



Everest Group Net Zero Consulting PEAK Matrix[®] Assessment 2023

Focus on Accenture
August 2023



Introduction

As the global concern over climate change intensifies, the urgent need to mitigate greenhouse gas emissions and achieve carbon neutrality has become top priority for governments, businesses, and individuals worldwide. Factors such as the evolving regulatory frameworks, corporate sustainability commitments, investor pressures, and consumer demand for environmentally conscious products and services are making the market more lucrative, bringing to light various potential opportunities for service providers to bring innovative solutions to the table. There is an increasing integration of technology, including Artificial Intelligence (AI), Machine Learning (ML), and data analytics, to enhance the accuracy of carbon accounting, facilitate efficient decision-making, and streamline sustainability practices.

To navigate this complex and transformative journey, organizations are increasingly turning to net zero consulting service providers, which offer invaluable expertise, strategies, and solutions for achieving their sustainability goals. In this research, we present an assessment and detailed profiles of 31 net zero consulting services providers featured on the Net Zero Consulting 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 2023, interactions with leading net zero consulting service providers, client reference checks, and an ongoing analysis of the sustainability services market.

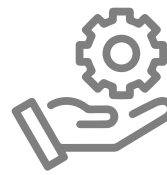
This full report includes profiles of the following 31 leading service providers featured on the [Net Zero Consulting Services PEAK Matrix® Assessment 2023](#):

- **Leaders:** Accenture, BCG, Capgemini, Deloitte, ERM, EY, Infosys, KPMG, McKinsey & Co., PwC, and TCS
- **Major Contenders:** Anthesis, Bain & Co., Brillio, The Carbon Trust, Engie Impact, Eviden, GEP, Globant, IBM, LTIMindtree, NTT DATA, Sopra Steria, West Monroe, Wipro, and WSP
- **Aspirants:** At Quest Sustainable Solutions, Jacobs, Sancroft, Sutherland, and Zensar

Scope of this report



Geography
Global



Providers
31



Services
Net zero consulting
services

Net Zero Consulting Services PEAK Matrix® characteristics

Leaders

Accenture, BCG, Capgemini, Deloitte, ERM, EY, Infosys, KPMG, McKinsey & Co., PwC, and TCS

- Leaders take a strong consultative approach to helping enterprises of varied maturity levels to contextualize their sustainability concerns to their businesses and define the roadmap for their net zero transformation accordingly
- They cater to the needs of the clients across the net zero consulting services value chain, including current-state profiling, identifying mitigation opportunities, creating a net zero strategy, enabling audit and assurance, supply chain auditability, and carbon credit management supplemented by a strong global footprint
- They have invested in building a robust partnership ecosystem comprising hyper scalers, enterprise platforms, and niche sustainability data and software vendors to provide holistic, data-backed net zero consulting services
- Leaders have a clear vision for their net zero transformation practice and a clearly defined plan of investment in talent, offerings, and proprietary tools In order to achieve it

Major Contenders

Anthesis, Bain & Co., Brillio, The Carbon Trust, Engie Impact, Eviden, GEP, Globant, IBM, LTIMindtree, NTT DATA, Sopra Steria, West Monroe, Wipro, and WSP

- Major Contenders are building consulting-drive tools, frameworks, and accelerators to be leveraged across industries and expedite time-to-market for consulting engagements
- They have strong capabilities in particular aspects of the net zero value chain, mainly data collection, tracking and visualization, climate-risk assessment, and waste management. They aim to expand their client reach by building strong market proof points in diverse areas of net zero transformations
- These players are continually investing in building deeper sustainability-first partnerships, co-developing technology solutions, and expanding market presence by joining global alliances

