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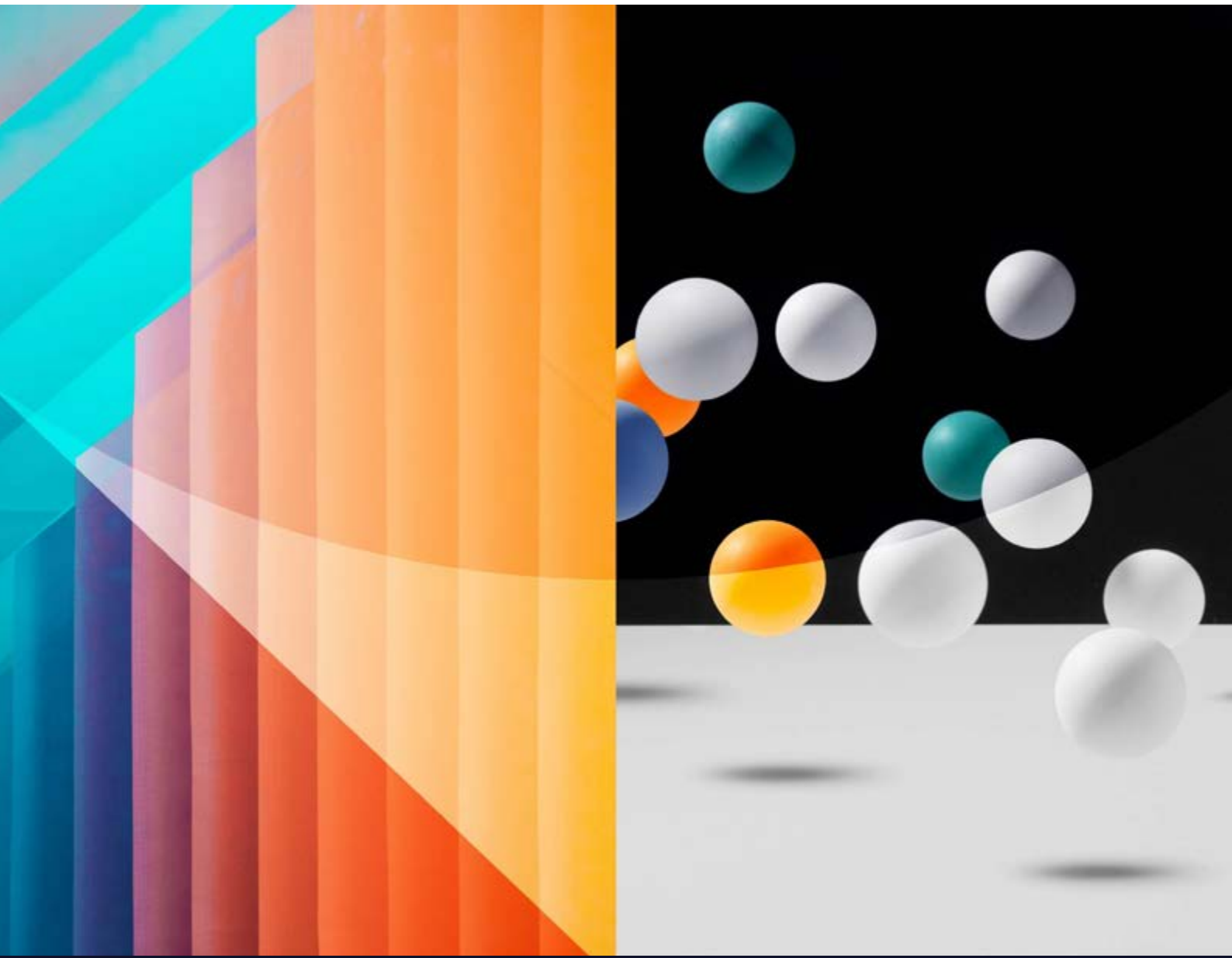
Net Zero & Energy Transition

Green Quadrant: Climate Change Consulting (2025)

By Connor Taylor
With Ryan Skinner

May 2025



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This report provides a detailed, fact-based benchmark of 12 of the most prominent climate change consulting providers in the market. Based on the proprietary Verdantix Green Quadrant methodology, our analysis included live briefings, customer interviews and vendor responses to a detailed 31-point questionnaire, covering five capability and seven momentum categories. This study finds that the market for climate change consulting has shifted in recent years, as organizations seek to develop and implement climate transition strategies, understand and invest in developing climate technologies, prepare for the energy transition, and stay ahead in a volatile regulatory landscape. Amongst the providers featured in the Leaders' Quadrant, six firms – Deloitte, EY, ERM, WSP, KPMG and PwC – demonstrated the most comprehensive climate change consulting capabilities.

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Organizations mentioned

Accenture, AEG, Arcadis, Archroma, Ascendance, Aston Martin, AtkinsRéalis, Bain & Company, BCG (Boston Consulting Group), Capgemini, Capital Power, Circulor, ClimSystems, Connecticut Institute for Resilience & Climate Adaptation, Context Labs, Corporate Knights, Deloitte, dss+, EcoAct, EDF, Energetics, Energize, ENGIE, ERM, EuroNext, EY, GE Vernova, Government of Haryana, HB Reavis, Heineken, Henkel, Iberia, IBM, Jacobs, JPMorgan Chase, K2 Management, Kouros, KPMG, Kua Group, L'Oréal, Malk Partners, McKinsey & Company, McLaren, Microsoft, Mobilize, National Highways, NewFields Companies, Ørsted, Outokumpu, Phoenix Group, Purolator, PwC, Ramboll, Roca Group, Salesforce, Sanofi, SAP, Schneider Electric, Science Based Target initiative (SBTi), ServiceNow, SGA (Gestión Ambiental S.A.), SLR, Stolt-Nielsen, Task Force on Climate-related Financial Disclosures (TCFD), Taskforce on Nature-related Financial Disclosures (TNFD), US Securities and Exchange Commission (SEC), VELUX, Walmart, Wardell Armstrong, Wind Prospect, Wolters Kluwer Enablon, Workiva, WSP, Yara.

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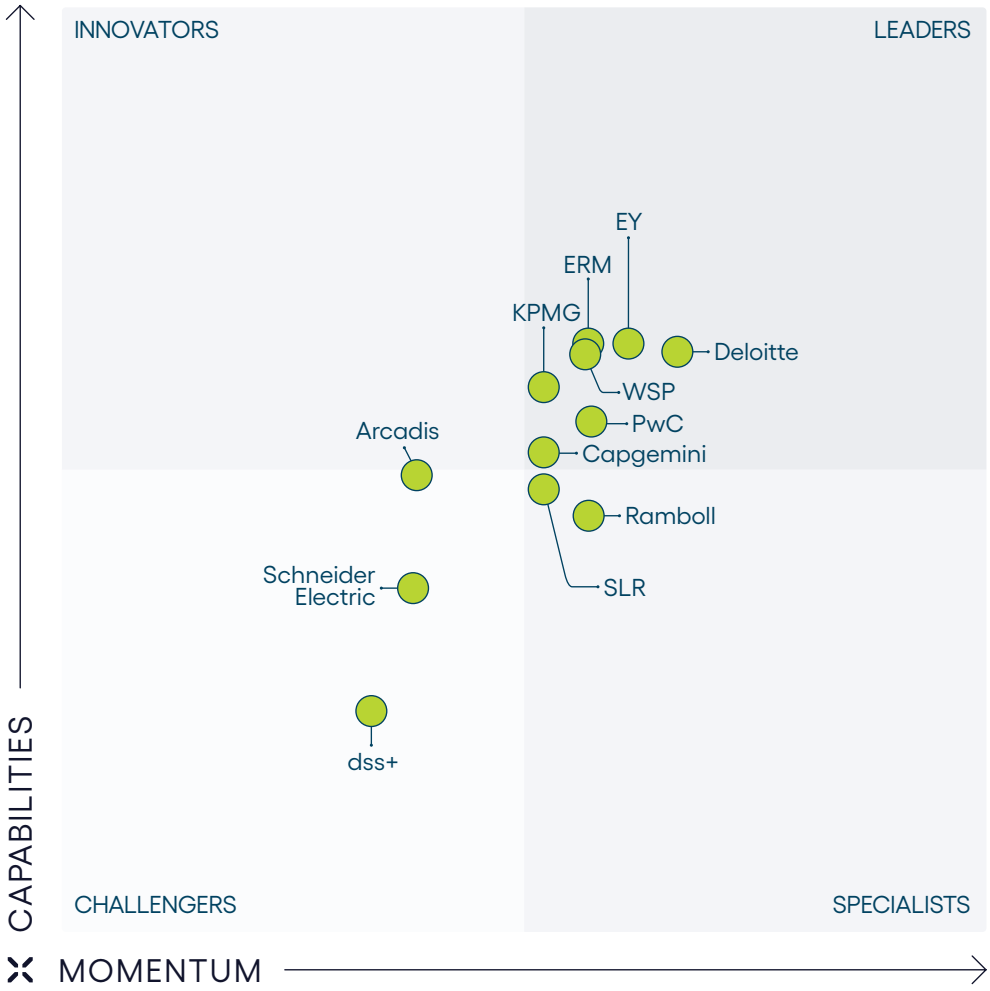
Summary for decision-makers

- This report is designed to help senior executives responsible for climate transition initiatives identify a best-fit provider for climate change consulting, for key support from strategic planning to asset-level implementation.
- Based on the proprietary Verdantix Green Quadrant methodology, our analysis included live briefings, customer interviews and vendor responses to a detailed 31-point questionnaire, examining consulting capabilities and market momentum.
- This study finds that the market for climate change consulting has shifted in recent years, as organizations seek to develop and implement climate transition strategies, understand and invest in developing climate technologies, prepare for the energy transition, and stay ahead in a volatile regulatory landscape.

Figure 5

Green Quadrant for climate change consulting 2025



Source: Verdantix analysis

How to use the Green Quadrant for climate change consulting

This Green Quadrant analysis applies to climate change consulting, which Verdantix defines as:

> *"Services – comprising skilled professionals, methodologies and data resources – that support organizations on their journeys towards decarbonization and climate resilience, encompassing strategy, operations, opportunities and risk."*

This Green Quadrant report assesses and benchmarks 12 leading vendors for climate change consulting, and serves as an update to the 2023 version (see Verdantix Green Quadrant: Climate Change Consulting 2023). The report will help senior executives select climate change consulting providers based on their needs. It positions the vendors into four quadrants: Leaders, Innovators, Specialists and Challengers – each with specific benefits and drawbacks. The report answers the following questions:

- **How are vendors innovating to meet evolving customer needs for climate change consulting?**
- **What differentiates vendors in this space?**
- **Who are the leading climate change consulting vendors?**
- **What should a buyer look for when selecting a climate change consulting provider?**

To answer these questions, Verdantix evaluated 12 vendors using a 31-point questionnaire and live product demonstrations. We also conducted 24 interviews with buyers of climate change consulting. The analysis uses the proprietary Verdantix Green Quadrant methodology, which provides an evidence-based, objective assessment of vendors offering comparable products or services. Additional Verdantix insights on climate change consulting can be found in the 2024 Buyer's Guide (see Verdantix Buyer's Guide: Climate Change Consulting (2024)), which provides an analysis of 53 climate change consulting providers.

Organizations need consulting expertise to navigate the climate transition

Organizational demands for climate change consulting have evolved significantly since 2023 (see Verdantix Green Quadrant: Climate Change Consulting 2023). The past two years have seen dramatic shifts in how climate strategies are both set and communicated, increased technology investment to support the energy transition, and unprecedented volatility in the regulatory landscape. Consequently, buyers need consulting support to:

- **Upgrade climate strategies as best practices develop and stakeholder expectations evolve.** Organizations need consulting support to ensure that climate strategies remain up to date and that they continue to be feasible and meet stakeholder expectations. Over the past two years, firms have shifted from standalone 'net zero' and climate risk strategies – often based on the foundation of the Task Force on Climate-related Financial Disclosures (TCFD) and the Science Based Target initiative (SBTi) – towards more coherent transition plans (see Verdantix Strategic Focus: Transition Risk Primer). This strategic repositioning has reinvigorated the market for strategy-focused climate change consulting; as organizations adopt a broader view of transition risks and opportunities, new topics – such as nature and biodiversity – have becoming key priorities for organizations. A new market for nature-related services has evolved since 2023 in response to developing buyer priorities (see Verdantix Market Insight: The Nature Consulting Services Market).

- **Support climate technology procurement, financing and implementation.**
  To meet decarbonization targets – which form the basis of organizational transition plans – organizations must ultimately invest in developing technologies to reduce emissions and increase energy efficiency. Firms are working with consulting providers more and more to understand the technology landscape, build a business case for investment and finance interventions. Technology groupings can be defined by asset class and use case, from mature building electrification and energy efficiency (see Verdantix Green Quadrant: Building Decarbonization Consulting 2024) to novel low-carbon fuels. As investment increases, so too does demand for site- and asset-level implementation services.

