



Everest Group Sustainability Enablement Technology Services PEAK Matrix[®] Report

Focus on NTT DATA

May 2024



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® Assessment 2024](#). 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.

The full 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, HCL Technologies, 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

Sustainability enablement technology services PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, Deloitte, EY, NTT DATA, PwC, and TCS

- Leaders in this assessment offer mature and interoperable end-to-end solutions and have strong market proof points on quantifiable improvement in sustainability metrics
- Leaders have a strong vision to invest in their go-to-market strategies via focused investments in key geographies and/or high potential use cases of the future
- These providers have a strong global presence in terms of delivery footprint and large-scale engagements, and enjoy market adoption across industries
- They take a consultative approach to drive sales and depth of work in their sustainability enablement use cases
- They invest heavily in industry- and geography-specific R&D and partnerships to address category-wise nuances

Major Contenders

Atos, Cognizant, DXC Technology, Gramener – a Straive company, HCL Technologies, Hitachi Digital Services, Infosys, KPMG, Kyndryl, LTIMindtree, Tech Mahindra, UST, and Wipro

- Major Contenders are building an asset-backed go-to-market narrative by introducing new IPs in-house or via partnerships. While these assets are yet to see significant market adoption, they do hold strong potential
- These providers have exhibited concerted efforts in integrating sustainability into existing engagements and creating proof points for their capabilities
- They leverage deep partnerships with hyperscalers, big technology providers, Original Equipment Manufacturers (OEMs), and some niche players to expand their sustainability offerings
- While their primary focus is on planet-driven offerings, some Major Contenders have ventured into people-led services as well

Aspirants

GEP, GFT, SG Analytics, and Stefanini

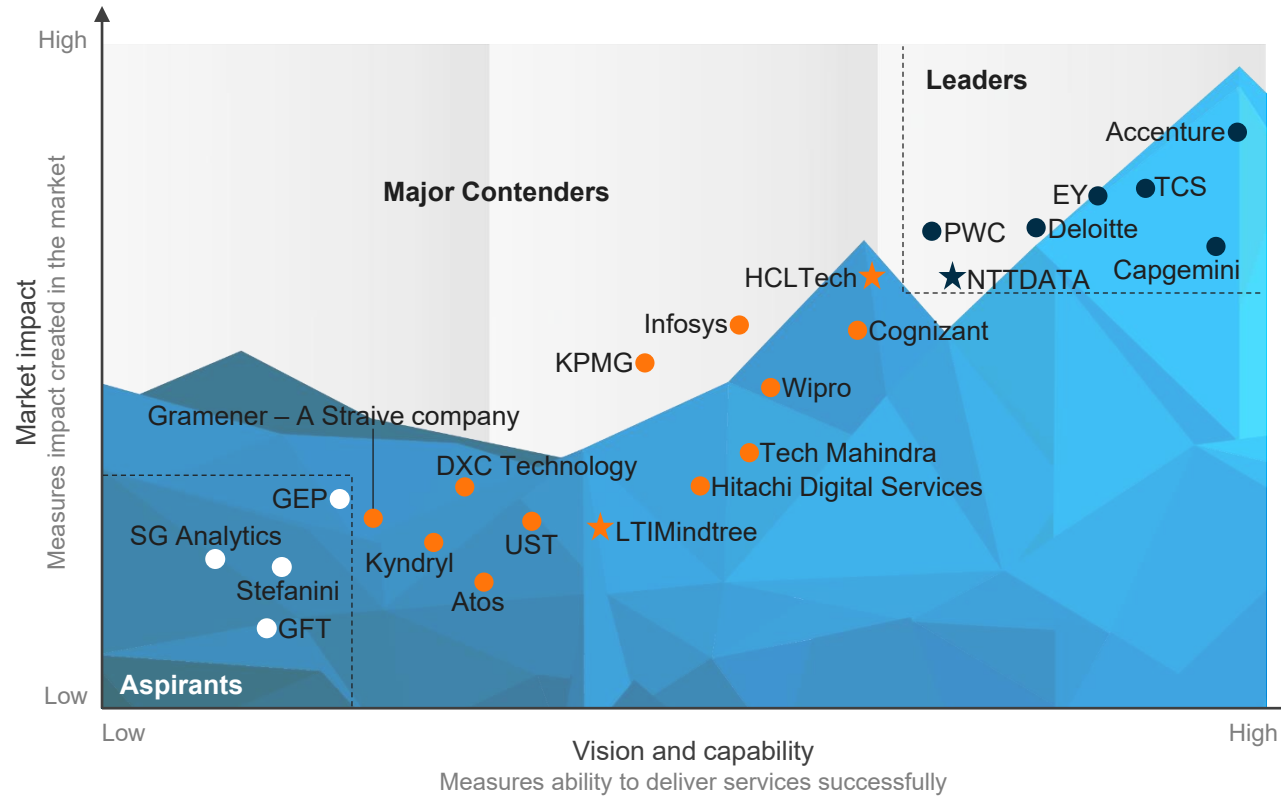
- Aspirants in this assessment have a relatively limited scope of services, focusing on a few themes within planet-driven offerings such as green IT or data management
- Their clientele is concentrated in certain regions or industries, with a lower scale of adoption

