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Businesses accelerate their climate adaptation investments yet just 15% have fully quantified the financial impact of climate-related risks

- **Nearly 7 in 10 executives are prioritizing climate adaptation to boost business resilience**
- **Share of organizations falling behind on net zero goals up to 11% in 2026, from 1% in 2025**
- **Access to critical resources is becoming a stronger driver of sustainability decisions than emissions-reduction targets for more than 7 in 10 organizations**

Paris, September 16, 2026 – Climate disruption, water stress, resource constraints, and geopolitical volatility are increasing pressure on business operations, supply chains and growth. According to the fifth edition of the Capgemini Research Institute's *A World in Balance: The resilience reset* report, organizations are responding by placing greater emphasis on climate adaptation and business resilience[1]. In addition, nearly two-thirds of organizations say they use AI to advance their sustainability agenda. However, the research also reveals a widening gap between ambition and delivery, as more organizations fall behind on net zero commitments and struggle to measure climate- and AI-related impacts.

Sustainability strategies increasingly focus on resilience, business continuity, and access to critical resources
Nearly nine in 10 organizations report that climate-related events have disrupted their supply chains. In response, 68% of executives say their organization actively prioritizes climate adaptation, up from 56% in 2025. The way business leaders perceive sustainability is evolving, stretching beyond reporting and compliance and increasingly being seen through the lens of measurable business outcomes, resilience, continuity, and access to critical resources. Nearly two-thirds of executives identify energy- and critical-resource security as a key driver of sustainability investment. More than seven in 10 say that securing access to critical resources – including energy, water, and materials – now has greater influence on sustainability decision-making than emissions-reduction targets.

This transition is also reshaping organizations' strategic priorities, with more than three-quarters of executives saying their organization is accelerating efforts to integrate energy and resource resilience into business and sustainability strategies. Alongside energy security, water-related risks are a growing concern – 61% of executives believe water scarcity will present a greater constraint on business growth than energy availability over the next five years.

While awareness of these risks is growing, operational readiness remains inconsistent. Just 15% of organizations have fully quantified the financial impact of climate-related disruptions, with just over one in four executives say their organization has assessed climate risks across its extended value chain or deployed climate-risk analytics tools or platforms. Nevertheless, there are signs that adaptation capabilities are maturing – the share of executives who say their organization is underprepared for climate impacts has fallen from 54% in 2025 to 44% in 2026.

"Climate change disruptions have become our new normal, and yet there is still a wide gap between business leaders' awareness of the risks and actual implementation. In order to protect their supply chains, operations, infrastructure, and access to essential energy, water, and materials, they can no longer defer climate action," said Cyril Garcia, Global head of Sustainability services and Corporate Responsibility, and Member of the Group Executive Board at Capgemini. "*It is encouraging to see organizations prioritize adaptation and resilience for sustainable growth. But as climate and political risks evolve, organizations must continue to embed sustainability into their core business strategy and day-to-day operations.*"

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[1] Resilience refers here to an organization's ability to anticipate, adapt to, and withstand disruptions across its operations, supply chains, resources, and markets.

Sustainability investments continue to demonstrate a positive ROI

Nearly seven in 10 organizations say their sustainability initiatives have generated a net-positive return on investment. Almost two-thirds of executives (64%) say sustainability investments have boosted sales, up from 47% in 2025, and 74% acknowledge that sustainable practices have enhanced their brand equity.

Looking ahead, 83% say their organization will increase climate adaptation spending over the next 12-18 months, reflecting a trend that is already visible today: organizations spent 1.04% of revenue on sustainability initiatives last year, exceeding the 0.8% they initially allocated. This investment is also helping organizations manage business disruption, as nearly two-thirds of executives from manufacturing or asset-intensive sectors say these investments have improved operational efficiency under supply constraints, while slightly over half say they have enhanced their ability to anticipate and respond to operational and supply-chain disruptions.

Businesses struggle to follow through with their net zero commitments

While most organizations have sustainability goals, the research suggests that implementation remains challenging. In 2026, 84% of organizations say they have set science-based targets, up three points since 2025. Yet only 42% say they are on track to meet their 2030 or interim targets. The execution gap is particularly visible in net zero programs. The number of organizations falling behind on their net zero goals has increased more than tenfold since last year. Moreover, 29% say they have postponed their net zero objectives, compared with just 8% last year.

Nearly two-thirds of organizations acknowledge that aligning sustainability efforts with science-based targets is challenging. Data availability, measurement, and value-chain visibility remain challenging. The proportion of organizations able to measure and collect data across all Scope 3 emissions has fallen to 34%, from 54% in 2025, underscoring the difficulty of tracking and managing emissions beyond direct operations.

AI supports sustainability initiatives, but environmental impact is hard to measure

AI is also increasingly considered as a tool to help turn sustainability ambition into action. Nearly two-thirds of organizations say they use AI to advance their sustainability agenda, and more than a third use or plan to use agentic AI for sustainability initiatives. At the same time, the environmental implications of AI are increasingly being recognized at senior levels. Seven in 10 organizations say AI's sustainability implications are discussed in the boardroom.

However, oversight and disclosure of the technology remain limited. Nearly half of executives say AI has significantly increased greenhouse gas emissions. Yet concern about AI's environmental impact appears to be outpacing organizations' ability to measure it: just over a third of executives say their organization measures the energy consumption of AI systems and workloads, and the associated carbon footprint.

To access the full report: https://www.capgemini.com/insights/research-library/sustainability-trends-2026/

Methodology of the report

The Capgemini Research Institute surveyed 2,100 executives employed at 701 organizations, each with more than $1 billion in annual revenue, across 13 countries in North America, Europe, and Asia-Pacific and in 12 industries and sectors. Respondents represented industries and sectors covered across: aerospace and defense, agriculture and forestry, automotive, consumer products, energy, financial services, healthcare and life sciences, industrial manufacturing, retail, telecom, utilities, and the public sector/government. The survey took place in June and July 2026. The research also includes a global survey of 6,500 consumers and interviews with 15 executives at leading organizations.

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Capgemini is the business transformation partner for enterprises in the age of AI. We help organizations imagine and build an intelligent, sustainable future, combining AI, technology and human ingenuity to transform how they operate, innovate and grow. With unique end-to-end capabilities spanning strategy, technology, engineering and intelligent operations, we bring together deep industry expertise and market-leading capabilities in AI, cloud and data to turn ambition into measurable business outcomes at scale. Supported by a robust ecosystem of partners and nearly 60 years of expertise, Capgemini is a responsible and diverse global organization of over 410,000 team members in more than 50 countries. The Group reported 2025 revenues of €22.5 billion.

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The Capgemini Research Institute is Capgemini’s in-house think-tank on all things digital. The Institute publishes research on the impact of digital technologies on large traditional businesses. The team draws on the worldwide network of Capgemini experts and works closely with academic and technology partners. The Institute has dedicated research centers in India, Singapore, the United Kingdom and the United States. It was ranked #1 in the world for the quality of its research by independent analysts for six consecutive times – an industry first.

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