives with clear targets, as exemplified by Australia’s Net Zero Plan, ensure a comprehensive approach to decarbonisation. The NIM MLE participants also stressed that any industrial decarbonisation policy needs to be aligned with a broader industrial strategy.

Strong political commitment is also essential for fostering alignment. Collaboration within a ministry is straightforward, but inter-ministerial efforts need silo-breaking and high-level policy alignment. Austria’s “Transformation of Industry” program, led by the Ministry for Climate Action, exemplifies successful cross-ministry collaboration in RDI and demonstration funding.

Flexible Policy Frameworks

Balancing short-term priorities with long-term goals is fundamental for fostering comparative global advantages in decarbonisation. Flexible policy frameworks promote the development and commercialisation of innovative technologies, processes, and business models while ensuring economic competitiveness. Early scenario analysis allows policymakers to assess the potential impacts of their strategies, predict public backlash, and adjust plans accordingly. The ability to navigate multiple paths and policies to net-zero enhances adaptability to changing circumstances was also discussed during the workshops.

Clear objectives and regular checkpoints ensure alignment and adaptability, exemplified by Canada’s Carbon Management Strategy that outlines an adaptive approach to support the continued growth of the carbon management industry.

Place-Based and Sector-Specific Approaches

A place-based approach optimises the implementation of decarbonisation technologies by addressing regional characteristics such as industrial clustering and geological conditions for carbon capture. In general, geographic and cultural differences significantly influence

collaboration, value chain development, and competitiveness, making it essential to tailor strategies to specific regions. Iron and steel plants, for example, will need to develop bespoke decarbonisation plans that take account of their specific circumstances. Each plant will have been custom-designed to process specific ores with properties that vary with geography, using location-dependent combinations of energy sources and supporting infrastructure. Plant-specific decarbonisation pathways will depend on the type and age of existing plants, as well as the unique combination of potential net-zero energy sources and CO₂ sinks available. Recognising these variations helps avoid a "one-size-fits-all" policy, ensuring that sector-specific needs and local capacities are met while fostering partnerships based on mutual benefits. This tailored approach is critical for effective international collaboration and value chain alignment.

De-Risking Investments and Fiscal Measures

De-risking investments in decarbonisation projects is essential, using financial incentives like subsidies, tax credits, and grants to reduce risks for private investors. Public funding programmes, such as co-funding and quality indicators, attract additional investments. These mechanisms, alongside public-private partnerships, enhance investor confidence and support high-risk R&D initiatives. Collaborative efforts between banks, investors, and pension funds further encourage green investment.

National and International Collaboration

Countries benefit from broader alliances and partnerships that reduce decarbonisation costs and improve resource efficiency. National, bilateral, cross-border, and multilateral collaboration fosters R&D, technology development, and joint funding opportunities. Knowledge-sharing platforms and harmonised standards are especially beneficial for emerging economies, enhancing their capacity to engage in global decarbonisation efforts.

It is also important to promote increased global climate ambition through ongoing climate diplomacy. International policies to promote decarbonisation will be critical to drive demand for net zero products and commodities and support green premiums.

Workforce Development and Diversity

Complementary workforce strategies, such as skills training programmes, are important to equip the workforce with the expertise needed for clean energy technologies. For example, Austria's large demonstration programmes, which combine R&D efforts with qualification measures, exemplify effective workforce development strategies. Promoting diversity and gender balance within these initiatives brings diverse perspectives and ensures a more inclusive transition to a low-carbon economy.

Challenges of Coordination and Alignment

The representatives from the NIM members experienced that coordination across policy sectors requires time, resources, and structured decision-making processes. Limited funding and human resources often constrain alignment efforts. Tools such as visual collaboration schemes and glossaries can simplify complex funding mechanisms and procedures. Competing priorities across sectors further complicate coordination but must be addressed to achieve alignment.

