



Everest Group Net Zero Consulting Services PEAK Matrix® Assessment 2025

Focus on NTT DATA
September 2025



Introduction

As the climate crisis intensifies and global regulations become stricter, enterprises across various industries are under increasing pressure to decarbonize their operations, supply chains, and offerings. In this context, net-zero consulting services have emerged as a strategic enabler, helping organizations navigate the complex, data-intensive, and often fragmented pathways to meaningful emissions reduction.

Unlike conventional sustainability advisory, net-zero consulting spans a multidimensional landscape – from enterprise-wide strategy, regulatory alignment, and emissions measurement to operational decarbonization, carbon market engagement, and environmental, social, and governance (ESG) integration. With heightened scrutiny around scope 3 emissions, evolving disclosure mandates, and rising expectations from investors and customers alike, organizations are increasingly seeking trusted consulting partners that offer credible expertise, proprietary tools, and scalable delivery models.

In the research report, we provide an in-depth analysis and detailed profiles of 32 net-zero consulting service

providers featured on the [Net-Zero Consulting Services PEAK Matrix® Assessment 2025](#), based on Everest Group's rigorous assessment process for 2025.

Our assessment is grounded in Everest Group's rigorous annual Request for Information (RFI) process for 2025, extensive engagements with leading net-zero consulting service providers, client reference checks, and continuous monitoring of the evolving market landscape.

The full report includes the profiles of the following 32 leading net-zero consulting service providers featured on the Net-Zero Consulting Services PEAK Matrix:

- **Leaders:** Accenture, BCG, Capgemini, Deloitte, ERM, EY, Infosys, McKinsey and Co., NTT DATA, PwC, Sphera, TCS
- **Major Contenders:** 3Degrees, Anthesis, Bain and Co., ClimatePartner, Cognizant, GEP, IBM, KPMG, L&T Technology Services, Mitie, Ramboll, SLR Consulting, South Pole, Tech Mahindra, The Carbon Trust, Wipro, and WSP
- **Aspirants:** Environmental Science Associates, Jacobs, and Woodard & Curran

Scope of this report

Geography: global

Industry: cross industry

Services: net-zero consulting services

Net-zero consulting services – market definition

[NOT EXHAUSTIVE]

Net-zero consulting and advisory services are aimed at helping clients become more environmentally responsible businesses. Such services include designing and building the strategies, operating models, data and technology solutions, and change management efforts for businesses to achieve their net-zero targets

Net-zero consulting service providers are building talent, solutions, and offerings to help their clients manage and reduce their environmental footprints (across scope areas 1, 2, and 3)

These services help extract more value out of sustainability investments by linking them with revenue, profits, and competitive differentiation objectives

Audits and certifications

Help clients attain relevant certifications to demonstrate their commitment to environmentally and socially responsible practices and build credibility among different stakeholders

Current-state analysis and materiality assessments

Measure and analyze the environmental footprints of clients' products/services, processes, and technologies using industry-specific ESG metrics and proprietary frameworks; engage stakeholders across the value chain to identify impact opportunities and address issues

Carbon offsetting

Help clients navigate carbon markets, invest in decarbonization levers, evaluate their energy requirements, and guide them to take necessary carbon-offsetting actions

Benchmarking and gap analysis

Compare clients' ESG metrics against industry standards and highlight opportunities to invest/improve to drive profits sustainably

Roadmap design

Assist clients in their decarbonization goals by helping them set scientifically derived targets and intermediate goals to measure progress by leveraging partnerships with ESG data provider

Climate adaptation and resilience

Assess the various environmental risks that clients face and devise strategies to avoid, reduce, or transfer them

Data and technology advisory

Guide the design, build, implement, and value extraction phases for data and technology solutions to deliver on net-zero targets

Governance and framework design

Ease the client's ESG reporting and ESG compliance mandates and assist them with frameworks such as The Global Reporting Initiative (GRI), The Sustainability Accounting Standards Board (SASB), and The Carbon Disclosure Project (CDP)



Scope of net-zero consulting services

Industry expertise

Consulting competence in technology and process requirements related to specific industry verticals

Functional expertise

Consulting skills in functional segments such as production / service enablement, finance, and supply chain management

Change management assistance

Consulting services to revamp organizational structures and reshape talent and culture in line with the net-zero strategy

