

Sustainability Enablement Technology Service Provider Compendium 2022

July 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

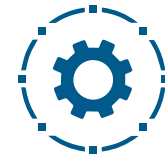
Scope of this report



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

The sustainability enablement technology service provider compendium report has over 14 provider profiles

Sustainability Enablement Technology Service Provider Compendium 2022

Provider | sustainability enablement technology services profile (page 1 of 5) Everest Group assessment – Major Contender



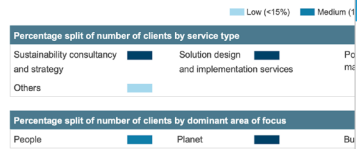
- Strengths**
- It has a broad portfolio of sustainability services, which includes climate risk management, sustainable and green infrastructure, and energy and emission management, infrastructure and operations, supply chain, electrification, energy and energy efficiency, and sustainability strategy.
 - In 2022, it acquired a leading data and analytics software provider for environmental risk management.
 - It has robust suites of ESG solutions to help its clients achieve their ESG goals and helps businesses to plan and respond to environmental risks.
 - It has a robust partnership ecosystem with a strong focus on co-innovation, decarbonization and IoT technology player, to develop renewable energy management solutions.
 - It effectively deploys emerging technologies in its sustainability solutions.

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Provider | sustainability enablement technology services profile (page 2 of 5) Overview

Vision: The provider helps its clients plan a sustainable and profitable path forward with solutions and platforms, and deep industry expertise that addresses its goals in five key areas: climate risk management, infrastructure and operations, supply chain, electrification, energy and energy efficiency, and sustainability strategy.



¹ Based on Everest Group's estimates
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Provider | sustainability enablement technology services profile (page 3 of 5) Case studies

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Case study 1: Customer engagement solutions designed for utilities, powered by AI

Business challenge: The client set out to enable industry-leading services for its 4.5 million customers, reduce operational costs, and prepare to enter the wholesale water market.

Solution: The company engaged the provider to assist with the design and implementation of the new solution. The company selected Oracle Customer Care and Billing, which integrates with the client's application landscape.

Impact: The solution helped in:

- Reduction of 80% in meter read-to-bill time, improving and smoothing cash flow.
- Increased customer convenience with flexible payments and streamlined customer engagement.
- Boosting automation, saving time, and empowering staff to take on more value-add tasks.

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Provider | sustainability enablement technology services profile (page 4 of 5) Solutions

Proprietary solutions (People) (representative list)

Solution name	Details
Solution 1	This solution includes asset management,...
Solution 2	It is an open, integrated platform that uses...
Solution 3	It helps clients to generate innovative ideas...

Proprietary solutions (Planet) (representative list)

Solution name	Details
Solution 1	It is a platform that uses open source for its sustainability enablement project deployment...
Solution 2	This solution is provider's strapline for a range of...

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Provider | sustainability enablement technology services profile (page 5 of 5) Investments and partnerships

Sustainability enablement technology services investments (representative list)

Investment theme	Details
Initiative	Provider announced that it will achieve net-zero greenhouse gas emissions by 2030 to further its decades-long work to address the global climate crisis.
Acquisition	In January 2022, provider acquired a data and analytics software company for sustainability and energy to help organizations accelerate sustainability initiatives and achieve environmental goals.

Sustainability led partnerships (representative list)

Partner name	Details
Partner 1	In 2020, it partnered with the Partner 1, a firm catering to climate risk analytics for investors and businesses, to work with financial institutions and corporations to better measure risks associated with climate change.
Partner 2	In 2020, the partnership developed a tracing system to give consumers greater insights into product sustainability.
Partner 3	The partnership used quantum computing to accelerate the development of next-generation batteries.
Partner 4	In 2020, the partnership developed the first digital platform for road design optimization, that can reduce carbon emissions by up to half while tripling road durability.

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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 Service Provider Compendium 2022	July 2022
State of the Market – Cloud 3.0 (Focus on sustainability and sovereignty)	Q3 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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