Dedicated teams and formal coordination mechanisms ensure ongoing dialogue and alignment across government departments. For example, Australia's inter-ministerial committees effectively address alignment challenges through cross-ministerial consultations. Regular meetings between governmental and sectoral entities maintain consistent policies. In Canada, for instance, a dedicated team within Natural Resources Canada led efforts, in collaboration with other relevant departments, to draft and publish Canada's Carbon Management Strategy. This strategy is a true testament to effective coordination within the federal government, ensuring that it advances the mandates of all departments involved while emphasising continued federal support for the growth of Canada's carbon management sector.

However, frequent changes in ministries and personnel disrupt policy continuity. Designating clear points of contact mitigates such effects, as seen in Canada, where consistent and dedicated points of contact ensure stability during political transitions. Alignment between government agencies funding various TRL stages is critical to leverage synergies.

Regulation and Standardisation

Regulatory frameworks, including intellectual property (IP) rights, competition laws, and product standardisation, must be established early to incentivise innovation, as stressed by the experts involved in the NIM MLE. Delaying regulation until after market entry can create unnecessary obstacles. For example, standardisation for circularity in steel production is vital for decarbonisation efforts. International partnerships and co-development initiatives enhance innovation efforts and harmonise global standards and regulations. Streamlining permitting procedures and improving inter-ministerial coordination reduces delays in the deployment of necessary technologies and infrastructure.

There is also a need to raise awareness of the importance of harmonising standards and definitions for carbon accounting on the international level. Efforts are needed to widen the use of standards among various actors, countries, and regions through the active participation in relevant events and workshops.

Public Procurement and Imported Products

Government procurement policies serve as powerful tools for driving the adoption of green technologies.

A comprehensive decarbonisation strategy must also consider imported products. Initiatives like the European Union's Carbon Border Adjustment Mechanism (CBAM) address the need to decarbonise imports, ensuring global alignment in emission reduction efforts.

3. RDI Policy Implementation

Concerning RDI Policy implementation the NIM MLE addressed the following question: *What is needed to implement RDI policies and design a comprehensive RDI funding programme?*

The main elements and lessons learned regarding RDI policy implementation are as follows:

Alignment and Integration

Effective RDI policy implementation relies on the integration of research and innovation into industrial applications through piloting, incubation, and commercialisation support. Bridging the gap between TRL 6–8 remains a persistent challenge requiring strategic funding, partnerships, and operational support from industry. Misalignment between industry needs, RDI initiatives, and regional or national priorities further complicates progress. Actionable roadmaps are essential for aligning these elements with broader goals, preventing market distortions and ensuring mutual benefits. Fragmentation arises from the lack of coordination among agencies, programmes, and ministries, particularly in industrial, finance, and climate policies. This misalignment hinders synergies, delays progress, and underscores the need for streamlined governance systems.

Unified governance models, such as the Advanced Technology Research Council (ATRC) approach in the United Arab Emirates, exemplify the benefits of coordinated national R&D efforts, attracting expertise and fostering innovation ecosystems. Similarly, the U.S. Department of Energy's technology commercialisation officer model illustrates the importance of seamless transitions across RDI stages. This model employs a team to oversee the progression from research to industry-scale commercialisation, demonstrating how national coordination can drive innovation. Mechanisms such as "one-stop shops" for applicants can address fragmentation, providing cohesive access to resources and aligning efforts across multiple stakeholders.

Funding Challenges, Bureaucracy, and Complexity

Funding gaps between RDI phases, especially during the transition from pilots to demonstration stages, impede the scaling of high-impact innovations. Costs escalate significantly at TRL 7–8, yet governments often hesitate to fund first movers due to concerns about preferential treatment. This challenge necessitates substantial funding instruments, operational support, and partnerships to bridge the gap. Matchmaking platforms that connect technology developers with commercialisation specialists are pivotal in overcoming these obstacles.

The NIM MLE workshop discussions revealed that the design of comprehensive RDI programmes is hampered by different funding guidelines, agency responsibilities and long-term objectives. Overly complex application requirements discourage participation, particularly for start-ups and smaller innovators, limiting accessibility and effectiveness. Simplifying application processes and tailoring funding mechanisms can alleviate these barriers.