Aspirants

At Quest Sustainable Solutions, Jacobs, Sancroft, Sutherland, and Zensar

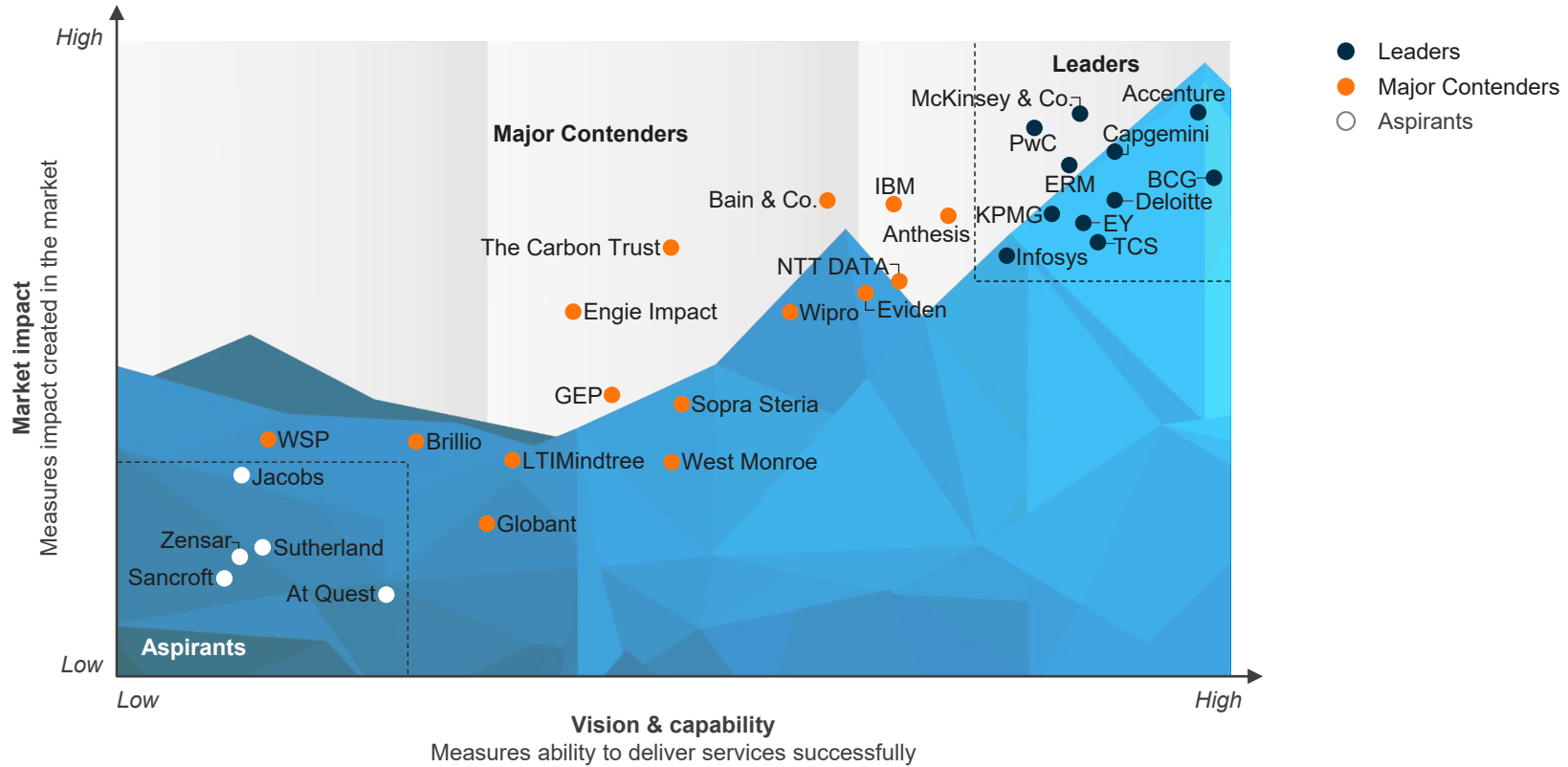
- Aspirants are focused on certain region(s), vertical(s) or function(s) or have a relatively small net zero consulting practice
- They are currently investing in talent upskilling and cross-skilling through in-house knowledge transfers or partner/industry certifications to enhance their niche sustainability talent pool and capabilities

Everest Group PEAK Matrix

Net Zero Consulting Services PEAK Matrix® Assessment 2023 | Accenture is positioned as a Leader



Everest Group Net Zero Consulting Services PEAK Matrix® Assessment 2023^{1,2}



1 Assessments Anthesis, Bain & Co., BCG, The Carbon Trust, Deloitte, Engie Impact, ERM, IBM, Jacobs, KPMG, McKinsey & Co., Sancroft, and WSP excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers
 2 Assessment for PwC and EY 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
 Source: Everest Group (2023)