Everest Group PEAK Matrix®

Sustainability Enablement Technology Services PEAK Matrix® Assessment 2024 | NTT DATA is positioned as a Leader and a Star Performer

Everest Group 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)

NTT DATA profile (page 1 of 5)

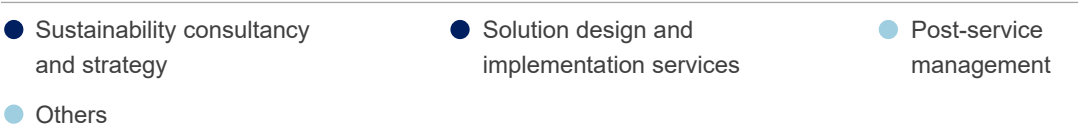
Overview

Vision

NTT DATA's vision for sustainability services offerings is to enable organizations to operate more sustainably by reducing their carbon footprint and overall environmental impact. It operates by working on three main pillars: People, Planet, and Prosperity Positive. People Positive includes applying digital capabilities to improve livelihoods and contribute to a diverse, equitable, and inclusive society. Planet Positive focuses on leading by example to disrupt industries for good, innovative services and solutions to regenerate the planet including the goal of net-zero emissions across its operations by 2030, and solutions and value chain by 2040 through Green Innovation. Prosperity Positive entails Smart X co-innovation to co-create new value with clients and partners, and resilient and sustainable value chains to maximize efficiency and manage volatility and maximize performance by providing new ways of working for the well-being of society.

● Low (<15%) ● Medium (15-30%) ● High (>30%)

Percentage split of number of clients by service type



Percentage split by dominant focus area

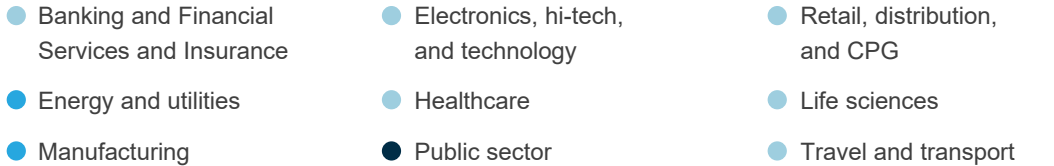


● Low (<10%) ● Medium (10-20%) ● High (>20%)

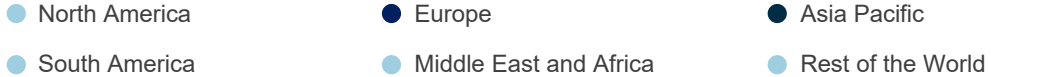
Percentage split of the number of clients by client size



Percentage split of number of clients by industry verticals



Percentage split of number of clients by geography



NTT DATA profile (page 2 of 5)

Case studies

PEOPLE

CASE STUDY 1

Diversity, Equity, Inclusivity and Belonginess in the workforce

Business challenge

The client, a technology company, wanted to trigger a change of mindset within the group due to a change in culture and work approach, requiring employees to understand the new mindset and acquire an entrepreneurial behavior that facilitates the transition of the current way of doing business.

Solution

NTT DATA helped in deploying a cultural change management program consisting of both operational and strategic communication activities. This included the following:

- Creation of a communication portal
- Workshops aimed at landing the values and the manifesto of the group
- Listening and engagement activities on the various roles to understand the difficulties and possible solutions

Impact

- Increased reach toward employees
- Adoption of the new mindset
- Improvement of employee sentiment toward change
- Increased knowledge of why the transformation is taking place and what it entails in terms of attitude
- Roles and tasks to be performed

PLANET

CASE STUDY 2

Decarbonization and responsible supply chain

Business challenge

A company from automotive sector required to calculate and analyze Scope 3 emissions from outbound transport as an important contribution to understanding their overall CO2 footprint. Main challenges were lack of insights into Scope 3 emissions from outbound shipments, large quantity of product deliveries, numerous third-party transportation suppliers, and impractical manual analysis of emissions.