- **Navigate a volatile regulatory landscape.**
  The last decade has seen climate change initiatives shift from a voluntary to a mandatory context; this shift has occurred in fits and starts, exposing organizations to considerable risk. With delays and setbacks to key regulations occurring across the EU and the US – such as the EU's Corporate Sustainability Reporting Directive (CSRD) and the Carbon Border Adjustment Mechanism (CBAM), and the SEC's climate rule – in the past 24 months, organizations are turning to climate change consulting providers to give clarity. Demand has also increased for climate-related tax and incentives advisory services, as firms seek to understand financing options for interventions, and potential financial exposure to mechanisms such as carbon pricing regulation.

Green Quadrant for climate change consulting

Clients of climate change consulting providers seek firms that demonstrate strong subject-matter expertise, experience within relevant industries, and the ability to engage with senior executives and management. Depending on which service is required – and the maturity of the client – relative strengths across strategy, technical and implementation capabilities are strong determining factors for selection.

This Green Quadrant study benchmarks climate change consulting offerings against five capability categories: climate transition strategy; climate transition analysis; climate operational transformation and programme management; energy transition and low-carbon technology support; and climate digital transformation.

Green Quadrant methodology

The Verdantix Green Quadrant methodology provides buyers of specific products or services with a structured assessment of comparable offerings across vendors at a specific point in time. The methodology supports purchase decisions by identifying potential suppliers, structuring relevant purchase criteria through discussions with buyers and providing an evidence-based assessment of the products or services in the market. To ensure the objectivity of the study results, the research process is defined by:

- **Transparent inclusion criteria.**
  We work to analyse all providers that would qualify for inclusion in the research. For those providers that decline our invitation or fail to respond, we work to include them based on publicly available information that would provide an impression of those firms' market positioning if such information was deemed complete and sufficiently accurate to form a basis for benchmarking.

- **Analysis from a buyer's perspective.**
  For this Green Quadrant, we spoke with 24 climate change consulting buyers to understand the relevant buying requirements and weight the evaluation criteria in the model that drives the Green Quadrant analysis graphic. Additionally, we utilized data from Verdantix corporate surveys of net zero and climate change decision-makers to inform the analysis.

- **Reliance on professional integrity.**
  As it would be unfeasible to check all data and claims that providers make, we emphasize the need for professional integrity. Correspondingly, competitors and existing customers can check each provider's assertions, as they are placed in the public domain through this report.
- **Scores based on available evidence.**
  To assess the expertise, resources, business results and strategies of individual providers, we collected evidence from public sources and conducted interviews with multiple representatives of each services provider, as well as industry experts. When providers claimed to be 'best in class', we challenged them to present related evidence.
- **Comparison based on relative capabilities.**
  We constructed measurement scales ranging from 'worst in class' to 'best in class' performance at a certain point in time for each assessment category. A provider's position in the market can change over time depending on how its offering and success evolve compared with its competitors. This means that even if a provider adds new capabilities, makes a strategic acquisition or receives new investment, its Quadrant positioning may not improve relative to other consultants, if its competitors also enhance their offerings. Verdantix repeats a Green Quadrant analysis for a product or service market annually or every two years, to capture these transitions over time.

Evaluated firms and selection criteria

Verdantix defines vendor inclusion criteria to ensure that the Green Quadrant analysis only compares firms with the potential to support implementations of comparable scale and complexity. The 12 climate change consulting providers included in this study were selected because they have:

- **Coverage of over half the Green Quadrant capability categories.**
  To ensure that participants can deliver a wide range of climate change consulting projects – and thereby ensure a competitive analytical playing field – vendors were only included in this Green Quadrant if they demonstrated capabilities across at least 50% of the following capability categories: climate transition strategy; climate transition analysis; climate operational transformation and programme management; energy transition and low-carbon technology support; and climate digital transformation.
- **At least 200 dedicated climate change consultants.**
  Firms only qualified for participation within this Green Quadrant if they employed 200 dedicated climate change consultants. Although firms with a smaller consulting and advisory capacity may be able to provide similar capabilities to those of their larger counterparts, our research finds that they cannot deliver a suitable breadth of project delivery across categories to meet the needs of all buyers.

Based on the inclusion criteria above, this report evaluated 12 climate change consulting providers: Arcadis, Capgemini, Deloitte, dss+, ERM, EY, KPMG, PwC, Ramboll, Schneider Electric, SLR and WSP.

All firms in this study actively participated through interviews and provided questionnaire responses. Verdantix also invited Accenture, Bain & Company, BCG and McKinsey & Company to participate, but these firms chose not to do so.

Evaluation criteria for climate change consulting providers

Verdantix defined the evaluation criteria for the Green Quadrant climate change consulting study through a combination of interviews with senior executives, desk research, discussions with multiple customers and staff expertise. In full, this year's Green Quadrant analysis compares offerings from 12 professional services firms, using a 31-point questionnaire covering five capability categories and seven momentum categories. Individual metrics were classified as follows:

- **Capabilities metrics.**
  The capabilities dimension, plotted on the vertical axis of the Green Quadrant graphic, was used to measure each consulting firm's climate change consulting based on the breadth and depth of that firm's service approach, its differentiators against other providers, and its proven experience in each area. In total, we assessed the providers across 18 capability criteria, representing five distinct capability categories.
- **Momentum metrics.**
  The momentum dimension of the analysis, captured on the horizontal axis of the Green Quadrant graphic, was used to measure each consulting firm based on its market vision, competitive strategy, and the size and scale of each provider's specific climate change consulting business. In total, we assessed the providers across seven distinct momentum categories.

The combination of high-level criteria scores in the Capabilities and Momentum sections generate the Green Quadrant graphic and rankings. **Figure 1** and **Figure 2** provide details of the study criteria; **Figure 3** and **Figure 4** show the scoring for all participants against the criteria. **Figure 1** also presents the weighting of each primary criterion, shown inside the parentheses. **Figure 5** provides the Green Quadrant graphic summarizing the positioning of all consulting firms in this benchmark study.

Figure 1

Capabilities criteria for climate change consulting services

Meta service line	Capabilities	Questions
Climate transition strategy	Decarbonization strategy and pathway development (34%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Climate data management and disclosure (33%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Climate regulation, policy and tax advisory (33%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
Climate transition analysis	Physical climate risk analysis (25%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Transition risk analysis (25%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Climate adaptation analysis (25%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Nature and biodiversity impact analysis (25%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
Climate operational transformation and programme management	Decarbonization intervention analysis, financing and implementation (34%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Supply chain decarbonization (33%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Product-level decarbonization (33%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.

Figure 1 (continued) ↓

Figure 1 (continued)

Energy transition and low-carbon technology support	Renewable energy sourcing and procurement (25%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Carbon capture and removal strategy and implementation (25%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Hydrogen and low-carbon fuel strategy and implementation (25%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Energy storage and grid optimization strategy and implementation (25%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
Climate digital transformation	Digital strategy development and solution design (35%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Digital technology implementation and process change management (35%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Digital solutions for supply chain and product decarbonization (25%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.
	Artifical intelligence strategy and digital implementation (5%)	Describe your capabilities for delivering these engagements for clients, including key differentiating factors that define your approach to project delivery, such as digital tools/ offerings and industry-specific capabilities. Please include how many projects you have delivered over the past 12 months, with named case studies.

Figures in brackets represent the weighting given to each criterion in the flexible multi-criteria model that generates the Green Quadrant graphical analysis.

Source: Verdantix analysis

Figure 2

Momentum criteria for climate change consulting services

Momentum	Questions
Market vision and competitive strategy	How do you see your climate change consulting services evolving over the next 2-3 years? Please describe your vision for scaling up your capabilities and/or expanding your scope in an evolving climate change consulting services market.
Innovation strategy	What is your innovation and R&D strategy to remain at the forefront of climate change consulting services expertise?
Acquisition strategy	What acquisitions relating to climate change consulting have you made in the past 12 months?
Climate change consulting employee size	How many full-time employees do you have who primarily deliver projects related to climate change consulting?
Number of deals	How many climate change consulting service engagements have you delivered over the past 12 months? (A climate change consulting engagement is here defined as a project or deal for which the majority of the itemized work stemmed from activities covered in the capabilities part of this questionnaire.)
Average climate change consulting deal size	What is the average revenue per climate change consulting engagement signed or delivered over the past 12 months? (A climate change consulting engagement is here defined as a project or deal for which the majority of the itemized work stemmed from activities covered in the capabilities part of this questionnaire.)
Climate change consulting revenue	What was your firm's total revenue against projects or deals for which the majority of the itemized work stemmed from activities covered in the capabilities part of this questionnaire (i.e. not digital transformation project revenue for which climate data were a sub-component), in the most recent reporting period (please indicate the reporting period in the answer)? How have these changed since the previous reporting period?

Source: Verdantix analysis

Figure 3

Consulting services provider scores: capabilities

	Arcadis	Capgemini	Deloitte	dss+	ERM	EY	KPMG	PwC	Ramboll	Schneider Electric	SLR	WSP
Decarbonization strategy and pathway development	2	1	2	1	2	3	2	2	1	1	1	2
Climate data management and disclosure	1	2	2	1	2	2	2	2	1	1	1	2
Climate regulation, policy and tax advisory	1	1	3	2	1	2	3	2	1	1	1	1
Physical climate risk analysis	2	1	2	1	2	2	2	2	2	1	3	2
Transition risk analysis	1	1	2	1	3	1	2	1	1	1	2	1
Climate adaptation analysis	3	1	2	1	2	2	2	2	2	0	2	3
Nature and biodiversity impact analysis	2	0	1	0	3	2	2	2	3	0	2	3
Decarbonization intervention analysis, financing and implementation	2	1	1	2	2	2	2	1	1	2	1	3
Supply chain decarbonization	0	1	3	0	2	2	2	2	1	1	1	1
Product-level decarbonization	1	1	2	1	3	2	1	2	3	1	2	2
Renewable energy sourcing and procurement	2	2	2	0	2	2	2	2	1	3	2	2
Carbon capture and removal strategy and implementation	1	1	2	1	2	2	1	1	2	1	2	3
Hydrogen and low-carbon fuel strategy and implementation	2	3	2	0	2	1	1	1	2	0	2	2
Energy storage and grid optimization strategy and implementation	2	1	1	1	1	1	2	2	2	3	2	3
Digital strategy development and solution design	1	3	1	0	1	2	1	1	0	1	0	1
Digital technology implementation and process change management	2	3	2	0	2	2	2	2	1	1	1	1
Digital solutions for supply chain and product decarbonization	1	3	2	0	1	2	1	1	0	1	1	1
Artifical intelligence strategy and digital implementation	0	2	1	0	0	1	1	1	0	1	0	0

Note: See Figure 4 for the scoring framework.
Source: Verdantix analysis

Figure 4

Consulting services provider scores: momentum

	Arcadis	Capgemini	Deloitte	dss+	ERM	EY	KPMG	PwC	Ramboll	Schneider Electric	SLR	WSP
Market vision and competitive strategy	1	2	2	1	2	2	2	2	1	1	2	2
Innovation strategy	1	2	2	1	2	2	2	1	2	1	2	1
Acquisition strategy	1	1	1	1	2	2	0	0	2	2	2	2
Climate change consulting employee size	1	1	2	1	1	2	2	2	2	1	1	2
Number of deals	2	1	2	1	2	1	1	2	2	1	2	1
Average climate change consulting deal size	1	2	2	1	1	2	2	2	1	1	1	2
Climate change consulting revenue	1	2	3	1	2	2	2	3	2	1	1	2

