# Sustainability Enablement Technology Services PEAK Matrix® Assessment 2024

May 2024: Complimentary Abstract / Table of Contents

PEAK MATRIX®

Sustainability Technology and Services

Everest Group®

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- Process Orchestration
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- Rewards and Recognition
- SAP Services
- Service Optimization Technologies
- Software Product Engineering Services
- Supply Chain Management (SCM) Services
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Locations: costs, skills, sustainability, portfolios

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# Introduction

In the contemporary business landscape, sustainability has transcended its erstwhile status as a mere buzzword and has emerged as a critical imperative for enterprises across industries. Amidst growing concerns about climate change, resource depletion, and social inequalities, businesses are under mounting pressure to not only mitigate their environmental impact but also to proactively contribute to societal well-being. In this context, sustainability enablement technology and services have assumed paramount importance, offering instrumental solutions to navigate the complexities of sustainability challenges.

However, the dearth of tangible market proof points as the standards and best practices continue to evolve, compounds the challenge of decision-making. Enterprises find themselves grappling with the daunting task of navigating this complex landscape to select partners who can not only address their immediate sustainability needs but also align with their long-term strategic objectives.

In this research, we present an assessment and detailed profiles of 24 sustainability enablement technology and services providers featured on the Sustainability Enablement Technology Services PEAK Matrix®. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2024, interactions with leading sustainability enablement technology and service providers, client reference checks, and an ongoing analysis of the sustainability services market.

**This report includes the profiles of the following 24 leading service providers featured on the Sustainability Enablement Technology Services PEAK® Matrix:**

- **Leaders**: Accenture, Capgemini, Deloitte, EY, NTT DATA, PwC, and TCS
- **Major Contenders**: Atos, Cognizant, DXC Technology, Gramener – A Straive company, HCLTech, Hitachi Digital Services, Infosys, KPMG, Kyndryl, LTIMindtree, Tech Mahindra, UST, and Wipro
- **Aspirants**: GEP, GFT, SG Analytics, and Stefanini

## Scope of this report

**Geography:** Global

**Industry:** Cross-industry

**Services:** Sustainability enablement technology services

# Overview and abbreviated summary of key messages

This report examines the sustainability enablement technology services market and evaluates the positioning of service providers on the Everest Group PEAK Matrix ®. It provides insights into evolving market dynamics, competitive landscape, providers' capabilities, and Everest Group's remarks on providers' key strengths and limitations.

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

### Low-hanging fruits in the sustainability enablement technology services landscape

Majority of the sustainability enablement engagements are focused on ESG data management, net zero services, and responsible supply chain.

### Capability enhancement by service providers

Service providers have invested in augmenting their sustainability enablement capabilities via several channels including joint go-to-markets, inhouse tools, and dedicated CoEs to enhance credibility in the market.

### Buyers' perception

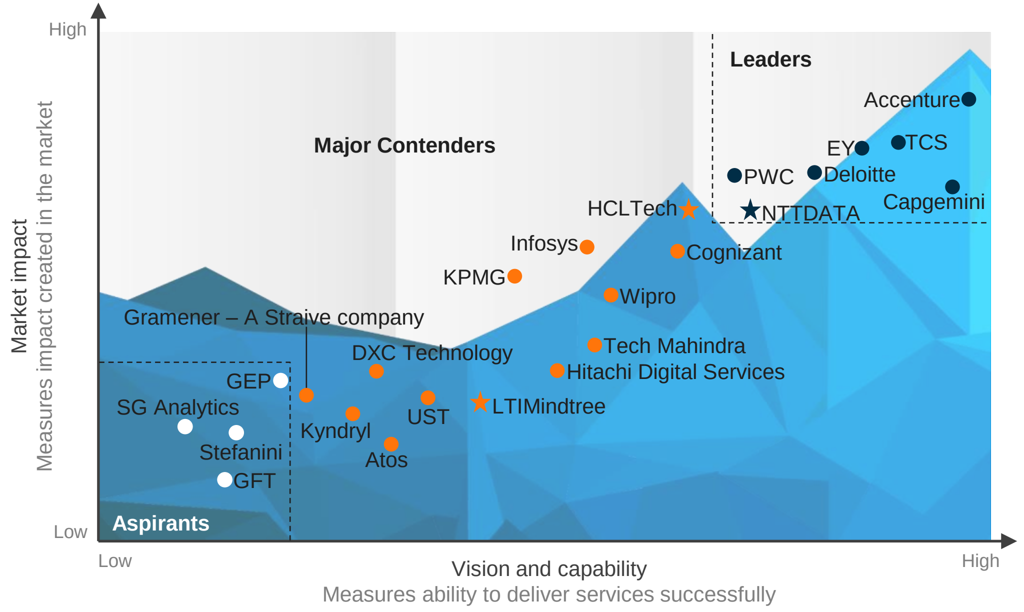
Buyers perceive gaps in the service provider capabilities with regards to change management, commercial flexibility, and domain knowledge, and expect higher levels of value addition from providers.

