

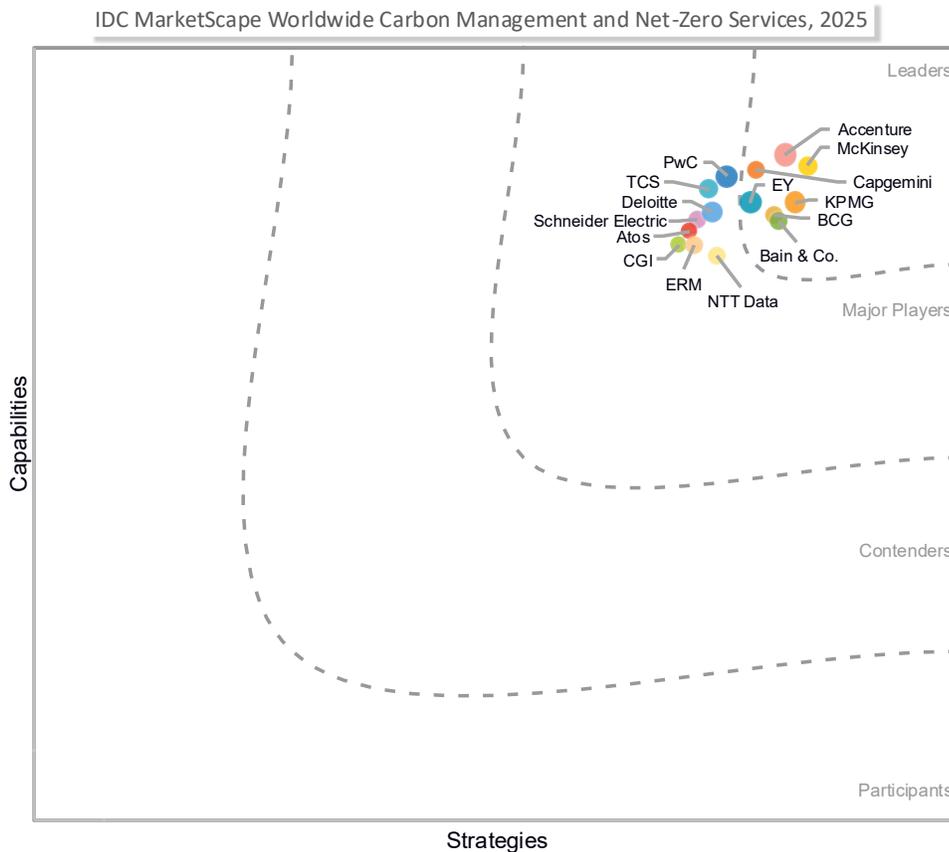
# IDC MarketScape: Worldwide Carbon Management and Net-Zero Services 2025 Vendor Assessment

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## IDC MARKETSCAPE FIGURE

**FIGURE 1**

### IDC MarketScape Worldwide Carbon Management and Net-Zero Services Vendor Assessment



Source: IDC, 2025

See the Appendix for detailed methodology, market definition, and scoring criteria.

## IDC OPINION

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This IDC study represents the vendor assessment model called IDC MarketScape. It is a quantitative and qualitative assessment of the characteristics that explain a vendor's current and future success in the marketplace. The evaluation assesses the capabilities and business strategies of many professional services firms' carbon management and net-zero services. It is based on a comprehensive framework and a set of parameters expected to be most conducive to success in driving carbon reduction through the use of services during both the short term and the long term. A significant component of this evaluation is the inclusion of business consulting (BC) buyers' perception of the key characteristics and the capabilities of these consulting providers, both directly from the vendors' clients and through a survey.

This IDC MarketScape assesses the performance of carbon management and net-zero services providers worldwide. Overall, these firms performed very well on this assessment, showing a continued growth in maturity in the overall sustainable market.

## Key Findings

### Comprehensive Service Offerings

Leading consulting firms offer a wide range of services to help companies integrate sustainability into their operations. These service offerings tend to focus on developing and implementing organizationwide strategies for carbon accounting and abatement as key facets to their success. Owing to the material differences between client organizations, vendors in this space must remain agile and flexible in both how they assess organizations' ability to decarbonize, as well as the operational pathways that need to be leveraged to drive carbon reduction impacts for clients.

### Proprietary Tools and Technologies

Many firms have developed proprietary tools and technologies to enhance their carbon management and net-zero services. These include artificial intelligence (AI)-powered platforms for emission tracking, climate risk analysis, and environmental, social, and governance (ESG) data management. According to client feedback, the use of proprietary technology and software was a key differentiator in driving the selection of one vendor over another in these engagements.

The use of advanced technologies allows firms to provide more accurate insights and strategic decision-making support to their clients.

## **Tailored Services for Client Maturity**

Firms recognize the need to provide tailored services based on their clients' sustainability maturity levels. They offer services suitable for both low- and high-maturity clients, helping organizations navigate their sustainability journeys regardless of their starting point

## **Focus on Regulatory Compliance**

With the increasing regulatory focus on sustainability, consulting firms emphasize their ability to help clients comply with various reporting frameworks and regulations, such as the Corporate Sustainability Reporting Directive (CSRD), EU Taxonomy, and SEC rules.

They assist in implementing compliance frameworks, conducting materiality assessments, and developing governance structures to ensure adherence to sustainability standards.

## **Emphasis on Climate Risk and Emissions Tracking**

Climate-related financial risks, including physical and transition risks, are a significant focus area for consulting firms. They offer services to assess and manage climate risks, conduct scenario analyses, and develop strategies to mitigate these risks

In addition, carbon accounting and emissions tracking are key services provided to help clients measure, manage, and report greenhouse gas (GHG) emissions across their operations and investments.

## **Key Strengths**

The carbon management and net-zero services landscape is characterized by several key strengths among consulting firms. A primary strength is the comprehensive range of services offered, which include sustainable carbon accounting, carbon data aggregation and analysis, net-zero strategy development, climate risk analysis, and regulatory compliance. Firms leverage proprietary tools and technologies, such as AI-powered platforms and scenario analysis engines, to enhance their service delivery and provide clients with actionable insights. The ability to tailor services to meet clients at various stages of their sustainability journeys is another significant advantage, allowing firms to cater to both low- and high-maturity clients effectively. Furthermore, strong partnerships with global technology corporations allow for seamless integration of third-party technology to enhance and simplify the carbon management process for clients.

## **Key Challenges**

Despite their strengths, consulting firms in the carbon management sector face several challenges. A significant hurdle involves improving how organizations articulate the

relationship between shifts in market maturity and the rollout of their services, which is crucial for demonstrating value to prospective clients, especially those unfamiliar with sustainability efforts. Some companies may also discover that their expertise in areas such as carbon abatement lags behind that of their peers, underscoring the importance of continuous investment in developing proprietary, technology-driven service offerings that align with clients' advancing sustainability needs. As the market expands, there is also a pressing need to respond to growing interest in services addressing the social dimension of ESG, ensuring that environmental, social, and governance priorities are integrated in a comprehensive manner

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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This research includes analysis of large business consulting firms based on their worldwide revenue in IDC's Services Tracker and additional firms with broad portfolios spanning the different business consulting domains identified in IDC's services taxonomy. These criteria were used because the scope of this evaluation covers the broadest definition of business consulting. The selection criteria were the largest vendors by global revenue as well as other business consulting firms with broad capabilities of relevant size. The assessment is designed to evaluate the characteristics of each firm — as opposed to its size or the breadth of its services. It is conceivable and, in fact, the case that specialty firms can compete with multidisciplinary firms on an equal footing. As such, this evaluation should not be considered a "final judgment" on the firms to consider for a particular project. An enterprise's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for an engagement.

Through thorough research, over the course of this assessment, IDC has found that, in general, the primary services vendors can be categorized as:

- **Technology led:** These are also large, multifaceted firms and are known for deep expertise in both technology and business consulting. IDC identifies these firms as those that expanded from information technology-centric businesses into more broad business consulting or vice versa.
- **Multidisciplinary:** IDC describes multidisciplinary firms as large, diversified consulting organizations that offer a range of business consulting services to clients across a myriad of sectors. To distinguish these from other specialty firms, consulting services must address more than two business functional areas, in addition to providing strategy and operational implementations.
- **Specialty:** Specialty firms have focused areas of consulting expertise in specific industries, functional areas, or technologies. Management and strategic consulting specialists that offer primarily strategy consulting and sustainability

business intelligence models to specific sectors or industries including government fit into this category of firms.

## ADVICE FOR TECHNOLOGY BUYERS

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This IDC MarketScape should be used as a tool to provide context and data on potential services providers in the carbon management and net-zero services market. These providers have shown that they all possess the necessary capabilities to help drive sustainable transformation across multiple domains. Each engagement with a services provider for carbon management and net zero will be different, based on the customers' ESG maturity and materiality, as well as on scope, budget, timeline, and goals, so it is important to understand where their key competencies lie and find the firm that best aligns with your internal strategy. Beyond that, consider the areas cited in this document where improvement is needed.

### Expertise in Carbon Management and Net Zero

- **Industry knowledge:** Seek firms with demonstrated expertise in carbon management and net-zero strategies, including a thorough understanding of GHG accounting, emission reduction pathways, and regulatory requirements across multiple sectors.
- **Certifications and credentials:** Verify the presence of relevant certifications, such as ISO 14064 (GHG quantification and reporting), PAS 2060 (carbon neutrality), or recognized affiliations with global climate initiatives. These credentials reflect a provider's commitment to best practices in carbon and net-zero management.

### Availability of Many Service Types

- **Understanding the investment criteria:** Based on your organization's size, ESG materiality, and budget, traditional consulting services may not be the best fit. Small to midsize organizations may benefit most from a managed services or SaaS approach to carbon management due to their decreased cost and quicker time to value. It is important to understand the investment from both a time and resource perspective before committing to a service provider.

### Proven Methodologies

- **Assessment tools:** Ask about the specific methodologies and digital tools the provider uses to measure, monitor, and manage carbon emissions. Robust frameworks for emission assessment, scenario analysis, and progress tracking are essential for credible outcomes.

- **Case studies:** Request examples of previous projects that illustrate the provider's ability to implement effective carbon reduction and net-zero strategies, demonstrating real-world impact and scalability.

## Collaborative Approach

- **Stakeholder engagement:** Choose a provider that prioritizes collaboration with your organization's internal and external stakeholders. This ensures that carbon management and net-zero solutions are tailored to your operational realities and strategic objectives.
- **Change management:** Evaluate the provider's approach to driving organizational change, building internal capabilities, and fostering a culture of sustainability that supports long-term carbon reduction goals.

## Transparency and Reporting

- **Clear reporting standards:** Confirm that the provider adheres to transparent, internationally recognized reporting standards and can deliver clear, actionable metrics for tracking emission reductions and net-zero progress.
- **Third-party verification:** Consider whether the provider offers or partners with independent third-party verification services to validate emission data and net-zero claims, thereby enhancing credibility and stakeholder trust.

## Long-Term Partnership Potential

- **Alignment of values:** Assess whether the provider's mission and values align with your organization's climate ambitions, as shared commitment is key to a productive, enduring partnership.
- **Innovation and adaptability:** Look for firms that demonstrate ongoing investment in technology-enabled carbon management solutions and adaptability to evolving regulatory and market expectations.

By focusing on these factors, organizations can select a carbon management and net-zero services provider that not only addresses immediate operational needs but also supports the achievement of long-term climate and sustainability objective.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

## Accenture

Accenture has been positioned in the Leaders category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

Accenture provides a suite of carbon accounting services, offering advisory, execution, technology integration, and custom solution development to help organizations measure, report, and manage their emissions. These services embed sustainability into a company's operations. Accenture offers strategic guidance on emissions accounting standards and regulatory frameworks, such as the GHG Protocol and ISO standards, which are often embedded within broader business and technology transformations, including ERP rollouts.

