



Everest Group PEAK Matrix[®] for Sustainability Enablement Technology Service Provider 2022

Focus on NTT DATA
July 2022



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

Sustainability Enablement Technology Services PEAK Matrix® characteristics

Leaders:

Accenture, Atos, Capgemini, Infosys, TCS

- 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
- They are focusing on generating profitability for clients through their innovative sustainability solutions and creating a shift in the perception around sustainability being a cost center for clients
- These Leaders have a robust partnership ecosystem, which includes hyperscalers, niche ESG software and data vendors, rating agencies, and academic organizations. They are focusing on building joint GTM strategy and co-innovation with their partners
- Leaders are effectively integrating emerging technologies such as data analytics, AI, IoT, and blockchain in their sustainability-led engagements

Major Contenders:

Cognizant, HCL Technologies, Hitachi Vantara, IBM, NTT DATA, Wipro

- Major Contenders are aiming to become a strategic partner in their clients' sustainability journey by focusing on net zero strategy roadmaps and visualizing ESG metrics for their clients
- They are building strong partnerships with niche ESG software vendors to provide their clients with enhanced capabilities around ESG metrics management
- Major Contenders are primarily offering planet-led solutions. However, some of them are widening their portfolios by building people-led solutions for their clients

Aspirants:

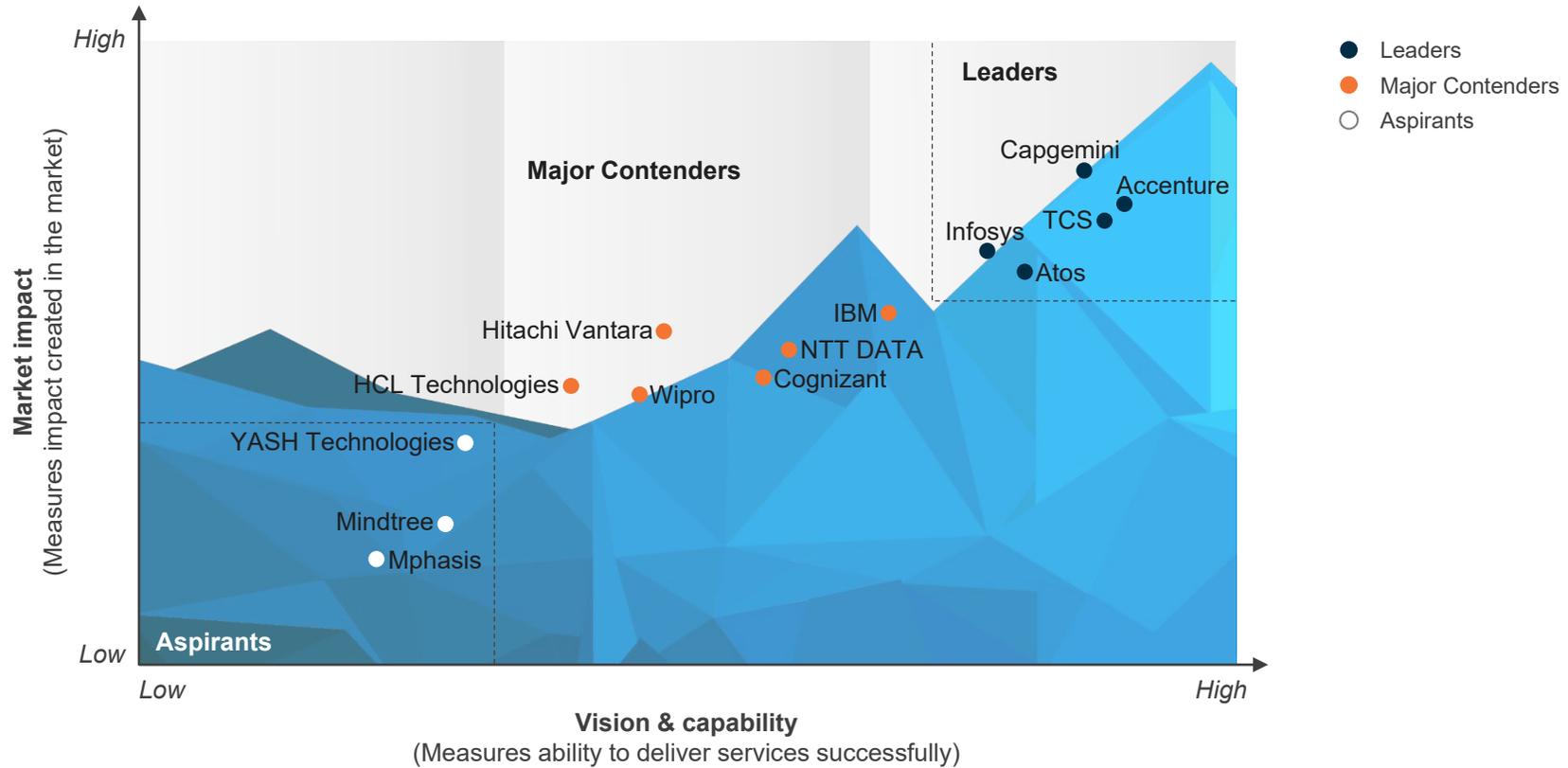
Mindtree, Mphasis, YASH Technologies

- Aspirants are focused on niche areas such as EHS, taxonomy, and auditing, by strengthening their capabilities and becoming a true sustainability partner for their clients in these areas

Everest Group PEAK Matrix®

Sustainability Enablement Technology Services PEAK Matrix® Assessment 2022 | NTT DATA positioned as Major Contender

Everest Group Sustainability Enablement Technology Services PEAK Matrix® Assessment 2022^{1,2}



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)

NTT DATA | sustainability enablement technology services profile (page 1 of 5)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability				
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation & investments	Delivery Footprint	Overall
								

Strengths

- NTT DATA has a comprehensive portfolio of sustainability-focused offerings including carbon footprint tracking, climate risk monitoring, natural capital management, smart city and smart mobility solutions, and sustainable healthcare solutions
- NTT DATA acquired Chainalytics in 2021, strengthening its supply chain consulting and analytics capabilities. The acquisition aims to help NTT Data to support its clients in optimizing their supply chains and making them more sustainable
- There is a strong focus on building a sustainability-skilled workforce and creating new roles within the firm to build expertise across the value chain of sustainability services such as sustainability and climate change manager, ESG reporting data specialists, sustainability tech advisors, and AI and sustainability developers
