



Let there be change



Connecting sustainability to value creation

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Mentimeter code:
7236 2390

Poll question 1

What word (s) do
you associate with
Sustainability?





Sustainability and value at Accenture



Sustainability as an opportunity

Sustainability is no longer just a moral obligation. It is a business imperative.

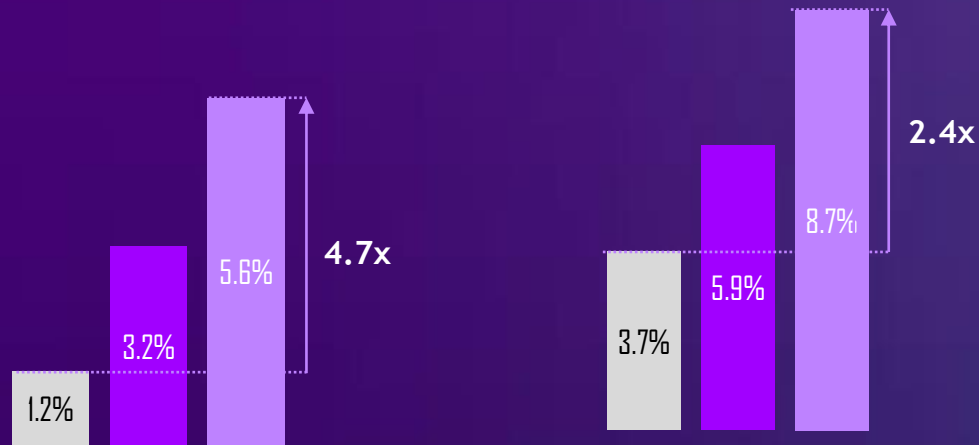
Better ESG performance drives:

4.7x

Operating margin

2.4x

Return to shareholders



ESG performance: ■ Medium ■ High ■ Consistently High

Source: Research analysis of Arabesque S-RAY® and S&P Capital IQ data. Number of companies in the S-RAY universe = 8,341



Funding needed

Globally, achieving the SDGs will require

\$5–7 trillion

in investment per annum, creating millions of new jobs.

MAS estimates Southeast Asia alone will require \$3 trillion per year.

Source: United National Conference on Trade and Development



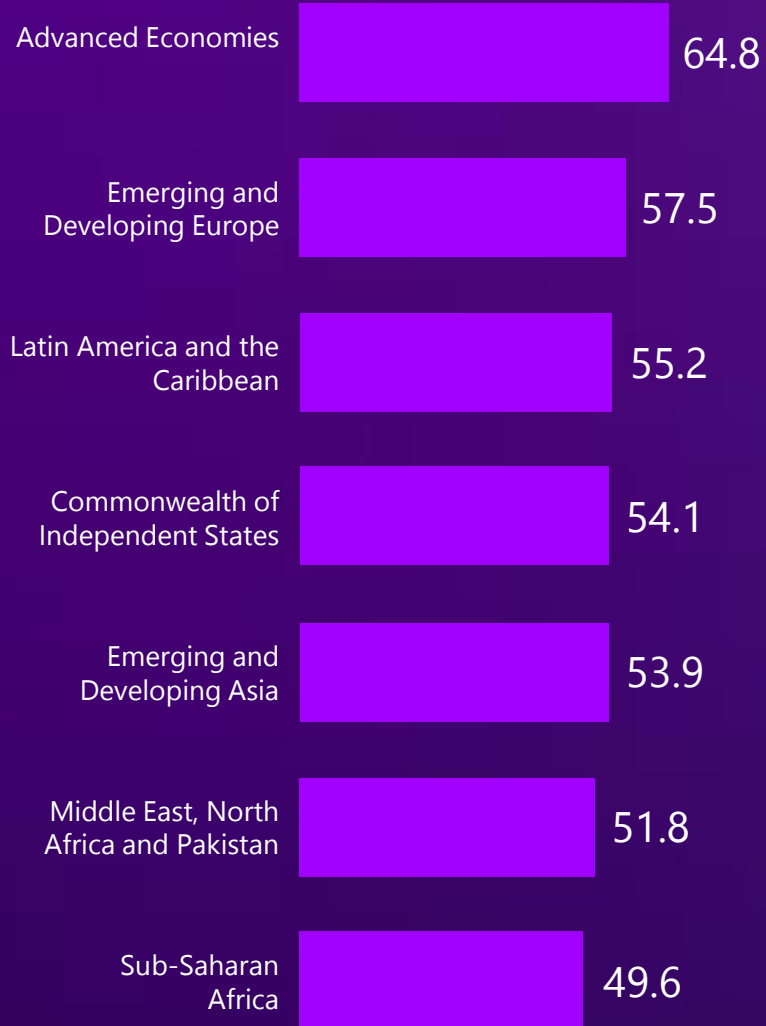
“When regulations force you to look at something that you haven’t paid attention to previously, you can gain new insights and inspiration.