Synergies and Coordination

Cross-ministerial coordination is essential for achieving industrial transformation and decarbonisation, as these policy areas intersect multiple sectors. Enhanced synergies within governments ensure continuity in strategic goals, while publicly funded facilitators like cluster coordinators and innovation labs act as amplifiers for outreach and engagement. For instance, Austria's flagship programme New Energy for Industry (NEFI) fosters collaboration among companies and stakeholders through networking and knowledge exchange.

Collaborative platforms and events, such as matchmaking platforms, enable partnerships and foster trust across sectors, facilitating the transition from research to industrial applications. Broad engagement with stakeholders—including banks, investors, engineers, policymakers, and NGOs—is essential to ensure RDI initiatives address practical needs. The exclusion of key players can lead to misaligned objectives and reduced effectiveness.

Thorough assessments of industry requirements and market dynamics help avoid ineffective programmes and market distortions. Researchers and academic institutions provide vital knowledge to overcome barriers, while collaboration with start-ups reveals specific challenges and informs targeted support. Interactive formats like workshops, hackathons, and online consultations provide opportunities for stakeholder feedback, enabling iterative refinements. Early feedback mechanisms ensure that programmes address concerns from inception, aligning innovation efforts with real-world challenges.

Monitoring and Evaluation

Workshop participants' experience of implementing RDI programmes showed that common metrics, criteria and robust monitoring protocols are essential to align policies, evaluate their effectiveness and ensure that RDI goals remain achievable. Ongoing evaluation and research embedded in RDI programmes facilitate continuous learning and improvement, as highlighted in the workshop discussions. Transparent assessment processes ensure alignment with goals, allowing necessary adjustments to meet milestones. Formative and ex-post evaluations integrate stakeholder feedback, guiding funding strategies and enhancing program effectiveness. Clear key performance indicators (KPIs) and evaluation criteria are essential, although long-term impacts often depend on broader policy frameworks.

Monitoring systems that track technology performance and public sentiment ensure policies remain relevant and responsive. Aligning funding agencies across different TRL levels is critical

for maintaining consistency and achieving desired outcomes, reinforcing the importance of whole-of-government approaches in RDI evaluation.

International Best Practices

Finally, adapting successful funding models and solutions from other countries can enhance local program design and implementation. Platforms, such as those introduced at COP events, connect stakeholders in hard-to-abate sectors with financial, technical, and strategic resources, fostering international collaboration. These initiatives provide roadmaps for aligning global decarbonisation efforts, leveraging shared expertise, and addressing common challenges in achieving climate and industrial goals. Promoting communication on best practices in legislation, standards, and norms ensures benefit from proven approaches.

4. Incentivising Private Investments

Industrial decarbonisation requires huge investments by companies in different sectors. Public policy has an important role to play in incentivising and enabling private investment. The NIM MLE therefore focused on the following specific question: *How can effective incentives and instruments be created to attract and engage private investment?*

Financial Incentives and Support Mechanisms

The lack of targeted mechanisms such as subsidies, tax credits, or grants discourages investment in high-risk innovations. These instruments are essential to reduce the financial burden on private investors, thereby enhancing the appeal of decarbonisation projects. Tax credits are particularly effective, while long-term, consistent grants provide reliability and planning security.

Public funding programmes act as quality indicators, facilitating access to additional national and international investments. Clear guidelines for evaluating the technical and economic viability of startup ideas are crucial for attracting private capital. Rigorous evaluations, such as those carried out for grants from the promotional bank of the Austrian federal government (AWS), build investor confidence by aligning with green finance standards and incorporating RDI investments to meet sustainability goals.

Public-private partnerships (PPPs) distribute financial and operational risks, encouraging private-sector participation in high-risk R&D initiatives. Co-funding signals corporate commitment, which can further secure private investment.