- NTT DATA is efficiently integrating emerging technologies such as AI, IoT, and blockchain to drive innovation in its sustainability solutions. Its supply chain traceability tool, for instance, embraces IoT to make supply chains transparent, while its remote health solutions leverage predictive analytics to optimize care for remote patients
- Clients appreciate NTT DATA’s quality of deliverables, agility in resource onboarding, and understanding of the problem statement

Limitations

- NTT DATA has a limited focus on the people aspect of sustainability owing to its limited set of solutions and market proof points around accessibility, DEIB, and EHS services
- Although it has robust partnerships with technology vendors, strong partnerships and go-to-market strategies with niche ESG software vendors are missing
- NTT DATA has a limited delivery footprint in the high-growth region of North America
- It needs to further enhance its consulting capabilities around sustainability services to be perceived as an end-to-end sustainability service partner by its clients
- Referenced clients perceive NTT DATA to have a premium pricing, which makes it less suitable for small and midsize clients
- Referenced clients cite time lags between the proposal and implementation of projects, which creates delays in the completion of projects

NTT DATA | sustainability enablement technology services profile (page 2 of 5)

Overview

Vision: NTT DATA's sustainability offerings help organizations enhance their use of energy, make efficient use of water, optimize transport safety and efficiency, and protect their environmental assets, with a global and comprehensive focus. NTT DATA leverages technology as a tool for the cause of human sustainability and well-being.

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

Percentage split of number of clients by service type

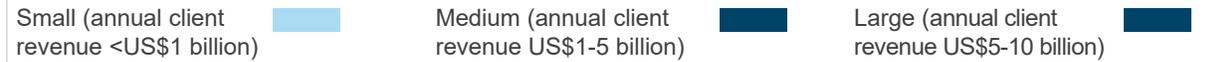


Percentage split of number of clients by dominant area of focus



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

Percentage split of the number of clients by client size¹



Percentage split of number of clients by industry verticals



Percentage split of number of clients by geography



¹ Based on Everest Group's estimates

NTT DATA | sustainability enablement technology services profile (page 3 of 5)

Case studies

People

Case study 1	Supported a public agency with risk assessment of landslides
Business challenge A catastrophic landslide killed 118 people and damaged 40 houses. The public agency wanted a risk assessment of landslides for its future construction projects.	
Solution NTT DATA used AW3D standard DSM to reconstruct and simulate the possible landslide influence area. AW3D provided high-resolution 3D data at two points of time. The simulation allowed NTT DATA to understand the extent and speed of damage caused by landslides.	
Impact The results of the assessment became the source of an important decision to plan the construction of the dam.	