Solution

NTT DATA deployed a customized analytics solution for identifying the CO2 footprint for outbound transports in SAP Analytics Cloud

Impact

- Customized analysis tool for capturing, calculating, and analyzing CO2 emissions from outbound transport
- Scope 3 emissions can be identified at all production sites
- User-friendly dashboard in SAP Analytics Cloud
- Data-driven planning: insights shape future city planning, improved resource allocation and sustainability
- Future-proof, expandable solution design

BUSINESS CASE

CASE STUDY 3

Responsible supply chain (supply chain visibility, monitoring, resilience)

Business challenge

A fishing and seafood production company needed to maximize the efficiency of its production processes, increase its supply chain transparency, and comply with regulation.

Solution

- NTT DATA deployed its proprietary solution for complete product life cycle traceability based on blockchain technology and the GS1 open standard
- Data visibility in real time in a scheme accessible anytime to all the companies and entities involved in the supply chain including fish producing companies, suppliers of packaging materials and additives, and agents participating in the product transformation process
- Included variables such as the place of origin of the catch, the date of capture, and distribution to stores and supermarkets.

Impact

- Improved product end-to-end traceability and increased trust in data shared by different actors including financial institutions
- Innovated its business model, achieving a differential positioning compared to its competition, placing people at the center of a more transparent and sustainable methodology
- Decrease in workers' opposition to technological transformation and process changes
- Decentralized leadership and innovative management model

NTT DATA profile (page 3 of 5)

Solutions

[REPRESENTATIVE LIST]

Proprietary solutions (Planet)

Solution name	Details
It.DGMSuite	The tool allows for optimized administration of hazardous materials data, document management, and the shipping process. Supplementary pre-trained digital assistant for worker support and protection is also available.
momenttum.ai	This is a customizable development and cloud computing platform for various use cases such as smart tourism, smart buildings, and smart X.
C-Turtle	C-Turtle allows for visualization of corporate carbon footprints (Scope 1, 2, and 3). Leveraging a partnership with CDP, the tool enables clients to get their suppliers specific emission factors as primary data.
SAFAR	This is a tool that facilitates a clearer understanding of the client's performance that generates a detailed score report, highlights areas that need attention, and points to the development of relevant remediations. It also allows for impact-based filtering of the remediations, thereby resulting in the organization improving its ESG score.

Proprietary solutions (People)

Solution name	Details
it.human platform	It is an AI-powered digital human that can create an emotional, interactive, and engaging experience for people and users to realize a more inclusive society. Flexible reprogramming capabilities allow for numerous use cases.
Las Vegas – A Sustainable and Safe City cross check accuracy	NTT's Smart Solution forms the foundation of the City of Las Vegas' ongoing, safe and sustainable solutions. The collaboration between the City and NTT using smart solutions and services is helping to improve the City through safer roads reducing wrong way accidents, safer parks for all, increased responsiveness, reducing carbon footprint, internet connectivity (P5G), and business growth for NTT.
AI Learning Helper	The AI Learning Helper is designed such that it can convey verbal and non-verbal signals to create better communication and provide counseling. Helper understands the needs of the learner/child and the context of their learning journey.
it.human platform	It is an AI-powered digital human that can create an emotional, interactive, and engaging experience for people and users to realize a more inclusive society. Flexible reprogramming capabilities allow for numerous use cases.