Net-zero consulting services PEAK Matrix® characteristics

Leaders

Accenture, BCG, Capgemini, Deloitte, ERM, EY, Infosys, McKinsey and Co., NTT DATA, PwC, Sphera, and TCS

- Leaders offer comprehensive consulting across strategy, emissions measurement, low-carbon design, ESG integration, and carbon markets (credits/trading)
- Their services are powered by in-house platforms such as climate risk assessment platforms, decarbonization frameworks, and software tools for emissions planning and regulatory compliance
- They enable scope 1, 2, and 3 reduction using Artificial Intelligence (AI) insights, lifecycle models, double materiality assessments, and integrated supply chain/risk analytics
- Leaders have strong alliances with hyperscalers, ESG data firms, and climate tech companies that drive co-innovation in areas such as Electric Vehicle (EV) infrastructure, industrial abatement, and biodiversity
- Leaders support large enterprises with scalable delivery and strategic consulting, actively participating in global forums and expanding via acquisitions in climate and sustainability

Major Contenders

3Degrees, Anthesis, Bain and Co., ClimatePartner, Cognizant, GEP, IBM, KPMG, L&T Technology Services, Mitie, Ramboll, SLR Consulting, South Pole, Tech Mahindra, The Carbon Trust, Wipro, and WSP

- Major Contenders have an emphasis on emissions accounting, ESG reporting, TCFD scenario planning, and roadmap design across operations, supply chains, and products
- They have developed scope 3 and climate risk frameworks (for example, scenario tools, emissions hubs, and Internet of Things (IoT) tracking), often embedded within broader ESG or digital transformation initiatives
- They partner with hyperscalers and ESG data providers but lag Leaders in proprietary tools and full lifecycle solutions
- They show sector-specific strength (for example, infrastructure, pharma, and mobility) but have narrower global reach and lower visibility in emerging areas such as biodiversity and nature-based solutions

Aspirants

Environmental Science Associates, Jacobs, and Woodard & Curran

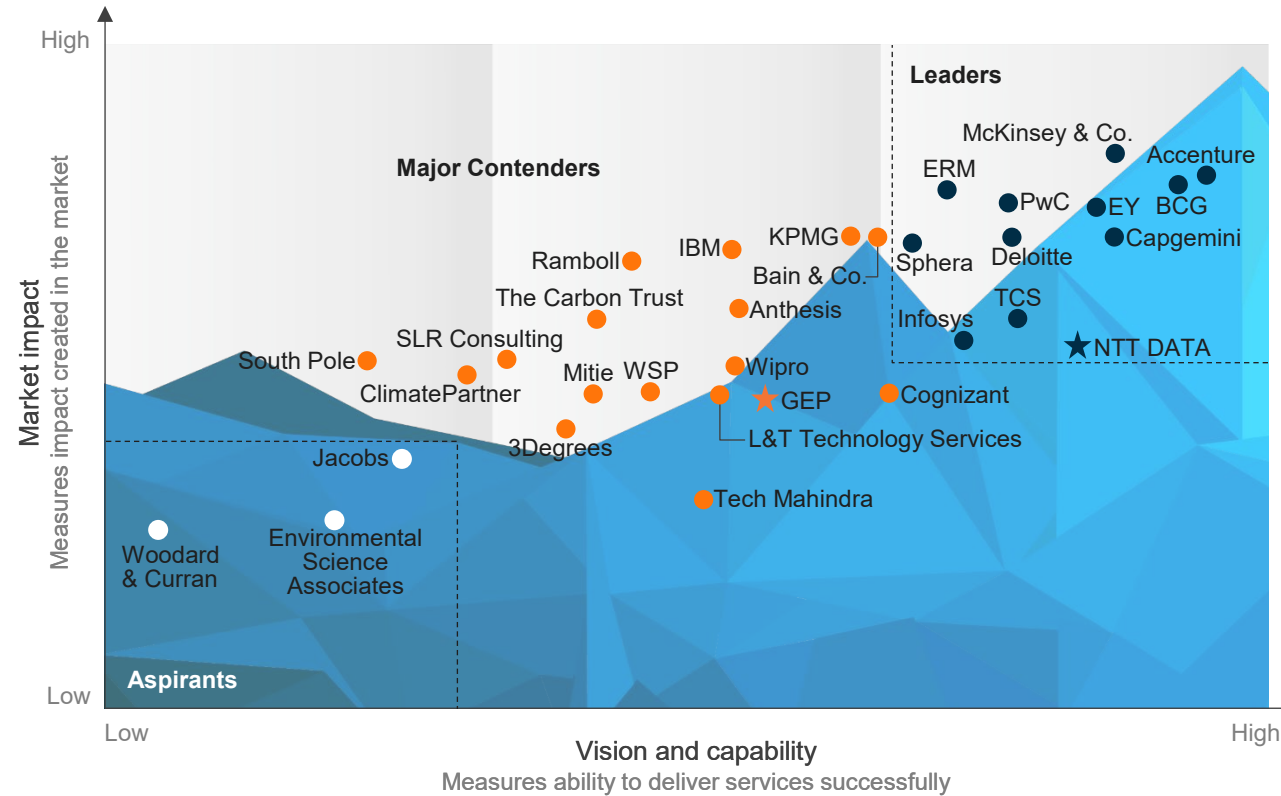
- Aspirants bring niche strengths in climate risk assessment, environmental permitting, resilience planning, and hazard mapping, often rooted in deep public sector or regional expertise
- Their consulting offerings are led by data services, with limited proprietary platforms or toolkits for net-zero use cases, such as carbon footprinting across the value chain and lifecycle modeling
- They are concentrated in specific regions with a lack of global presence, reducing their appeal for multinational enterprises seeking cross-regional decarbonization support
- They have yet to build robust capabilities in emissions reduction strategy, carbon trading, or platform-based delivery, and will need to broaden their portfolios and partnerships to remain competitive