Accenture profile (page 1 of 4)

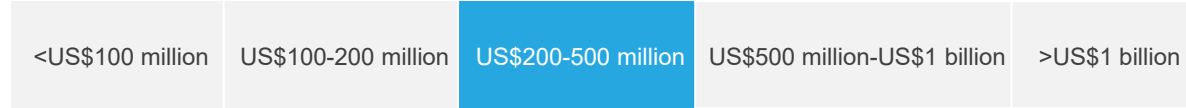
Overview

Net zero consulting services vision

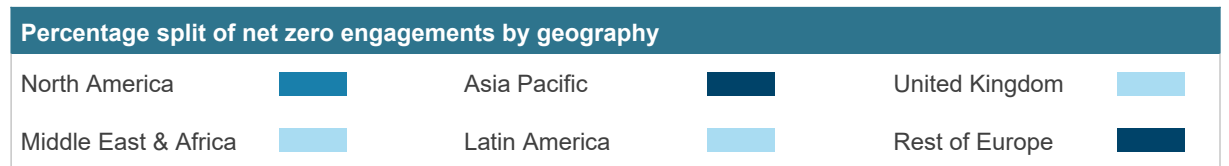
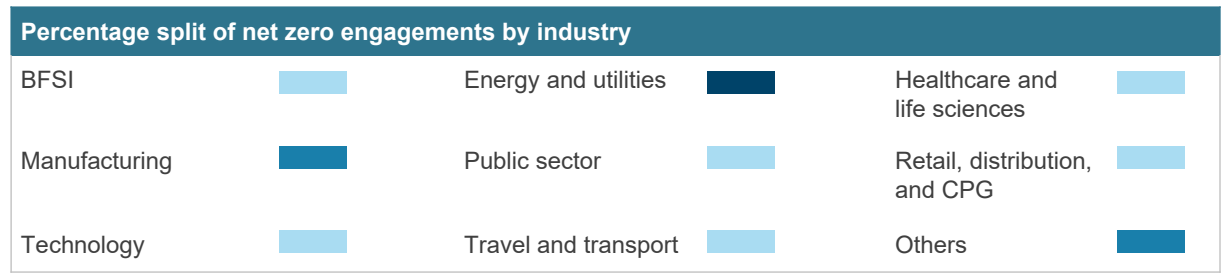
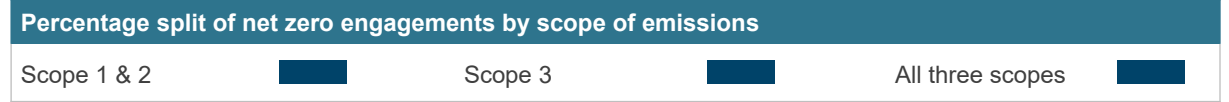
Accenture's vision for a net zero consulting practice is to drive the reduction and removal of emissions by assisting clients to achieve twin transformations by bringing together their expertise in digital technologies and sustainability, enabled by culture and experience.

Accenture believes that sustainability needs to be at the core of every business. In line with the United Nations' Sustainable Development Goals, the company defines sustainability broadly to include Environmental, Social, and Governance (ESG) issues, from transitioning to a net zero-carbon economy and protecting and restoring nature to advancing human rights, inclusion, and diversity.

Overall net zero consulting services revenue (2022)



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



Accenture profile (page 2 of 4)

Case studies

Case study 1

Developed a decarbonization roadmap for Braskem

Business challenge

The client required an effective strategy to mitigate its environmental impact and transition to a low-carbon future. The petrochemical industry is inherently associated with high GHG emissions due to the energy-intensive nature of its operations. It faced difficulties such as complexities in manufacturing processes, increases in energy consumption, and the lack of identification of supply chains for emission.

Solution

Accenture developed a business solution for a client in collaboration with Microsoft Power BI. The solution, the Roadmap Prioritization Tool, consolidated and analyzed decarbonization data from the client's industrial complexes. This tool enables informed decision-making and strategic planning for sustainability initiatives. It provides a centralized database, real-time insights into project maturity, and the ability to forecast capital expenditure. Additionally, it offers a Marginal Abatement Cost Curve (MACC) visualization, allowing the client to evaluate the cost-effectiveness of projects based on the reduction of carbon emissions per ton.