NTT DATA profile (page 4 of 5)

Investments and partnerships

[REPRESENTATIVE LIST]

Sustainability enablement technology services investments

Investment theme	Details
Sustainability Biz and Tech Validation	The investment program, BizTech investment, nurtures promising solutions for sustainability. The investment is used for business validations and technology validations of solutions, which clients aspire for.
Sustainability Innovation	<ul style="list-style-type: none"> • NTT DATA has been operating six innovation centers globally (Japan, US, Italy, Germany, China, and India) and sustainability is one of the focused themes. Its main objective is to acquire world-leading capabilities for utilization of advanced technologies and to pursue joint R&D with innovative customers • The innovation center focuses on advanced technologies of emerging domains. It presents proposals, conducts joint R&Ds, and creates use cases with innovative customers who desire to utilize advanced technologies at global locations worldwide. The goal of internal funding is to create and accelerate the value for NTT DATA clients, especially in the context of innovation technologies (emerging) which are less business relevant • This helps in shortening the time-to-market and investment for clients, offering a significant competitive advantage, allowing them to embed innovative technologies into business processes before market trends • It also allows NTT DATA to develop assets that help clients in delivering advanced technologies faster, with less effort, and in a more flexible and adaptive way










Sustainability enablement technology services partnerships

Partner name	Details
Hyperscalers	NTT DATA acts as a consultant, guiding clients through their sustainability journey via technology transformation. Clients may prioritize cloud choices based on the environmental impact, opting for solutions with the greenest workloads. Services are provided across AWS, Azure, and GCP, each equipped with a carbon calculator to offer clients transparency regarding their carbon footprint in the cloud.
Microsoft Sustainability Manager	It uses MSM internally and with its clients to help them measure and manage their carbon footprint across Scope 1, 2, and 3.
ServiceNow	It uses ServiceNow ESG to collect its own ESG information across the organization and also deliver to clients.
Workiva	It helps its clients with ESG reporting.

NTT DATA profile (page 5 of 5)

Everest Group assessment – Leader and Star Performer

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

- NTT DATA has invested in building a robust global narrative for its wide-ranging sustainability services including ESG data management, net zero consulting, sustainable IT, and supply chain sustainability
- It strongly leverages its internal sustainability initiatives and Japanese heritage to build credibility in the market
- Its offerings have a strong undertone of integrating emerging technologies such as IoT, blockchain, and generative AI to build unique IPs for momentum.ai and IoTrace
- Referenced clients appreciate NTT DATA’s technical expertise and overall project management capabilities
- Buyers also highlight the team’s proactiveness and productivity during engagements

Limitations

- NTT DATA’s clientele is prominently skewed toward Europe and APAC. Enterprises looking to partner with the provider in other regions must do so after evaluating its delivery capabilities
- It lacks depth of case studies in key sectors such as BFSI, retail and CPG, and travel and transport
- While NTT DATA has strong implementation-driven partnerships with the sustainability offerings of hyperscalers and big tech players, it lags peers in mature joint go-to-markets with niche providers
- Buyers expect to have shorter negotiation timelines