### Product Carbon Footprint Accounting Capabilities

- **Product carbon footprint (PCF) measurement and reporting:** Ensuring ISO 14067 and PEFCR-aligned carbon footprint measurement using tools such as Ecochain, iPoint, openLCA, SimaPro, SAP SFM, and Sphera (GaBi)
- **Life-cycle assessment (LCA):** Conducting cradle-to-cradle, cradle-to-gate, or gate-to-gate impact assessments based on ISO 14040 standards and indicators such as water usage, land use, ozone depletion, acidification, eutrophication, and resource depletion (These provide a more holistic view of a product's environmental impact across its life cycle.)
- **Ecodesign and sustainable innovation:** Driving product redesign and material optimization to reduce emissions and enhance sustainability
- **Regulatory and certification support:** Helping clients navigate evolving regulations and obtain sustainability certifications for market differentiation
- **Technology-driven PCF solutions:** Integrating automation and digital analytics into product development and supply chain management

### Organizational-Level Carbon Accounting

At the organizational level, Accenture enables GHG accounting across Scope 1, 2, and 3 emissions, ensuring alignment with the GHG Protocol Corporate Standard and Science-Based Targets initiative (SBTi) requirements. Accenture's offerings include:

- **Frameworks and protocols alignment:** Covering all Scope 1, 2, and 3 calculation methodologies (spend-based, activity-based, hybrid, and primary data) with sector-specific approaches, such as the Forest, Land, and Agriculture (FLAG) sector, as defined by GHG Protocol Land Sector and Removals Guidance, and the Partnership for Carbon Accounting Financials (PCAF) for financial services
- **Technology-enabled carbon accounting:** Partnering with platforms such as Sweep, Pulsora, SAP, Microsoft Sustainability Manager (MSM), and Watershed for

precise emissions tracking and integration with Accenture's proprietary decarbonization tools (This is supported by a robust data architecture and strategy that ensures consistent, scalable, and auditable emissions data across business units and value chains.)

- **Excel-based carbon accounting:** Offering customized models for diverse industries, supporting entire Scope 1, 2, and 3 emissions tracking along with SBTi-aligned transition planning
- **Supply chain carbon accounting:** Collecting and integrating data from clients and suppliers to enhance Scope 3 emissions calculations and reporting

With a technology-driven, regulatory/audit-compliant, and industry-tailored approach, Accenture empowers organizations to embed sustainability into their core business strategy, ensuring measurable impact and long-term resilience.

## Net-Zero Services

Accenture offers clients an extensive end-to-end net-zero transition solution, providing all the necessary capabilities and proven decarbonization expertise across industries, powered by unique technology solutions. The net-zero transition is not a single challenge within the value chain; it is a complex, multifaceted process that requires holistic, end-to-end measures. Accenture's portfolio addresses this challenge with eight key net-zero components, paired with a unique set of assets and accelerators:

- **Net-zero strategy:** Collaboratively supporting clients to create a decarbonization road map that is tailored to their business, responds to the pressures their industry is facing, and meets best practice carbon reduction targets
- **Carbon intelligence:** Deployment of capabilities that enable organizations to control, improve, and drive value creation by embedding carbon business intelligence (BI) into the core business and across the value chain (These workstreams enable monetization of carbon performance [e.g., product differentiation], cost reductions and efficiencies [direct overheads and indirect taxation], automated and transparent CO<sub>2</sub>e measurement, streamlined regulatory reporting, and enterprisewide carbon metrics driving cross-functional and value chain decisions.)
- **Net-zero infrastructure:** Capital builds that accelerate the net-zero transition, that is, future-fit energy grids, renewable generation, nuclear (small modular/large national), battery storage, hydrogen (H<sub>2</sub>), and mobile asset infrastructure
- **Energy management:** Transform the way clients buy, consume, and produce energy by optimizing energy management and core operations to achieve net zero (This includes mobility solutions such as fleet electrification, charging operations, vehicle-to-grid [V2G] integration, and battery management.)

- **Net-zero products:** Development of net-zero products with heightened circularity for carbon and additional resource benefits, supported by our IX Industrial Design capability
- **Net-zero finance:** Capital deployment to accelerate the net-zero transition; reporting for IFS on carbon emissions associated with all investment categories and assets
- **Decarbonization of supply chain:** Optimization of supply chains for decarbonization by leveraging circular strategies and sustainable procurement to reduce emissions and drive efficiency

Accenture delivers Excel-based emissions models integrated with Alteryx for large-scale data transformations, providing a detailed view of supply chain emissions for strategic decision-making and reporting. Designed with a structured framework, these models capture key assumptions, emissions factors, and data refresh cycles for a seamless, replicable process. They integrate with Power BI and Tableau, transforming complex data into actionable insights for forecasting and sustainability strategies.

In addition, Accenture partners with a variety of third-party software providers — such as Watershed — to deliver end-to-end emissions reporting and visualization solutions tailored to client preferences and existing tech stacks. For a client, Accenture identified more than 20 key topics and more than 550 data points, achieving 40% data availability, automating processes, embedding controls, and implementing a governance framework for ESG reporting, including last-mile solutions such as Workiva.

## Strengths

Accenture's strengths lie in its ability to tailor and score carbon abatement strategies and methodologies to fit its client's organizational materiality and maturity. Accenture's capabilities in Scope 3 emissions modeling and abatement are true differentiators for clients whose maturity in sustainability requires cutting-edge subject matter expertise.

## Challenges

Accenture could benefit from additional investment in its managed services offering for carbon accounting and reporting. As organizational maturity continues to grow, and new entrants enter the sustainability-related services market, managed services are predicted to grow in importance and use cases across industry.

## Consider Accenture When

Clients should consider partnering with Accenture in cases where an existing sustainable transformation or net-zero strategy is posing challenges in its operationalization. Accenture's subject matter experts and powerful adject software offerings enable the company to deliver value to clients with existing net-zero and carbon management strategies, as well as develop, implement, and operationalize new strategies for customers.

## Atos

Atos has been positioned in the Major Players category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

Atos delivers a broad suite of carbon management and net-zero services, supporting organizations in quantifying, reducing, and reporting GHG emissions across all scopes. The company's approach combines consulting, digital platform implementation, and managed services, utilizing both proprietary and partner solutions to address emissions at the company, product, and IT/digital estate levels.

Atos' carbon management services begin with comprehensive data collection and processing, enabling clients to build GHG inventories for Scope 1, 2, and 3 emissions. The company applies established methodologies such as the GHG Protocol and PCF, using a wide range of emissions factor data sets to ensure accurate calculations. These services are supported by advanced analytics and visualization tools, which facilitate net-zero and decarbonization modeling, scenario analysis, and the development of action plans. Clients can set and track emissions reduction targets, manage key performance indicators (KPIs), and generate ESG reports that comply with regulatory frameworks such as the CSRD and the EU Taxonomy.

Atos' net-zero services guide organizations through the complexities of carbon accounting and the development of actionable strategies for achieving net-zero emissions. The process typically starts with a detailed assessment of a client's GHG emissions, followed by the formulation of carbon reduction targets aligned with international frameworks such as the SBTi. Atos then develops customized road maps, outlining specific actions, timelines, and milestones for emissions reduction, and supports implementation through technology integration. This includes deploying IoT sensors, data analytics, and AI for real-time emissions monitoring, as well as providing managed services for both in-house and third-party carbon management and LCA software.

Ongoing monitoring and reporting are central to Atos' offering. The company establishes systems for continuous tracking of emissions and performance against targets, using advanced analytics to provide insights into progress. Atos also assists clients in preparing sustainability reports that meet global standards and regulatory requirements and offers collaborative platforms to facilitate stakeholder engagement. Training programs are available to educate employees and partners on carbon accounting practices and net-zero objectives.

Atos invests in research and development (R&D) to identify innovative digital solutions for carbon reduction, including renewable energy, sustainable supply chains, ecodesign products, and smart mobility and buildings. The company's expertise is demonstrated

through a range of client implementations, such as automating ESG data collection for a fashion company using SAP, enabling product footprint calculation for a cosmetics company with EcoDesignCloud, and establishing IT carbon footprint baselines for retail clients. Atos has also developed solutions for emissions calculation and reporting, such as integrating IT carbon calculators for service companies, implementing Scope 3 spend-based methodologies for banks, and automating product carbon footprint calculations for chemical manufacturers using ISO standards. Atos has developed its own generative AI solutions to help clients in reducing their suppliers' CO<sub>2</sub> emissions. This type of solution significantly reduces the data collection workload and accelerates the decarbonization of suppliers.

Scenario analysis capabilities are provided through platforms, such as CDMP, which forecast emissions based on intensity, revenue, and activity data and can integrate with IoT and AI models for real-time monitoring. EcoDesignCloud enables "what if" scenario modeling and sensitivity analysis, supporting ecodesign decisions and value chain optimization. Through its partnerships, Atos offers carbon reduction and forecasting solutions, climate target tracking, and climate risk assessment platforms aligned with TCFD and EU Taxonomy requirements.

Atos employs a variety of pricing models, including time and material for consultancy, fixed pricing for carbon footprint assessments, subscription-based pricing for software platforms, and outcome-based pricing through Decarbonization Level Agreements in IT outsourcing contracts.

Data quality assurance is maintained through configurable validation, standard operating procedures, intelligent verification, manual and system-based checks, and comprehensive audit trails. Atos also provides structured documentation to support third-party assurance. The company's carbon accounting services support a wide array of methodologies and standards, including the GHG Protocol, ISO 14064, ISO 14067, ISO 14040, ISO 14044, PAS 2050, and Product Environmental Footprint (PEF). The CDMP tool can analyze up to 15 Scope 3 categories, depending on client data availability and organizational mapping.

## **Partnerships**

Partnerships are integral to Atos' carbon management and net-zero services. Atos collaborates with technology providers such as Microsoft and SAP to deliver robust digital platforms for emissions tracking and reporting. The company also works closely with EcoAct, a strategic partner, to offer bespoke carbon reporting, scenario analysis, and climate risk assessment solutions. Through EcoAct, Atos extends its capabilities to include methodologies, such as PCAF, CDP, and Bilan Carbone, and provides advanced tools such as the CRaFT platform for carbon reduction forecasting and the ECLR platform for climate risk visualization. These partnerships enable Atos to augment its in-house solutions and deliver a comprehensive, flexible service offering tailored to diverse client needs.

## **Strengths**

The company leverages advanced analytics, AI, and IoT technologies for real-time emissions monitoring, scenario analysis, and actionable decarbonization strategies, supported by strong partnerships with technology providers and specialized firms such as EcoAct.

Atos demonstrates robust expertise in regulatory compliance and reporting, supporting a wide array of global standards (e.g., GHG Protocol, ISO, CSRD, and EU Taxonomy), and provides flexible pricing models to suit diverse client needs.

## **Challenges**

The effectiveness of Atos' scenario analysis and carbon footprinting tools is dependent on client data quality and availability, which can limit the accuracy and scope of the company's services in organizations with less mature data infrastructures.

While Atos offers a broad range of methodologies and standards, the breadth of its service portfolio may lead to challenges in maintaining deep specialization or rapid innovation in highly niche or emerging areas of carbon management.

## **Consider Atos When**

Clients should consider partnering with Atos for projects where IT-specific carbon management is needed. Atos' suite of IT-centric tools and services allows the firm to quickly deploy carbon measurement and reduction technology and strategies, delivering value to customers efficiently.

## **Bain & Co.**

Bain & Co. has been positioned in the Leaders category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

Bain provides services in sustainability and carbon management and has a global presence of 65 offices and 19,000 employees, with a significant number contributing to sustainability projects. Bain focuses on linking carbon-related value creation to business outcomes, offering expertise across sectors and collaborating with nonprofits and business forums.