# This study offers five 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

## Everest Group PEAK Matrix® Assessment 2024

### Sustainability Enablement Technology Services PEAK Matrix® Assessment 2024[1,2,3]

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers




1 Assessment for Deloitte, Infosys, and KPMG excludes provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
2 Assessment for Accenture, Atos, DXC technology, EY, and PwC 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 disclosures, and interaction with buyers
3 This assessment takes into account the recent divestment of EcoAct by Atos and its impact on the latter's ability to provide sustainability enablement technology services
Source: Everest Group (2024)

## Capability assessment

Illustrative example

Measure of capability: ◔ Low ● High

| Providers | Market impact | | | | Vision and 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 | ◔ | ◔ | ◕ | ◑ | ◕ | ◔ | ◔ | ◕ | ◑ |

## Everest Group's remarks on providers

Illustrative example

Measure of capability: ◔ Low ● High

| Market impact | | | | Vision and capability | | | | |
|---|---|---|---|---|---|---|---|---|
| Market adoption | Portfolio mix | Value delivered | Overall | Vision and strategy | Scope of services offered | Innovation and investments | Delivery footprint | Overall |
| ◔ | ◕ | ◕ | ◕ | ◕ | ◑ | ◑ | ◑ | ◕ |

**Strengths**

- Provider 1 has a focus on enabling environmental stewardship with a comprehensive set of offerings for net zero transitions, sustainable value chain, ESG data management, and green IT
- It has invested in a robust go-to-market approach for separate geographies such as EMEA and North America, and has a good understanding of the geography-wise nuances

**Limitations**

- While Provider 1 has a strong presence in planet-led services, it has a lesser focus on and lacks depth and scale of IPs in people-led services
- Most of Provider 1's experience comes from larger value deals with large enterprises. It has limited coverage for mid- and small-sized buyers

# Research calendar

## Sustainability Technology and Services

Published Current release Planned

| Reports title | Release date |
|---|---|
| From Efficiency to Responsibility: How Enterprises Are Leveraging Technology to Drive Sustainability | May 2023 |
| Sustainability in Applications - Paving the Way for a Greener IT Landscape | June 2023 |
| Insuring a Sustainable Tomorrow: How the Insurance Industry is Driving Positive Change | July 2023 |
| Net Zero Consulting Services PEAK Matrix® Assessment 2023 | July 2023 |
| Net Zero Consulting Services Provider Landscape – Provider Compendium 2023 | September 2023 |
| A Provider's Playbook to Bridging the Sustainability Skills Gap | November 2023 |
| Mapping the Carbon Mitigation Landscape: Carbon Emission Management Trailblazers | December 2023 |
| Driving Sustainability in Retail and CPG Industry: A Business Model Transformation Approach | January 2024 |
| Sustainability Enablement Technology Services PEAK Matrix® Assessment 2024 | May 2024 |
| Unveiling the Carbon Frontier: A Comprehensive Analysis of Players in the Carbon Offset and Carbon Capture Technology Spaces | Q2 2024 |
| Sustainability Enablement Technology Services Provider Landscape – Provider Compendium 2024 | Q2 2024 |
| Supply chain and circularity: Harnessing Technology for Sustainable Solutions | Q2 2024 |
| Unlocking Sustainability with GenAI: A Service Provider's Guide to Propagating the Sustainability Agenda for Clients | Q2 2024 |
| Sustainability Services: State of the Market 2024 | Q2 2024 |
| ESG Data Management Platform PEAK Matrix® Assessment 2024 | Q3 2024 |
| Sustainable IT Services PEAK Matrix® Assessment 2024 | Q3 2024 |

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