

Case Study.

Private Equity Investor.

Switzerland.

Private Equity & Principal
Investors.

Driving a PE firm's portfolio climate action through a pragmatic Climate Transition Framework

Context

Our client is a European mid-market private equity firm, investing in healthcare and services. Its portfolio companies deliver essential products and services but are increasingly exposed to climate risks that threaten operations, tightening regulatory demands, and growing investor scrutiny on Paris Agreement alignment. The firm backs small and mid-sized businesses through buyouts and growth capital.

Challenge

Investor expectations were rising, with an anchor Limited Partner (LP) calling for credible evidence of portfolio climate action and alignment with the Paris Agreement. Yet portfolio companies were at very different stages of maturity, making a prescriptive "net zero" pledge unrealistic and risking inconsistent progress.

Solution & methodology

dss+ worked with the client to design a practical, scalable approach tailored to its portfolio profile:

- Developed a Climate Transition Framework aligned with Net Zero Investment Framework (NZIF) principles and embedded across the investment lifecycle.
- Assessed 100% of portfolio companies against transition preparedness criteria to identify gaps and priorities.
- Designed tailored Climate Action Roadmaps for each portfolio company, proportionate to maturity and sector context.
- Trained the investment team to apply the framework consistently in sourcing, due diligence, and engagement.



Assignment

- Climate Transition Framework development;
- Portfolio Assessment;
- Climate Action Roadmap development;
- Investment team enablement to apply the Climate Transition Framework consistently.



Offering

Sustainable Finance. Climate Risk & Resilience.



Impact

- As a result, the client identified five portfolio companies with climate transition needs to increase value at exit.
- Client was able to secure anchor investment for new fund with European sustainability-focused LP.

"Working with dss+ helped us respond to investor expectations with a credible framework tailored to our portfolio. It positions us to engage confidently with LPs while supporting our companies on their climate journey."

Partner, European Private Equity Firm

dss+

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