## **Carbon Accounting Capabilities**

Bain assists organizations in measuring, managing, and reducing their carbon footprint through a data-driven approach. The company's capabilities include:

- **Comprehensive emissions measurement.** Bain helps companies track Scope 1, 2, and 3 emissions using technical knowledge and sector-specific expertise. The company applies the GHG Protocol and tailor metrics to align with sector-specific standards. It conducts site-level measurements for Scope 1 and 2 emissions and maps the client's entire value chain for Scope 3 emissions, engaging suppliers to collect primary emissions data.
- **Regulatory compliance and reporting.** Bain provides guidance on sustainability regulations and reporting, integrating sustainability into business operations and developing climate transition plans. The company collaborates with organizations such as GFANZ, WBCSD, and SBTi. Bain supports alignment with carbon accounting frameworks, including the Greenhouse Gas Protocol, TCFD, SBTi, SASB, ISSB, EU RED II, and SEC climate disclosure rules. In addition, the company helps clients define company-specific or industrywide product carbon footprint and chain of custody standards.
- **Digital tools and advanced analytics.** Bain enhances carbon tracking and integrates emissions data across business units through a combination of software tools and strategy partnerships. Examples include:
  - **Persefoni:** Bain has an equity investment in Persefoni, a carbon management SaaS platform, to provide a solution for carbon management and accounting.
  - **Terralytiq:** Bain has a strategic partnership with Terralytiq, focusing on AI-enabled supply chain emission analysis and product carbon footprints.
  - **Carbon Cube:** It is an internal Bain tool for upstream Scope 3 emission tracking and supply chain carbon footprinting based on spend cube. Key activities include measurement of Scope 3 emissions, baseline for CO<sub>2</sub>e footprint, and tracking supplier emissions.
  - **ARC for carbon:** Built on Bain's ARC program management platform, this tool facilitates carbon reduction tracking and serves as a single source of truth for carbon reporting.

## Net-Zero Services

Bain provides net-zero services across industries, integrating tools, expertise, and partnerships to help organizations accelerate decarbonization while maintaining financial resilience. The company's key capabilities include decarbonization strategy and planning, value creation, operations and supply chain decarbonization, climate risk mitigation, and carbon management, tracking, and reporting.

A cornerstone of its net-zero capability is the *Net Zero Navigator (NZN)*, a tool jointly developed with Persefoni. This platform enables decarbonization pathway simulation to help guide clients in designing and executing decarbonization strategies. The tool includes Marginal Abatement Cost Curves (MACCs) and a proprietary decarbonization lever library.

Bain also leverages its data partnership with CDP in its carbon benchmarking, which provides peer and sector comparisons using CDP climate data.

This forms the basis for defining the net-zero strategy for companies' ambition setting, defining key decarbonization levers, linking decarbonization to value creation, and making the difficult trade-offs with the overall business priorities. It also includes support to implementation from defining the road map to deliver, putting all enablers in place (e.g., operating model, internal carbon price, and incentives), and driving disciplined execution.

## **Strengths**

Bain & Co.'s strengths lie in its deep expertise in the financial and banking sectors. This expertise is leveraged to provide customers with deep understanding and strategies to decarbonize their investments. Bain also differentiates through its ability to effectively consult clients on selling their sustainable efforts to customers, providing financial direct value to clients undergoing a sustainable transition

## **Challenges**

Bain's emphasis on strategic planning and value creation may sometimes overshadow the need for rapid, tactical emissions reductions, which could delay tangible decarbonization outcomes for clients seeking immediate impact.

## **Consider Bain & Co. When**

Clients should choose to partner with Bain & Co. in situations where they are having difficulty operationalizing and monetizing their carbon reduction strategies, Bain is uniquely positioned to aide clients that necessitate a clear financial case for their net-zero efforts.

## **BCG**

BCG has been positioned in the Leaders category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

Boston Consulting Group (BCG) did not fully participate in this IDC MarketScape assessment and was assessed on publicly available information, case studies provided by the company, and previous IDC research.

BCG offers a range of services focused on carbon management and achieving net-zero targets. These services are designed to help clients reduce emissions, optimize costs, and build sustainable business models. BCG's approach integrates operational efficiency, strategic planning, and innovative solutions to support clients in their sustainability journey.

## Key Services

- **Net-zero business and portfolio strategy:** BCG enables its clients to reach their net-zero emissions target while prioritizing value creation and improving competitive advantage and practicality. The firm leverages proprietary tools, such as its robust abatement lever library, to develop enterprise road maps that make clear the trade-offs of sustainability, cost, and other critical business metrics. This includes making informed technology choices, such as adopting energy-efficient equipment and processes, and managing feedstock supply and demand to ensure a steady flow of low-carbon materials. As with any large transformations, BCG also works with clients on change management to ensure the successful adoption of its net-zero strategy and also assists clients in identifying and investing in sustainable business opportunities that align with their net-zero goals.
- **Sustainable operations:** BCG supports clients by helping embed sustainability into operations, uncovering synergies around cost, material, and waste in a company's manufacturing as well as supply chain and procurement practices. BCG conducts thorough assessments to establish baselines of current emissions, identify abatement levers and key areas for improvement, and develop tailored strategies to reduce emissions.
- **Sustainable manufacturing (Scope 1 and 2):** BCG leans on its operations and manufacturing experience to identify the best emissions tactics that fit each manufacturing plant's strategic plan, uncovering opportunities to green assets through a cost and productivity lens. The firm aims to achieve a 10–20% reduction in conversion costs while reducing emissions by more than 20%. This includes optimizing production processes, adopting energy-efficient technologies, and implementing best practices for waste management and resource conservation.
- **Sustainable procurement and supply chain (Scope 3):** BCG leverages its extensive procurement experience and develops strategies to engage suppliers in sustainability initiatives based on known trade-offs and synergies between procurement teams and suppliers on decarbonization. BCG uses tools to help quantify difficult-to-measure Scope 3 emissions impact and help clients prioritize their engagements
- **Green growth accelerator:** BCG partners with clients to uncover new opportunities for exponential growth by building and scaling new green products and businesses. The firm supports corporates, investors/developers, and scaleups in an end to end fashion. This includes identifying market opportunities for sustainable products and services, developing business models that align with sustainability goals, and providing strategic guidance and support to scale.

- **Climate risk, adaptation, and resilience:** BCG identifies climate risks and impacts, minimizes vulnerabilities and exposure, and takes steps to future-proof operations. The firm highlights that up to 25% of EBITDA could be at risk due to climate events in certain sectors and geographies, emphasizing the financial implications of climate risks. The firm conducts comprehensive assessments to identify potential climate-related risks and quantifies their impacts, develops strategies to mitigate them, and implements measures to enhance resilience. This includes adopting best practices for risk management, investing in resilient infrastructure, and developing contingency plans to ensure business continuity in the face of climate-related disruptions.

## Tools and Enablers

BCG provides several tools and enablers to support clients in their carbon management and net-zero efforts:

- **Quantis:** An environmental sustainability consultancy acquired by BCG in 2022 bringing deep science-based expertise in footprint automation and LCA at scale to clients on their net-zero journey — including tools such as eQopack ecodesign tool for packaging and eQosphere, a database for EFs and LCA data sets
- **BCG's Center for Policy and Regulation:** Helps clients understand how carbon markets and regulations can impact an organization's plans to decarbonize:
  - **Smart Banking AI:** Net-zero climate tool for FI NZ business and portfolio strategy
  - **Energy Transition Optimiser:** Suite of solutions to optimally design and operate Power-to-X energy cluster at project and portfolio levels

BCG also has AI-driven geospatial intelligence tools to help clients understand adaptation and resilience impacts on their net-zero strategies:

- **Ag AI:** A platform to model farm's emission, yield, impact of climate change, sustainable agricultural practices, and fertilizers use
- **Climate Impact AI:** Enables companies to rapidly assess the business impact of physical and transition risks on their value chains, quantify value at risk, and identify optimal adaptation and resiliency strategies
- **Net-Zero Tool Suite:** Offers end-to-end support from baselining to pathway prioritization, helping clients develop and implement comprehensive decarbonization strategies.
- **Abatement Lever Library:** Helps prioritize actions to achieve emissions reductions, providing a comprehensive list of potential measures and technologies to reduce emissions

- **Logistics Decarbonization Index:** Tracks decarbonization progress for top industry players, providing insights and benchmarks to help clients measure and improve their performance

## Partnerships and Collaborations

BCG engages in partnerships and collaborations to enhance its carbon management and net-zero services:

- In partnership with *CO2 AI*, an AI-powered carbon management platform (first incubated in BCG), BCG helps clients readily develop robust and granular corporate and product footprints and drive decarbonization at scale across complex value chains.
- The *BCG X AI Science Institute* collaborates with partners such as *Google Earth Engine*, *NASA*, and *USRA* to leverage geospatial intelligence and generative AI in environmental simulations to mitigate climate risks and develop net-zero strategies with unprecedented precision.
- BCG partnered with *ESG Book* and *Google* in developing the framework powering the ESG Book LEO platform to help financial institutions streamline and standardize climate disclosures.
- In partnership with *SAP*, BCG developed *Circelligence* to analyze circularity along the value chain and across business dimensions, helping clients identify opportunities for resource conservation and waste reduction.

## Strengths

BCG's strengths lie in its ability to decarbonize organizations at scale. With the wealth of strategic partnerships and internal resources, BCG's depth and breadth of offerings can serve clients across industry, geography, and materiality. The firm's acquisition of Quantis and partnerships with technology providers (e.g., Google, SAP, and CO2 AI) enhance its science-based footprint automation, LCA capabilities, and regulatory insight, enabling clients to address complex Scope 1, 2, and 3 emissions challenges with precision.

## Challenges

Clients cite some challenges in communication with BCG during service engagements. A greater focus on clear and concise knowledge transfer would aide BCG as it continues to serve clients in the net-zero and carbon management market.

## Consider BCG When

BCG's expertise in operations consulting allows it to serve clients best in cases where a net-zero strategy implementation is needed, either with an existing strategy that was not fully realized or when a net-new strategy is needed. Clients of all maturity level will find a strong partner in BCG.

# Capgemini

Capgemini has been positioned in the Leaders category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

Capgemini is a global organization specializing in consulting, technology services, and digital transformation. The company has developed a robust portfolio of ESG solutions including carbon management and net-zero services designed to help businesses transition to a low-carbon economy. By leveraging data, artificial intelligence, and automation, Capgemini supports organizations in embedding sustainability into their operations while aligning with broader business objectives.

## Strategic Approach to Carbon Management

Capgemini's sustainability strategy is rooted in the belief that carbon management and net-zero initiatives can serve as drivers of operational efficiency and resilience. The company emphasizes the integration of sustainability into core business processes, enabling organizations to optimize resource use, reduce emissions, and achieve measurable outcomes.

Key elements of Capgemini's approach include:

- **Data-driven decision-making:** Utilizing AI and automation to streamline carbon accounting and enhance operational efficiency
- **Value beyond compliance:** Moving beyond regulatory requirements to create long-term value by embedding sustainability into supply chains, manufacturing, R&D, and product design
- **Holistic operating models:** Developing frameworks that integrate people, processes, data, and technology to support sustainable transformation

## Core Offerings in Carbon Management

Capgemini provides end-to-end solutions tailored to the unique needs of its clients. These offerings include:

### Data Integration and AI-Driven Insights

Capgemini employs advanced AI models to analyze historical data, generate proxy data sets, and automate sustainability reporting.

These tools enable organizations to monitor environmental impacts, identify areas for improvement, and make informed decisions.

## **Proxy Data Utilization**

Proxy data is used to address gaps in sustainability reporting, particularly when real-time data is unavailable. This approach supports strategy development and operational monitoring while maintaining transparency in calculations. To maintain a high level of assurance, Capgemini leverages its strengths in data analysis to verify any proxy data used for client decision-making.

## **Frameworks for Implementation**

Capgemini's structured methodology begins by creating a sustainability use case matrix and then prioritizing high-impact use cases and initiatives based on ROI potential, eventually scaling solutions across business units or geographies.

The company emphasizes industrialization by building digital foundations that automate and scale sustainability efforts.

## **Sustainable Value Chain**

Capgemini assists organizations in embedding sustainability within supply chains through AI-powered tools that optimize resource use and reduce environmental footprints.