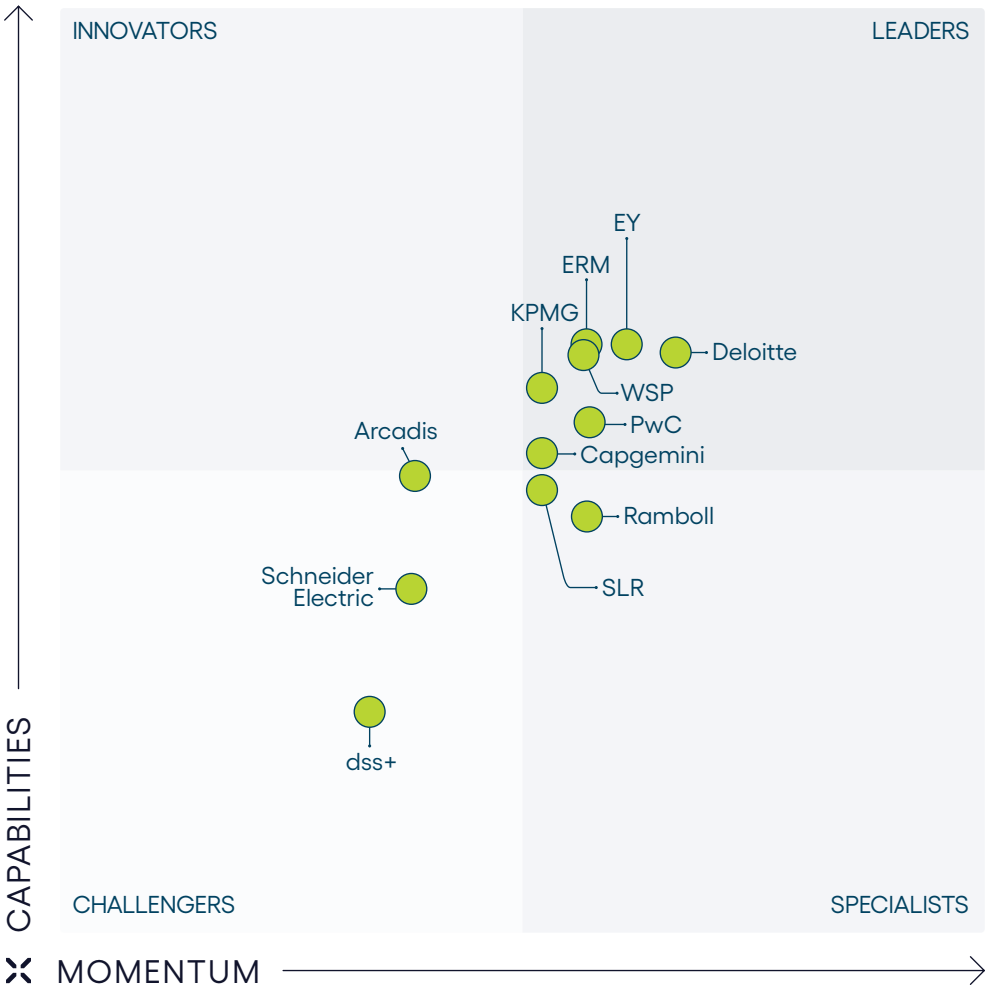
Scoring framework	
Evidence of market-leading functionality or positioning	3
Evidence of strong, above-par functionality or positioning	2
Evidence of on-par functionality or positioning	1
Lack of evidence, or evidence of sub-par or a lack of functionality or positioning	0

Verdantix research teams determine all scores at either sub-criteria level (for capabilities) or criteria level (for momentum), using the scoring framework above. These assessed scores are then weighted and compiled into derived scores at criteria or capability/momentum level.

Source: Verdantix analysis

Figure 5

Green Quadrant for climate change consulting 2025



Capabilities

This dimension measures each service provider on the breadth and depth of its climate change consulting services across five capability criteria, as outlined in **Figure 1**.

Momentum

This dimension measures each service provider against seven momentum criteria, as outlined in **Figure 2**.

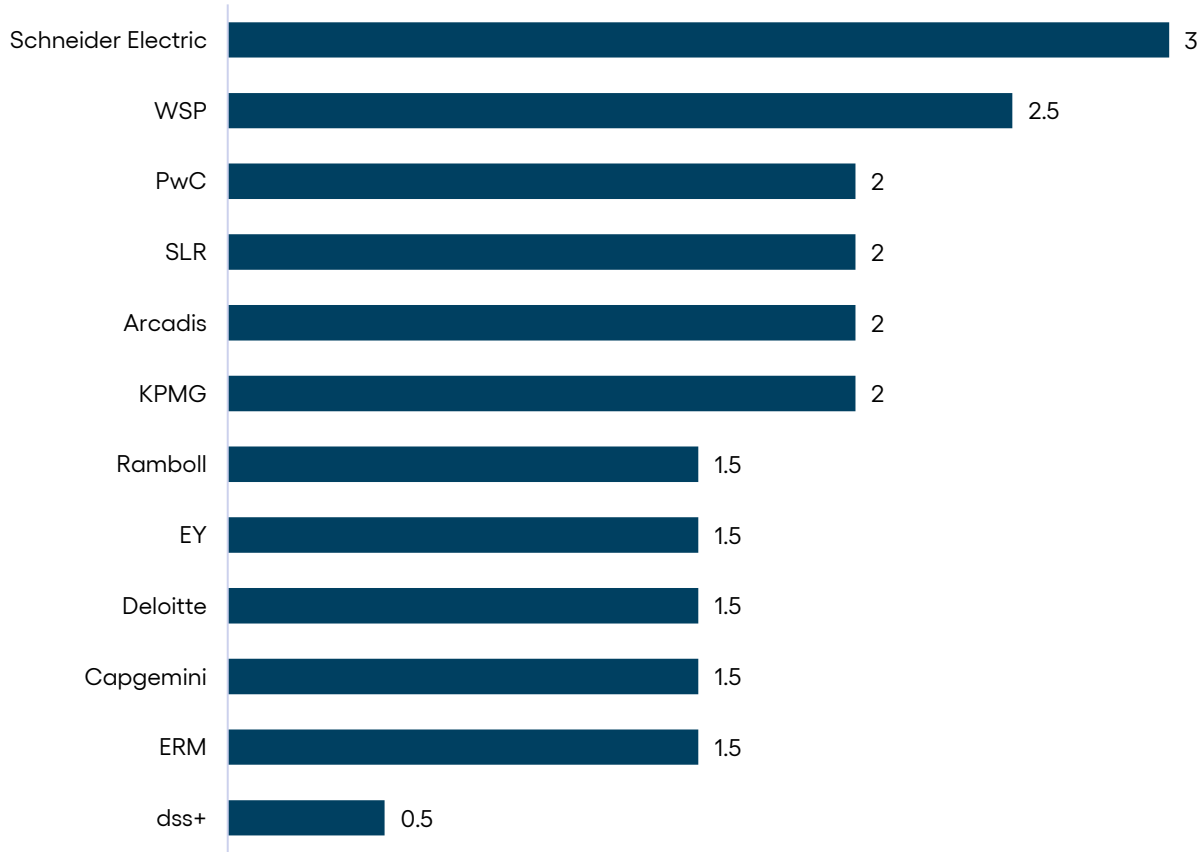
Source: Verdantix analysis

Leading capabilities for renewable energy procurement and energy services

Within the Green Quadrant, Schneider Electric and WSP demonstrated leading capabilities for firms prioritizing renewable energy procurement and electrification (see **Figure 6**). This analysis represents the capabilities of all Green Quadrant participants for the 'Renewable energy sourcing and procurement' and 'Energy storage and grid optimization strategy and implementation' criteria. Schneider Electric and WSP are differentiated in the market due to their expertise in delivering asset-level electrification projects and expertise in working with energy supply- and demand-side organizations.

Figure 6

Green Quadrant analysis for renewable energy procurement and electrification services



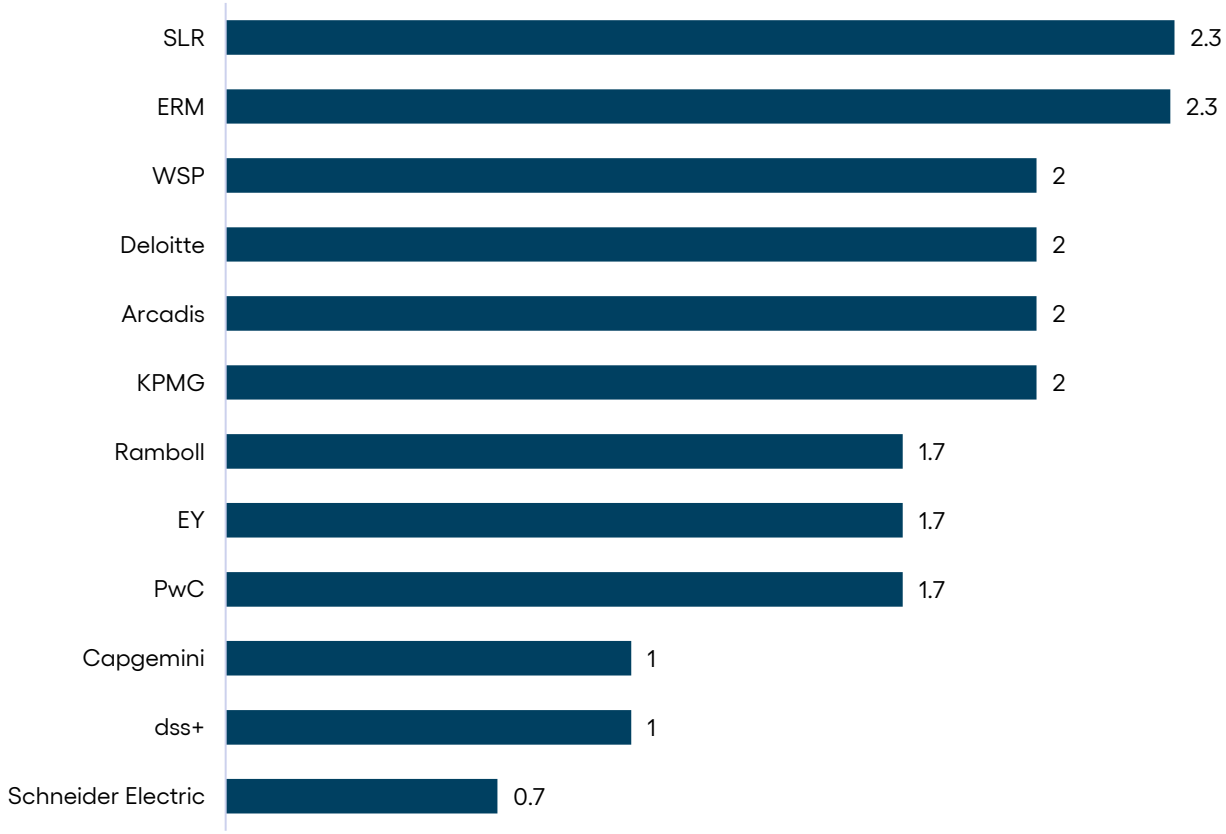
Source: Verdantix analysis

Leading capabilities for climate risk analysis

SLR and ERM demonstrated market-leading capabilities for climate risk analysis projects (see **Figure 7**). This analysis represents the capabilities of all Green Quadrant participants for the 'Physical climate risk analysis', 'Transition risk analysis' and 'Climate adaptation analysis' criteria. SLR and ERM emerged as market-leaders due to the strength of their scientific expertise, breadth of historic project delivery and cross-industry capabilities.

Figure 7

Green Quadrant analysis for climate risk analysis services



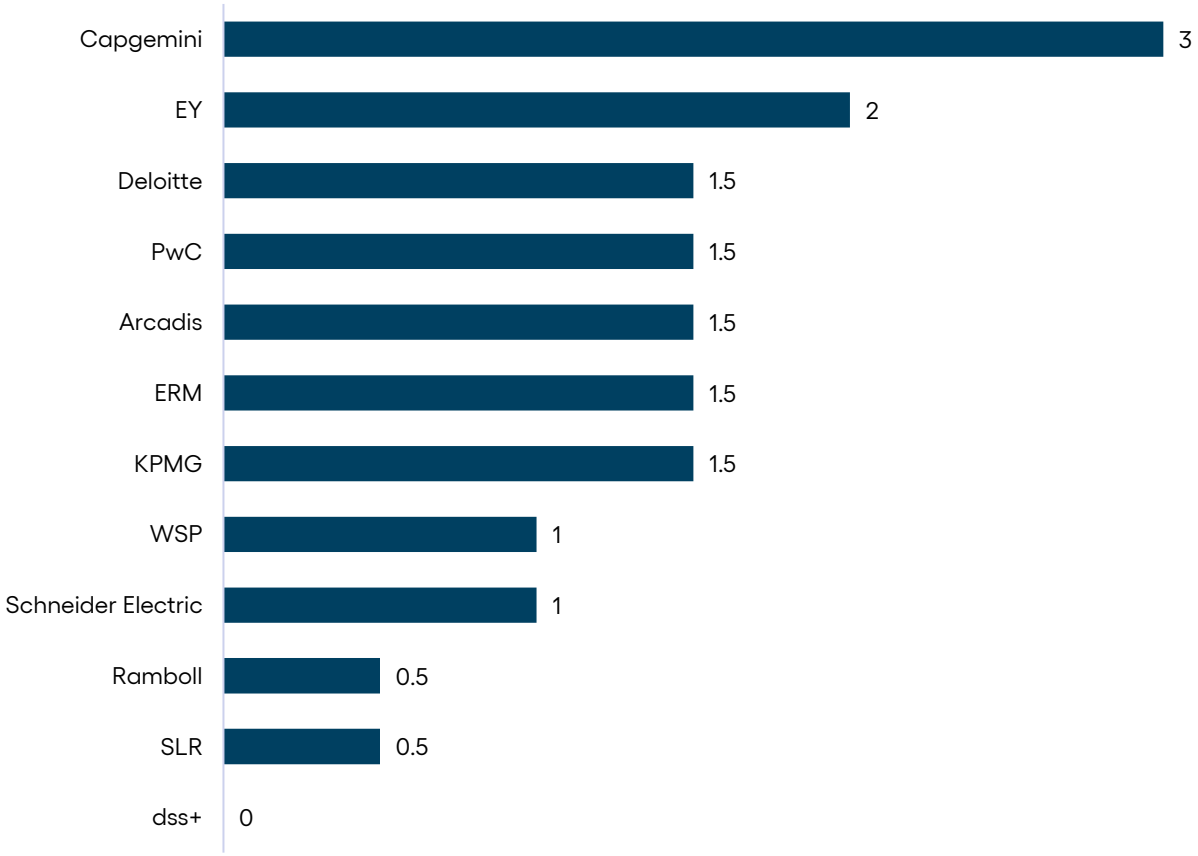
Source: Verdantix analysis

Leading capabilities for digital technology implementation and strategy development

Capgemini and EY displayed market-leading capabilities for digital technology implementation and strategy development projects (see **Figure 8**). This analysis represents the capabilities of all Green Quadrant participants for the 'Digital strategy development and solution design' and 'Digital technology implementation and process change management' criteria. Capgemini and EY are differentiated in the market due to the breadth of their partnership programmes, their ability to manage digital transformation projects and the strength of their proprietary digital solutions.

