Sustainability Enablement Technology Services PEAK Matrix® Assessment 2022

June 2022: Complimentary Abstract / Table of Contents

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Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Background of the research

In a constantly evolving world, value-driven business is a key driver for long-term success. Enterprises have started adopting a triple-bottom-line approach, which intertwines the focus on people, the planet, and profit in business strategies. Technology is the key enabler for sustainable and responsible business models, with the sustainability services market being underpinned by emerging technologies such as AI, IoT, predictive analytics, and blockchain. Currently, the focus is tilted more toward the planet aspect of sustainability, with service providers designing net zero strategies, providing climate risk assessment and auditing, and assessing the product life cycles. The pandemic has thrown light on the need for social responsibilities toward business stakeholders and communities. Service providers have started developing people-led solution portfolios for helping their clients with accessibility, DEIB, and EHS services.

While the market for the above-discussed services is stabilizing, the market for smart infrastructure, smart mobility, smart farming, sustainable supply chains, digital learning, digital health, and low-carbon and low-energy manufacturing is evolving at an accelerated rate. The demand for sustainability services is increasing, and so is the enterprises' wish to leverage end-to-end strategic partners who can provide seamless sustainability-led journeys. However, the market is still fragmented with capabilities being siloed. In this research, we present an assessment and detailed profiles of 14 service providers featured on the sustainability enablement technology services PEAK Matrix®, a comprehensive matrix that evaluates and categorizes providers based on their capabilities. The assessment focuses on the integrated capabilities that these IT service providers offer to the sustainability services ecosystem. The study is based on Everest Group's annual Request for Information (RFI) process for the calendar year 2021, interactions with leading sustainability enablement technology service providers, client reference checks, and an ongoing analysis of the market.

This report includes the profiles of the following 14 leading service providers featured on the Sustainability Enablement Technology Services PEAK Matrix:

- **Leaders:** Accenture, Atos, Capgemini, Infosys, TCS
- **Major Contenders:** Cognizant, HCL Technologies, Hitachi Vantara, IBM, NTT DATA, Wipro
- **Aspirants:** Mindtree, Mphasis Limited, and YASH Technologies

Scope of this report

Geography
Global

Providers
14

Services
Sustainability Enablement Technology Services

Overview and abbreviated summary of key messages

This report examines the sustainability enablement technology service provider landscape and its impact on the sustainability services market. It focuses on provider position and growth in the sustainability services market, changing market dynamics and emerging provider trends, assessment of provider delivery capabilities, and key sustainability enablement technology service provider profiles. It also identifies the key implications of the research findings for buyers and providers.

Some of the findings in this report, among others, are:

Service provider delivery capability
- Sustainability enablement technology service providers can be categorized into leaders, major contenders, and aspirants
- Accenture, Atos, Capgemini, Infosys, and TCS are the current leaders in the space

Emerging service providers' trends
- Leaders have mature offerings around sustainability services with a balanced approach toward the planet and people aspect of sustainability, covering the end-to-end sustainability value chain
- Leaders are venturing into strategy-led engagement in areas that have wider community impact such as smart farming, smart mobility, biodiversity conservation, and assistive technologies
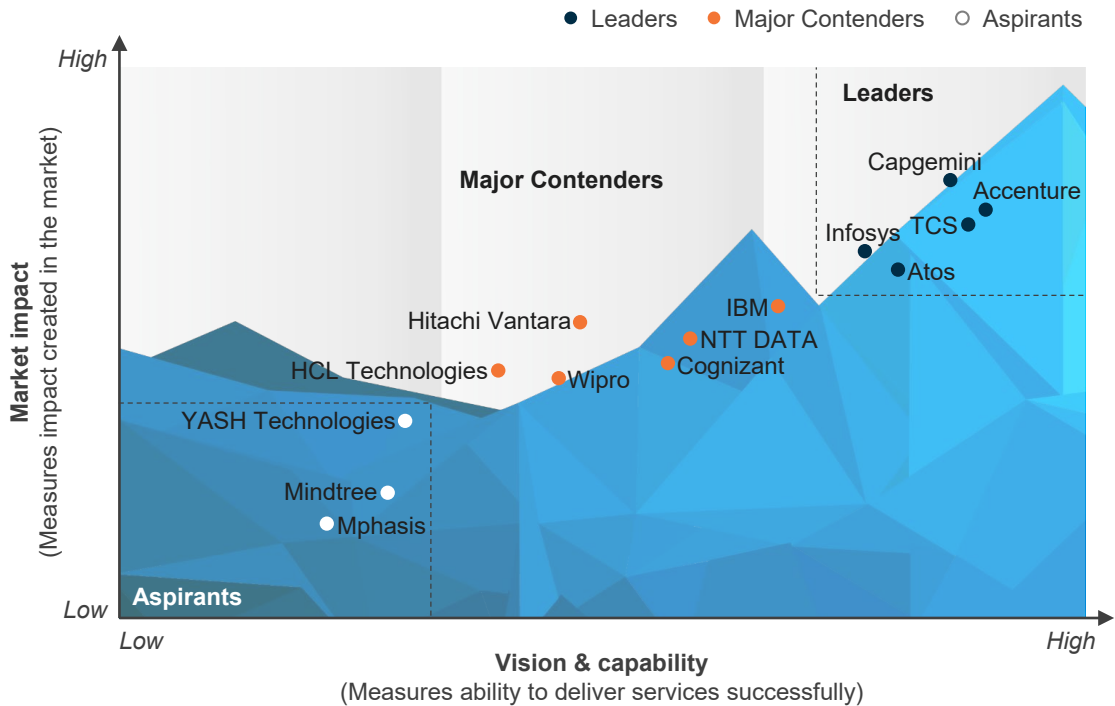
Changing market dynamics
- Enterprises are focusing on sustainability led business strategies, underpinned heavily by technological transformations
- The sustainability services market is tilted towards the planet aspect of sustainability. However, pandemic is brining the people aspect to the forefront