Planet

Case study 2	Reduced paper-based communication between trading companies and trade practitioners for a Japanese manufacturer
Business challenge The client wanted a platform that could be used by a variety of companies, rather than being managed by a single organization.	
Solution NTT DATA provided a trading platform that uses blockchain technology. All the paper-based transactions that were previously conducted between trading companies and trade practitioners have now been digitized.	
Impact The decrease in paper documents transport reduced annual greenhouse gas emissions by 1,700-423,000 tons of CO2. It also contributed to conservation of about 6,200-30,800 trees.	

Business case

Case study 3	Developed a study for a utility company that identifies, quantifies, and monetizes the natural assets and ecosystem services in the company's land properties
Business challenge The client wanted to refresh the real value of its patrimony according to nature and social value and wanted to generate a management proposal for the added value of these properties.	
Solution NTT DATA developed a specific framework that provides the first assessment of natural capital, natural assets, and ecosystem services, and improve their economic value. It designed an adaptative management plan for reducing risks and aligned it with UN nature economic accountancy.	
Impact The outcome of this project helped NTT DATA to replicate the methodology with more clients with the same needs and in new territories of the same utility company.	

NTT DATA | sustainability enablement technology services profile (page 4 of 5)

Solutions

Proprietary solutions (People) (representative list)

Solution name	Details
Mobility Services Platform	It helps in global expansion of connected cars for the smart city initiative.
IoTrace	It is a solution based on blockchain that allows generating of complete traceability of the product from its production to its sale, thereby creating trust in supply chains.
ehCOS Remote Health	It helps in improving the care and remote clinical monitoring and health outcomes of patients with the help of telehealth.
BlockTrace4Sharing	It is a blockchain platform for sustainability aimed at managing, tracing, and validating donations, and promoting contributions through a rewarding smart economy model.

Proprietary solutions (Planet) (representative list)

Solution name	Details
Habitat	It optimizes the use of the common spaces in offices, reduces structural costs, and improves energy efficiency.
TradeWaltz	It is a trading platform that uses blockchain technology to digitize all paper-based transactions for clients.
origAMI	It is a solution for smart water management that leverages cloud-native technologies and the IoT paradigm.

NTT DATA | sustainability enablement technology services profile (page 5 of 5)

Investments and partnerships

Sustainability enablement technology services investments (representative list)

Investment theme	Details
Acquisition	<ul style="list-style-type: none"> It acquired Chainalytics in January 2022. It is a supply chain consulting and managed analytics company that strengthens NTT DATA's consulting and digital transformation capabilities and will support clients as they advance their sustainability and net-zero initiatives In May 2021, NTT DATA acquired Nexient, a cloud-native company with agile development skills, to expand NTT DATA's offerings in North America in the area of modernization and cloud app development
Green Innovation Office	It is responsible for reducing NTT DATA CO2 emissions, meeting its targets to achieve the SBT 2030 targets, and promoting initiatives to expand green business in collaboration with domestic and overseas organizations.
Green Center of Excellence	It is established to align global organizations and decide on key investment decisions to grow business and expand the global sustainability portfolio.

