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First to Feel It, Last to Shape It

The people, skills and capability required to deliver a low-emissions economy

November 2026

Prepared for the Sustainable Business Council by Proxima Consulting Limited

Executive summary

The shift to a low-emissions economy is reshaping investment, operations, supply chains and competitive advantage. Delivering that shift depends not only on sound technology and finance, but on whether organisations have the people, skills, suppliers and capacity to execute their plans.[1]

This report helps executives identify and manage those requirements early, and helps boards seek assurance that material execution risks are being addressed.[2] It considers whether organisations have the people and capability to implement change, and whether people affected by major decisions have a meaningful opportunity to shape what is proposed and how it is delivered.

Prepared for Sustainable Business Council (SBC) by Proxima, this report draws on interviews with senior executives from energy, finance, manufacturing, infrastructure and iwi organisations, supported by a review of New Zealand and international evidence.[3]

In this report, "people, skills and capability" means the human and organisational conditions needed to shape and deliver change. It includes the employees, leaders, suppliers, contractors, customers, iwi, whānau, communities and regions affected by transition decisions. It also covers the skills and capacity required for delivery, and the systems, trust and accountability needed for affected groups to influence decisions while meaningful choices remain open

Interviewees described AI, digital transformation and the low-emissions transition as interconnected business changes. Together, they are reshaping roles, operating models and the capabilities organisations need to compete. Yet the research identified cases where low-emissions decisions had begun to be shaped by technical and commercial considerations before their implications for people, suppliers and communities were fully explored.[4]

In practical terms, a low-emissions economy means businesses producing, moving, buying and selling goods and services through cleaner energy, low-emissions transport, more efficient operations and technologies and more resilient supply chains.

Bringing these perspectives into decisions while options remain open helps leaders test feasibility and identify delivery dependencies. It also allows them to adapt decisions about capital, assets, procurement, operations and timing before assumptions become difficult or costly to revisit.[5]

SBC and the Climate Leaders Coalition's Driving Sustainable Growth: Opportunities for New Zealand's Economy identifies people and capability as critical enablers of a more productive and low-emissions economy. Building on that finding, this report provides practical tests for executives to integrate these requirements into key decisions. It also helps boards seek assurance that material execution risks are being managed.

Core findings

1. **Bringing people and delivery requirements in early should shape decisions**

   People, skills, supplier capacity and the perspectives of those affected should inform decisions while meaningful choices remain open. The test is not simply whether these factors were considered, but whether they influenced the design, timing, investment, support or accountability for the decision.

2. **Those closest to delivery can improve how change is designed**

   Those closest to delivery and the impacts of low-emissions initiatives can identify practical constraints and opportunities that may not be visible in the business case. Bringing this knowledge in early helps organisations adapt the design, timing and support needed to make initiatives workable in practice.[6]

3. **Organisations are delivering several transformations at once**

   Delivering low-emissions initiatives alongside other major transformations is increasing demands on people, skills and organisational capacity. Leaders need to consider these demands together rather than treating each transformation in isolation.[7]

What this means for leaders

The challenge is not whether to pursue the shift to a low-emissions economy, but how to make the investments and operating changes it requires deliverable. Executives should test whether low-emissions plans are supported by the necessary people, skills, supplier capacity and practical knowledge before key choices are fixed. Boards should seek assurance that these requirements - and their interaction with other major transformations - are being managed as execution risks.

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PART ONE

1. The opportunity: aligning major decisions with people and delivery requirements

1.1 Why this is a leadership issue, as well as a workforce issue

People, skills and supplier capacity are established management considerations. What matters is whether they are considered early enough to influence strategic choices about what is feasible, when it can be delivered and the value it can create.[8]

Low-emissions strategy becomes real through decisions about technology, operations, suppliers and timing.[9] Many significant decisions carry assumptions about who will do the work, what capability they need, what suppliers can deliver and how much change the organisation can absorb.[10]

These decisions also carry assumptions about how change will work in practice and who will experience its benefits, costs and disruption. Employees, frontline managers, suppliers, contractors, customers, iwi and communities can see consequences and practical constraints that may be less visible at organisational level. The critical question is not simply whether affected groups were consulted or their impacts considered. It is whether their knowledge was brought in early enough to influence the preferred approach.