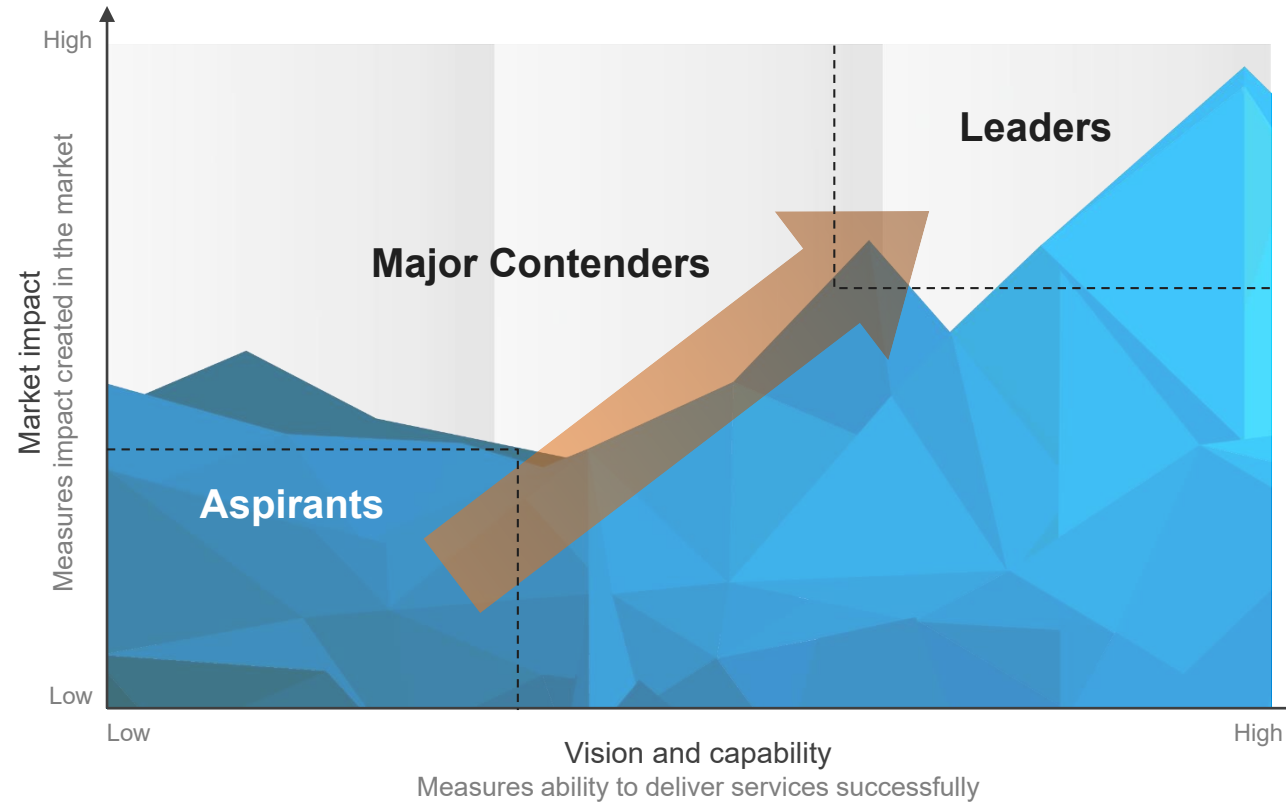
Appendix

PEAK Matrix® framework

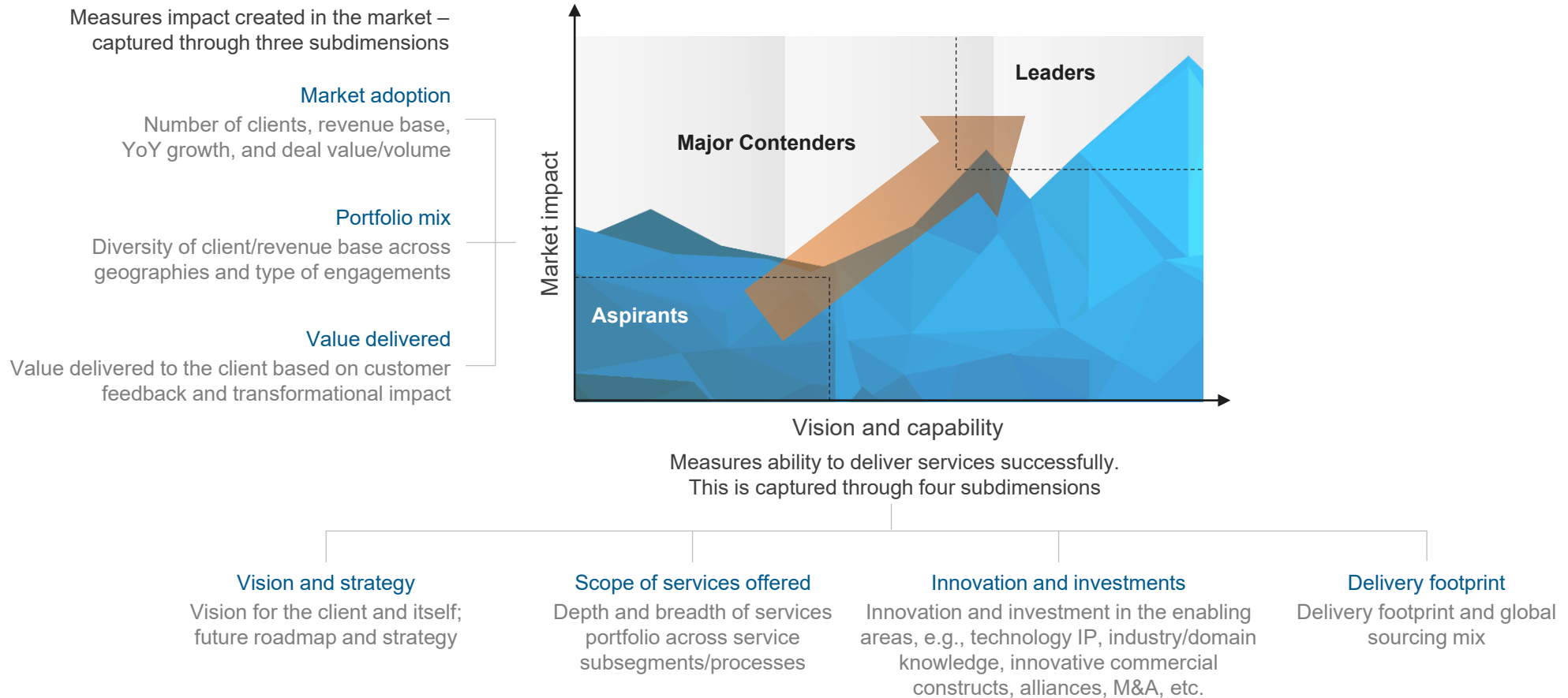
FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