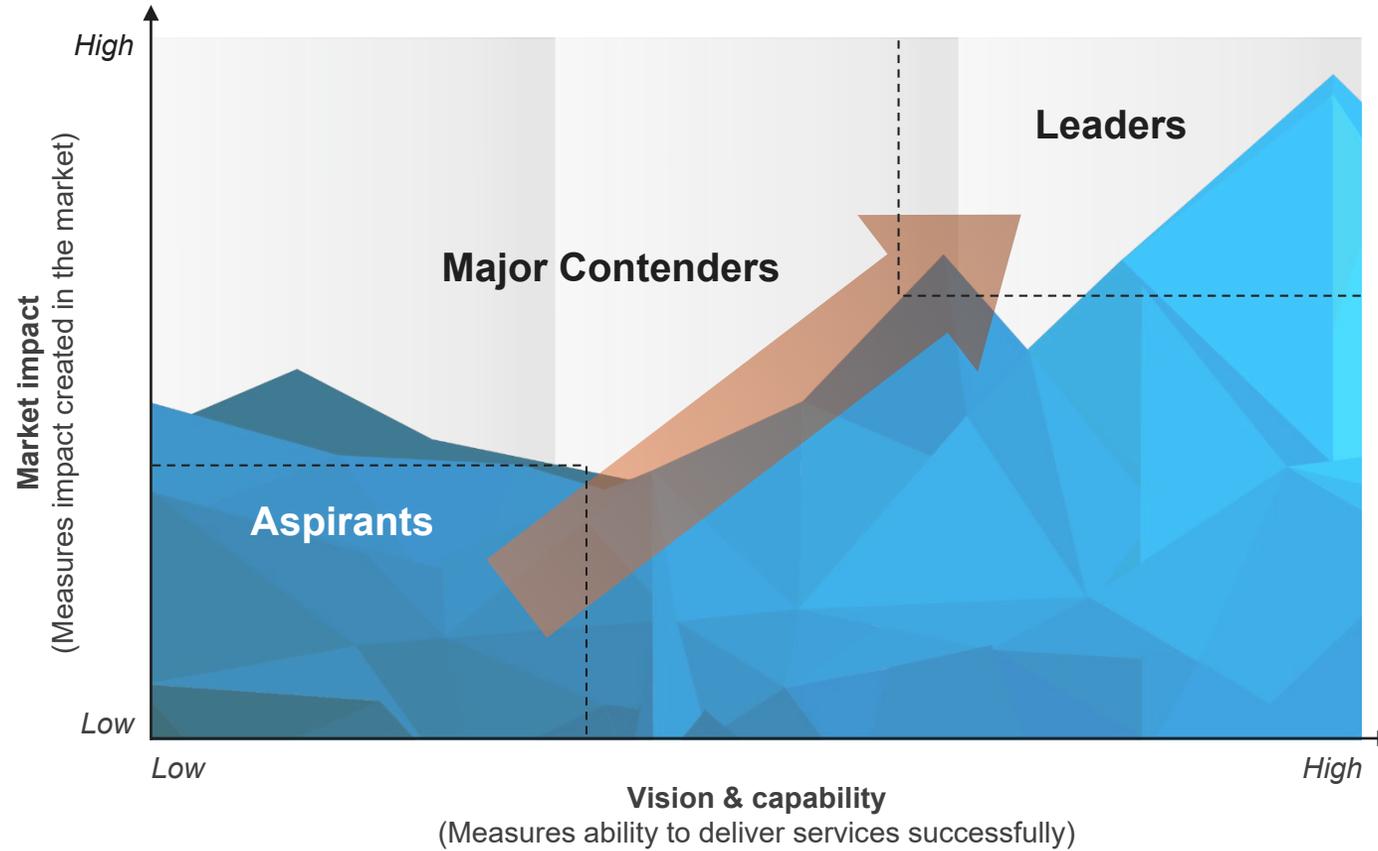
Sustainability led partnerships (representative list)

Partner name	Details
Google Cloud	The partnership works on a collaboration model leveraged to jointly define and develop AI applications based on Google Cloud, delivering technology foresight.
Microsoft	The partnership is working to support the scaling of Knowler (NTT DATA asset in knowledge management, an AI-based solution).
WELL	NTT DATA has partnered with WELL, which is a leading tool for advancing health and well-being in buildings globally and aims to improve health and human experience through design.
VERDE	The partnership acknowledges the reduction in environmental impact of buildings, compared to a standard reference building.

Appendix

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

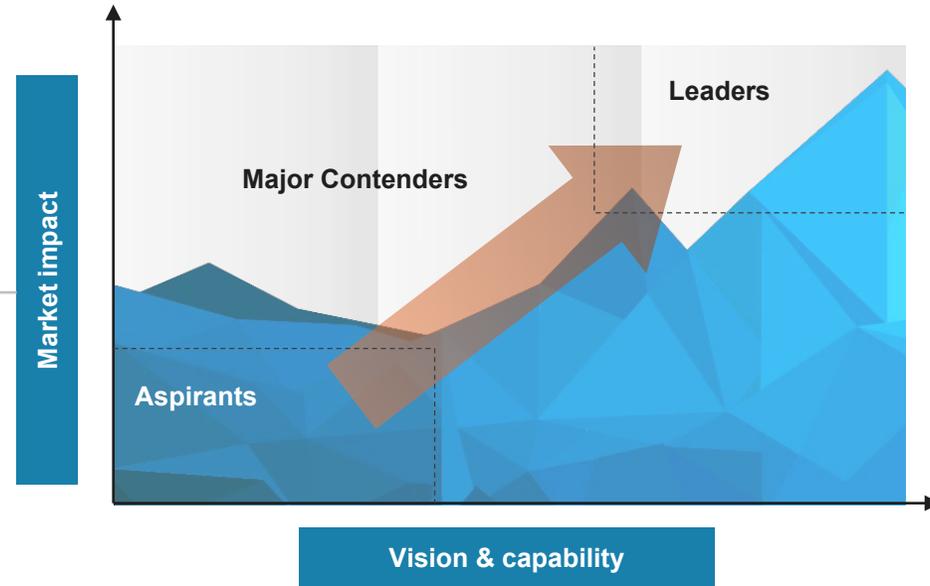
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YoY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

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

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

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

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

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix 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 the designated POC at Everest Group.

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

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. 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 as well as serve the future expectations of enterprises



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