The way forward

Although the enterprises are currently adopting sustainability services majorly to serve compliance and regulatory purposes, they are moving towards becoming purpose driven following the example of industry leaders

This study offers 4 distinct chapters providing a deep dive into key aspects of sustainability enablement technology services market; below are three charts to illustrate the depth of the report

Sustainability Enablement Technology Services PEAK Matrix® Assessment 2022[1,2]

Illustrative example

● Leaders ● Major Contenders ○ Aspirants

Market impact (Measures impact created in the market)

Vision & capability (Measures ability to deliver services successfully)

Leaders: Capgemini, Accenture, Infosys, TCS, Atos

Major Contenders: Hitachi Vantara, HCL Technologies, Wipro, IBM, NTT DATA, Cognizant

Aspirants: YASH Technologies, Mindtree, Mphasis

1 Assessments for IBM excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
2 Assessment of Accenture, Cognizant, Hitachi Vantara, Infosys, and Mphasis 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 disclosure and interaction with buyers

Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: ◖ Low ● High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1									
Provider 2									
Provider 3									
Provider 4									
Provider 5									
Provider 6									
Provider 7									
Provider 8									
Provider 9									

Everest Group's remarks on providers

Illustrative example

Measure of capability: ◖ Low ● High

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

Strengths
- It has a broad set of ESG-related advisory offerings including ESG analysis, data governance, ESG auditing, sustainable finance, change management, and digital footprint analysis
- It has created strong market proof points around sustainable manufacturing and smart spaces, showcasing its ability to deploy emerging technologies such as AI and IoT in sustainability engagements

Limitations
- It has made limited investment in Europe, where it is catching up with its peers by slowly expanding its sustainability consulting services portfolio in the UK
- Client adoption and advocacy is an aspect where the firm lacks prominence

Research calendar
Sustainability Technology and Services

	Published	Planned	Current release

Reports title	Release date
Decoding the Sustainability Opportunity in BFSI – Market Report	July 2021
Finance: a Cornerstone of Enterprise Environmental, Social, and Governance (ESG) Strategy	October 2021
Sustainability in Financial Services – The Next Big Opportunity in Data, Technology, and Services	December 2021
Environmental, Social, and Governance (ESG) Adoption in the Engineering Landscape	March 2022
Social Sustainability in Life Sciences: Connecting the Dots between Profit and Purpose	March 2022
The Growing Need for Inclusive Talent Models: Learning from Impact Sourcing Specialists	May 2022
Impact Sourcing Specialists Service Providers Compendium 2022	June 2022
Sustainability Enablement Technology Services PEAK Matrix® Assessment 2022	**June 2022**
Sustainability Enablement Technology Services Provider Landscape – Compendium	Q2 2022
State of the Market – Cloud 3.0 (Focus on sustainability and sovereignty)	Q2 2022
State of the Market – Sustainability Enablement Technology Services 2022	Q3 2022
Data and Analytics (D&A) for Sustainability	Q3 2022
Sustainability Software Vendor Landscape	Q3 2022
Talent for Sustainability	Q4 2022

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