Figure 8

Green Quadrant analysis for digital technology implementation and strategy development services



Source: Verdantix analysis

Arcadis overview

Information

Arcadis is a global design and engineering consultancy for natural and built assets, founded in the Netherlands in 1888. Its climate change consulting offerings are built on legacy offerings for environmental, energy, transportation and building-related services. Arcadis has made several acquisitions that have boosted its climate change services in recent years, such as Giftge Consult to strengthen its energy transition offerings, Kua Group, which designs efficient data centres, and IBI Group, a sustainable design and engineering consultancy.

Vendor info

Firm name	Arcadis
Headquarters	Amsterdam, the Netherlands
Employees	36,000
Revenues	€5.12bn
No. of offices	350
Example customers	Archroma, HB Reavis, Heineken

Customer regional presence

Asia	<10%
Oceania	<10%
Europe	25%-50%
Middle East and Africa	<10%
Latin America and the Caribbean	<10%
North America	above 50%

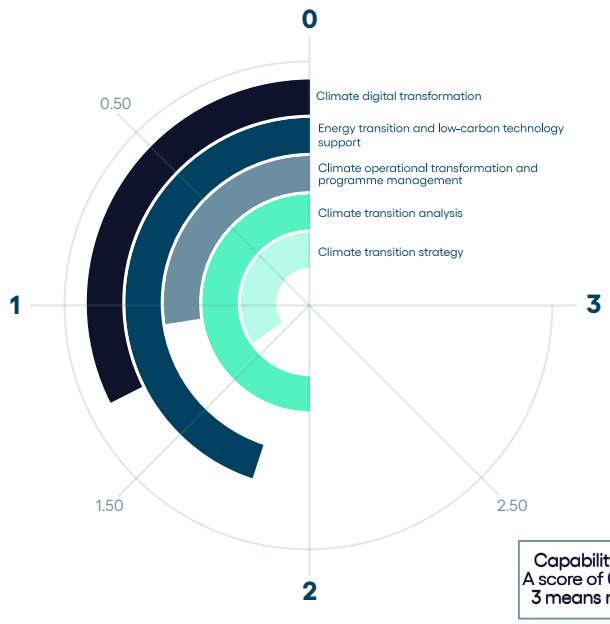
% Customer base

0% <10% 10%-25% 25%-50% above 50%

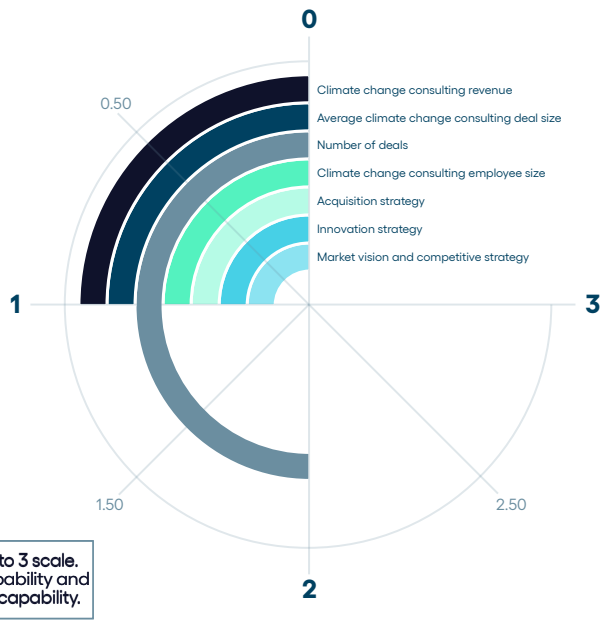
Arcadis's top three industry penetration

1. Public administration
2. Manufacturing
3. Real estate

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

Arcadis provides deep technical expertise across climate transition analysis and technology implementation

The Green Quadrant analysis finds that Arcadis provides:

- **Strong capabilities for climate transition analysis, built on legacy environmental service offerings.** Arcadis was one of the top scorers for climate transition analysis. In particular, Arcadis demonstrated market-leading capabilities for climate adaptation analysis, working across sectors such as real estate, transportation and energy. Arcadis's adaptation services range from intervention analysis to business case development and implementation planning, supported by digital tools such as Climate Risk Nexus, which models climate hazards against asset-level data, to inform adaptation planning. Arcadis also showed strong capabilities in physical climate risk analysis, due to its global project delivery capabilities and cross-sector expertise.
- **Weaker capabilities for operational transformation and programme management.** Arcadis has relatively weaker offerings in climate operational transformation and programme management, and in particular in supply chain decarbonization; the firm has delivered fewer supply chain decarbonization projects than its competitors over the past twelve months.
- **Best-fit services for firms in select industries, such as real estate, manufacturing and transportation.** Arcadis has developed strong climate change consulting offerings for firms in asset-intensive industries, reflecting its expertise and heritage as a design and engineering firm. Arcadis demonstrates particular strengths in helping clients in these sectors identify and finance decarbonization interventions, using tools such as COSIS – which assesses the energy performance of buildings and identifies decarbonization measures – and Net Zero Catalyst, which helps organizations identify cost-effective decarbonization strategies. Arcadis is working with Heineken to implement net zero plans across four manufacturing sites, encompassing roadmap development, engineering and design, and implementation, as part of Heineken's 'Integrated Net Zero Production' programme. Heineken aims to reduce 88% of Scope 1 and 2 emissions resulting from beverage production.

Capgemini overview

Information

Capgemini is an IT services and consulting provider, founded in 1967 and headquartered in Paris, France. In 2019, Capgemini acquired Altran Technologies, subsequently launching Capgemini Engineering; Capgemini now provides end-to-end engineering services, including dedicated R&D service lines. In 2021, Capgemini formalized its approach to sustainability services development through the launch of the Sustainability Accelerator, and in June 2022, it launched the Sustainability Campus to upskill its workforce on sustainability topics.

Vendor info

Firm name	Capgemini
Headquarters	Paris, France
Employees	340,000
Revenues	€22.1bn
No. of offices	Not disclosed
Example customers	Ascendance, Henkel, Mobilize

Customer regional presence

Asia	-
Oceania	-
Europe	-
Middle East and Africa	-
Latin America and the Caribbean	-
North America	-

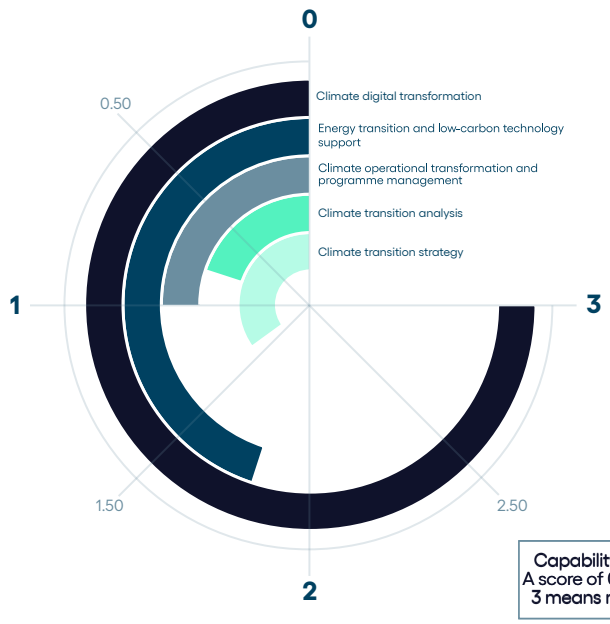
% Customer base

○ 0% ◔ <10% ◑ 10%-25% ◕ 25%-50% ● above 50%

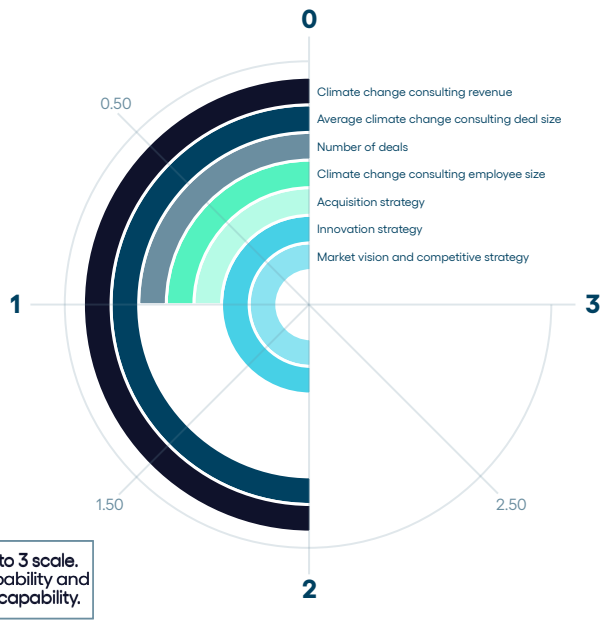
Capgemini's top three industry penetration

Not disclosed

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

Capgemini champions a digital-first approach to climate change consulting

The Green Quadrant analysis finds that Capgemini offers:

- **Best-in-class services for climate digital transformation.**
  Capgemini's climate digital transformation capabilities stand head and shoulders above its peers in the climate change consulting space. The firm has built on its legacy as an IT services provider and developed comprehensive approaches to digital systems integration, design and change management. Capgemini's Sustainability Data Hub automates data ingestion from multiple systems, performs automated data quality checks and improves data governance for organizations. In line with its digital supremacy, Capgemini is the market-leader for AI-related services in climate change consulting; the firm has brought to market a suite of AI solutions for climate change, covering use cases encompassing reporting and Scope 3 modelling.

- **Limited capabilities for climate transition analysis.**
  Capgemini's climate transition analysis capabilities are weaker than most of its peers. Despite strong digital offerings for climate and adaptation risk analysis, Capgemini has a relatively narrow suite of capabilities in this area, focused on business case design and intervention implementation. Furthermore, Capgemini has developed fewer transition- and nature-specific projects than competitors within the Green Quadrant.

- **Leading support for organizations looking to develop and bring to market climate technologies.**
  Due to its strong engineering and R&D capabilities, Capgemini is a best-fit partner for organizations looking to both industrialize and implement climate change technologies. The firm helps organizations to commercialize climate change technologies, providing services to develop technology concepts, conduct feasibility analysis, manage financing and operationalize technologies. These capabilities are supported by Capgemini's digital solutions for digital twins and digitized plants. Transportation provider Kouros worked with Capgemini to launch Hyliko, a mobility platform that offers hydrogen-fuelled transportation as a service, and to develop its investment case and go-to-market strategy. Within its first year, Hyliko had signed contracts to deliver hydrogen-powered trucks to the market.

Deloitte overview

Information

Founded in 1845, Deloitte is an international professional services network headquartered in London, UK. Deloitte offers a range of services, from tax, audit and assurance to strategy consulting. Since the early 2020s, Deloitte has built its climate change consulting capabilities through acquisition (notably CarbonCare Asia, OCT Emissions Solutions and PACER) and through organic growth. Over the past two years, Deloitte has invested in building its digital capabilities for climate change consulting, through the development of solutions such as Deloitte GreenLight Solution (for decarbonization pathway development) and ClearCarbon (for carbon reduction and removal management).