Capgemini also offers solutions for mobilizing and empowering members across the organization's entire value chain to enhance Scope 3 reporting while establishing an auditable data management process

Capgemini drives enhanced visibility into product-level emissions through innovative data-driven engineering approaches and sustainable material integration.

## **ESG Reporting Enablement**

The company offers tools that simplify ESG reporting processes through automation. These solutions allow sustainability teams to focus on implementing impactful initiatives.

To enhance the value proposition, Capgemini collaborates with providers of ESG reporting tools and technologies to facilitate a seamless and efficient transition for companies toward automated carbon and ESG reporting.

## **Innovation Through AI**

Capgemini integrates AI technologies into its carbon management services to enhance efficiency and scalability. Examples include:

- Generative AI for automated narrative generation in ESG reporting

- AI-driven analytics for identifying trends and opportunities within sustainability data
- Tools designed to industrialize sustainability efforts while minimizing environmental impacts during implementation
- The organization also collaborating with technology partners to refine its solutions and ensure they align with client needs

## **Operationalization of Net-Zero Strategies**

Capgemini's approach extends beyond strategy development to operationalize net-zero goals. This involves:

- Building road maps that prioritize quick wins while laying the foundation for long-term transformation
- Implementing minimum viable products (MVPs) for specific use cases or regions before scaling solutions enterprisewide
- Supporting change management processes to ensure seamless adoption of new operating models

The company's frameworks are designed to help clients integrate net-zero strategies into their overall business operations, ensuring measurable progress toward emissions reduction targets.

## **Strengths**

Capgemini's structured frameworks and scalable digital solutions facilitate rapid deployment and industrialization of sustainability initiatives, while partnerships with ESG technology providers enhance the automation and transparency of reporting processes.

The company excels at embedding sustainability into core business processes and value chains, enabling organizations to achieve measurable emissions reductions and operational efficiencies beyond mere regulatory compliance.

## **Challenges**

Capgemini's reliance on proxy data to fill gaps in real-time sustainability reporting, while practical, may introduce challenges around data accuracy and stakeholder trust, especially for clients with limited historical data. While there is rigorous validation of this data, direct measurement is still the golden standard of carbon management data.

## **Consider Capgemini When**

Clients should consider partnering with Capgemini for carbon management and net-zero needs when they require a cutting-edge, technology-driven, data-centric approach

to sustainability that leverages advanced AI, automation, and deep industry expertise to streamline emissions measurement and reporting. Capgemini is particularly well suited for organizations seeking to embed sustainability into core business operations.

## **CGI**

CGI has been positioned in the Major Players category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

CGI did not actively participate in this IDC MarketScape assessment and was assessed on publicly available information and previous IDC research.

CGI provides comprehensive carbon management and net-zero strategy services, integrating technology solutions with science-based methodologies to support organizational decarbonization. The company's approach emphasizes measurable outcomes, regulatory compliance, and cross-sector expertise, underpinned by its own operational commitment to achieve net-zero emissions for Scope 1 and 2 and business travel-related Scope 3 emissions by 2030.

## **Strategic Framework**

CGI employs a four-phase operational model — assess, plan, perform, and sustain — to guide clients through decarbonization. CGI applies the SBTi to integrate agile business models and support digital transformation strategies that help both client and CGI to meet sustainability goals. Continuous improvement is enabled through AI-driven analytics and automated reporting systems.

CGI's strategic framework for sustainability focuses on reducing the environmental impact of its digital services through low-carbon initiatives, ecodesign practices, green coding, and energy-efficient operations, as demonstrated in its partnership with the EDF Group.

CGI follows the 6R framework to drive long-term value for sustainability solutions and applies five key principles to balance pressures: visibility, build it in, understanding, collaboration, and adaptability.

By applying insights, systems thinking, and data-driven strategies to address ESG challenges, CGI helps clients balance sustainability with financial growth, embed sustainability into operations, and create long-term business value.

## **Core Service Offerings**

CGI's carbon management services include net-zero road map development aligned with the Paris Agreement; regulatory compliance automation for CSRD, SFDR, and TCFD; and supply chain decarbonization programs. The company specializes in energy

transition strategies, including grid modernization for renewable integration and methane monitoring systems for the energy sector clients. Technology-driven solutions include AI-powered emissions forecasting, IoT-enabled energy monitoring, and cloud-based ESG reporting platforms.

CGI also offers a range of digital solutions and services to support the transition to a circular economy (Scope 4), focusing on data-driven strategies that enhance transparency, traceability, and sustainability across industries.

CGI provides end-to-end offerings with multiple data solutions, covering the entire energy value chain from power generation to energy retail. These help organizations take a strategic, insights-led approach to achieving low-carbon goals.

CGI AgileDX-Sustainability, for example, enables secure, auditable tracking of Scope 1, 2, and 3 data to support reporting requirements and drive carbon reduction.

CGI AgileDX-Hydrogen enables transparent data sharing across hydrogen ecosystems to support decision-making, policy, and funding, with a focus on Scope 3 certificate tracking as the hydrogen economy evolves.

CGI OpenGrid360 is a modular suite that helps utilities integrate and act on critical network data for greater visibility, smarter grid management, and innovation toward a low-carbon, flexible energy system.

CGI's AI-enabled Renewables Management System (RMS) supports real-time monitoring, analysis, and optimization to boost performance, reduce downtime, and drive efficient, low-carbon energy generation.

CGI DataTwin360 is a solution that drives energy and emission reduction while preventing clients from losing money through inefficient hosting platforms and datacenters.

## **Technology Integration**

A distinguishing feature of CGI's approach is its emphasis on digital tools for sustainability. The company deploys Persefoni's Climate Management Platform for auditable Scope 1–3 accounting, the CGI DataTwin360 for real-time carbon simulations, and Microsoft Azure's renewable-powered infrastructure for sustainable IT modernization. Partnerships with Munich Re enable climate risk modeling through the Location Risk Intelligence Platform, combining physical risk data with financial analytics.

## **Operational Commitments**

CGI has reduced its global operational emissions by 70% since 2014 through energy efficiency upgrades and renewable energy procurement. U.K. operations aim for net

zero by 2026, supported by building management systems optimizing energy use across facilities. The company requires 36% of its U.K. suppliers to spend to maintain science-based targets and provides decarbonization guidance through its supplier engagement program.

## **Sector-Specific Solutions**

For energy and utilities clients, CGI implements grid digital twins and satellite-linked methane detection systems. Financial institutions leverage climate stress testing tools, integrating flood and wildfire risk models with portfolio analytics. Public sector engagements focus on fleet electrification programs and environmental data management, including the U.K. Defra Earth Observation Data Service processing 30TB of satellite data daily.

Launched in 2022 with the United Nations and global academia, CGI's Sustainability Exploration Environmental Data Science (SEEDS) program unites experts to develop innovative technologies tackling sustainability challenges across climate, biodiversity, circular economy, natural capital, water, behavior change, modal shift, and public health.

## **Regulatory Expertise**

CGI maintains platinum EcoVadis ratings and aligns its methodologies with CDP, GRI, and SASB standards. The company assists clients in navigating EU Taxonomy requirements through automated double materiality assessments and SFDR-compliant reporting systems. TCFD-aligned dashboards provide real-time insights into climate-related financial risks for executive decision-making.

## **Forward-Focused Initiatives**

CGI is advancing Scope 4 life-cycle assessments for digital services and piloting AI-driven carbon capture analytics. The company integrates climate resilience planning into infrastructure projects, combining flood risk modeling with adaptive design principles. Employee training programs emphasize sustainability literacy, including STEM-based curriculum development for low-carbon technology adoption.

This operational and service structure positions CGI as a provider of integrated decarbonization solutions, combining verified emission reduction strategies with scalable technology platforms across industries. The company's dual focus on internal net-zero commitments and client-facing innovation reflects a systemic approach to addressing climate challenges through measurable, technology-enabled action.

## Strengths

CGI's structured, science-based approach — anchored in frameworks such as SBTi and a four-phase operational model — enables clients to develop actionable road maps, automate ESG reporting, and embed sustainability into core operations. CGI's strong operational track record, including significant in-house emissions reductions and sector-specific digital innovations (such as grid digital twins and methane monitoring), demonstrates a commitment to sustainability that the company passes on to its clients.

## Challenges

CGI's advanced digital solutions and emphasis on technology integration may present adoption challenges for organizations with less mature IT infrastructures or limited experience in data-driven sustainability.

## Consider CGI When

CGI is particularly well suited for organizations seeking sector-specific expertise, robust regulatory compliance, and a partner with a proven track record of operational emissions reduction and innovation in sustainable IT and energy solutions.

## Deloitte

Deloitte has been positioned in the Major Players category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

Deloitte did not actively participate in this IDC MarketScape assessment and was assessed on publicly available information and previous IDC research.

Deloitte offers end-to-end net-zero strategy services designed to integrate decarbonization objectives into clients' core business strategies. Deloitte's approach begins with a Net-Zero Maturity Model assessment that evaluates a company's current state across key dimensions including strategy, governance, data management, and stakeholder communication. This assessment forms the foundation for developing tailored road maps that guide organizations through their net-zero journey.

A cornerstone of Deloitte's methodology is its support for SBTi alignment, ensuring that clients' emissions reduction goals meet global climate objectives. The firm recognizes that different industries face unique decarbonization challenges, particularly in high-emissions and hard-to-abate sectors, and delivers sector-specific solutions accordingly. Deloitte emphasizes CEO-led initiatives to establish accountability and ensure net-zero objectives permeate all business operations.

## Implementation and Transformation

Deloitte's services extend beyond strategy development to practical implementation through robust transformation programs. These include:

- **Operational decarbonization:** Reducing emissions from offices, travel, and digital infrastructure, with Deloitte itself committed to a 90% emissions reduction by 2040
- **Supply chain engagement:** Working with suppliers to establish science-based targets, reduce emissions, and improve product-level emissions reporting — critical for organizations with significant Scope 3 emissions
- **Circular economy and energy transition:** Guiding clients in shifting from linear to circular business models and transitioning to renewable energy sources

Deloitte leverages emerging technologies including IoT, geospatial analytics, and AI to optimize decarbonization projects and track progress. Strategic alliances with technology companies such as Google Cloud and SAP enhance its ability to deliver integrated, scalable net-zero solutions.

## Carbon Management Solutions

At the center of Deloitte's carbon management offering is ClearCarbon, its proprietary digital platform. This tool enables organizations to track, optimize, and monetize carbon reductions and removals, with features including:

- Automated documentation and traceability across project life cycles
- Integration of data from suppliers and internal systems
- Advanced analytics for prioritizing carbon initiatives
- Alignment with regulatory frameworks and verification standards

ClearCarbon provides granular, project-level accounting for all greenhouse gases, enhancing transparency and credibility while helping organizations identify value creation opportunities in their carbon strategies, including participation in carbon markets and incentive programs.

## Emissions Reporting Expertise

Deloitte guides clients through the complexities of greenhouse gas accounting according to the GHG Protocol, helping organizations classify emissions into Scope 1, 2, and 3 and establish appropriate boundaries. The company's Omnia ESG Module integrates environmental, social, and governance data, streamlining reporting processes while ensuring alignment with multiple standards.

The firm's automated data integration capabilities connect with clients' existing systems to enhance the efficiency and accuracy of emissions tracking. Deloitte also offers solutions for regulatory compliance, including readiness for the CSRD.

## **Governance and Stakeholder Engagement**

Deloitte helps clients establish robust sustainability governance structures with clearly defined roles and responsibilities, including board-level oversight. The company's risk management offerings include climate scenario analysis and resilience planning, integrating sustainability considerations into enterprise risk management frameworks.

The firm advises on best practices for transparently communicating net-zero commitments to maintain credibility with stakeholders, with governance models designed to adapt as regulations and expectations evolve.