You can translate this input into concrete actions and even discover that something good for the environment can also benefit the bottom line.”

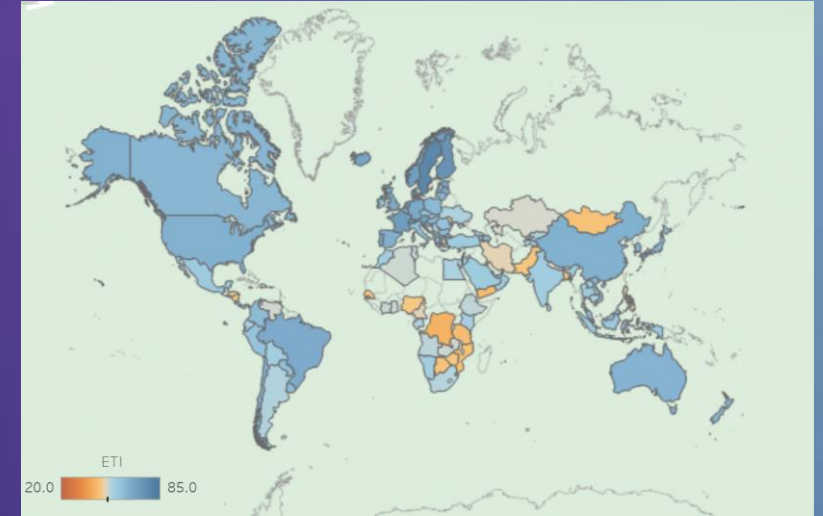
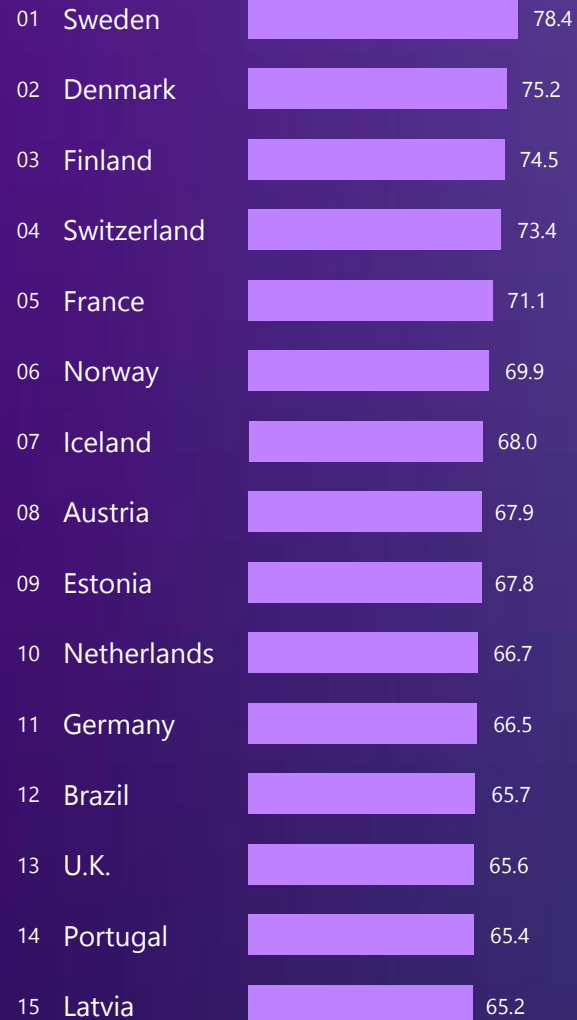
Massimo Terrevazzi
Group CFO & Executive Director
Perfetti Van Melle Group