Commercialisation and Industry Relevance

Investment needs differ across the development spectrum, spanning from early-stage research to advanced deployment phases. Workshop discussions highlighted the need for tailored approaches that address complex issues such as environmental permitting, CAPEX/OPEX assessments and ROI projections. Categorising technologies by their TRL,

economic viability, emissions reduction potential, and costs helps investors assess their maturity and impact. Notably, the U.S. model of a technology commercialisation officer, coordinating national programmes to support stakeholder collaboration from research to industry-scale deployment, underscores the importance of structured transitions. Linking funding to milestones, such as securing private investment or demonstrating progress, provides a structured framework to incentivise participation and ensure practical pathways to market scalability.

Broader Systemic Challenges

A sole focus on R&D neglects the broader need for value chain integration. Developing integrated energy systems is essential for aligning national priorities with decarbonisation goals and building efficient and resilient energy networks. These systems leverage local resources and capacities, addressing the broader need for value chain integration, particularly in hard-to-decarbonise industries like steel, which depend on green hydrogen and electricity.

A focus on systemic integration across industries and regions optimises resource use, strengthens value chain resilience, and embeds circular economy principles into industrial strategies. Key elements, such as robust IP strategies, coherent business models, and proof-of-concept frameworks, are crucial for investor confidence. Public measures that support startups in building these components further enhance private investment and accelerate the transition to decarbonised systems.

Stakeholder Engagement and Consultation

The involvement of stakeholders is important for the promotion of private investment activities. Engaging stakeholders, particularly private industry players, during feasibility studies ensures practical alignment with market demands and builds trust. Guaranteeing the protection of IP rights during these consultations fosters both confidence and openness.

The workshop participants stressed that public awareness and engagement are equally important. Clear communication of goals and activities ensures societal buy-in, aligns innovations with market needs, and attracts investment. Long-term planning and globally aligned roadmaps based on resource availability and circular economy principles provide strategic direction, fostering confidence in economic and policy stability.

Networking and Matchmaking

Collaborations between corporate investors, startups, and private entities bridge the gap between innovation and market needs, accelerating commercialisation. Creating hubs that bring together investors, startups, financial institutions, and research organisations fosters a collaborative ecosystem that drives innovation and reduces investment barriers.

Providing guidance for fundraising efforts improves investment readiness, while matchmaking events and working groups enable stakeholders to form partnerships and share insights, driving forward innovative projects. Organising matchmaking events and working groups helps stakeholders to form partnerships and share insights.

5. Recommendations

The results of the NIM MLE discussions on **'Policy Design and Implementation'** highlight the need for a coordinated, flexible and integrated policy framework to address the challenges of industrial decarbonisation, often referred to as a whole-of-government approach. This approach requires alignment across policy areas through structured coordination, clear objectives and robust monitoring mechanisms. Stakeholder engagement and collaboration at all stages of technology development is essential to build trust, ensure relevance and improve outcomes. Coordination at national, regional and international levels further strengthens policy alignment and impact. In addition, tailored, adaptive approaches, including place-based strategies, address regional and cultural needs, while monitoring and adaptive governance systems ensure that policies remain effective in the face of evolving challenges. A comprehensive R&D strategy therefore needs to consider: i) technology - which decarbonisation technologies need support, ii) sector - which sectors need support, iii) location - which locations should be targeted for support, and iv) timing - how support should be sequenced over time.

The workshops also identified barriers such as fragmented governance, bureaucratic complexity and funding gaps, which can be mitigated through streamlined governance, reduced administrative burdens and targeted funding mechanisms. Capacity building and learning are essential, requiring strengthened institutional capacity, stakeholder skills development and lessons from international best practice. By integrating these elements, policies can effectively drive industrial decarbonisation and advance RDI goals, overcoming challenges while maintaining adaptability and inclusiveness.