Impact

- Resulted in approval of over 160 decarbonization initiatives
- Prioritized decarbonization projects to reduce carbon emissions
- Reduced the emissions achieved within a short span of a few months

Case study 2

Worked with Shell to launch a new blockchain-powered Sustainable Aviation Fuel (SAF)

Business challenge

The client was facing a challenge in its quest for net zero by 2050 and aimed to achieve this goal using Sustainable Aviation Fuel (SAF), which it believes will play a pivotal role in decarbonizing the entire industry. However, there were several obstacles to overcome. These included the high price point of SAF, the absence of mechanisms to provide credibility for its attributes, and the lack of an accepted accounting framework.

Solution

Accenture collaborated with Shell and represented a pioneering SAF solution that aims to overcome all the obstacles. Together, they launched Avelia, a new blockchain technology that ensured transparency, traceability, and immutability across the entire SAF supply chain. It also offered a platform that facilitates collaboration, information exchange, and the monitoring of SAF's life cycle from production to consumption for producers, suppliers, airlines, and regulatory bodies.

Impact

- Reduced emissions by up to 80%
- Accelerated the scaling of SAF demand
- Launched Avelia to improve sustainability

Accenture profile (page 3 of 4)

Partnerships

NOT EXHAUSTIVE

Partnerships (representative list)	
Partner name	Details
Microsoft	Partnered with Microsoft to assist clients in enhancing their understanding and effectiveness in reducing carbon emissions through sustainability within IT practices, sustainability using IT solutions, and innovative industry-specific approaches
Google	Partnered with Google for encompassing net-zero transition efforts such as energy management, scope 3 emissions reduction, and 24/7 carbon-free electricity. It also works on sustainable supply chain initiatives involving supplier insights, logistics optimization, and product promotion. It addresses ESG risk management and green cloud solutions, including the creation of a carbon calculator on Google Cloud Platform (GCP) to quantify energy and CO2 savings across various use cases
Salesforce	Partnered with Salesforce to enhance the sustainability of its service fleet. It involves the utilizing of Salesforce's expertise to monitor and enhance the environmental impact of fleet operations. It also leveraged its capabilities to optimize vehicle routes and improve efficiency at various levels, including service vehicle, work order, account, and asset, and implemented net zero cloud solutions that enable tracking and displaying of comprehensive ESG information
Schneider Electric	Partnered with Schneider Electric to guide clients through their climate journey, encompassing every stage from strategic planning to implementation and the measurement of value realization
EcolInvent	Partnered with EcolInvent to leverage its data to understand the baseline carbon footprint of products, identify the opportunities to reduce carbon emission by conducting portfolio analysis, detect carbon footprint hotspots, and recommend carbon footprint optimization strategies
MSCI	Partnered with MSCI for its in-depth research, ratings, and analysis of ESG-related business practices for companies

Accenture profile (page 4 of 4)

Capabilities and investments

NOT EXHAUSTIVE

Capabilities (representative list)

Capabilities name	Details
Renewables digital development platform	It revolutionizes project management by offering a centralized hub for monitoring project progress and ensuring transparency, accountability, and collaboration. It facilitates comprehensive project tracking, including essential milestones, commitments, and regulatory compliance. It also enables the efficient implementation of quality control measures at every stage of the project development
eMobility	It is an Advanced E-Mobility Platform (AEMP) that assists mobility clients in various aspects, such as conceptualizing and managing innovative business models, implementing agile service development processes, and providing engineering services focused on software-defined vehicles
Energy efficiency	It is a dynamic, excel-based solution augmented with Power BI visualization, enabling organizations to evaluate their energy management maturity across various facets
Connected Low Carbon Infrastructure (CLCI) framework	It has a wide range of tools and resources that enable streamlined operations and enhanced decision-making for sustainable and efficient project management. It leverages various capabilities such as project control tower, supply chain control tower, connected construction, generative design studio, Engineering Data Digitization (EDD) tool, and digital twins, using which asset owners can effectively expedite projects, minimize their carbon footprint, and optimize expenditure
Decarbonization framework	It offers a comprehensive range of solutions that are aimed at reducing carbon emissions and are supported by an initial strategy for achieving net zero. The primary areas of focus include electrification, eMobility, green finance, carbon intelligence, and industry-specific decarbonization pathways. It also provides a holistic suite of decarbonization services to guide and support clients in their sustainability journeys
Sustainability accelerator	It is a comprehensive solution that streamlines the process for organizations to effectively involve, assist, and motivate their supply chains in achieving substantial reductions in emissions. This platform facilitates and expedites the monitoring and reduction of an organization's overall carbon footprint, by encompassing scope 1, 2, and 3 emissions, aligning with the goal of achieving net zero emissions, and meeting science-based targets










