Case Study.
North America.
Private Equity & Principal Investors.
Sustainability.

Future-Ready: A Lasting Framework for Climate Transition

Challenge

A leading global asset management firm with $700 billion in assets, sought expert guidance to develop a comprehensive sustainability strategy. Overseeing substantial assets, the firm realized that adopting a future-focused approach would enable them to go beyond public climate investment commitments while simultaneously addressing the diverse priorities of their client base.

Achieving this required developing a climate transition framework aligned with global standards and capable of addressing Scope 3 emissions—the indirect greenhouse gas emissions generated across the value chain, outside direct control. But there was no one-size-fits-all solution. The firm needed to navigate diverse client priorities: some investors placed little emphasis on Environmental, Social, and Governance (ESG) considerations, while others expected robust commitments and measurable progress. At the same time, regulatory expectations were evolving rapidly, with ESG integration, climate action, and credible target-setting increasingly viewed as essential to maintaining business credibility in key markets.

dss⁺ Approach

Laying the foundation, dss⁺ conducted a comprehensive Net-Zero Readiness Assessment (NZRA) to evaluate the firm's preparedness for achieving net-zero greenhouse gas emissions by 2050. This analysis drew upon internal policies, strategic documents, and insights gathered through targeted workshops with both investment and operational teams. The assessment was structured around four overarching themes, six categories, and forty guiding principles, collectively providing a granular understanding of readiness across both regional and investment dimensions.

dss⁺ also undertook a target-setting review and a data architecture review, yielding critical insights into the firm's methodology for greenhouse gas emissions target-setting and identifying structural limitations within the existing data systems. This required enhancement to support rigorous climate reporting and effective strategy execution.

Drawing on these insights, dss⁺ developed a climate transition framework anchored in six core elements, delivering a clear and actionable roadmap. The new framework addressed both regional and global challenges while remaining fully aligned with the firm's strategic objectives and organizational values.

Assignment

To establish a climate transition framework for both near- and long-term sustainability.

Offering

Climate Transition Framework

Impact

- Addressed client engagement, capital allocation, and risk strategy for asset management firms.
- Enables flexibility to adapt client's pathway as policies, markets, and technologies evolve.
- Provides a framework for future work with investment teams on decarbonization.
- Prevents a box-ticking approach by showing regulators and investors tangible progress in real-economy transition.

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