Project interviews identified several cases in which people, skills or supplier requirements became visible after preferred options had begun to form. They also raised a related question about influence - whether affected groups had an opportunity to shape the decision, and what changed as a result. This illustrates the risk of bringing material delivery assumptions and affected-group perspectives in only after choices about scope, pace or investment have narrowed. By then, leaders have fewer options to strengthen the plan.

The consequences of this vary. Organisations may face recruitment pressures, need to invest more in supplier capacity or reskilling, or work more actively to maintain workforce trust.[11] Consider the example of a manufacturer preparing to electrify its process heat. The business case may focus on equipment costs and energy prices, but delivery also depends on the timely availability of electricians, controls engineers and installation contractors. Testing these assumptions early creates options for sequencing, contracting, capability development and investment. Testing them only after approval leaves fewer practical responses.

1.2 What the global evidence tells us

Global demand is rising for some skills associated with the low-emissions transition. However, their availability varies by occupation, sector and location. At the same time, organisations are adapting to digitalisation, AI and other changes in how work is organised. Together, these shifts can create capability and sequencing challenges for investment. This remains the case even where organisations can recruit, contract or source expertise internationally.[12]

The challenge is broader than creating a new category of "green jobs". The transition is changing the skills required within existing occupations as well as increasing demand for specialist expertise. For businesses, this means capability may need to be built through a combination of developing existing employees, recruitment, redeployment and access to suppliers and contractors.

Capability constraints become business constraints when they affect execution. Where organisations and sectors depend on the same specialist skills or supplier capacity, competition may affect the cost, pace and sequencing of investment.[13] Workforce and supplier assumptions therefore need to be tested alongside technical, financial and emissions assumptions.[14]

These pressures are compounded because the low-emissions transition is not happening in isolation. Digitalisation, AI, productivity initiatives and changes to operating models can draw on the same leadership attention, specialist expertise and organisational capacity. Considering these changes together provides a clearer view of shared dependencies and cumulative execution risk.

People and capability are also increasingly part of responsible transition governance. Boards and executive teams need to understand not only the financial and emissions implications of major decisions, but also the capability, fairness, timing and delivery assumptions on which those decisions rely.

The evidence does not suggest that organisations are unaware of these issues. The gap is between recognising that people and capability matter and allowing that understanding to influence decisions early enough.[15]

The business case for putting people at the centre of the transition

Research by SBC's global partner, the World Business Council for Sustainable Development (WBCSD), highlights a clear economic case for integrating people considerations into climate action. Its analysis found that companies with stronger social performance delivered 3–7% higher returns over five years. It also found that highly engaged business units were 23% more profitable than those with low engagement. The report also points to the costs of getting it wrong: community conflict added US$750 million in costs to a major energy project, and 39% of investors say they would rule out funding projects associated with human rights violations.[16]

WBCSD concludes that successful climate transitions depend not only on technology and capital, but on understanding impacts on workers, suppliers, communities and consumers from the outset. Embedding people considerations early helps strengthen resilience, maintain social licence, reduce implementation risks and improve the likelihood that transition plans succeed.[17]

1.3 Translating the evidence to Aotearoa New Zealand

Aotearoa New Zealand is not simply a smaller version of the global transition. Its labour market, supplier base and social context affect where delivery pressures arise and which assumptions leaders need to test.[18]

New Zealand's relatively small labour market can affect the availability, timing and cost of specialist capability for some energy, engineering and infrastructure investments.[19] Project interviewees identified instances where the availability and timing of specialist capability affected energy, engineering and infrastructure decisions.

Organisations may respond through recruitment, contracting, specialist partnerships, international expertise or capability development. The relevant question is therefore not whether expertise exists in the abstract, but whether the required capability can be secured at the necessary time, place, scale and cost.[20]

The capability required to deliver the transition also sits beyond organisations' direct workforces.[21] Businesses rely on contractors, suppliers and technical specialists to turn low-emissions plans into reality. Smaller suppliers may face their own capability, investment and resourcing constraints. These pressures are greater when new requirements are introduced quickly or demand increases across several customers at once.