Everest Group PEAK Matrix®

Net-Zero Consulting Services PEAK Matrix® Assessment 2025 | NTT DATA is positioned as a Leader and a Star Performer

Everest Group Net-Zero Consulting Services PEAK Matrix® Assessment 2025^{1,2}

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



¹ Assessment for 3Degrees, Anthesis, Bain & Co., BCG, ClimatePartner, Deloitte, ERM, Environmental Science Associates, IBM, Jacobs, KPMG, McKinsey & Co., Mitie, Ramboll, South Pole, SLR Consulting, The Carbon Trust, WSP, and Woodard & Curran excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group interactions with buyers



² Assessment for EY, PwC, and Wipro includes partial inputs from the service providers and is based on Everest Group's estimates that leverage Everest Group's proprietary data assets, service providers' public disclosures, and interaction with buyers










The source of all content is Everest Group unless otherwise specified

Source: Everest Group (2025)

NTT DATA

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- NTT DATA offers advisory services across net-zero strategy, Scope 1-3 emissions planning, carbon market enablement, and regulatory alignment, supported by frameworks that span manufacturing, energy, and the public sector
- Its proprietary tools, including C-Turtle and Sustainability Data Simplified, support decarbonization planning and product carbon footprint analysis using spend-based modeling
- The firm has built a diverse partner ecosystem across ESG platforms, data providers, and enterprise systems, enabling it to integrate net-zero data with reporting and procurement workflows
- NTT DATA has invested in building sustainability-focused talent through multiple initiatives, including AI-led decarbonization training, role-specific certification programs, and digital solutions upskilling
- Its broader talent strategy includes university collaborations, inclusive hiring, and community-led learning programs across 50+ countries, supporting consulting scale and sustainability awareness across levels

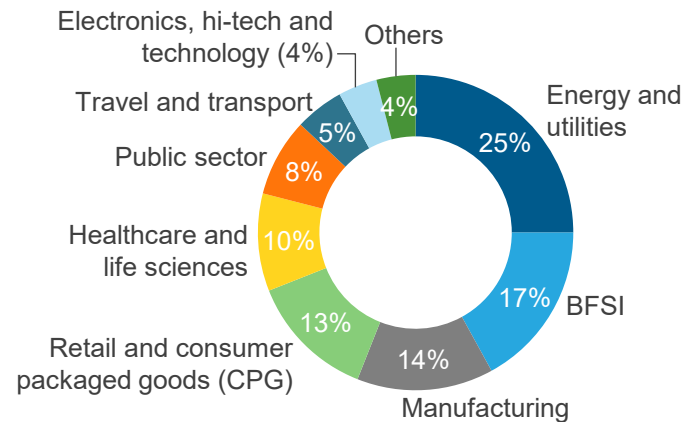
Limitations

- NTT DATA's offerings are still evolving in carbon markets, climate adaptation, and scenario modeling, which may limit its relevance for clients seeking climate resilience planning
- Its partnership ecosystem is broad but shows limited engagement with emerging ESG tech providers, which may restrict access to niche innovations in areas such as LCA automation, AI-driven ESG risk analysis, and digital carbon solutions
- Its client base in North America remains relatively small compared to peers, which may affect its contextual relevance and support for region-specific regulatory needs
- It has limited experience in benchmarking and gap analysis, which may affect its ability to help clients compare with industry peers or assess the business impact of evolving regulations
- Some clients noted that NTT DATA could improve in consolidating sustainability data and offering more user-friendly tools for emissions tracking and reporting