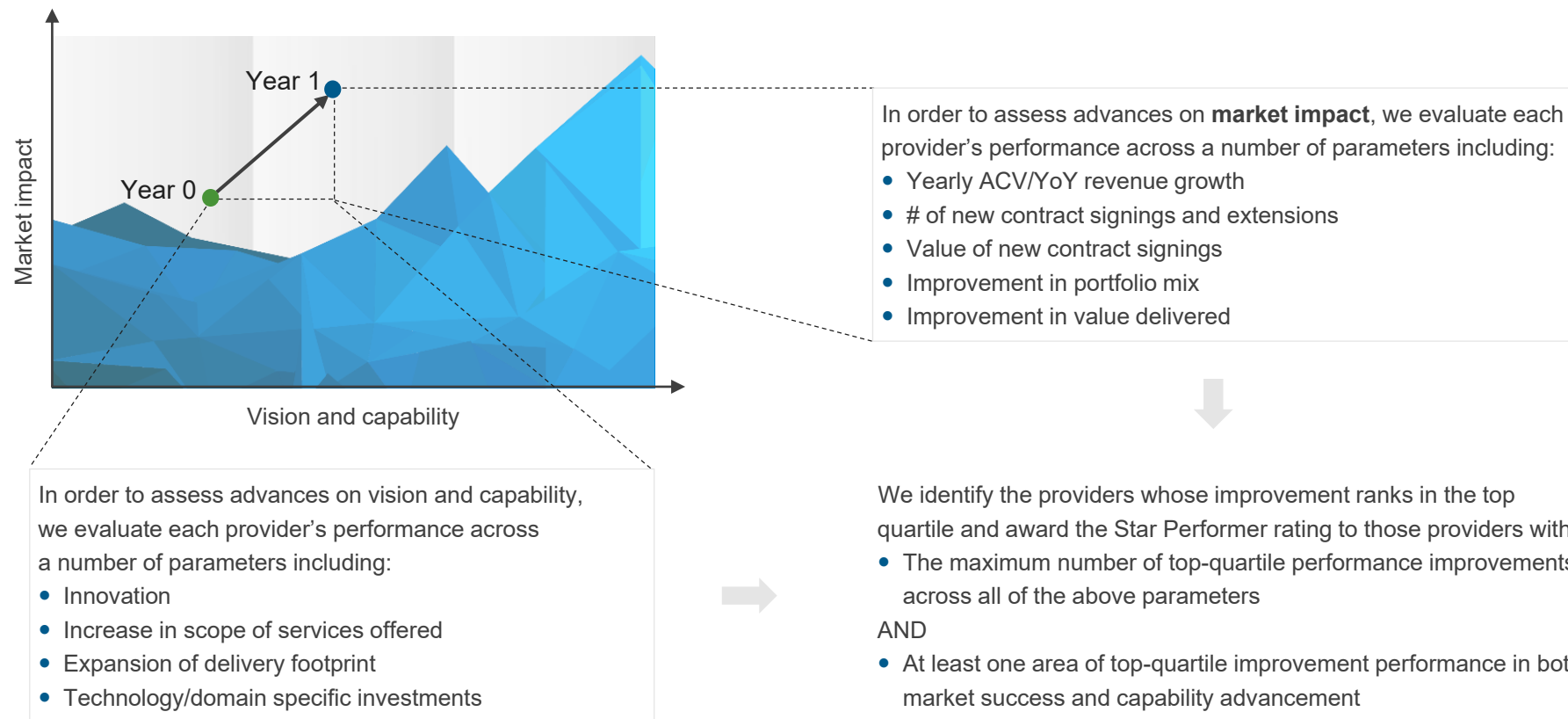
Services PEAK Matrix® evaluation dimensions



Everest Group confers the Star Performer title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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