Building supplier capability for the transition

As Meridian Energy has accelerated its development of new renewable generation, one of its emerging workforce challenges has been from outside its own organisation. Meridian has been able to attract the people that it needs internally, but greater development activity means working with more contractors and subcontractors, including smaller civil businesses.

Meridian Chief Executive Mike Roan described how these businesses can often have strong technical capability but not always the systems, resources or practices needed to meet Meridian's expectations across areas such as safety and environmental performance. Meridian has responded by putting more time, resource and support into working with contractors than its contractual arrangements alone would require.

The experience has reinforced the importance of looking beyond whether suppliers can technically deliver the work. As Meridian moves into newer areas the selection of partners, contracting approaches and supplier capability are all becoming increasingly important to the successful delivery of New Zealand's new electricity infrastructure.

Capital availability, policy direction and investment timing can also influence when organisations commit to transition activity.[22] This can make future demand for skills and supplier capability harder to anticipate, even where the longer-term direction of change is understood.

The New Zealand context also broadens what credible delivery looks like.[23] Transition decisions can affect employees, suppliers, iwi, communities and regions differently. In Aotearoa, transition decision-making should recognise the country's distinctive social and cultural context, including the relevance of Te Tiriti and the impacts decisions may have on whānau, communities and future generations.[24]

Understanding these impacts early helps organisations assess whether a decision is deliverable and what is needed to maintain trust and legitimacy. A technically and financially credible transition plan can still depend on people or capability that is difficult to secure at the required scale, place or time.

1.4 What's happening inside New Zealand businesses right now

The interviews for this project show people, skills and supplier capacity affecting practical, immediate decisions. The issue is not only whether the shift to a low-emissions economy will create or remove jobs over time. It is how work moves, how roles are reshaped, how capability is built. It is also whether people and delivery requirements are visible while leaders still have choices about timing, design and delivery.[25]

Interviewees described work being automated, relocated, redesigned, accelerated or made more complex. In some cases, fewer people were needed for a particular task; in others, more skilled people were needed sooner than expected. Project research also showed how centrally made decisions can change tasks, workloads, working arrangements and customer interactions for frontline teams. Bringing frontline perspectives in early can surface these practical delivery constraints before plans are fixed. The common challenge was not whether people mattered, but whether they were considered early enough to shape the decision.[26]

INDUSTRY PERSPECTIVE: Rethinking capability in a changing world

At Generate Zero, we're seeing decarbonisation, AI and digital transformation converge, fundamentally changing both what's possible and what's expected of organisations.

Technology is making it possible to analyse emissions and supply-chain risks at a scale that would have been unimaginable just a few years ago. For example, organisations can now use emissions data and supplier reduction plans to inform procurement decisions, looking beyond cost alone to consider long-term sustainability outcomes.

But this requires more than technology. It requires people across the business to think differently, challenge traditional decision-making and sometimes make bold choices that prioritise long-term value over short-term cost.

As *First to Feel It, Last to Shape It* highlights, this means bringing workforce capability into strategic decision-making early, rather than treating it as something to address once change is already underway.