Net-zero consulting is gaining enterprise-wide traction as organizations pursue decarbonization through data-driven, modular, and region-specific pathways

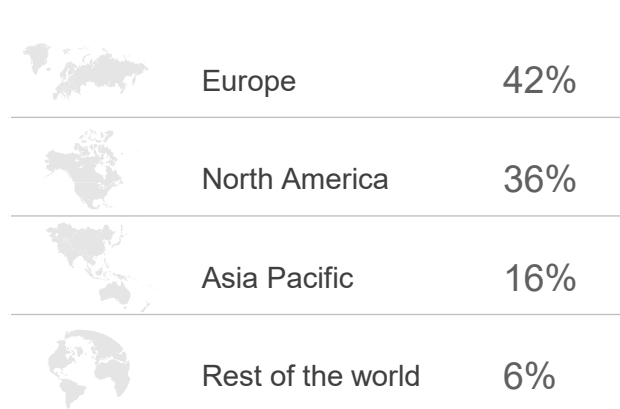
Based on 8,435+ net-zero consulting services engagements

Client-spread across industries



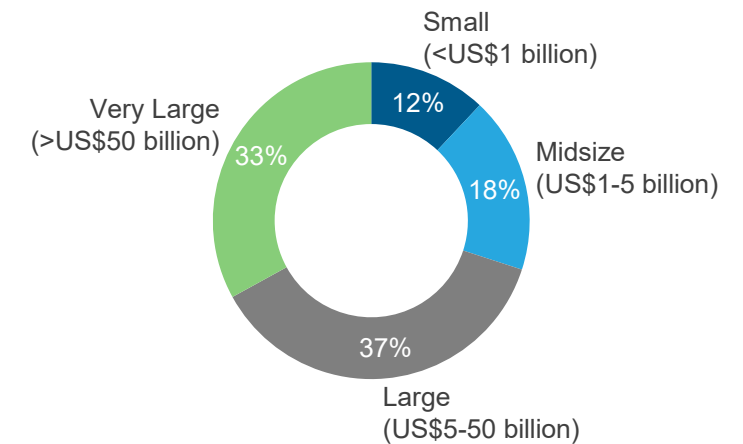
- Energy and utility clients are leading adoption, driven by regulatory pressure and decarbonization mandates, with a focus on grid decarbonization, emissions tracking, and renewable integration
- BFSI firms are ramping up net-zero initiatives through financed emissions tracking, climate stress testing, and alignment with global frameworks such as Task Force on Climate-related Financial Disclosures (TCFD) and Corporate Sustainability Reporting Directive (CSRD)
- Manufacturing and heavy industries are targeting Scope 1 and 2 reductions via decarbonization roadmaps, energy audits, and operational low-carbon transitions

Client-spread across geographies



- Europe, led by the UK and Germany, dominates demand, driven by a strong policy push (for example, CSRD and EU Green Deal) and mature use cases such as portfolio decarbonization, carbon accounting, and AI-enabled emissions tracking
- North America, especially the US, is focused on ESG data modernization, climate risk analytics, and automation of scope 3 emissions to meet evolving disclosure expectations
- APAC is an emerging hotspot, with Australia and India adopting ESG reporting, energy efficiency, and cloud-led emissions tracking as foundational net-zero steps