Vendor info

Firm name	Deloitte
Headquarters	London, UK
Employees	460,000
Revenues	$67bn
No. of offices	700+
Example customers	Government of Haryana, McLaren, Purolator

Customer regional presence

Asia	◑
Oceania	◔
Europe	◕
Middle East and Africa	◔
Latin America and the Caribbean	◔
North America	●

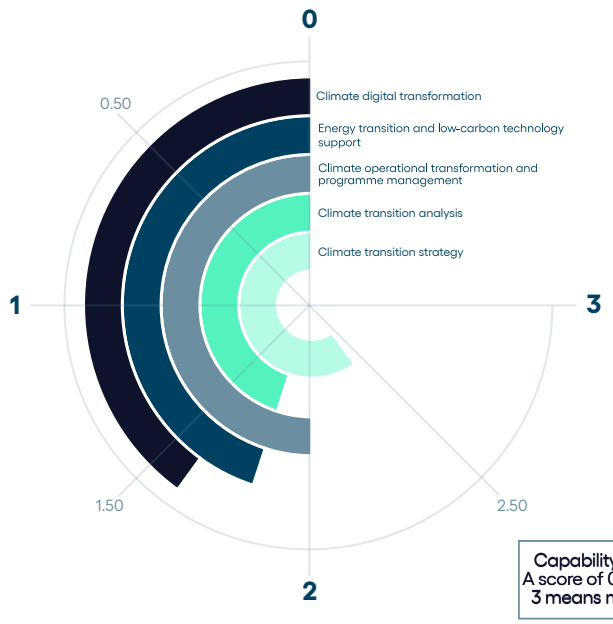
% Customer base

○ 0% ◔ <10% ◑ 10%-25% ◕ 25%-50% ● above 50%

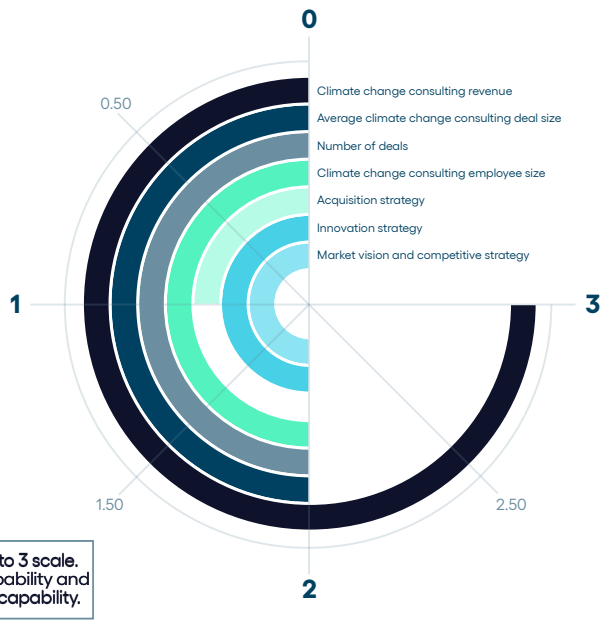
Deloitte's top three industry penetration

1. Public administration
2. Finance
3. Utilities

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

Deloitte delivers comprehensive services, from boardroom strategy to technology implementation

The Green Quadrant analysis finds that Deloitte has:

- **Best-in-class capabilities for delivering climate transition strategy services across industries.**
  Deloitte is one of the top providers of climate transition strategy services across the Green Quadrant, due to its breadth of capabilities – spanning decarbonization strategy to regulation and tax – and the strength of its digital solutions. Its GreenLight Solution helps organizations develop project roadmaps to target investments to help financial and decarbonization returns, and includes a global incentives and tax credits hub covering 16,000 programmes across 70 countries. In January 2023, Deloitte launched GreenSpace Tech, an initiative to help organizations understand how to implement and build a business case for climate technology adoption, thus connecting technology providers with industry.

- **Fewer climate digital transformation projects than some competitors.**
  Despite offering a strong portfolio of proprietary digital solutions, Deloitte's weakest area is in climate digital transformation, reflecting some limitations in end-to-end digital transformation projects. It demonstrated a greater ability to add value through innovative technology support than end-to-end digital strategy design. Deloitte also delivered fewer digital-transformation-focused projects than leaders in this category.

- **A strong suite of services for firms looking to implement innovative climate transition strategies.**
  Deloitte performed strongly against competitors for implementation-focused capabilities, such as supply chain and product decarbonization; when combined with its experience in delivering climate transition strategy projects, the firm emerges as a best-fit provider for organizations looking to develop implementation plans for innovative climate technologies. Deloitte works with the McLaren Formula 1 Team to reduce emissions through improved circularity, waste elimination and resource maximization.

dss+ overview

Information

Geneva-headquartered dss+, formerly known as DuPont Sustainable Solutions, is a global operations management consulting firm with expertise in operational efficiency and risk management, EHS and sustainability-focused services. Originally functioning as the consulting arm of chemicals giant DuPont, dss+ undertook a management buyout to become an independent entity in 2019. dss+ has the equivalent of 300 full-time consultants working in climate change consulting.

Vendor info

Firm name	dss+
Headquarters	Geneva, Switzerland
Employees	2,000
Revenues	$303m
No. of offices	40
Example customers	Not disclosed

Customer regional presence

Asia	○
Oceania	○
Europe	●
Middle East and Africa	◕
Latin America and the Caribbean	○
North America	◔

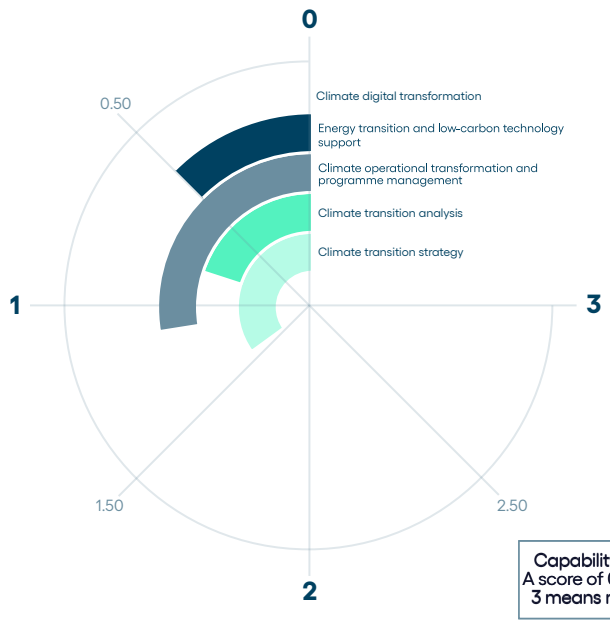
% Customer base

○ 0% ◔ <10% ◑ 10%-25% ◕ 25%-50% ● above 50%

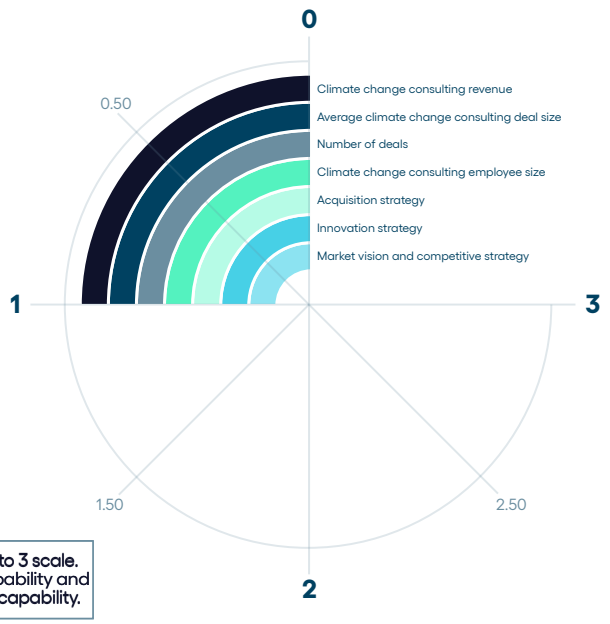
dss+'s top three industry penetration

1. Mining, metals and minerals
2. Oil and gas
3. Agriculture

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

dss+ uses operational expertise to develop and implement transition plans

The Green Quadrant analysis finds that dss+ provides:

- **Deep capabilities for implementing climate transition plans at the site level.**
  dss+ has strong capabilities in decarbonization intervention analysis, financing and implementation. As a consulting firm with a long history of operations-focused project delivery – including dedicated service lines for operational risk management (ORM), operational excellence and organizational transformation – dss+ has strong capabilities to implement climate transition plans, particularly for emissions-intensive sectors. The firm's Integrated Framework for operationalizing climate strategy focuses on process management and technical scenario-modelling, alongside capability building and cultural transformation. dss+ also has a dedicated due diligence service line, which can deliver site-based due diligence assessments for investors.
- **Weak capabilities for climate digital transformation.**
  dss+ has only limited capabilities for digital-focused project delivery. The firm offers digital solutions for risk management through the dss+ 360 platform, but has yet to develop notable capabilities for climate change digital transformation, or a competitive partnership strategy with external solution providers. Furthermore, dss+ does not have significant capabilities for nature-related services.
- **Market-leading services implementing operational decarbonization strategies for emissions-intensive sectors.**
  A key differentiator for dss+ is its expertise across emissions-intensive sectors, such as manufacturing, mining and metals, and agriculture. The firm has developed industry-targeted strategy frameworks and models for critical business processes that align with emissions-intensive industries, such as low-carbon technologies, and energy transition business models. dss+ also has significant expertise in advising on expenditure plans, asset maintenance and management, and policy, through its operational consulting heritage. The firm worked with one global equipment manufacturer to identify specific decarbonization initiatives at the site level, highlight maturity gaps and identify corrective actions amongst staff.

ERM overview

Information

Founded in 1971, ERM is the largest dedicated sustainability consultancy globally, and is headquartered in London, UK, with more than 150 offices globally and 1,500 climate change consultants. In recent years the firm has developed an ambitious go-to-market strategy for climate change consulting, characterized by the formation of specific climate change service lines; partnerships with digital solutions such as Wolters Kluwer Enablon and Workiva; and a focus on acquisitions to expand capabilities and geographic reach, acquiring 'The Big Group', Energetics and the environmental division of NewFields Companies in the past 12 months alone.

Vendor info

Firm name	ERM
Headquarters	London, UK
Employees	8,000
Revenues	$1.4bn
No. of offices	150+
Example customers	ENGIE, JPMorgan Chase, Salesforce

Customer regional presence

Asia	◑
Oceania	◑
Europe	◑
Middle East and Africa	◑
Latin America and the Caribbean	◔
North America	◕

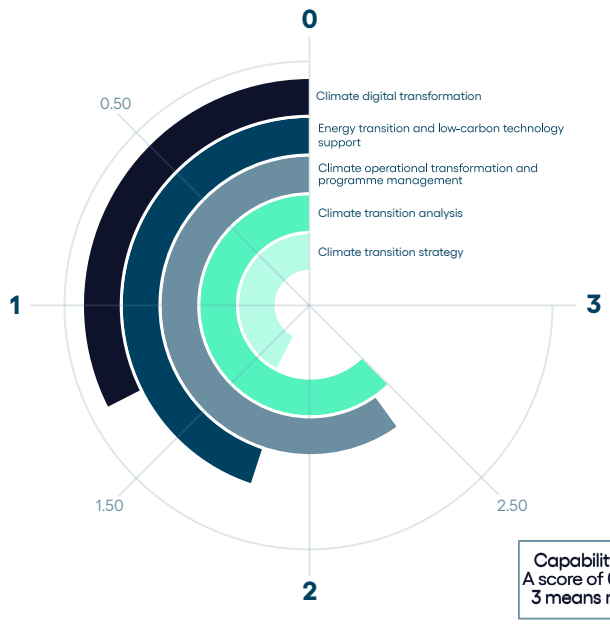
% Customer base

○ 0% ◔ <10% ◑ 10%-25% ◕ 25%-50% ● above 50%

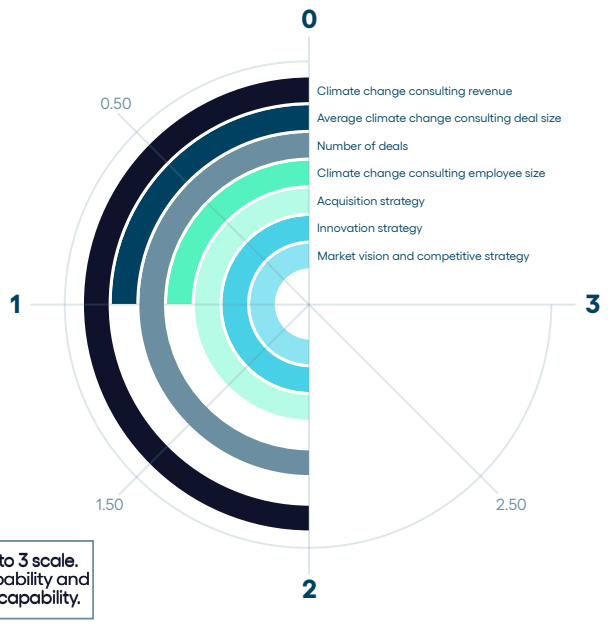
ERM's top three industry penetration

1. Manufacturing
2. Utilities
3. Technology, media and telecommunications

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

ERM combines technical and strategy expertise to deliver climate change consulting projects at scale

The Green Quadrant analysis finds that ERM offers:

- **Market-leading capabilities for climate transition analysis.**
  ERM is the world's leading provider of climate transition analysis, which reflects the breadth of its offerings for climate risk analysis across physical, transition and nature-related topics. ERM's value proposition for climate transition analysis is supported by strong proprietary digital solutions, notably its Climate Impact Platform. ERM also has a strong legacy in conducting scenario analysis and was responsible for preparing the technical guidance scenario analysis implementation for the Task Force for Climate-related Financial Disclosures (TCFD). The firm's nature-related services are notably mature, due to its environmental services legacy; it provides site-based nature services, such as impact analysis, alongside overarching strategy support.