## **Technology Ecosystem and Partnerships**

Deloitte's sustainability services are enhanced by its technology ecosystem, including:

- ClearCarbon for carbon management and monetization
- Omnia ESG Module for data integration and reporting
- GreenSpace Tech for connecting clients with innovative climate solutions

The firm maintains strategic partnerships with technology providers and actively participates in industry initiatives including Climate Group's RE100, EV100, and EP100, as well as the World Green Building Council.

## **Strengths**

Deloitte's proprietary ClearCarbon platform, along with the Omnia ESG Module, enables granular, automated emissions tracking, reporting, and monetization, ensuring regulatory compliance and alignment with global standards. Deloitte's strong technology partnerships and CEO-led governance models further support scalable implementation, robust stakeholder engagement, and transparent communication of net-zero progress.

## **Challenges**

Deloitte's broad service portfolio and focus on large-scale transformation may be less accessible or cost-effective for smaller enterprises seeking more targeted or incremental carbon management solutions

## **Consider Deloitte When**

Clients should choose Deloitte for net-zero and carbon management projects when they require an end-to-end solution that integrates strategy, governance, data

management, and stakeholder engagement — particularly if they need to align with global standards such as SBTi and address complex, sector-specific decarbonization challenges.

## **EY**

EY has been positioned in the Leaders category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

EY offers a suite of carbon management and net-zero services designed to assist organizations in measuring, reporting, and reducing their greenhouse gas emissions while advancing toward net-zero goals. The firm provides end-to-end support across multiple dimensions of carbon management, from baseline emissions assessment to strategy development and implementation of decarbonization pathways. EY has advanced digital capabilities to support clients in automating carbon footprint measurement using robust processes and controls and achieving their decarbonization targets.

### **Carbon Accounting Services**

EY delivers a range of carbon accounting services covering Scope 1, 2, and 3 emissions. For clients with varying levels of internal capabilities, EY supports emissions data collection, calculation, aggregation, and reporting based on existing standards. Key services include:

- Assessment of current emissions management programs
- Selection of appropriate criteria and organizational boundaries
- Identification of key emissions data owners and evaluation of primary data availability
- Design of inventory management processes and implementation of data governance
- Review of emission calculation methodologies aligned with regulatory frameworks
- Development of inventory management plans (IMPs)

For Scope 3 emissions specifically, EY employs a flexible approach to build programs that fit clients' needs. The firm helps identify emissions sources across the value chain and performs high-level screening to identify significant Scope 3 categories. EY assists clients in interpreting screening results to facilitate understanding of carbon hotspots and determining which Scope 3 categories to pursue for detailed calculation.

## Specialized Emissions Services

EY provides specialized services for financed emissions and product-level emissions:

- **Financed emissions:** For financial institutions, EY supports the establishment and enhancement of net-zero strategies by:
  - Developing methodologies to measure financed emissions and set targets
  - Creating Category 15 financed emissions GHG inventory management plans in line with PCAF
  - Performing current state gap assessments using industry frameworks
  - Developing financed emissions target pathways and road maps
- **Product-level emissions:** EY offers services including:
  - Comprehensive LCAs aligned with ISO standard 14067
  - End-to-end sustainability tracking solutions to accelerate product-level reporting capabilities
  - Circularity insights tools to evaluate quantitative environmental and financial impacts of implementing R-strategies (reuse, repair, remanufacture, etc.)

## Emissions Assurance Services

EY conducts both pre-assurance and formal assurance engagements for emissions reporting:

- **Pre-assurance:** EY performs pre-assessment engagements to evaluate the criteria, data, processes, systems, and controls used in preparing sustainability disclosures including GHG metrics. These assessments identify gaps in reported disclosures and help companies proactively manage risks in response to stakeholder expectations and regulatory requirements.
- **Assurance:** EY provides independent assurance over nonfinancial disclosures, metrics, and reporting to enhance transparency and accountability to stakeholders. While limited assurance over emission metrics has been common, EY notes an increasing interest in reasonable assurance with evolving global sustainability regulations. The firm employs a Sustainability Assurance Methodology (SAM) that applies a risk-based approach to provide credibility and transparency.

## Net-Zero Strategy and Transformation

EY's approach to supporting clients through its net-zero transition is structured around the EY Net Zero Transformation Framework, which addresses three key areas:

- **Strategy definition:** EY helps clients understand global alignment toward net-zero, build business cases, and define ambitions and strategies.
- **Action acceleration:** Services include support for decarbonizing operations, reducing value chain emissions, and reshaping portfolios with innovative solutions.
- **Transformation enablement:** EY assists clients in funding their net-zero journey, adapting operating models, engaging with stakeholders, and preparing for compliance and progress reporting.

Throughout the process, EY supports clients in leveraging data and technology to accelerate change and employs a maturity assessment model to help clients understand their position in the decarbonization journey and identify where to invest for impact. EY enables clients to understand climate change mitigation and adaptation holistically by providing services that draw connections between transition planning, physical and transition risk, and nature dependencies and impacts as integral parts of its net-zero transformation services.

## Strengths

EY's advanced digital capabilities enable automation of carbon footprint measurement, robust data governance, and alignment with global regulatory frameworks, making the company well suited for organizations with complex reporting requirements. EY's specialized expertise in financed emissions, product-level life-cycle assessments, and independent emissions assurance services further enhances transparency, credibility, and stakeholder trust in sustainability disclosures.

## Challenges

EY's emphasis on comprehensive assurance and risk-based methodologies could result in longer project timelines, especially for clients new to nonfinancial disclosure or those seeking rapid progress.

## Consider EY When

EY is particularly well suited for clients seeking robust expertise in Scope 3 and financed emissions, independent assurance for sustainability disclosures, and a holistic approach that connects climate risk, nature dependencies, and innovative solutions to accelerate progress toward ambitious net-zero goals.

## ERM

ERM has been positioned in the Major Players category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

Environmental Resources Management (ERM) did not fully participate in this IDC MarketScape and was assessed based on publicly available information and existing IDC research.

ERM is a sustainability consultancy with over 8,000 experts operating in 40 countries. ERM supports organizations in carbon management and net-zero transition by combining technical expertise, strategic advisory, implementation, and digital solutions. This approach enables clients to meet climate targets while addressing business resilience and regulatory compliance.

## **Carbon Management Capabilities**

ERM's carbon credit procurement services are delivered through its *ERM Climate Markets* division, established in 2024 to address demand for decarbonization pathways that include carbon credit solutions.

Central to ERM's carbon market offering is the *ERM Carbon Credit Portal*, a platform that supports clients in identifying, assessing, and procuring carbon credits from verified nature-based projects. These credits emphasize carbon sequestration along with biodiversity conservation and social co-benefits.

## **GHG Accounting, Target Setting, and Decarbonization Road Maps**

ERM assists clients in quantifying GHG emissions, setting targets and developing decarbonization road maps aligned with net-zero commitments (e.g., via the SBTi). This includes operational improvements, energy efficiency upgrades, circular economy integration, and supply chain emissions reduction across Scope 1, 2, and 3. ERM provides advisory services on policy impacts such as carbon border adjustment mechanisms and regional compliance schemes to help clients anticipate regulatory changes.

## **Net-Zero Transition Services**

ERM supports organizations in translating net-zero commitments into actionable strategies and measurable outcomes through sector-specific expertise, digital tools, and regulatory guidance.

ERM develops net-zero road maps for sectors including energy, heavy industry, manufacturing, finance, and technology. Energy clients receive support for services including methane abatement programs and clean energy permitting, while manufacturers can access industrial symbiosis and low-carbon product design services. Financial institutions utilize ERM's climate risk modeling and portfolio alignment tools to meet investor and regulatory requirements.

ERM works with clients to develop carbon market strategies that complement their decarbonization actions.

ERM is a *Global Tier 1 Implementation Partner* with Salesforce for Net Zero Cloud, a platform that automates emissions data collection, integrates Scope 1–3 reporting, and supports compliance with frameworks such as CSRD, IFRS, and TCFD. Scenario modeling capabilities allow clients to evaluate decarbonization pathways, balancing capital expenditures (capex) against carbon pricing risks.

ERM also provides expertise in double materiality assessments, climate risk disclosures, and just transition frameworks to address workforce and community impacts during energy transitions.

## Sector-Specific Expertise

ERM provides solutions tailored to specific sectors:

- **Energy and heavy industry:** Permitting for carbon capture and storage, offshore wind development, and methane emissions reduction using AI-enabled leak detection
- **Financial services:** Climate risk stress testing, carbon market guidance and support, green bond structuring, and Paris-aligned portfolio screening
- **Technology and manufacturing:** Renewable energy procurement, datacenter efficiency, life-cycle assessments, and compliance with recycled content regulations

## Integrated Sustainability Approach

ERM integrates nature-based solutions, water–energy nexus strategies, and social impact assessments to deliver sustainability outcomes. With over 180 active biodiversity projects worldwide, ERM combines carbon sequestration with ecosystem restoration. Its human rights due diligence frameworks address local communities and indigenous rights in decarbonization projects.

## Verification and Assurance

ERM's independent assurance arm, *ERM CVS*, provides accredited third-party validation and verification services for carbon market projects, as well as independent assurance on corporate GHG emissions and related claims.

## Partnerships and Industry Contributions

ERM's alliances with ecosystem partners including Salesforce and CEEZER and groups such as the Science-Based Targets initiative support its service delivery. The firm participates in global climate policy development and contributes to industry standards for carbon credit integrity. Internally, ERM has set a net-zero operations target for 2040, validated by SBTi.

## Strengths

ERM's track record as a specialist firm for environmental consulting, combined with its proprietary Carbon Credit Portal and partnerships, such as its Global Tier 1 Implementation Partner status with Salesforce for Net Zero Cloud, enables clients to automate emissions data collection, access verified carbon credits, and ensure robust regulatory compliance.

## Challenges

ERM's comparatively smaller size and narrower global footprint may limit its capacity to scale rapidly for the most complex, multijurisdictional carbon management projects or to provide the same breadth of in-house resources across every market. This can present challenges for clients with extensive global operations that require seamless, highly coordinated support in multiple regions.

## Consider ERM When

Clients should consider partnering with ERM for engagements that require deep subject matter expertise and industry experience in carbon credit acquisition and verification.

## KPMG

KPMG has been positioned in the Leaders category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

KPMG is a provider of professional services in carbon management and net-zero services, offering comprehensive solutions to help organizations address climate-related challenges and achieve their sustainability goals. With deep expertise in carbon accounting, net-zero strategies, and emissions reporting, KPMG supports corporate and public sector clients across diverse industries, including financial services, manufacturing, and energy.

## Core Capabilities in Carbon Accounting

KPMG's carbon accounting services are designed to estimate GHG emissions and develop detailed GHG inventories for various purposes:

- **Sustainability reporting:** Assisting clients in meeting ESG disclosure requirements
- **Finance- and insurance-related and facilitated emissions:** Helping financial institutions understand the climate impact of their investment portfolios and other financial activities

- **Regulatory compliance:** Supporting measurement, reporting, and verification (MRV) requirements under carbon market governance mechanisms
- **Decarbonization planning:** Developing baselines and road maps for emissions reduction targets and tracking progress over time
- **Technology integration:** Implementing technology-enabled solutions such as Microsoft Sustainability Cloud for efficient carbon accounting and ESG reporting

KPMG also provides assurance services to verify the accuracy and completeness of clients' GHG inventories. In addition, the firm conducts reviews of existing inventories to recommend improvements in data quality and relevance.