Client-spread by buyer size



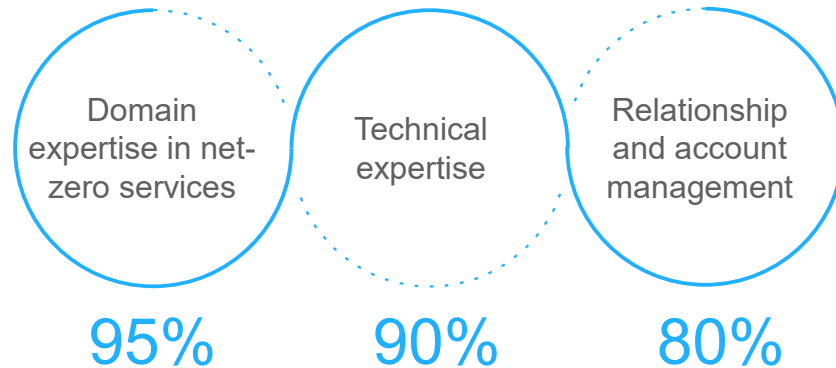
- Very large enterprises lead with end-to-end net-zero programs, covering Greenhouse Gas (GHG) baselining, data architecture, cloud enablement, and supplier sustainability
- Large clients pursue modular initiatives, such as facility decarbonization, GreenCo scoring, and regional net-zero roadmaps
- Midsize and small firms focus on ESG data and emissions baselining, often through pilot or compliance-driven projects

Key strengths and areas of improvements for service providers

Domain expertise, relationship management, and change management are appreciated by buyers; however, they expect deeper and broader services portfolio, enhanced support in terms of innovative value addition, and higher commercial flexibility

Everest Group asked buyers about the relative strengths and areas of improvement of their service providers and their view of future interactions with incumbent service providers

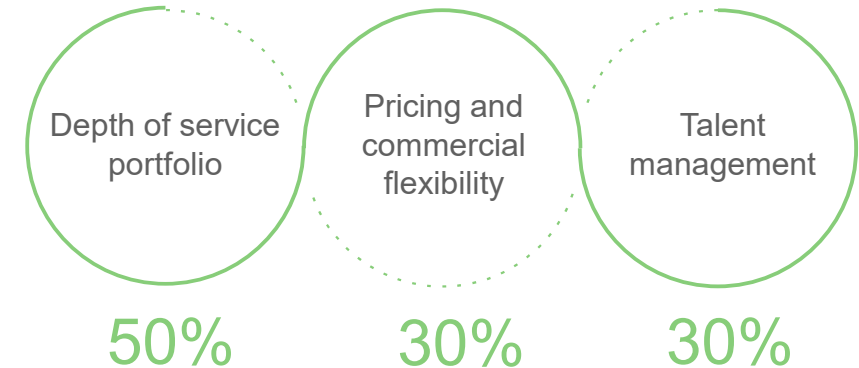
Top three strengths¹



“We appreciated the provider’s robust understanding of the company’s operations and processes along with its deep expertise in environmental sustainability.”

– Director of Procurement, multinational science and technology company

Top three areas of improvement¹



“Internal processes have become slower, and there is a noticeable decline in flexibility around pricing and decision-making.”

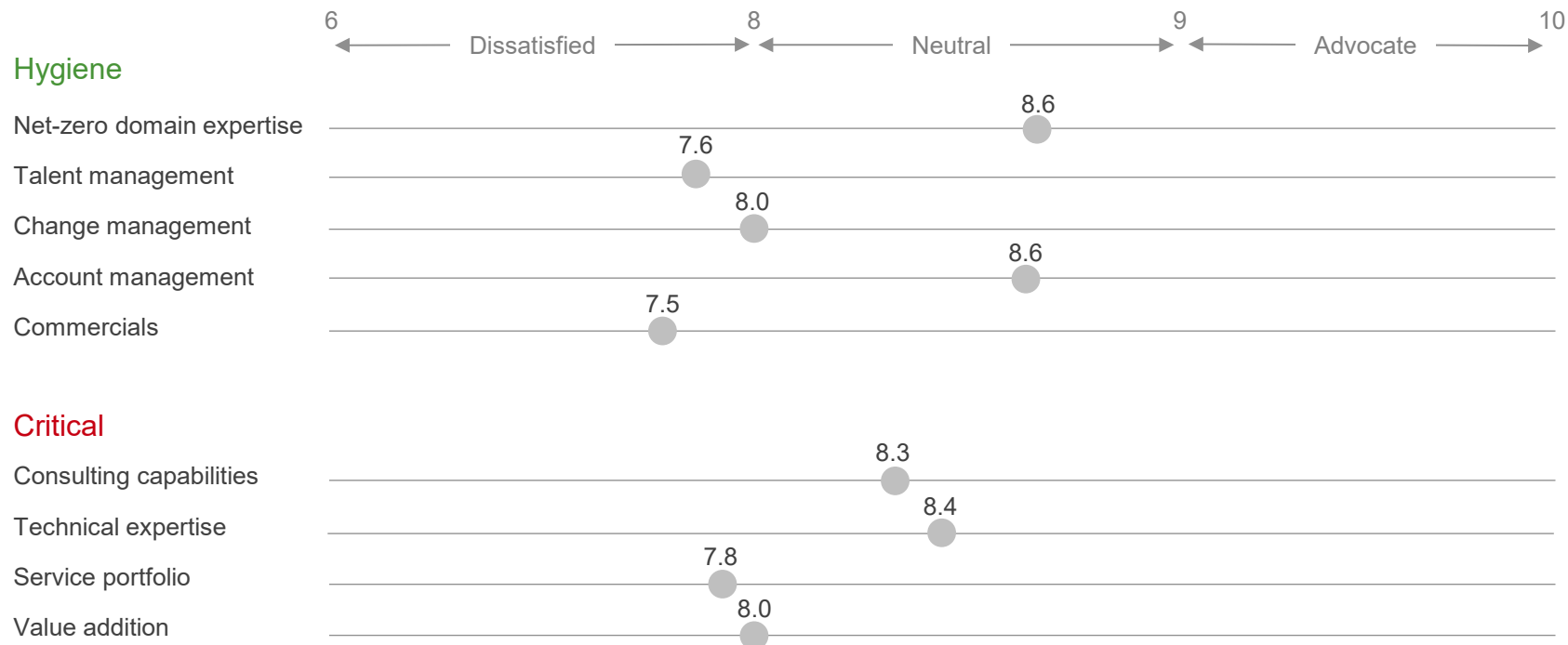
– Chief Sustainability Officer, Indian multinational conglomerate