- **Digital services focused on implementation, rather than overarching transformation.**
  ERM's weakest climate change consulting capability is in climate digital transformation, reflecting the firm's limited scope for offering full end-to-end services in this area. It focuses on providing vendor selection and implementation-related services for climate solutions, rather than comprehensive digital transformation projects, thus limiting its market penetration in this area. Further, the firm's capabilities for artificial intelligence strategy and digital implementation are among the weakest in this assessment.

- **Specific capabilities geared towards a range of industry sectors.**
  No vendors exceed ERM in terms of the overall breadth and depth of their climate change consulting capabilities. The firm has expanded its capabilities to service both its historical client base – focused on emissions-intensive industries – and gain a competitive foothold within sectors such as finance. For power and utility customers, ERM offers services to support capital investment strategies, implement energy technologies and optimize grid capacity; for financial services, relevant offerings encompass portfolio decarbonization strategy and analysis. The firm also delivers dedicated services for oil and gas firms, such as supporting product differentiation strategies based on environmental attributes.

EY overview

Information

EY is a global professional services firm headquartered in London, UK. Established in 1989 after the merger of Ernst & Whinney and Arthur Young & Co., it provides assurance, consulting, strategy and transactions, and tax services, and has delivered climate change consulting services since the early 2000s. In April 2024, EY acquired Austria-based sustainability consulting provider Denkstatt.

Vendor info

Firm name	EY
Headquarters	London, UK
Employees	400,000
Revenues	$51.2bn
No. of offices	Not disclosed
Example customers	Not disclosed

Customer regional presence

Asia	◑
Oceania	◑
Europe	◕
Middle East and Africa	◔
Latin America and the Caribbean	◔
North America	◑

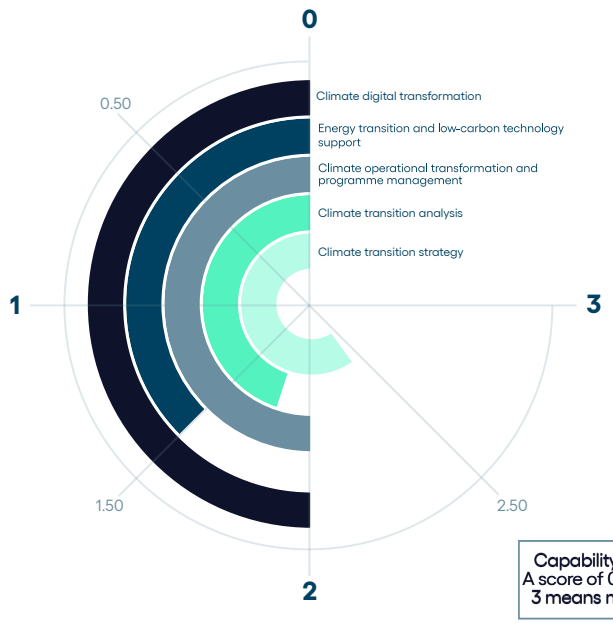
% Customer base

○ 0% ◔ <10% ◑ 10%-25% ◕ 25%-50% ● above 50%

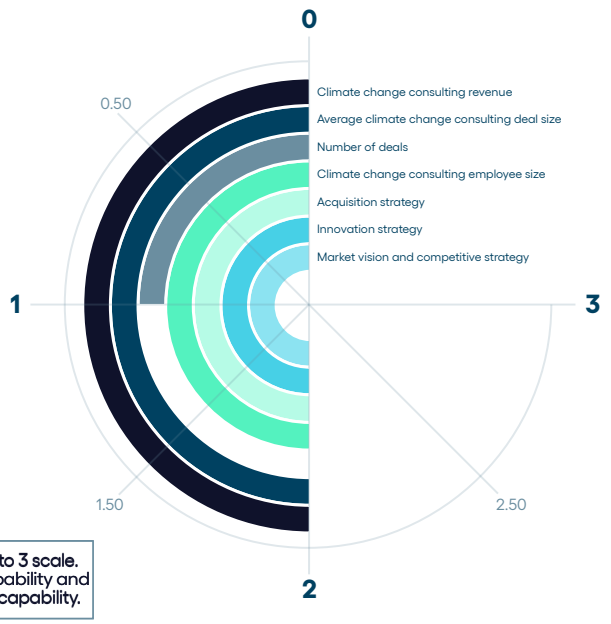
EY's top three industry penetration

1. Finance
2. Manufacturing
3. Utilities

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

EY delivers globally aligned consulting services supported by strong digital capabilities

The Green Quadrant analysis finds that EY has:

- **Market-leading capabilities for delivering climate transition strategy engagements.**
  EY is a world-leader in providing climate transition strategy. The firm demonstrated a robust breadth of offerings across strategy-setting, data management, and regulation and policy advisory. EY has developed a robust and mature digital solution portfolio to improve project delivery. EY's ESG Reporting Regulatory Scan helps organizations respond to changing climate regulations, and its dedicated Carbon Border Adjustment Mechanism (CBAM) compliance tool helps organizations calculate embodied emissions and estimate financial impact. EY's strengths in these areas are underlined by the maturity of its digital services capabilities; its partner ecosystem has over 135 members, including IBM, Microsoft and SAP.

- **Weaker capabilities for energy transition and low-carbon technology strategy and implementation.**
  EY has more limited capabilities for energy transition and low-carbon technology support than most vendors across the Green Quadrant. For projects related to low-carbon fuels and energy storage and grid optimization, EY delivered fewer projects than top-performing competitors in this area. Moreover, despite strong capabilities for certain project types – such as investment advisory and feasibility analysis – EY does not frequently deliver projects involving on-site implementation, or critical services relating to permitting.

- **Global capabilities for multinational organizations, across key climate change consulting services.**
  EY has consistently strong offerings across most of the climate change consulting capabilities that clients ask of it, as well as significant penetration across geographies and industries. It worked with Yara – a crop nutrition and agricultural solutions provider with operations across 160 countries – to quantify physical and transition risks across a time frame to 2030 and 2050. EY has also invested significantly in aligning global capabilities for climate change consulting, and has built dedicated global offerings for climate technology, digital, and broader ESG and sustainability services; it is therefore particularly suited to selection by multinational organizations with a diverse operational footprint.

KPMG overview

Information

Headquartered in Amstelveen, the Netherlands, and with a history dating to 1891, KPMG is a multinational professional services network offering services across audit and assurance, tax and legal, and advisory. In October 2021 it announced a $1.5 billion investment in its global ESG solutions, to be spent on training and expanding the firm's global workforce. The firm also invested in building a dedicated global decarbonization hub, thereby aligning its global climate change, decarbonization and nature services; the hub is supported by dedicated practices for global climate policy and incentives and energy and natural resources.

Vendor info

Firm name	KPMG
Headquarters	Amstelveen, the Netherlands
Employees	280,000
Revenues	$38.4bn
No. of offices	700+
Example customers	L'Oréal, Outokumpu, Stolt-Nielsen

Customer regional presence

Asia	◕
Oceania	◑
Europe	◕
Middle East and Africa	◔
Latin America and the Caribbean	◔
North America	◑

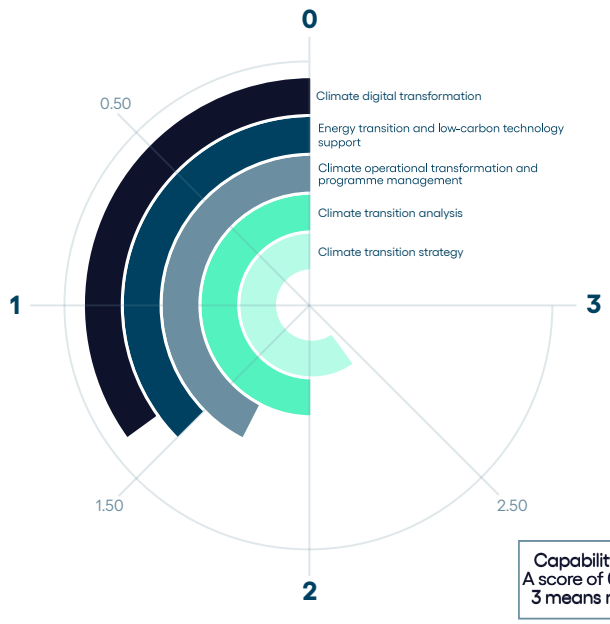
% Customer base

○ 0% ◔ <10% ◑ 10%-25% ◕ 25%-50% ● above 50%

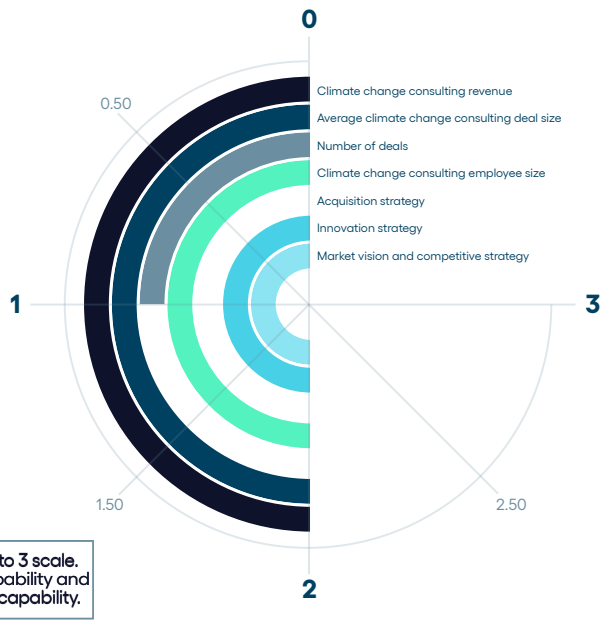
KPMG's top three industry penetration

Not disclosed

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

KPMG blends strategy and operational transformation expertise for climate change

The Green Quadrant analysis finds that KPMG has:

- **Market-leading climate regulation, policy and tax advisory services.**
  KPMG is one of the world's most effective providers of climate regulation, policy and tax advisory. Reflecting its historical tax advisory offerings, KPMG has developed services to help organizations manage and navigate the landscape of environmental taxes, including specific carbon-related taxes; these are formalized under its Global Climate Policy & Incentives Advisory Hub (CPIA) and ESG Tax & Legal Advisory. The firm has also built strong digital capabilities in this area through a proprietary ESG tax tracker covering more than 80 countries and supported by global KPMG specialists, and through partnerships with over 60 technology providers, including Circulor, Context Labs and ServiceNow. Through a network of over 3,000 tax professionals, organizations can access specific tax and compliance expertise in local jurisdictions.

- **Limitations in climate digital transformation services.**
  KPMG has weaker digital strategy development and solution design capabilities than some of its competitors in this Green Quadrant. It provides organizations with services focused on technology selection and implementation, but has some gaps in change management and comprehensive digital strategy development. Furthermore, KPMG has a smaller partnership network with external providers than some competitors and has co-developed fewer dedicated solutions for climate change.

- **Leading energy transition services for the power and utilities sector.**
  KPMG has a dedicated energy transition team, delivering services relating to tax, renewable energy procurement and commercial advisory. The firm has holistic capabilities for commercial power purchase agreement (PPA) support, encompassing implementation, risk mitigation and trading strategies – offerings underpinned by its global footprint. KPMG is differentiated by its experience in strategy and transactions across the power and utilities sector; in the last 12 months, it conducted buy-side due diligence for a high voltage connection provider and a data centre building management systems integrator.

PwC overview

Information

PwC was founded in 1998, when Coopers & Lybrand merged with Price Waterhouse; both constituent firms have histories dating to the 18th century. PwC is an international professional services network of firms, which operate as partnerships under the PwC brand. As a multi-disciplinary practice – with dedicated advisory, tax and assurance lines, amongst others – PwC provides a range of climate change consulting services; in 2023, it launched the global Centre for Nature Positive Business, consisting of some 500 nature specialists from across the PwC network.