Investments (representative list)

Investment name	Details
Acquisitions	<ul style="list-style-type: none"> • Akzente: acquired Akzente to possess comprehensive expertise in sustainability strategy, reporting, communication, and stakeholder management • Avieco: acquired Avieco for encompassing net zero strategy and regulation, along with the integration of real-time data analytics • Carbon Intelligence: acquired for Carbon intelligence to specialize in providing guidance on Science Based Targets initiative (SBTi) strategies to minimize carbon footprints and achieve substantial reductions
Strategic/Minority investments	Invested in Accenture Ventures, which is actively fostering innovation and sustainability by engaging in partnerships with a diverse range of start-ups and investing in notable organizations such as Cervest, ESG Book, Pixxel, Planet Labs, PulsESG, and Reactive Technologies. It also aims to enhance net zero and decarbonization capabilities and contribute to a more sustainable future
Invention disclosures and patents	Invested in 15 invention disclosures that are being processed; two patents have been successfully granted for innovative solutions in sustainable technology

Accenture profile

Everest Group assessment – Leader

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

- Accenture combines digital and AI capabilities with its experience services by Accenture Song to cover a range of net zero services, including net zero roadmap and governance models, green IT, and experience, which are integrated under an overarching Accenture Reinvention Console
- It has acquired several players in the sustainability domain such as Green Domus, Akzente, Carbon Intelligence, and Zestgroup among others to augment its decarbonization capabilities
- It showcases established partnerships with strong market proof points on joint development with them. It is also the founding member of the Green Software Foundation, which is aimed at infusing sustainability into the software development life cycle
- Referenced buyers are appreciative of Accenture’s domain expertise and innovative and customer-centric approach