¹ The percentage figures indicate the frequency distribution of traits demonstrated by service providers as a percentage of all responses on traits mentioned by buyers. The cumulative percentage scores may cross 100%, as the buyer may have indicated multiple traits in many instances
Source: Everest Group (2025)

Enterprise feedback on the net-zero consulting services PEAK Matrix® 2025

Levels of client satisfaction

● Average score of service providers in a particular segment



- Clients highly value strong account management and engagement support, as these elements play a crucial role in building trust and ensuring alignment across complex net-zero initiatives
- Clients are seeking deeper domain expertise in net-zero to help them design roadmaps for complex value chains
- They are seeking better technical talent to support complex decarbonization roadmaps
- Consulting strength, technical depth, and innovative service portfolios are critical expectations, especially as clients look to embed decarbonization into enterprise strategy

Source: Everest Group (2025)

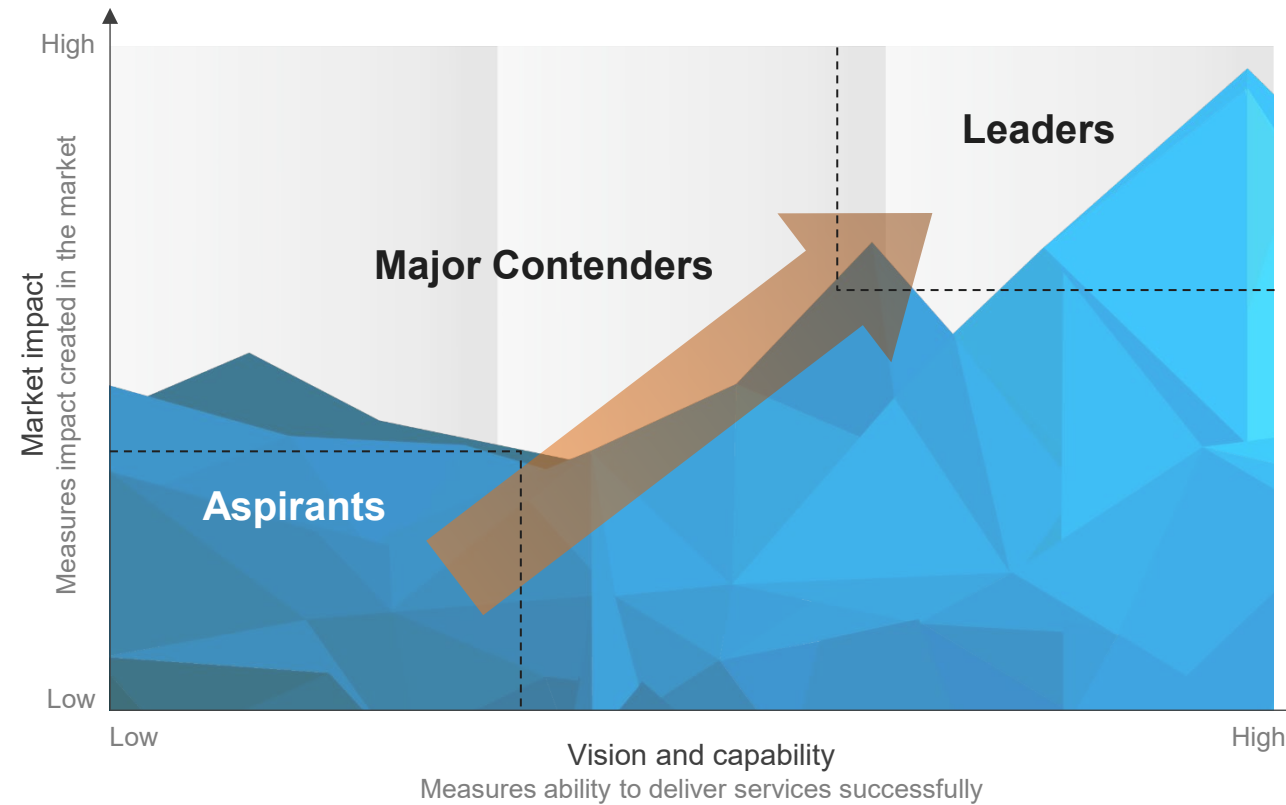
Appendix

PEAK Matrix® framework

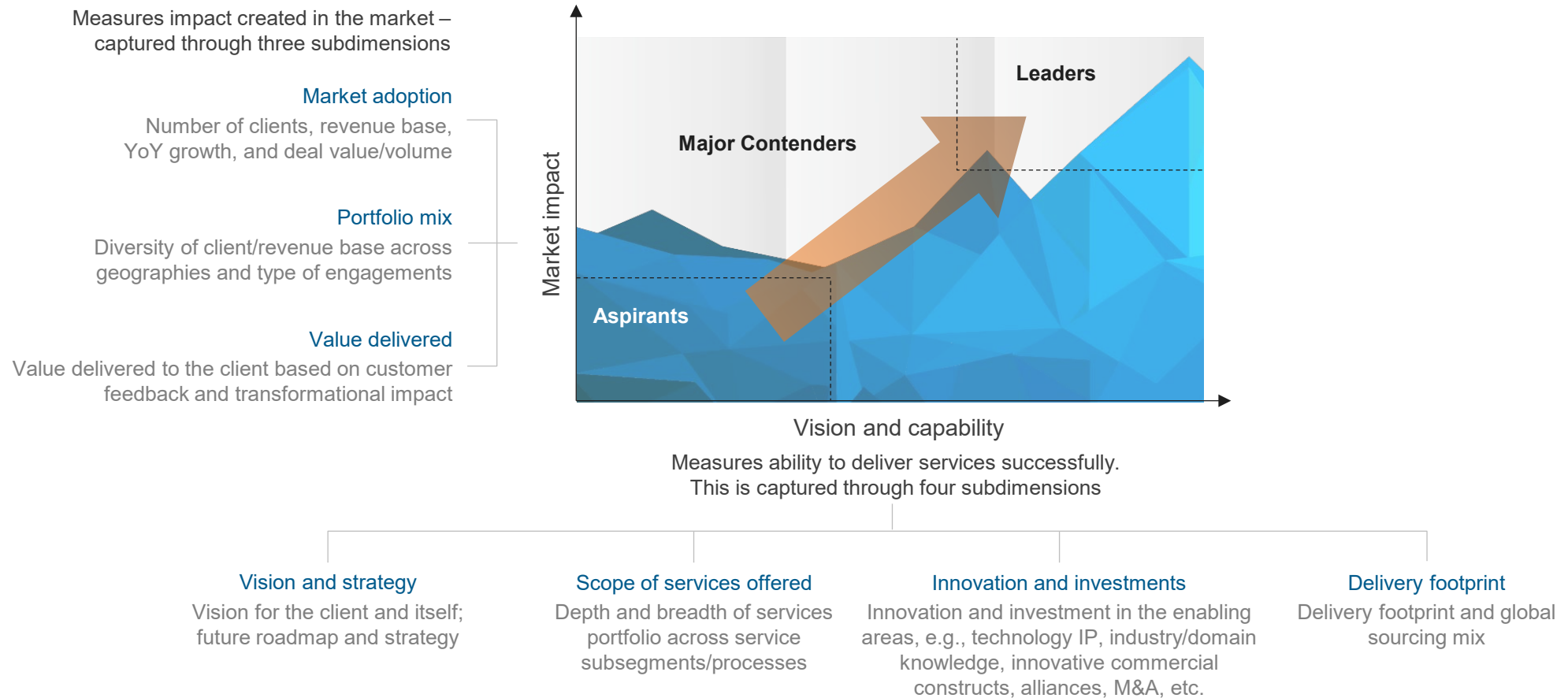
FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