Vendor info

Firm name	PwC
Headquarters	London, UK
Employees	364,000
Revenues	$55.4bn
No. of offices	Not disclosed
Example customers	GE Vernova, Iberia, Phoenix Group

Customer regional presence

Asia	◑
Oceania	◔
Europe	●
Middle East and Africa	◔
Latin America and the Caribbean	◔
North America	◑

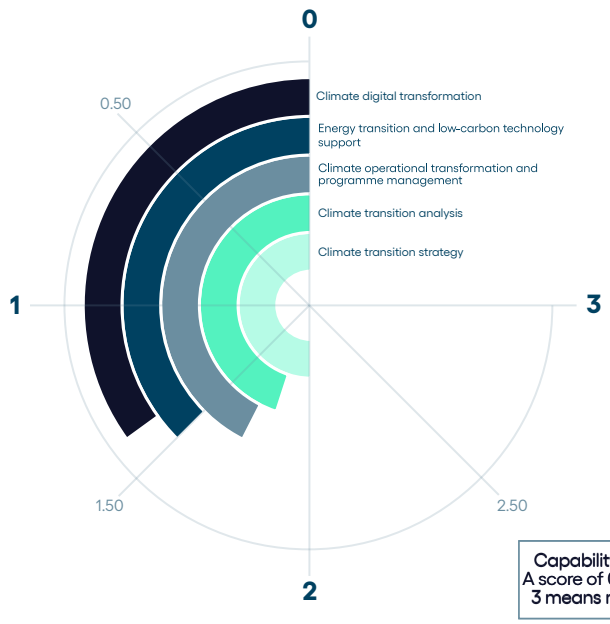
% Customer base

○ 0% ◔ <10% ◑ 10%-25% ◕ 25%-50% ● above 50%

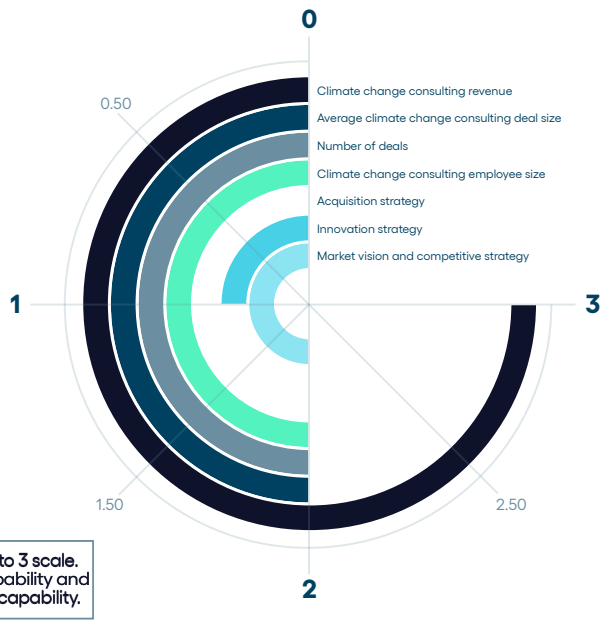
PwC's top three industry penetration

Not disclosed

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

PwC excels at delivering climate transition strategy engagements for diverse industries

The Green Quadrant analysis finds that PwC offers:

- **Leading strategy capabilities supported by a robust digital solution suite.**
  PwC is a market-leader for climate transition strategy engagements. Its approach to strategy engagements consists of four phases: maturity and baselining, strategy development, transformation road mapping, and transformation implementation. The firm has developed a comprehensive suite of digital tools – known as the Sustainability Tech Suite – to support project delivery. The Carbon Intelligence Hub is a database containing over 2,000 industry-specific decarbonization levers; its Emissions Tracker is a carbon management solution focusing on supply chain emissions.

- **Limited capabilities for specific energy transition technologies.**
  PwC does not deliver the full breadth of services – from strategy to implementation – for certain technology use cases, notably carbon removal and green low-carbon fuels. Its offerings focus on strategic advisory, regulatory and policy guidance, and financial and investment analysis, with weaker capabilities for implementation and specialist services such as permitting, design and environmental studies. PwC regularly partners with firms such as AtkinsRéalis and Jacobs for engineering capabilities.

- **Mature transition nature strategy capabilities, across industries.**
  PwC has strong capabilities for a range of transition analysis projects, from physical climate risk and nature to climate adaptation and mitigation. In particular, its nature offerings – structured under the dedicated global Centre for Nature Positive Business – are market-leading for strategy and data analysis. PwC worked with the Taskforce for Nature-related Financial Disclosures (TNFD) to assess the nature data landscape and identify key issues and challenges for organizations. Additionally, it worked with a global pharmaceutical firm to develop a nature-positive strategy and develop short- and long-term targets for biodiversity, water, waste and resources.

Ramboll overview

Information

Ramboll is a Copenhagen-headquartered consulting engineering group; in 2003, following a merger with Swedish Scandiaconsult, the firm became the largest consulting engineering group in the Nordics. Ramboll's overarching sustainability strategy – entitled The Partner for Sustainable Change – has led to investments in green energy, decarbonization capabilities for energy-intensive sectors and in sustainable urbanization services, amongst others. Ramboll's Innovation and Digital Transformation group is focused on scaling digital innovation. In 2024, it made three acquisitions to build climate change consulting capability: i3 Solutions Group, K2 Management and W&G.

Vendor info

Firm name	Ramboll
Headquarters	Copenhagen, Denmark
Employees	18,000
Revenues	€2.3bn
No. of offices	300
Example customers	Not disclosed

Customer regional presence

Asia	◔
Oceania	◔
Europe	●
Middle East and Africa	◔
Latin America and the Caribbean	◔
North America	◑

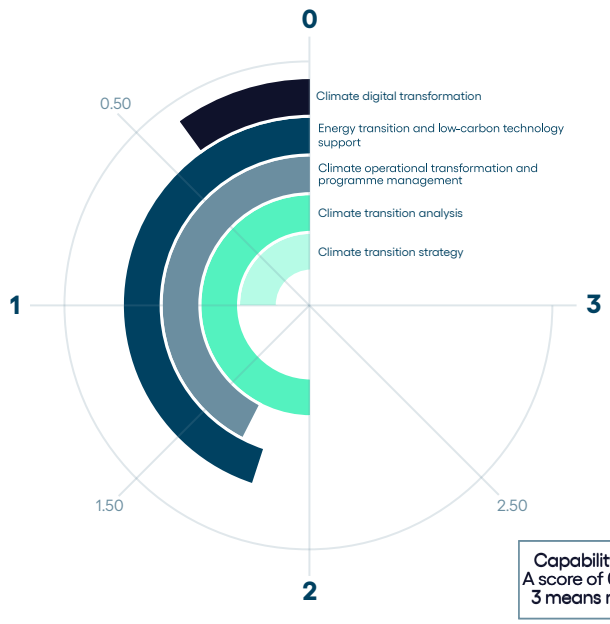
% Customer base

○ 0% ◔ <10% ◑ 10%-25% ◕ 25%-50% ● above 50%

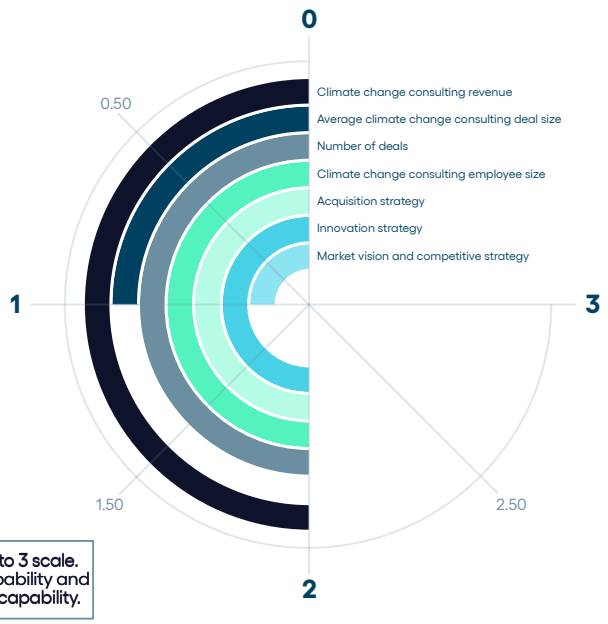
Ramboll's top three industry penetration

1. Manufacturing
2. Oil and gas
3. Utilities

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

Ramboll's climate change consulting offering is powered by engineering and environmental services expertise

The Green Quadrant analysis finds that Ramboll provides:

- **Market-leading capabilities for nature-related services.**
  Ramboll is a market-leader in nature and biodiversity impact analysis. Its capabilities are built on a legacy of environmental services, and a strong network of conservation biologists, ecologists and environmental economists. In 2024, Ramboll launched a novel open-source global biodiversity metric at COP16, and has built extensive digital capabilities for nature through its Galago platform. The platform combines drone, unmanned aerial vehicle (UAV) and satellite imagery to track nature and biodiversity impact; in 2024, it analysed over 17,000 km^2 of satellite and aerial imagery across five continents, for organizations ranging from pharmaceutical businesses to extractive industry firms.

- **Limited services to help organizations build overarching transition plans.**
  Ramboll has one of the weakest climate transition strategy offerings in this assessment. Competitors offer deeper capabilities in change management, business case development and financial planning engagements. Furthermore, digital-related services are not a key component of Ramboll's go-to-market approach, particularly in the area of digital transformation.

- **Strong capabilities to support the implementation of climate technologies at the asset level.**
  Ramboll's climate change consulting offerings combine strong technical and implementation expertise with a particular focus on the built environment, energy and industrial sectors. Ramboll also demonstrated strengths in technical and commercial advisory for complex projects including carbon capture and green hydrogen, and is a market-leader in energy transition and low-carbon technology support. Ramboll should therefore be considered for selection by organizations looking to implement climate transition strategies at the asset level – a use case made more compelling in light of the firm's site-level transition analysis capabilities.

Schneider Electric overview

Information

Schneider Electric is a Paris-headquartered giant in energy management and digital automation. Founded in 1836, Schneider Electric is a Fortune 500 firm, publicly trading on the EuroNext exchange; in 2025 it earned the title of 'world's most sustainable corporation' from Corporate Knights for a second time, the first corporation to do so. Schneider Electric offers a diverse portfolio of products and services, from hardware to software solutions for industry, utilities, data centres and assets. In November 2023, it finalized the acquisition of EcoAct, a climate change consulting specialist, expanding its capabilities in this area.

Vendor info

Firm name	Schneider Electric
Headquarters	Paris, France
Employees	150,000+
Revenues	€38bn
No. of offices	1,000+
Example customers	AEG, Roca Group, Sanofi

Customer regional presence

Asia	-
Oceania	-
Europe	-
Middle East and Africa	-
Latin America and the Caribbean	-
North America	-

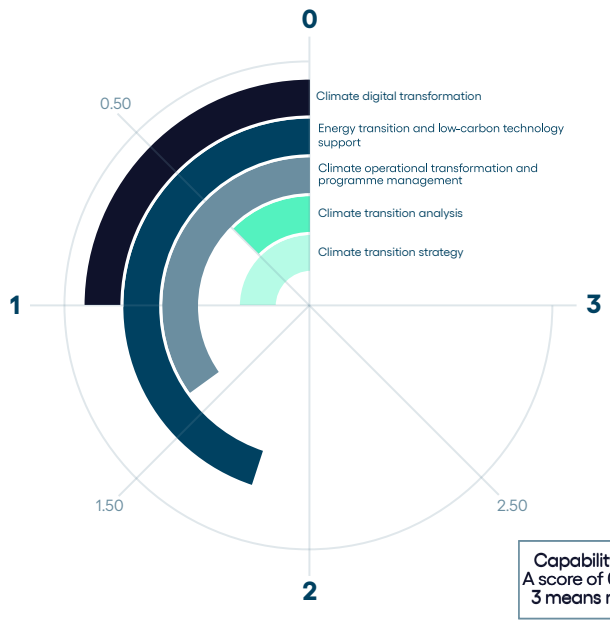
% Customer base

○ 0% ◔ <10% ◑ 10%-25% ◕ 25%-50% ● above 50%

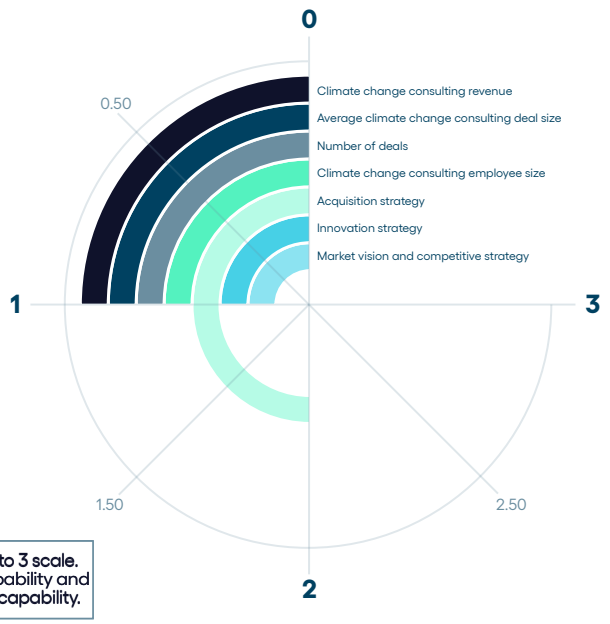
Schneider Electric's top three industry penetration

Not disclosed

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

Schneider Electric is a dominant player in the field of energy transition services

The Green Quadrant analysis finds that Schneider Electric delivers:

- **World-class energy transition services globally.**
  Schneider Electric is peerless in renewable energy sourcing and procurement among climate change consultants and a market-leader in energy storage and grid optimization strategy and implementation. Additionally, it emerged as a top leader in the 2024 Verdantix Green Quadrant on building decarbonization (see Verdantix Green Quadrant: Building Decarbonization Consulting 2024). The firm delivers projects for initial education and market intelligence, global renewable energy strategies and roadmaps, supplier engagement and education, formalized solicitation and procurement, and ongoing asset management and reporting. Schneider Electric also designs and implements battery energy storage systems (BESS) and has developed a digital suite to control and optimize distributed energy resources through the EcoStruxure Platform. These strengths are reinforced by the firm's global footprint and delivery capability.