The following key recommendations can be made on Policy Design and Implementation:

- *Comprehensive and Targeted Funding:* Ensure that funding spans the entire innovation continuum, from early-stage research to large-scale commercialisation. This includes both CAPEX and OPEX support, bridging the "valley of death" (TRL 6–8) through targeted incentives, roadmaps, and tailored funding mechanisms like public venture capital, green bonds, and tax credits.
- *Strategic Stakeholder Engagement:* Organise broad stakeholder engagement across all stages of RDI policy. Early engagement through workshops, surveys, and innovation labs ensures inclusivity, reduces fatigue, and incorporates diverse perspectives into

programme design. Mechanisms for continuous feedback and adaptation, including formative and ex-post evaluations, enhance trust and policy relevance.

- *Strong Political Commitment and Governance:* RDI priorities need to be embedded within national strategies with clearly defined targets fosters political commitment and continuity beyond electoral cycles. Unified governance structures, such as "one-stop-shop" entities or inter-ministerial teams, can streamline coordination and ensure policy alignment across sectors and ministries.
- *Adaptive and Place-Based Frameworks:* RDI policies have to balance short-term priorities with long-term decarbonisation goals, incorporating adaptive governance systems that respond to evolving technologies and market needs. Place-based and sector-specific strategies tailored to regional and industrial characteristics leverage local capacities and address unique challenges, optimising the deployment of technologies.
- *Public Procurement:* Leveraging government procurement drives demand for low-carbon solutions, fostering market confidence and long-term investment in sustainable technologies.
- *Workforce Development and Inclusivity:* Building a skilled workforce is critical for a successful energy transition. R&D initiatives should integrate comprehensive training programmes that address skill gaps and promote diversity.
- *Cross-Border and Multilevel Collaboration:* Fostering national and international collaboration through partnerships, joint funding initiatives, and harmonised standards reduces decarbonisation costs.
- *Integration of Monitoring and Evaluation Systems:* Common assessment frameworks with shared metrics enable robust monitoring and evaluation. Feedback mechanisms help refine policies to remain responsive to stakeholder needs and evolving priorities.

The findings regarding **'Private Investments'** reveal that private investment in industrial decarbonisation hinge on demonstrating clear commercialisation pathways, offering financial incentives, mitigating risks, and fostering collaborative ecosystems. Systemic challenges such as regulatory misalignment, high upfront costs, and fragmented value chains hinder private-sector engagement. Enabling factors include tailored funding models, stakeholder networking, and emphasising systemic integration. Government support in risk-sharing, regulatory stability, and market creation plays a critical role in attracting private investments.

The following key recommendations can be given to enable private investments:

- *Develop Targeted Financial Incentives:* Implement financial instruments such as tax credits, grants, subsidies, and green bonds to reduce investment risks and attract

private-sector participation. These incentives should be tied to specific decarbonisation milestones, ensuring accountability and alignment with sustainability objectives.

- *Foster Public-Private Partnerships (PPPs)*: Establish frameworks that equitably distribute risks, resources, and benefits between public and private stakeholders.
- *Streamline Regulatory Frameworks*: Align regulations with innovation timelines to reduce uncertainty and administrative burdens.
- *Leverage Government Procurement*: Use government demand as a tool to stimulate markets for decarbonisation technologies. Setting procurement standards and creating guaranteed markets signals opportunities for private investors and accelerates the adoption of sustainable innovations.
- *Strengthen Matchmaking and Networking Mechanisms*: Organise strategic events, hubs and platforms to connect key stakeholders, including startups, corporate leaders, and policymakers.
- *Establish Long-Term Investment Roadmaps*: Design collaborative and transparent roadmaps that align public and private investment strategies with long-term decarbonisation objectives.
- *Tie Funding to Performance Milestones*: Adopt funding models that incentivise progress by linking financial support to key achievements, such as prototype development, investor engagement, or emissions reductions.
- *Conduct Rigorous Feasibility Assessments*: Provide robust technical and economic evaluations as part of funding processes. These assessments enhance investor confidence by demonstrating the viability and sustainability of proposed decarbonisation solutions.
- *Raise Public and Stakeholder Awareness*: Effectively communicate the benefits of decarbonisation projects to enhance societal buy-in and demonstrate the economic viability of investments. Public awareness campaigns can attract broader private-sector engagement.

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