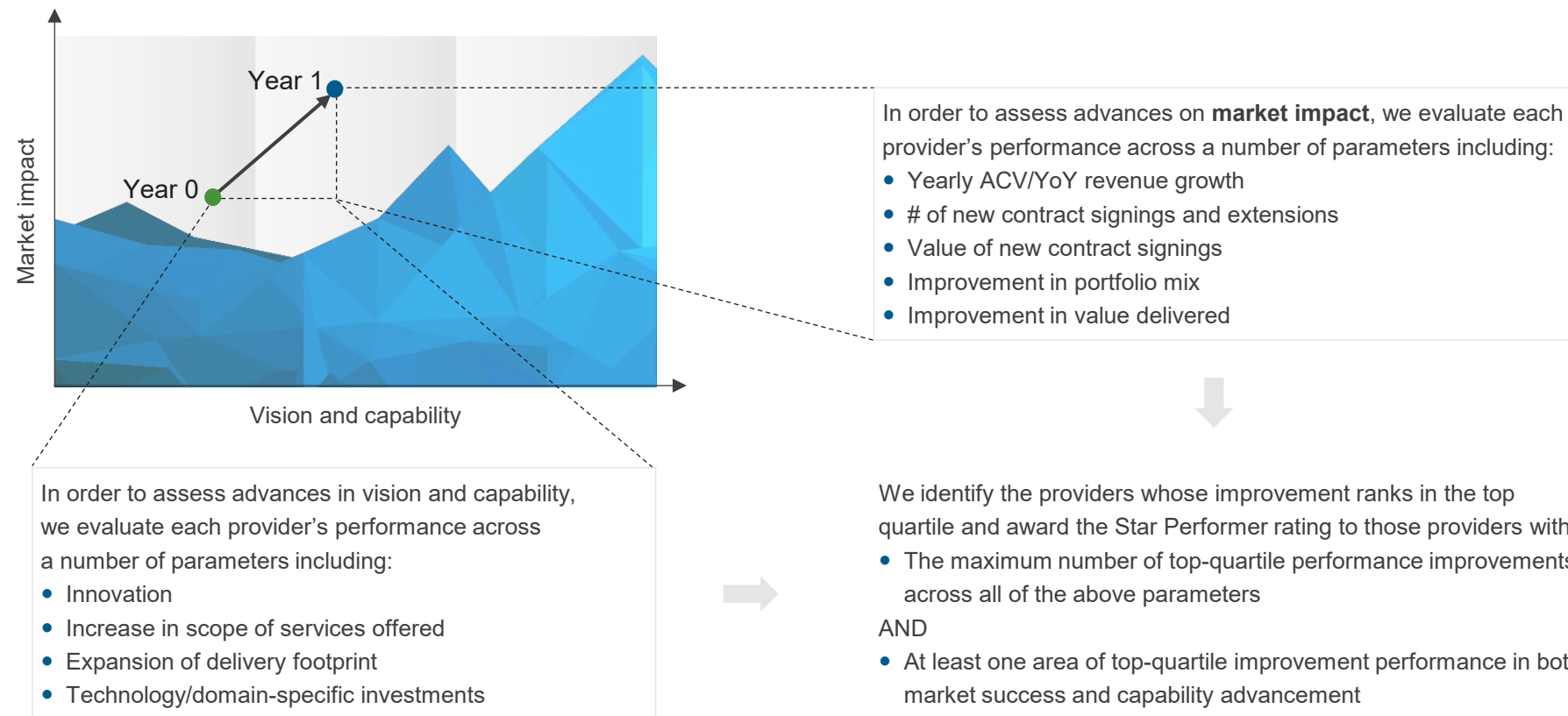
Services PEAK Matrix® evaluation dimensions



Everest Group confers the Star Performer title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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