Energy Transition Index (ETI) – 2024

by Region



by Country



Source: World Economic Forum

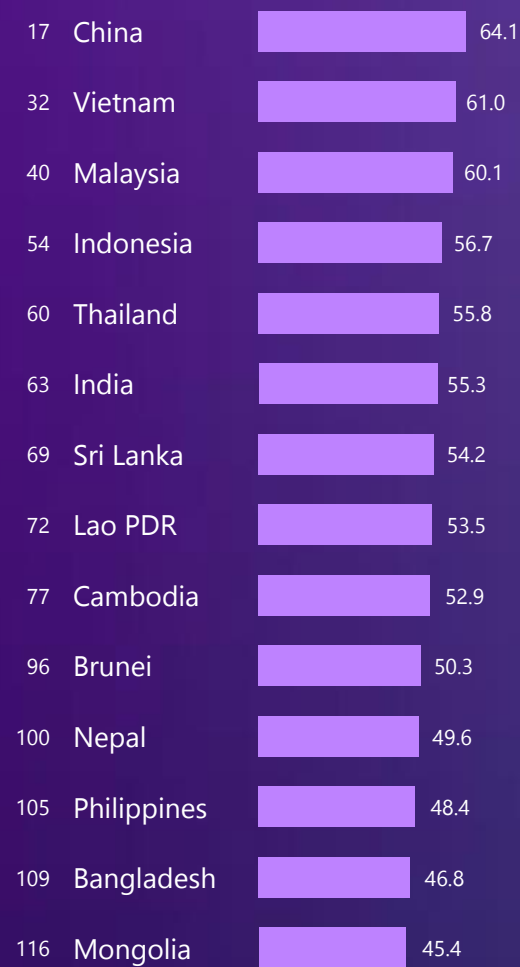


Energy Transition Index (ETI) – 2024

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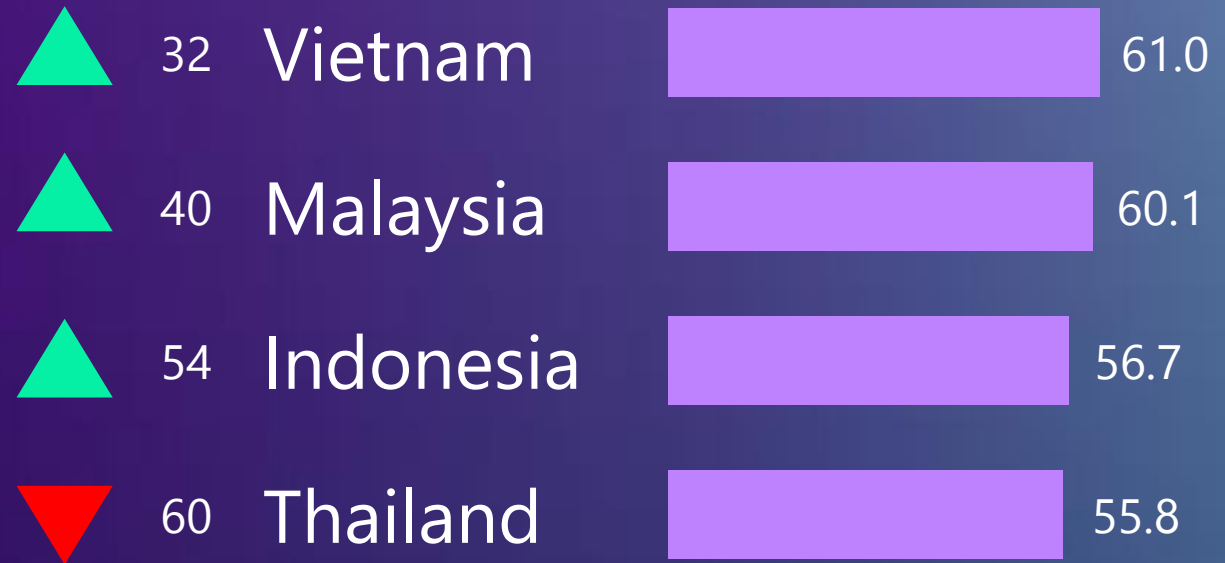