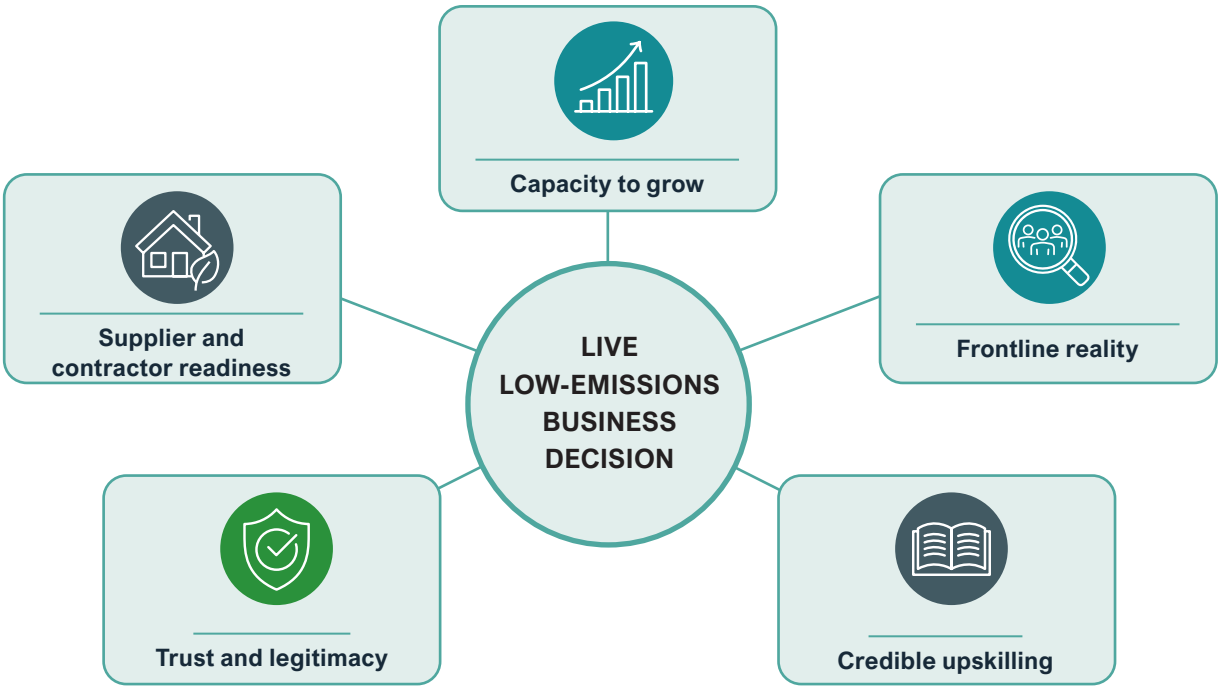
Caroline Knowles,
CEO, Generate Zero

Project interviews identified examples of organisations relying on overlapping technical, leadership and change capability. Where several organisations or projects require the same specialist skills or suppliers at similar times, availability, cost and sequencing can become material considerations for delivery.

1.5 How people and delivery requirements show up in business decisions

People and delivery requirements do not appear in one neat category. They surface in different ways depending on the decision being made. The lens below brings those patterns together so leaders can identify people, skills and supplier capacity before major decisions are locked in.[27]

Five delivery risks to test before a low-emissions decision is locked in



Each pattern can change scope, pace, sequencing, investment or accountability.

1. **Capacity to grow:** whether the organisation has enough people, skills and leadership capacity to capture low-emissions opportunities at the pace required.
2. **Frontline reality:** whether affected groups have identified how a decision will work in practice, and whether their knowledge has changed the design, pace, sequencing, investment or support.
3. **Credible upskilling:** whether promises to reskill or redeploy people are backed by funding, sequencing, leadership time and realistic pathways.
4. **Trust and legitimacy:** whether the way a decision is made strengthens engagement, retention and licence to operate.
5. **Supplier and contractor readiness:** whether the wider value chain has enough clarity, support and time to deliver what the transition plan assumes.

The five patterns bring together the published evidence, project interviews and roundtable discussion into a practical framework for leaders. They help identify material people and delivery requirements, assess whether relevant perspectives have shaped the choice, and determine where further analysis, adaptation or assurance is needed while decisions remain open.[28]

Frontline reality

Reflecting on OCS's experience, Gareth Marriott emphasised the importance of understanding how sustainability initiatives will work for the people responsible for delivering them. Working arrangements, customer requirements and local conditions can all affect what is feasible at a particular site.

OCS's work at Auckland Airport illustrates the point. Waste from international flights is subject to strict biosecurity requirements. OCS's WasteLine team worked with the airport and the Ministry for Primary Industries to introduce a facility that allowed selected materials, including plastic and aluminium, to be separated for recovery while meeting those requirements.