- **Weaker capabilities for projects related to climate transition strategy.**
  Schneider Electric's strategy-related services are not as strong as some of its peers in this analysis. Although the acquisition of boutique consulting firm EcoAct in 2023 improved its capabilities in this area, the majority of its strategy work remains focused on energy-transition-related initiatives, rather than the full spectrum of climate transition. Schneider Electric also delivered fewer projects in this area than many competitors. Furthermore, the firm's climate transition analysis capabilities are focused on electrification and renewables, with a lesser emphasis on nature-related projects; in relative terms, the firm lacks some digital capabilities and support for these projects.

- **Support for organizations looking to decarbonize value chain emissions through renewable energy initiatives.**
  Schneider Electric has mature offerings designed to help organizations increase supply chain access to renewable energy; in October 2022, in partnership with Ørsted, it convened the first cohort of suppliers to Walmart's Gigaton power purchase agreement (PPA) renewable energy accelerator. Furthermore, the firm has fostered industry-specific collaborations to increase renewable energy access for supply chains, such as with Energize, which fosters collaboration between global pharmaceutical organizations and suppliers.

SLR overview

Information

SLR is an international environmental and sustainability consultancy, founded in 1994 and headquartered in the UK. Offering strategy, engineering and technical services, SLR has pursued an aggressive M&A strategy to support geographical expansion and increase capability depth. In 2024 it made 11 acquisitions, including Malk Partners, a financial services specialist; Palmer Environmental Consulting; SGA (Gestión Ambiental S.A.), a leading environmental consultancy based in Latin America; and Wardell Armstrong. These acquisitions have increased SLR's capabilities in key areas such as environmental science, nature and sustainability strategy.

Vendor info

Firm name	SLR
Headquarters	London, UK
Employees	4,500
Revenues	£450m
No. of offices	100+
Example customers	Aston Martin, Capital Power, EDF

Customer regional presence

Asia	<10%
Oceania	10%-25%
Europe	above 50%
Middle East and Africa	<10%
Latin America and the Caribbean	<10%
North America	25%-50%

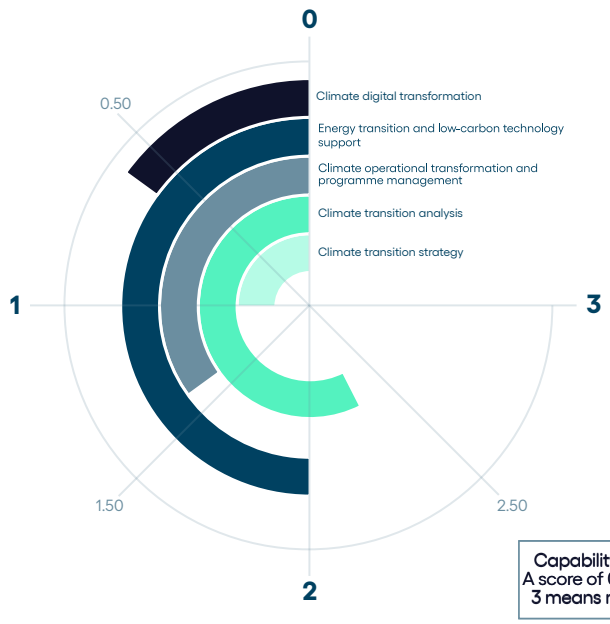
% Customer base

0% <10% 10%-25% 25%-50% above 50%

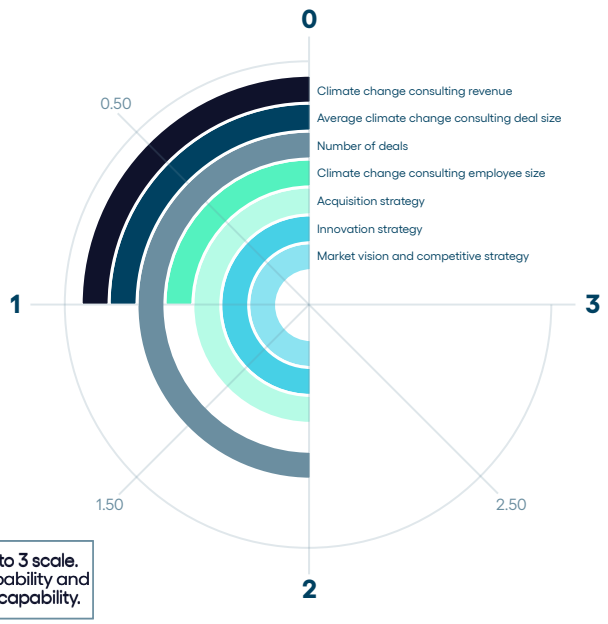
SLR's top three industry penetration

1. Construction
2. Manufacturing
3. Utilities

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

SLR delivers differentiated climate risk, mitigation and adaptation services

The Green Quadrant analysis finds that SLR offers:

- **Best-in-class services for physical climate risk analysis.**
  SLR is the market-leader for physical climate risk analysis. Its dedicated climate risk management division – ClimSystems – has been delivering climate risk management projects for 20 years, and has a dedicated digital tool, Climate Insights. The platform shows future changes in climatic variables across multiple physical hazards, based on global and regional climate models up to 2080, and – through integration with financial metrics – can be used to quantify climate-adjusted value at risk. SLR delivers not only a high volume of physical climate risk analysis engagements, but works across a range of industries and geographies.

- **Limited support for climate digital transformation.**
  SLR has a weaker offering for climate digital transformation than most of its competitors in this analysis. In particular, it delivered fewer projects in this area than leading competitors, and lacks the full breadth of capability; notably, competitors were able to provide more complete stakeholder engagement and change management engagements, and demonstrated greater expertise with a broader range of digital technologies across sectors. Furthermore, while SLR has built a robust ecosystem of partnerships for point-climate solutions, the firm has less experience working with leading enterprise resource planning (ERP) platforms.

- **A compelling value proposition for climate mitigation and adaptation strategies.**
  SLR's strengths in climate transition analysis, and accompanying energy transition, engineering and environmental service propositions, make the firm well-placed to develop and implement climate mitigation and adaptation strategies, particularly for firms in asset-intensive industries and the public sector. SLR worked with the Connecticut Institute for Resilience & Climate Adaptation to advance resiliency concepts and designs for 10 shoreline municipalities in Connecticut, allowing for increased coastline resilience and targeted investment for infrastructure and development.

WSP overview

Information

Headquartered in Montreal, Canada, WSP is one of the world's largest professional services firms, providing advisory, engineering and design services across sectors such as oil and gas, mining, real estate and transportation. WSP has executed an ambitious acquisition-led growth strategy in recent years, expanding its decarbonization capabilities through the acquisition of Golder in 2021, and the environment and infrastructure business of the John Wood Group in 2022. Coinciding with the launch of its 2025-2027 strategic action plan, WSP signed a seven-year global partnership with Microsoft to drive digital transformation for the AEC industry.

Vendor info

Firm name	WSP
Headquarters	Montreal, Canada
Employees	73,000
Revenues	CAD 14.4bn
No. of offices	500+
Example customers	City of Chicago, National Highways, Wind Prospect

Customer regional presence

Asia	◑
Oceania	◑
Europe	◑
Middle East and Africa	◑
Latin America and the Caribbean	◔
North America	◕

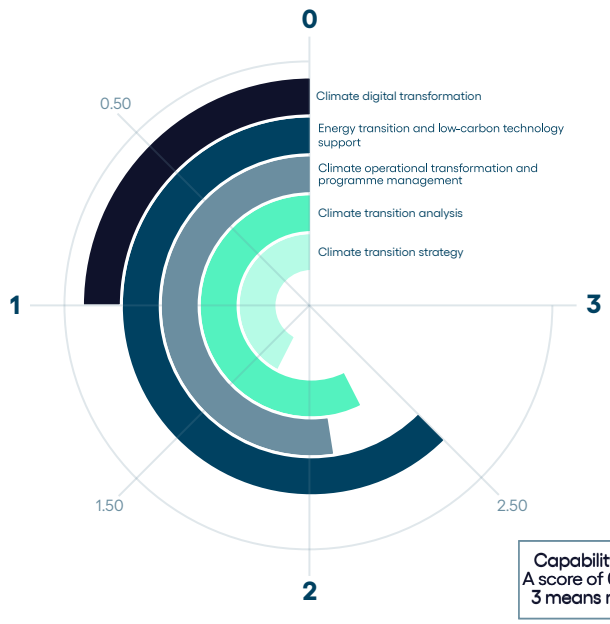
% Customer base

○ 0% ◔ <10% ◑ 10%-25% ◕ 25%-50% ● above 50%

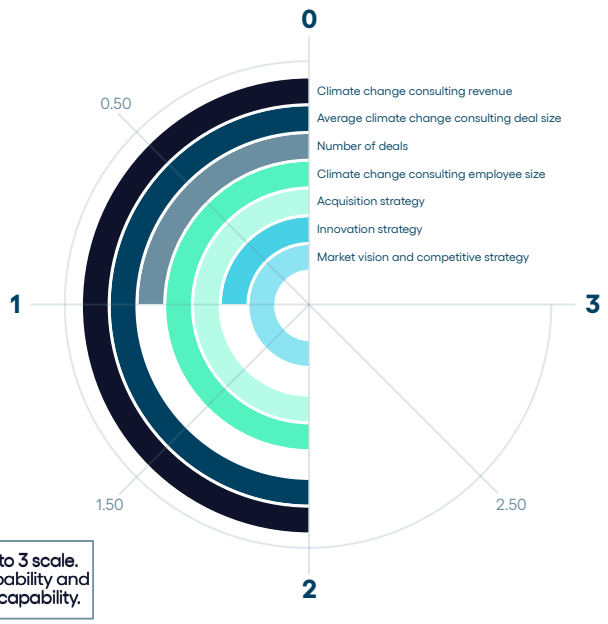
WSP's top three industry penetration

1. Utilities
2. Transportation
3. Mining, metals and minerals

Capabilities scores



Momentum scores



Capability scores on a 0 to 3 scale. A score of 0 means no capability and 3 means market-leading capability.

WSP delivers climate implementation projects at global scale across key asset-intensive industries

The Green Quadrant analysis finds that WSP has:

- **Leading capabilities for implementing decarbonization initiatives at the asset level.**
  WSP is the leading provider of decarbonization intervention analysis, financing and implementation in the market. Due to its heritage, the firm is able to deliver end-to-end services in this area, including strategy, design and engineering, and project management, with notable capabilities for building and fleet decarbonization. With strengths in decarbonization strategy and pathway development and transition pathway modelling, WSP both develops operational decarbonization strategies and implements interventions directly.
- **Limited capabilities for climate digital transformation.**
  Across the Green Quadrant analysis, WSP's weakest capabilities were in climate digital transformation. Leading competitors demonstrated more comprehensive capabilities in business systems transformation, user experience and user interface design, and change management. Furthermore, some competitors possessed broader partner ecosystems with both climate-specific platforms and broader technology providers.
- **Comprehensive offerings for firms looking to develop and implement carbon removal and storage technologies.**
  WSP has the best offering in the market in carbon capture and removal strategy and implementation; the firm provides diverse services to support project delivery from geologic feasibility, surface facility design, and environmental and land use studies. The firm has worked with Net Power to develop an emission-free natural gas technology using carbon capture and storage; the demonstration plant, located in Texas, generated 25MW of energy. WSP has also worked with the UK Government as a technical advisor for the UK's carbon capture, utilization and storage (CCUS) programme.

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