## Net-Zero Strategy Development

KPMG specializes in crafting tailored net-zero strategies that align with science-based targets. Key offerings include:

- **Policy assessment:** Evaluating climate policy and regulation impact in current and future operations
- **Scenario development:** Modeling decarbonization scenarios with varying levels of ambition, such as business-as-usual or 1.5C-aligned pathways
- **Techno-commercial assessments:** Evaluating technological and operational levers for emissions reduction
- **Financial assessment:** Evaluating the financial requirements and impact of technological and operational levers for emissions reduction and supporting the development of business case for implementation
- **Target setting:** Establishing near-term and long-term emissions reduction targets in alignment with the SBTi
- **Portfolio alignment:** Assisting financial institutions with net-zero portfolio strategies and temperature alignment
- **Implementation support:** Operationalizing decarbonization road maps through renewable energy advisory, strategic energy management, supplier engagement strategies, and carbon offset planning
- **Transition planning support:** Assisting in the development of transition planning strategy, implementation, and reporting

## Data Collection and Emissions Calculation

KPMG employs a structured approach to data collection and aggregation for GHG inventorization:

- **Scope analysis:** Assessing the relevance of Scope 1 (direct emissions), Scope 2 (indirect emissions from energy use), and Scope 3 (value chain emissions) categories based on applicable standards and sector-specific guidance
- **Data validation:** Ensuring accuracy through primary data sources such as fuel consumption records, electricity usage data, and supplier-specific information
- **Emission factors:** Utilizing globally recognized databases from credible organizations such as the International Energy Agency (IEA) and IPCC to ensure verifiability and consistency

Emissions are calculated following the GHG Protocol Corporate Standard and other sector-specific market guidelines to ensure precision and relevance.

## Reporting and Visualization

To enhance transparency, KPMG supports clients in aligning their emissions reporting with standards such as the Global Reporting Initiative (GRI), CDP, ISSB, and CSRD requirements. Advanced visualization tools such as Power BI dashboards enable organizations to monitor emissions trends, identify hotspots, and track progress against reduction targets.

## Carbon Scenario Analysis

KPMG offers robust carbon scenario analysis capabilities to model the impact of various decarbonization initiatives. Scenarios range from business-as-usual (BAU) to more ambitious pathways aligned with global climate goals. These analyses help organizations evaluate potential outcomes under different policy environments or operational conditions.

## Strengths

KPMG excels in integrating technology-enabled solutions, such as Microsoft Sustainability Cloud, and advanced visualization tools to streamline data collection, ensure regulatory compliance, and provide actionable insights through scenario analysis and robust reporting dashboards. KPMG's structured approach to target setting, policy assessment, and implementation support aligns with global standards such as the GHG Protocol and SBTi, helping clients achieve credible and measurable sustainability outcomes.

## Challenges

KPMG's broad service portfolio and multi-industry focus, while comprehensive, may limit the depth of sector-specific customization compared with specialized sustainability consultancies. And for clients with less mature digital infrastructures, KPMG's technology-driven services may potentially cause minor delays due to the complexities in their implementation.

## Consider KPMG When

KPMG is especially well suited for organizations seeking to integrate advanced technology solutions for granular measurement, audit-ready climate disclosure, and actionable insights across complex, multi-industry operations.

## McKinsey

McKinsey has been positioned in the Leaders category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

McKinsey provides organizations with structured approaches to measure, manage, and reduce GHG emissions while advancing toward net-zero objectives. The company's services integrate proprietary digital tools, sector-specific expertise, and strategic advisory to address emissions across operational, supply chain, and product life-cycle stages. The sections that follow provide an expanded overview of McKinsey's carbon management and net-zero capabilities.

## Carbon Management Framework

### Measurement and Reporting

McKinsey's carbon management begins with robust emissions measurement systems. The *Catalyst Zero* platform serves as a core tool, enabling organizations to calculate emissions at corporate and product levels, including LCAs. The platform supports compliance with global standards, such as the GHG Protocol, ISO 14064, and ISO 14067, while offering access to a database of over 300,000 emission factors. This tool allows clients to establish auditable baselines, identify emission hotspots, build cost-optimal decarbonization road maps, and track progress against reduction targets. Its distinctiveness lies in a library of more than 1,400 premodeled decarbonization business cases across value chains.

### Specialized Tools for Value Chain Decarbonization

- **Spendscape:** Targets procurement and supply chain emissions (Scope 3), linking spend data to emission factors to prioritize high-impact decarbonization actions
- **Value Chain Twin:** A digital replica of a client's value chain that simulates carbon impacts at each life-cycle stage, enabling scenario testing for operational optimization
- **Resource Cleansheet:** Analyzes resource efficiency and cost structures to inform sustainable product design and process improvements
- **Planetrics:** Focused on financial institutions, this tool evaluating climate risks across asset classes and integrating them into investment decisions

## Carbon Market Integration

McKinsey supports clients in navigating voluntary and compliance carbon markets through market intelligence, policy advisory, and project development. Services include carbon credit price forecasting, demand analysis, and end-to-end project support — from due diligence to certification and trading. The integration of *Vivid Economics* enhances capabilities in economic modeling and climate risk assessment, enabling clients to align carbon strategies with regulatory frameworks and market trends.

## Net-Zero Transition Services

### Strategy Development

McKinsey assists organizations in setting science-based targets and designing decarbonization pathways that balance ambition with feasibility. This includes identifying high-impact reduction levers, such as energy efficiency, renewable energy adoption, and circular economy practices. McKinsey uses a library of more than 1,400 premodeled decarbonization business cases — that specify capex and opex — across value chains to help establish cost-optimal decarbonization plans.

### Technology and Innovation

The firm provides expertise in emerging technologies, including Carbon Capture, Utilization, and Storage (CCUS) and Carbon Dioxide Removal (CDR), to address hard-to-abate emissions. The company also advises on scaling green technologies, such as hydrogen and battery storage, through partnerships with start-ups and industry leaders.

### Implementation Support

Cross-functional execution plans are developed to operationalize net-zero strategies, supported by tools such as Catalyst Zero for monitoring progress. McKinsey emphasizes on integrating decarbonization into broader business operations, ensuring alignment with financial and operational goals.

### Regulatory and Risk Alignment

Services include scenario modeling to anticipate regulatory shifts and physical climate risks. Proprietary models analyze emissions trajectories under frameworks such as the IPCC's Representative Concentration Pathways (RCPs), helping clients future-proof strategies against policy changes and market disruptions.

### Cross-Cutting Capabilities

- **Digital integration:** Cloud-based platforms and AI-driven analytics enable real-time emissions tracking and integration with financial systems

- **Sector-specific solutions:** Tailored approaches for industries such as energy, manufacturing, and finance, addressing unique challenges such as supply chain complexity or financed emissions
- **Collaborative ecosystems:** Partnerships with technology providers, investors, and policymakers to accelerate innovation and scale decarbonization solutions

## Strengths

McKinsey's sector-specific expertise, robust economic modeling through Vivid Economics, and integration of advanced technologies, such as CCUS and green hydrogen, position the company as a strong provider for addressing operational and supply chain emissions as well as hard-to-abate sectors. McKinsey's cross-functional execution support and collaborative partnerships with technology providers further ensure that clients receive actionable strategies aligned with global standards and market trends.

## Challenges

McKinsey's strong emphasis on digital tools and cross-functional integration may require significant change management and organizational alignment, which could slow down implementation due to the necessity of adjacent services to ensure deep connection and alignment between client and provider.

## Consider McKinsey When

McKinsey is especially well suited for organizations seeking to balance ambitious decarbonization targets with financial and operational goals, benefit from advanced scenario modeling and economic analysis, and access innovative approaches for hard-to-abate sectors or global, multijurisdictional projects.

## NTT Data

NTT Data has been positioned in the Major Players category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

NTT Data did not fully participate in this IDC MarketScape and was assessed based on publicly available information and existing IDC research.

NTT DATA is a global provider of IT and business services with a portfolio that includes carbon management, net-zero strategy, and carbon reporting solutions. The company delivers technology platforms, consulting services, and data integration tools to support organizations in measuring, managing, and reporting GHG emissions, as well as developing and implementing decarbonization strategies.

## Carbon Management Solutions

### Carbon Footprint Measurement and Management

NTT DATA offers solutions for the measurement, monitoring, and management of organizational and product-level carbon footprints. The company provides integration with platforms such as SAP SiGREEN to enable automated data transfer and calculation of PCFs. These solutions support the collection and analysis of emissions data across direct (Scope 1 and 2) and indirect (Scope 3) sources.

### Technology Platforms

NTT DATA has developed and implemented several digital platforms for carbon management:

- **C-Turtle:** A cloud-based platform for visualizing greenhouse gas emissions across supply chains
- **CO2Sink:** A platform focused on monitoring carbon sequestration in forestry projects
- **MeetZero:** A tool for managing carbon credit transactions and emissions offsetting
- **VALU-ES:** A platform for integrating natural capital and ecosystem services data into business reporting

## Net-Zero Strategy and Advisory Services

### Net-Zero Targets

NTT DATA has publicly stated net-zero targets, including achieving net-zero emissions from datacenters by 2030, all facilities by 2035, and the entire value chain (Scope 3) by 2040. These targets have been validated by the SBTi.

### Consulting Services

The company provides advisory services for the development and execution of net-zero strategies. These services include:

- Assessment of climate-related risks and opportunities
- Development of decarbonization road maps
- Integration of climate risk management into business processes
- Implementation of carbon accounting and offset programs

## **Supply Chain Emissions Management**

NTT DATA offers solutions to support supply chain transparency and decarbonization. This includes supplier engagement, emissions visualization tools, and platforms for data sharing and collaboration.

## **Carbon Reporting and ESG Disclosure**

### **Reporting Platforms and Regulatory Compliance**

NTT DATA delivers ESG and carbon reporting solutions designed to support compliance with international frameworks such as the CSRD, GRI, TCFD, and CDP. The company implements data models and reporting platforms that automate the collection, calculation, and disclosure of sustainability data.

### **Platform Integration**

NTT DATA integrates with third-party platforms, including Salesforce Net Zero Cloud, to streamline sustainability data management and reporting. The company's solutions are configurable for various regulatory and stakeholder requirements.

### **Operational Scope and Resources**

NTT DATA has over 15 years of experience in sustainability services.

The company employs a global sustainability team of over 400 specialists, supported by a workforce of approximately 190,000.

The company has reported a 21% reduction in total emissions and over 1.6 million tons of carbon emissions avoided in a recent fiscal year.

### **Strengths**

NTT Data's strengths lie in its organizational commitment to sustainability. While the sustainability practice is still relatively young, NTT-Data's development strategy shows strength and commitment to the continued development of sustainability-related services, and carbon management is one of the largest focus areas for the organization today.

### **Challenges**

NTT Data's comparably smaller sustainability-specific workforce may hinder the company in some larger, more global projects. NTT Data could be well served by expanding this workforce through internal training and upskilling or outside talent acquisition.

## Consider NTT Data When

Organizations should consider partnering with NTT Data when their needs are focused primarily on reporting and compliance. NTT Data's strong technology and software foundation allows the company to deliver value to clients on reporting and compliance in an efficient and cost-effective manner, regardless of the materiality of the client.

## PwC

PwC has been positioned in the Major Players category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

PricewaterhouseCoopers (PwC) presents its carbon management and net-zero services as an integrated component of its broader strategic vision, aligning sustainability with other global priorities such as business model reinvention, artificial intelligence, and trust. This approach is designed to embed sustainability considerations into all aspects of client service delivery, rather than treating them as distinct or isolated initiatives.

PwC's organizational structure supports this integration through the Global Climate Impact Centre, which brings together climate scientists, financial accountants, industry experts, and engineers. The center coordinates efforts across geographies and industries, leveraging both global collaboration and local expertise. Strategic alliances with technology partners, such as SAP and Microsoft, further augment PwC's capabilities in developing and deploying sustainability solutions.

The firm's net-zero services are structured around four key phases: maturity and baselining, strategy development, transformation road map, and transformation implementation. These phases guide clients through a comprehensive decarbonization process, starting with a detailed assessment of the current emissions profile, followed by the development of actionable strategies for short-, medium-, and long-term goals. The service offering covers 12 core capabilities, including emissions inventories, target setting, supply chain transformation, and operations alignment.