The example shows how operating conditions can shape the design of an initiative. Involving site teams and delivery partners early gives leaders a chance to identify those conditions and adjust the approach before decisions are fixed.

1.6 Core findings

1. **Bringing people and delivery requirements in early should shape decisions**

   People, skills, supplier capacity and the perspectives of those affected should inform decisions while meaningful choices remain open. The test is not simply whether these factors were considered, but whether they influenced the design, timing, investment, support or accountability for the decision.

2. **Those closest to delivery can improve how change is designed**

   Those closest to delivery and the impacts of change can identify practical issues and opportunities that may not be visible at an organisational level. Bringing this knowledge in early can strengthen how change is designed and delivered.

3. **Organisations are delivering several transformations at once**

   Delivering low-emissions initiatives alongside other major transformations is increasing demands on people, skills and organisational capacity. Leaders need to consider these demands together rather than treating each transformation in isolation.

PART TWO

2. The tools: bringing people, skills and supplier capacity into low-emissions decisions

2.1 From insight to action

Part Two translates the report's findings into practice. Executives can use the decision tests to shape choices before approval. Boards can use the governance questions to seek assurance that management is applying this discipline consistently across the low-emissions portfolio.[29]

2.2 Executive decision tests: stress-testing live, operational decisions

Use this tool before approving a major capital, technology, procurement, supplier or operating-model decision. Its purpose is to test whether material people and delivery requirements are visible and whether affected groups have influenced the choice while options remain open. The earlier these questions are considered, the greater the scope to strengthen the outcome.

For each test, mark the decision **Green**, **Amber** or **Red**. Green means the issue has been considered in the decision. Amber means the issue is partly understood but not yet resolved. Red means the issue is unclear, unowned or has only been considered after the preferred option was formed.

Test	Ask this before approval	If unclear, pause and resolve
1. Impact	Who is affected by this decision (employees, suppliers, customers, communities), and how? What mitigations have been considered?	Identify the affected groups and assess the impacts before the options are narrowed.
2. Burden	Which risks, costs or uncertainty are being shifted to other parties, and is that appropriate?	Assess whether costs, risks and uncertainty are allocated appropriately. Adjust the design, timing or support where needed.
3. Timing	What changed in the options, scope, pace or investment because of workforce input? If nothing changed, why not?	Reopen the option design so people implications can influence scope, pace, sequencing or investment.
4. Redeployment reality	Are assumptions about retraining, redeployment, supplier capability and delivery capacity backed by realistic funding, sequencing and ownership?	Adjust the decision, procurement approach, investment, support or timing before relying on these assumptions.
5. Incentives and accountability	What behaviour are our KPIs, incentives and approval criteria rewarding and who is accountable for delivery after approval?	Resolve conflicting incentives, assign ownership, and agree how delivery and residual risk will be monitored.
6. Trust	Have affected groups had a meaningful opportunity to shape the decision, and what changed in the design, timing or support as a result?	Engage affected groups, record how their input shaped the decision, and strengthen the design, support or explanation before proceeding.

Decision-ready threshold: Proceed only when people and delivery requirements are visible, owned and reflected in the decision design. If two or more tests are Amber or Red, pause approval and resolve the gaps first.

2.3 Governance questions: testing execution risk across the low-emissions portfolio

The following seven questions help directors assess whether management has identified, owned and actively managed the material people and delivery requirements that could affect the low-emissions portfolio.[30]

Management owns the detailed assessment of people, supplier and organisational capability requirements and integrates them into option design, business cases and delivery plans. The board's role is to seek assurance that material assumptions and affected-group perspectives have influenced the decision. It should also confirm that accountable executives are managing the resulting dependencies and trade-offs, and that significant residual risks are escalated and monitored across the low-emissions portfolio.

1. **What assurance does the board have that people, skills and supplier capacity were considered early enough to shape the key decisions in the low-emissions strategy?**
   Evidence to look for: people and delivery requirements have influenced decisions about capital, operations, technology, suppliers and timing.

2. **What assurance does the board have that management has tested assumptions about people's ability to adapt, retrain or redeploy?**
   Evidence to look for: workforce data, funded capability plans, realistic timeframes, accountable owners and clear measures of progress.