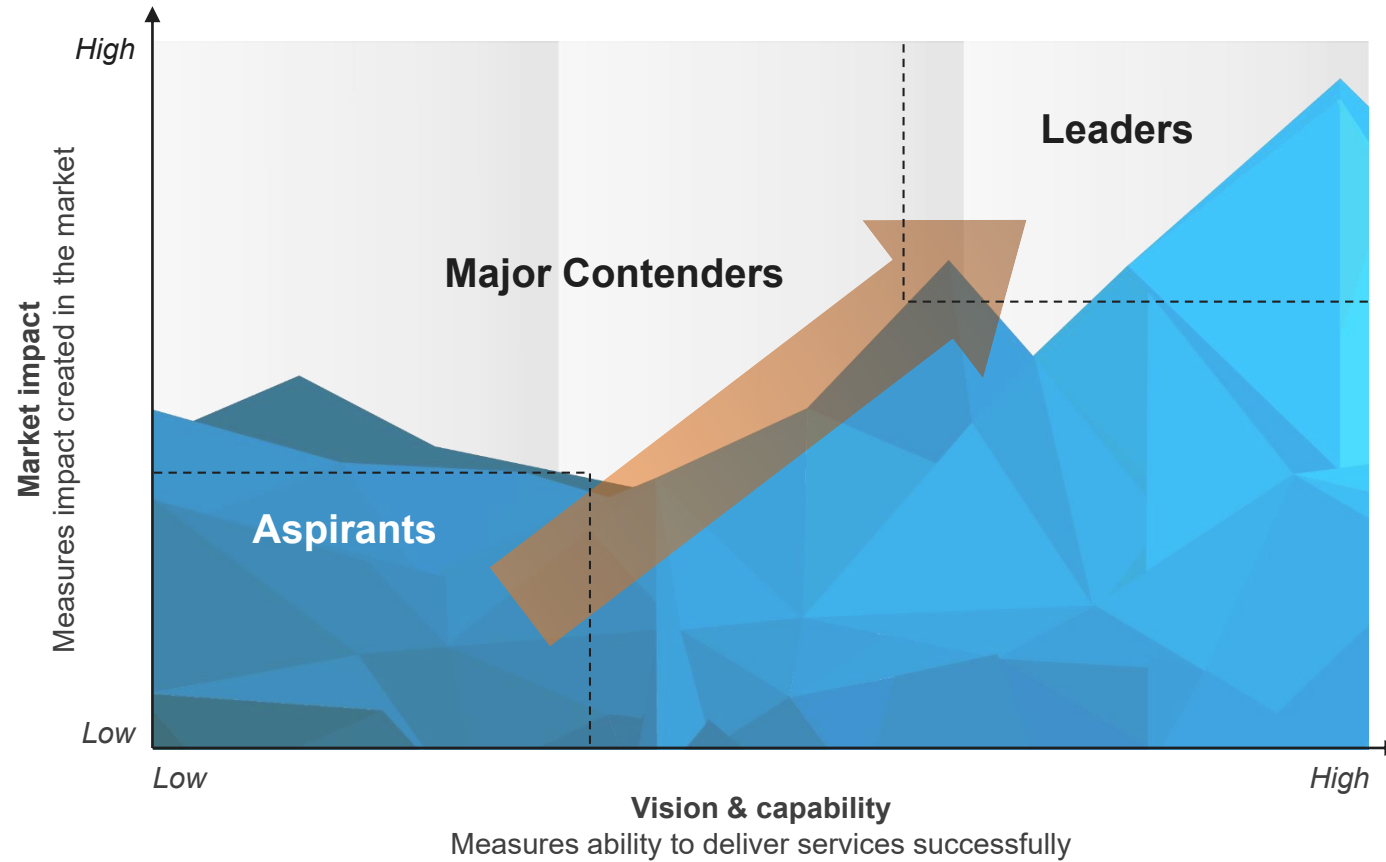
Limitations

- Accenture may be more suited to larger enterprises as compared to small and mid-sized and cost-conscious enterprises owing to its proposition as a premium player and its strategic focus on G2000 as a target audience
- While it has a robust set of proprietary tools to help clients with net zero transitions, its in-house portfolio lacks depth in carbon credit traceability and product life cycle footprint capabilities
- Referenced buyers expect Accenture to have a broader portfolio of services and more well-rounded consulting capabilities

Appendix

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

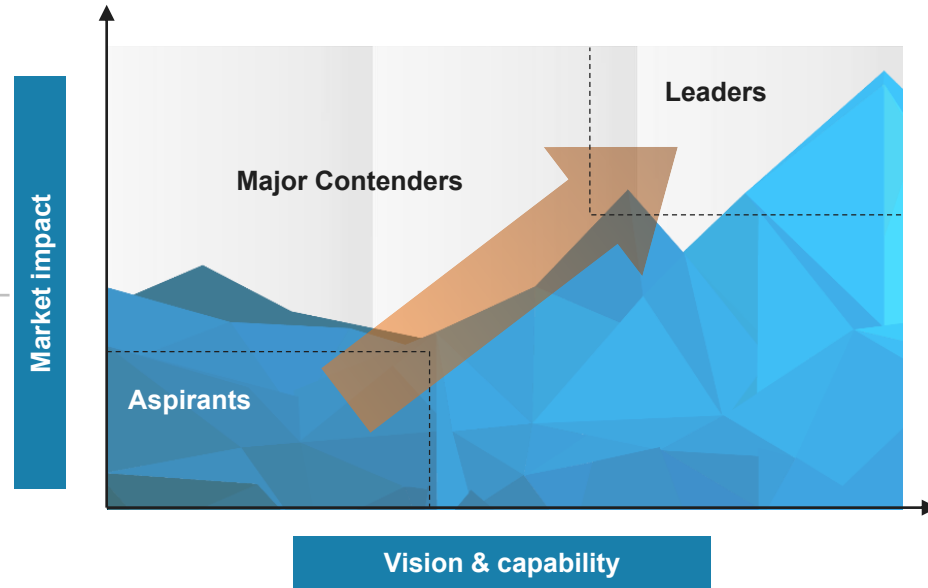
Everest Group PEAK Matrix



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 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.

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 the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

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.

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

- 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

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

- 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](#)

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

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.



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

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