Carbon accounting services at PwC are designed to help organizations navigate the complexities of global climate reporting standards and voluntary disclosures. The firm supports a range of GHG accounting methodologies, including the GHG Protocol, ISO 14064, PCAF, Climate Disclosure Project, Bilan Carbone Method, Science-Based Targets initiative, Task Force on Climate-Related Financial Disclosures, and the Sustainability Accounting Standards Board. These services include assistance with regulatory requirement interpretation, data selection, and the application of GHG accounting principles, ensuring consistency across various operational, geographic, and industry contexts.

PwC employs a suite of proprietary tools and digital solutions to support its carbon management services. Notable examples include the Emissions Tracker for carbon data management, the Net Zero Maturity Assessment for evaluating client readiness, ESG Pulse for ESG performance assessment, and Geospatial Climate Intelligence software for assessing physical climate threats across multiple perils and scenarios. These tools are updated regularly to reflect current emissions factors and to ensure readiness for third-party assurance and investor-grade reporting.

The firm's climate scenario analysis capabilities have been developed over two decades and are integrated into its core sustainability services. PwC's methodology evaluates physical climate risks, such as flooding, wildfires, heat, and water stress, using established risk concepts such as hazard, exposure, sensitivity, and adaptive capacity. Scenario analyses align with frameworks such as ESRS E1, IFRS S2, and TCFD, providing clients with transparency and accountability in sustainability reporting. The Geospatial Climate Intelligence software, for example, models potential climate threats across 12 perils under various scenarios extending to 2100.

PwC's approach to service delivery emphasizes the integration of sustainability into IT operations and the use of technology to drive sustainability reporting, disclosures, and strategic initiatives. The firm's strategy for scaling services to global clients involves understanding specific client needs, leveraging both global coordination and local expertise, integrating technology and data, and maintaining robust data governance and continuous improvement processes.

Key data capabilities identified by PwC for supporting clients in their net-zero transformation include current state assessment, decarbonization strategy development, transformation road map creation, and implementation support. The firm advises clients to align sustainability strategies with commercial objectives, noting that ESG and commercial strategies often respond to similar challenges, such as changing customer behaviors and emissions targets.

PwC's managed services for sustainability have been enhanced to address evolving ESG standards and client needs, providing organizations with tools to assess and improve their ESG performance.

The firm's advisory services extend to supporting clients in operationalizing carbon reduction strategies across their business, with a focus on data-driven decision-making and transparent reporting.

PwC's methodology for client engagement includes the identification and understanding of challenges and opportunities related to sustainable business transformation, as well as the infusion of ESG considerations throughout business models, products and services, operating models, and talent management.

## Strengths

PwC differentiates by integrating carbon management and net-zero services into its broader strategic vision, embedding sustainability across business model reinvention, AI, and trust. The firm leverages its Global Climate Impact Centre, which unites climate scientists, accountants, engineers, and industry experts to deliver coordinated, cross-disciplinary solutions tailored to both global and local contexts.

## Challenges

PwC's wide-ranging service portfolio and global coordination efforts can lead to complex project management structures, potentially resulting in slower decision-making or less personalized support for midsize organizations. In addition, PwC's approach of aligning ESG and commercial strategies may not always align with clients whose primary goals are compliance driven or narrowly focused on carbon accounting.

## Consider PwC When

PwC is particularly well suited for multinational organizations or those facing complex regulatory landscapes, as the firm's global network, strategic technology alliances, and experience in aligning sustainability with commercial objectives provide comprehensive support from strategy development to implementation and ongoing compliance.

## Schneider Electric

Schneider Electric has been positioned in the Major Players category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

Operating in over 190 countries with a team of more than 3,300 sustainability professionals, Schneider Electric serves a diverse client base across industries. The company's global presence enables it to address complex challenges at both local and international levels while tailoring solutions to meet the unique needs of each organization.

## Core Focus Areas

Schneider Electric's carbon management and net-zero services are designed to support organizations across industries in reducing their environmental impact. The company's approach is built on three pillars: *strategize*, *digitize*, and *decarbonize*.

## Strategize

Schneider Electric helps clients develop comprehensive sustainability strategies tailored to their specific needs. This includes setting science-based targets, creating net-zero road maps, and aligning with regulatory requirements such as emerging ESG reporting

standards. The company also provides guidance on climate risk management to help businesses navigate physical and transitional risks associated with climate change.

## Digitize

Leveraging cutting-edge digital tools, Schneider Electric enables organizations to monitor, analyze, and optimize their energy usage and carbon emissions. Key solutions include AI-driven platforms, such as Resource Advisor Copilot, which provide real-time insights for data-driven decision-making. These tools empower companies to streamline sustainability reporting, track progress against goals, and identify opportunities for improvement.

Zeigo is a sustainability software (SaaS) solution developed by Schneider Electric to accelerate decarbonization for companies of all sizes. Leveraging decades of expertise, Zeigo transforms ambition into action with proven decarbonization strategies:

- **Emissions tracking and calculation:** Zeigo allows businesses to establish a carbon emissions baseline, set measurable decarbonization targets, and calculate Scope 1 and 2 emissions.
- **Decarbonization road map:** The platform provides a customized decarbonization road map to guide businesses in achieving their sustainability goals.
- **Solution provider marketplace:** Zeigo connects businesses with a network of solution providers, including renewable energy providers, to help them implement decarbonization strategies.

## Decarbonize

Schneider Electric implements practical solutions to reduce emissions across Scope 1, 2, and 3. This includes renewable energy procurement strategies, energy efficiency improvements, electrification initiatives, and supply chain engagement programs. The company also supports organizations in adopting circular economy principles to minimize waste and maximize resource efficiency.

## Service Offerings

Schneider Electric's carbon management services encompass a wide range of solutions designed to address the unique challenges of achieving net zero:

- **Carbon footprinting:** Comprehensive assessments of emissions across all scopes to establish baselines and identify reduction opportunities
- **Net-zero strategy development:** Customized planning for achieving net-zero emissions through actionable milestones

- **Renewable energy advisory:** Guidance on sourcing renewable energy through power purchase agreements (PPAs), tax credit transfers (TCTs), onsite generation, and other mechanisms
- **Supply chain decarbonization:** Engagement with suppliers to reduce upstream emissions and improve overall supply chain sustainability
- **Carbon offset development:** High-quality offset projects that meet rigorous certification standards for verified emissions reductions
- **Climate risk assessment:** Tools for identifying vulnerabilities related to climate change impacts and integrating resilience into business strategies

## Integration with EcoAct

The acquisition of EcoAct has significantly enhanced Schneider Electric's capabilities in carbon offset development and sustainability consulting. This integration has created a global network of specialists focused on delivering end-to-end solutions for climate action. EcoAct's expertise in nature-based solutions, biodiversity conservation, and carbon offset certification complements Schneider Electric's technical prowess in energy management and decarbonization.

## Strengths

Schneider Electric's integrated approach leverages advanced digital tools such as the AI-driven Resource Advisor Copilot and the Zeigo SaaS platform to provide real-time emissions tracking, customized decarbonization road maps, and access to a broad network of renewable energy and solution providers. The acquisition of EcoAct further strengthens Schneider Electric's capabilities in carbon offset development, nature-based solutions, and sustainability consulting, creating a comprehensive end-to-end climate action offering.

## Challenges

Schneider Electric may face challenges in pure net-zero or carbon management consulting engagements as its experience in this area is less so due to the company's focus on energy transition and hardware implementation. However, as Schneider Electric continues to invest aggressively in its consulting practice, this challenge should fade.

## Consider Schneider Electric When

Schneider Electric is particularly well suited for organizations seeking integrated support in energy management, supply chain decarbonization, and renewable energy procurement, as well as those looking to leverage platforms such as Zeigo and Resource Advisor Copilot, backed by the expertise of a company consistently recognized as a sustainable corporation.

# TCS

TCS has been positioned in the Major Players category in this 2025 IDC MarketScape on worldwide carbon management and net-zero services.

Tata Consultancy Services (TCS) is a global IT services, consulting, and business solutions organization that partners with businesses to guide and streamline their transformation journeys. TCS offers a consulting-led, cognitive-powered, integrated portfolio of business, technology, and engineering services and solutions. As part of its purpose-led sustainability service offerings, TCS provides comprehensive carbon management and net-zero solutions, helping businesses navigate the complexities of sustainability and achieve their triple bottom-line goals.

## Carbon Accounting Services

TCS offers a comprehensive array of carbon accounting and decarbonization services, including:

- Building carbon registries as per agreed methodologies/protocols to provide a centralized database for tracking and managing carbon-related data
- Source-to-target mapping of Scope 1, 2, and 3 emissions as per agreed reporting frameworks to ensure accurate and comprehensive emissions tracking across the value chain
- Data collection and analysis capabilities to ensure accurate tracking, reporting of emissions, and empowering with intelligent insights that enable enterprises to take actions as they progress in their net-zero journey
- Providing insights to enable enterprises to take actions as they progress in their net-zero journey. TCS IUX, TCS Clever Energy, TCS Quartz ESG Solution, and TCS Envirozone are a few TCS solutions used as digital enablers.

Furthermore, TCS delivers CCUS solutions, providing technologies for capturing CO<sub>2</sub> at the source and storing it safely, employing advanced carbon capture technologies and AI-driven solutions for efficient CO<sub>2</sub> sequestration. The company also offers carbon market and offset solutions:

- **Carbon offset and portfolio management:** TCS assists companies in managing their carbon offset portfolios by identifying and investing in projects that reduce or remove greenhouse gases, providing strategies for purchasing carbon credits and managing offset investments to maximize the environmental impact.
- **Carbon trading and CO<sub>2</sub> tokenization:** TCS supports companies in trading carbon credits and utilizing CO<sub>2</sub> tokenization to enhance transparency and efficiency, enabling businesses to engage in carbon markets with blockchain technology (TCS Quartz) to tokenize carbon credits and ensure secure, traceable transactions.

## Net-Zero Services

TCS's net-zero service capabilities include:

- **Net-zero strategy and road map:** Constructing net-zero strategies and road maps based on materiality assessment and SBTi-based target setting, considering the value chain and business plans/strategy
- **Decarbonization pathways assessment and implementation:** Assessing and implementing decarbonization pathways by analyzing current carbon footprints and identifying reduction opportunities (energy efficiency, renewable energy, and optimizing operations) (TCS and its ecosystem [co-innovation network of partners, start-ups, and academies] support the execution of strategies to reduce carbon emissions.)
- **Emissions forecasting and pre-assurance support:** Helping companies predict future emissions and ensure regulatory compliance through detailed reports and recommendations (TCS Intelligent Urban Exchange [IUX] and Envirozone use AI and data analytics to forecast emissions and provide insights for pre-assurance.)
- **Process/design efficiency measures:** Improving workflows, resource allocation, and operational efficiency using real-time data analytics, process mining, and IoT solutions
- **Sustainable supply chain:** Helping build sustainable supply chains by offering solutions that help businesses assess, manage, and improve their ESG performance and reduce environmental and social risks across their supply chains (Digital solutions such as TCS Digifleet and Envirozone are used in this area.)
- **Climate risk management:** Identifying, assessing, and mitigating climate-related risks using a framework that integrates with enterprise risk management (ERM), along with sustainability reporting and disclosures (TCS IUX supports disclosure reporting according to various regulatory standards. The platform utilizes GIS data and climate models to estimate the probability and intensity of a particular event at a particular time horizon to analyze the impact of potential natural threats.)