3. **Has management identified who is most affected by the decision - including employees, contractors, suppliers, regions and communities - and provided sufficient evidence of the material impacts?**
   Evidence to look for: a clear assessment of who carries the impacts, costs and execution risks across the value chain.

4. **What assurance does the board have that the decision will be experienced as fair, credible and transparent by the people most affected?**
   Evidence to look for: early engagement, clear communication, credible support and a record of how feedback shaped the decision.

5. **Has management assessed whether material costs, risks or uncertainty are being shifted onto workers, suppliers or communities without appropriate support or influence over the decision?**
   Evidence to look for: a clear allocation of costs and risks, appropriate support, and consideration of impacts beyond the organisation's direct workforce.

6. **Has management assigned clear executive accountability for the people and delivery requirements associated with this decision, and what evidence will the board receive that the risks are being managed?**
   Evidence to look for: named executive ownership, funded actions, clear milestones and regular reporting on material execution risks.

7. **What assurance does the board have that the people, skills or supplier constraints that could prevent delivery are being managed as strategic execution risks?**
   Evidence to look for: material constraints are included in risk reporting, linked to the strategy and supported by mitigation plans and escalation triggers.

Building social considerations into investment decisions

Manulife Investment Management established a Carbon Standards Working Group to strengthen due diligence for carbon projects undertaken for clients. Drawing on expertise from across the business, the group developed principles defining high-integrity projects and uses them to assess projects and screen potential counterparties. The principles address both environmental integrity and social impacts, including avoiding harm, supporting social and ecological benefits, and guarding against greenwashing. Manulife also applies international human-rights standards across its investment lifecycle, covering health and safety, Indigenous rights, community engagement and responsible contracting. The approach shows how people considerations can be built into investment decisions, controls and accountability.

Source: World Business Council for Sustainable Development and ERM, Business Leaders' Guide to a Just Climate Transition (2025).[31]

2.4 What good looks like

Good practice means considering material people, skills, supplier and organisational capability requirements while meaningful choices remain open. These requirements should influence decisions about design, pace, investment, sequencing and accountability. It also requires leaders to show how the knowledge and perspectives of affected groups changed the choice or, where they did not, why.

Organisations doing this well:

- Identify people, skills, supplier and organisational capability requirements early, before preferred approaches become fixed
- Use these requirements to shape design, pace, sequencing, investment, procurement and accountability
- Involve affected people early enough to influence what is proposed and how it is delivered, and can show where their knowledge and perspectives changed the approach
- Consider practical impacts on employees, suppliers, contractors and communities, including affordability, transport, time, safety and whānau wellbeing
- Consider low-emissions initiatives alongside other major changes, such as technology adoption, productivity initiatives and cost pressures, so cumulative demands inform decisions about pace, sequencing and support

Building capability in customer-facing teams

Coca-Cola Europacific Partners New Zealand's (CCEP) experience suggests that low-emissions capability can usefully extend beyond sustainability specialists to customer-facing teams. As customers asked more detailed questions about packaging, recycling, product emissions and returnable glass, CCEP identified an opportunity to strengthen account managers' knowledge and confidence when responding.

CCEP has introduced sustainability training for its sales and key-account teams, with learning tailored to different levels of seniority. As customer conversations have become more sophisticated, interest in this training has increasingly been driven by employees and teams.

CCEP has taken steps to help build its people's capability to respond to customer questions during interactions. This work is reflected in several ways:

- **This is Forward** is CCEP's sustainability action plan, setting out the commitments and actions guiding the business across climate, packaging, water and nature, and communities. Internally, it provides a framework for helping employees understand CCEP's sustainability priorities, actions and commitments. Through resources such as the Sustainability Hub, New Zealand employees can access information about This is Forward alongside local initiatives, news and practical resources, helping build sustainability knowledge and support informed conversations with customers and other stakeholders.
- **A business-wide commitment:** Sustainability is identified as one of CCEP's four strategic business pillars, reflected in the phrase 'Great brands, great people, great execution, done sustainably'. This focus is intended to support the development of sustainability capability beyond specialist teams.
- **Practical learning and tools:** The bespoke Sustainability Academy is available to employees across the organisation and offers structured e-learning on climate, packaging and water. It is complemented by a Sustainability Storytelling Workshop, developed through collaboration between the sustainability and cross-functional teams, which is designed to help employees translate technical information into clear, confident customer conversations.

This experience suggests that capability needs can emerge well beyond technical and operational teams. Changing customer expectations have increased the need to build capability across the organisation, including both broad sustainability literacy and specialist knowledge. Identifying these needs early can help organisations address potential skills gaps and enhance customer relationships.

3. Conclusion: A call to action

The findings point to a practical shift in how organisations approach low-emissions delivery. For every significant low-emissions investment or programme, leaders should ask three questions before key decisions are locked in:

1. Do we have the people and skills to deliver this?
2. Can our suppliers and partners deliver what the plan requires, when it requires it?
3. Have the people responsible for implementing the change had enough influence over its design, timing and sequencing?

Where the answer is no, leaders still have choices: adjust the design or timing, invest in capability, work differently with suppliers, or provide additional support. Boards can reinforce this discipline by asking management to demonstrate how these questions have shaped major low-emissions decisions and how material delivery risks are being managed.

The opportunity is to act earlier. Bringing delivery realities into decisions while choices remain open gives organisations a better chance of turning low-emissions ambition into credible execution.

This is how low-emissions ambition becomes deliverable: by integrating people, skills, supplier capacity and organisational capability into decisions while meaningful choices remain open. Those affected should also be able to shape the design, pace, investment, support and accountability. That is how Aotearoa New Zealand's sustainable growth opportunity becomes something businesses can deliver credibly in practice.[32]

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About the Sustainable Business Council

The Sustainable Business Council (SBC) is a CEO-led membership organisation with around 120 businesses from all sectors, ambitious for a sustainable New Zealand. Members represent $170 billion of collective turnover, 38% of GDP, and nearly 255,000 full-time jobs. Our network gives members access to trusted peer connections, world-class expertise, global best practice, and opportunities to collaborate on high-impact initiatives. SBC is part of the BusinessNZ network and is the New Zealand Global Network partner to the World Business Council for Sustainable Development.

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Appendices

Appendix A About this project

This report was developed by Proxima Consulting Limited with SBC to explore workforce readiness as a practical implementation challenge in Aotearoa New Zealand's low-emissions transition.

The report draws on published international and New Zealand evidence alongside interviews with senior leaders from a range of New Zealand organisations and sectors. Participating organisations included Aurecon, Coca-Cola Europacific Partners, Meridian Energy, Ngāti Whātua Ōrākei Whai Rawa and OCS. Additional businesses contributed through a project roundtable including Beca, Fonterra, Tonkin + Taylor, Generate Zero, New Zealand Forest Owners Association. Evidence from these engagements is cited collectively as project interviews and roundtable discussions to preserve participant anonymity and avoid attributing particular findings to individual organisations.

The project took place between June and September 2026.

Appendix B Evidence inputs

The report draws on published evidence, New Zealand business examples and insights from senior leaders and practitioners. Endnotes identify the evidence used for key claims.

References

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22 World Resources Institute, Systemiq and partners, *Jobs and Skills for the New Economy* (2025); MBIE *A Guide to Just Transitions* (2024); SBC and Proxima project interviews and roundtable discussion, June-September 2026

23 MBIE A Guide to Just Transitions (2024); project roundtable discussion.

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25 SBC and Proxima project interviews, June-September 2026.

26 SBC and Proxima project interviews, June-September 2026; OECD, *A Fair Net-Zero Transition* (2025); Deloitte New Zealand, *The Green Collar Revolution* (2023).

27 Analytical synthesis of SBC and Proxima project interviews and roundtable discussion, June-September 2026.

28 SBC/Proxima synthesis of published evidence, SBC and Proxima project interviews and roundtable discussion, June-September 2026; not an externally validated standard.

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