## Implementation

TCS has experience with various standards and frameworks around Scope 3 emissions, including supporting European banks with GRI and EU Taxonomy. Examples of implementations include:

- **Data collection and aggregation:** Ingesting data from multiple sources such as fuel, electricity, waste, water, employee commute, and business travel data for a large Indian MNC using TCS IUX

- **Emissions calculation:** Using GHG protocols to develop emission overview and drill-down dashboards with descriptive analysis, quantifiable outputs (bar graphs and pie charts, etc.), based on GHG protocols, and published KPIs that are compliant with GRI reporting method
- **Reporting and visualization:** TCS generating energy dashboards that presents energy consumption in charts and graphs and calculating factors such as energy intensity, percentage renewable energy consumed, monthwise energy trends, total energy purchased, and total energy sold (Similarly, waste, water, and other dashboards have also been processed.)
- **Target setting and tracking:** Configuring targets in IUX based on the company's self-declared targets and industry benchmarks that allow the enterprise to compare and benchmark their emission levels against SBTi targets

## Carbon Scenario Analysis Capabilities

TCS offers carbon scenario analysis using AI/ML-powered analytics to help organizations manage their carbon emissions and climate risks, ultimately enabling them to meet sustainability goals and achieve net-zero targets. While doing carbon scenario analysis, TCS explores potential future outcomes by considering different assumptions and variables, helping organizations prepare for various possibilities and make more informed decisions.

TCS' carbon scenario analysis aims to improve environmental compliance, minimize supply chain risks, drive sustainability-led growth, and facilitate data-driven decision-making.

## Strengths

TCS offers a comprehensive, consulting-led approach to carbon management and net-zero, leveraging advanced digital solutions such as TCS IUX, Clever Energy, Quartz ESG, and Envirozone to enable accurate emissions tracking, scenario analysis, and AI-powered insights for strategic decision-making.

## Challenges

The integration of multiple digital solutions and platforms can introduce complexity for clients, requiring significant change management and internal alignment to achieve optimal results. However, with proper change management and IT implementation services, the time to value for developing internal alignment should be relatively short.

## Consider TCS When

TCS is especially well suited for organizations seeking to integrate sustainability into their core business through AI, IoT, and cloud-based platforms; benefit from expertise in carbon markets and offset strategies; and align with ambitious science-based targets for rapid, measurable progress toward net zero.

### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

This assessment weighted the capabilities criteria of vendors higher than the strategy criteria on a 75:25 ratio. This was done as clients of these service providers showed an increased scrutiny of a vendor's ability to provide technical expertise for carbon management and net-zero services over how the firm operates as a whole.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the relative revenue each individual vendor within the specific market segment being assessed.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

The carbon management and net-zero services market includes advisory, implementation, investment, and management services (inclusive of SaaS and managed services) related to an organization's carbon reduction and abatement strategies. These services take the form of carbon accounting, carbon risk assessments, reporting and compliance, carbon sequestration, net-zero strategy development and implementation, and carbon data sourcing, aggregation, analysis, and reporting.

These services are often a combination of traditional consulting services and a tech-enabled solution for monitoring, measuring, data capture, and reporting on pillar-specific ESG issues.

The sections that follow provide the definition for carbon management, net-zero, and sustainability services.

## Carbon Management Services: Core Components of Carbon Management Services

- **Measurement and assessment:** Establishing a comprehensive baseline by quantifying direct (Scope 1), indirect (Scope 2), and value chain (Scope 3) emissions through robust data collection, carbon footprint analysis, and life-cycle assessments
- **Reporting and disclosure:** Preparing standardized reports for internal stakeholders and external regulatory bodies, ensuring transparency and compliance with frameworks such as the Science-Based Targets initiative (SBTi), EU and U.K. reporting mandates, and other environmental, social, governance (ESG) requirements
- **Carbon capture, utilization, and storage (CCUS):** Deploying advanced technologies to capture, remove, transport, reuse, or permanently store CO<sub>2</sub> emissions from industrial processes, power generation, or directly from the atmosphere (e.g., direct air capture)
- **Offsetting and compensation:** Facilitating investments in verified carbon offset
- **Technology integration:** Leveraging digital platforms and carbon management software to automate data collection, emissions tracking, scenario analysis, and progress monitoring, thereby enabling data-driven decision-making and continuous improvement
- **Stakeholder engagement and advisory:** Providing expert guidance on regulatory trends, best practices, and change management to ensure organizationwide alignment and effective communication with investors, customers, and other stakeholders

## Strategic Objectives

The overarching aim of carbon management services is to enable organizations to:

- Achieve and demonstrate progress toward net-zero or science-based targets.
- Enhance operational efficiency and reduce costs associated with energy and resource use.
- Strengthen brand reputation and stakeholder trust by proactively addressing climate-related risks and opportunities.
- Comply with evolving climate regulations and nonfinancial disclosure requirements.
- Contribute meaningfully to global efforts to limit warming to 1.5C above preindustrial levels, as outlined by the Intergovernmental Panel on Climate Change.

## Sustainability

It is an umbrella term used to define a broad range of actions and stances that uphold and further the notion that social and environmental stewardship should be key factors in any decision-making process.

## Net-Zero Services

### Core Components of Net-Zero Services

- **Strategic planning and target setting:** Assisting organizations in developing robust net-zero strategies aligned with science-based targets, regulatory requirements, and industry best practices (This includes establishing clear, time-bound objectives for emissions reductions across all operational scopes.)
- **Emissions reduction pathways:** Designing and implementing deep decarbonization initiatives to reduce emissions by at least 90–95%, as required by leading net-zero standards (This may involve energy efficiency programs, renewable energy adoption, process innovation, and supply chain engagement.)
- **Carbon removal and offsetting:** Identifying and investing in credible carbon removal solutions (e.g., reforestation, direct air capture, and carbon capture and storage) to neutralize residual emissions that cannot be eliminated internally
- **Performance monitoring and reporting:** Providing ongoing data management, progress tracking, and transparent reporting in line with frameworks such as the SBTi Net-Zero Standard and other ESG disclosure requirements.
- **Stakeholder engagement and change management:** Facilitating internal and external engagement to drive organizational alignment, foster behavior change, and communicate progress to stakeholders, investors, and regulators

- **ESG:** A more corporate-specific derivation of sustainability (ESG is used to define specific action criteria through a corporate materiality lens. ESG first came to prominence in the investing community as a way to denote how investors can categorize their investments as "socially and environmentally progressive.")

## Strategies and Capabilities Criteria

The importance of a firm's characteristics to project success and relevance of the particular issue combined with IDC's opinion about the impact those elements have on the selection of firms implies a unique weighting of these elements when evaluating a firm's overall strategy and capability to address market opportunity and realizing market success (see Tables 1 and 2).

**TABLE 1**

### Key Strategy Measures for Success: Worldwide Carbon Management and Net-Zero Services

Strategies Criteria	Definition	Weight (%)
Financial/funding	<ul style="list-style-type: none"> <li>▪ Consistent growth or increase in market share</li> </ul>	10.00
Delivery	<ul style="list-style-type: none"> <li>▪ Maturity of an organization's managed service offering for carbon management and net-zero services</li> <li>▪ Vendor's ability to match the material needs of its clients through the implementation methods</li> </ul>	19.00
Innovation	<ul style="list-style-type: none"> <li>▪ Vendor's strategy for maintaining readiness for itself and clients among the shifting regulatory landscape for carbon reporting</li> <li>▪ Customer's assessment of innovation</li> </ul>	20.00
Growth	<ul style="list-style-type: none"> <li>▪ Vendor's growth strategy for its subject matter experts</li> </ul>	8.00
Functionality or offering strategy	<ul style="list-style-type: none"> <li>▪ Vendor's ability to effectively communicate success in carbon management and net-zero services engagements on a global scale</li> <li>▪ How quickly the vendor is able to introduce new capabilities/standards/frameworks into services</li> </ul>	26.00
R&D pace/productivity	<ul style="list-style-type: none"> <li>▪ The vendor's overall R&amp;D funding, specific to sustainability</li> <li>▪ The percentage of workforce devoted to sustainability initiatives, both internally and externally</li> </ul>	17.00
Total		100.00

Source: IDC, 2025

**TABLE 2**

**Key Capability Measures for Success: Worldwide Carbon Management and Net-Zero Services**

Capabilities Criteria	Definition	Weight
Functionality or offering	<ul style="list-style-type: none"> <li>▪ One point for each of the following: carbon calculator, carbon forecasting, net-zero planning, net-zero implementation, and carbon data sourcing and validation</li> <li>▪ The vendor demonstrating its ability to offer specific capabilities listed one point for each of the following: net-zero strategy, net-zero implementation, net-zero goal setting, net-zero operationalization, and net negative strategy</li> <li>▪ Scenario analysis capabilities</li> <li>▪ The vendor's ability to replicate results for clients in differing industries/geos</li> </ul>	21.00
Pricing model or structure of product/offering	<ul style="list-style-type: none"> <li>▪ Has a pricing model for different types of delivery, such as cloud, on premises, per user, and enterprise</li> </ul>	2.50
Carbon accounting	<ul style="list-style-type: none"> <li>▪ GHG methodologies</li> <li>▪ Data validation, controls, audit, and assurance capabilities</li> <li>▪ Depth of Scope 3 decarbonization expertise</li> </ul>	17.50
Range of services	<ul style="list-style-type: none"> <li>▪ Customer evaluation of range of business consulting services offered</li> <li>▪ Customer evaluation of range of ITC services offered</li> <li>▪ Customer evaluation of vendor expertise in carbon mitigation strategy development</li> <li>▪ Customer evaluation of vendor expertise in carbon mitigation strategy implementation</li> </ul>	18.00
Net-zero strategy	<ul style="list-style-type: none"> <li>▪ The vendor's ability to integrate SBTi, SASB, GRI, CSRD ... considerations into an organization's operating model</li> <li>▪ The vendor's ability to analyze various decarbonation scenarios and their effect on a customer's business</li> </ul>	5.00
Customer service delivery	<ul style="list-style-type: none"> <li>▪ The vendor's ability to engage effectively with non-sustainability personas within client organizations to drive efficient knowledge transfer</li> </ul>	2.50
Methodologies	<ul style="list-style-type: none"> <li>▪ Availability of differing analysis frameworks determined by client industry/geography, and offerings of proprietary analysis</li> <li>▪ Number of standard boards available to clients</li> </ul>	7.50
Portfolio benefits	<ul style="list-style-type: none"> <li>▪ Quality of related software portfolio for carbon management and net-zero services</li> <li>▪ The vendor's ability to effectively scale services to fit global organizations and various industries</li> </ul>	10.00

**TABLE 2**

**Key Capability Measures for Success: Worldwide Carbon Management and Net-Zero Services**

Capabilities Criteria	Definition	Weight
Carbon reduction	<ul style="list-style-type: none"><li>▪ The vendor's ability to effectively develop a tailored, bespoke carbon reduction strategy for clients</li><li>▪ The vendor's ability to effectively integrate and operationalize carbon reduction strategies across the business</li></ul>	16.00
Total		100.00

Source: IDC, 2025

**LEARN MORE**

**Related Research**

- *IDC Market Glance: Business Consulting Services, 2Q25* (IDC #US52405425, April 2025)
- *IDC MarketScape Criteria: Worldwide Print Security Solutions and Services Hardcopy 2025 Vendor Assessment* (IDC #US52334025, May 2025)
- *IDC Innovators: Business Consulting Services in the United States, 2025* (IDC #US53309225, April 2025)
- *What Information Sources Do Organizations Use for Business Cases for Professional Service Engagements?* (IDC #US53288325, April 2025)
- *Organizations' Selection Criteria and Service Delivery Effectiveness Align for Business, Technology, and Operational Outcomes for Hybrid IT Initiatives* (IDC #US53282925, March 2025)
- *IDC's Worldwide Environmental, Social, and Governance Business Services Taxonomy, 2023* (IDC #US50035421, January 2023)

**Synopsis**

This IDC MarketScape evaluates the performance of global consulting firms in carbon management and net-zero services, highlighting their capabilities in sustainability integration, regulatory compliance, and technology-driven solutions. It emphasizes the importance of tailored strategies, proprietary tools, and stakeholder engagement to

drive carbon reduction and achieve net-zero targets. This study identifies key strengths and challenges faced by firms, offering insights for organizations seeking effective partners in their sustainability journey.

"Unlock the future of sustainability with IDC MarketScape's insights on carbon management and net-zero services, where innovation meets global climate goals."  
— Dan Versace, research analyst, Environmental, Social, and Governance (ESG) Business Services

## ABOUT IDC

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International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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