Source: World Economic Forum



According to WEF ETI 2024,

Thailand is moving backward



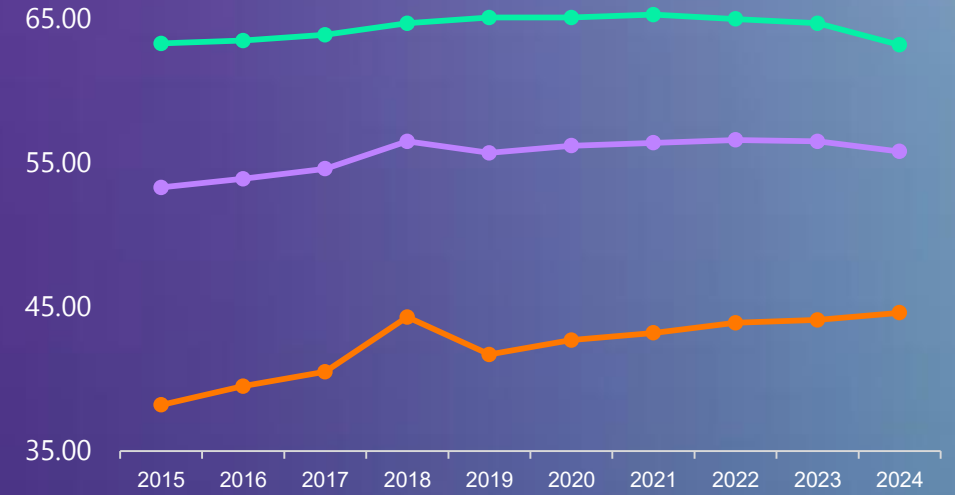
Source: World Economic Forum



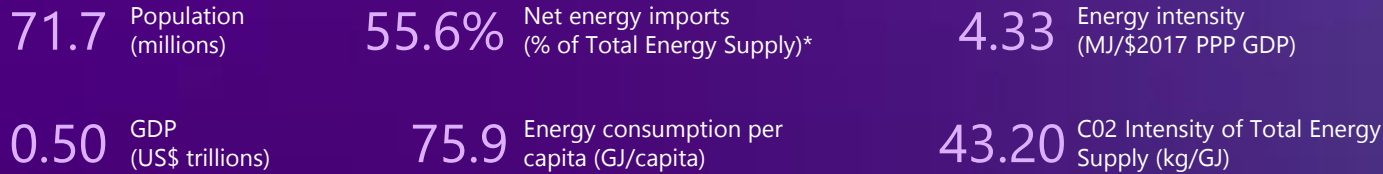
ETI Rank

60
out of
120

Thailand



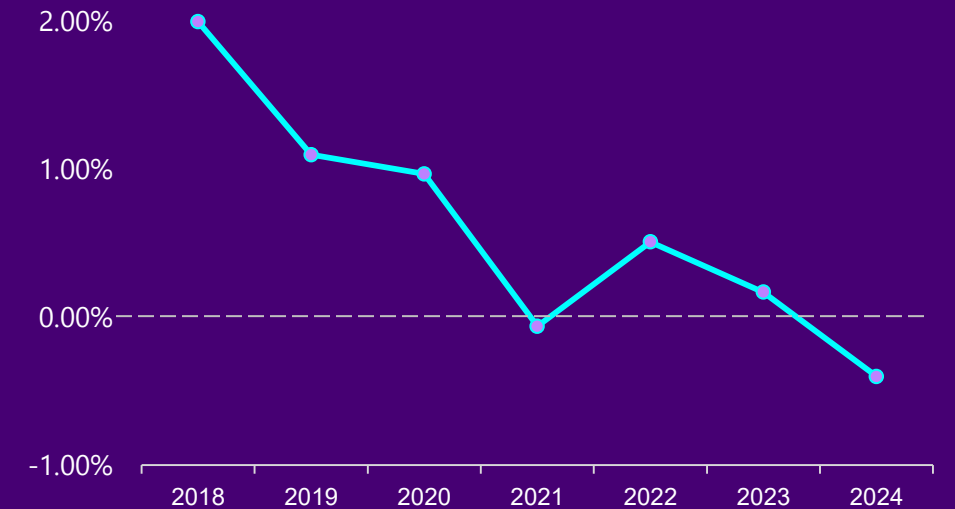
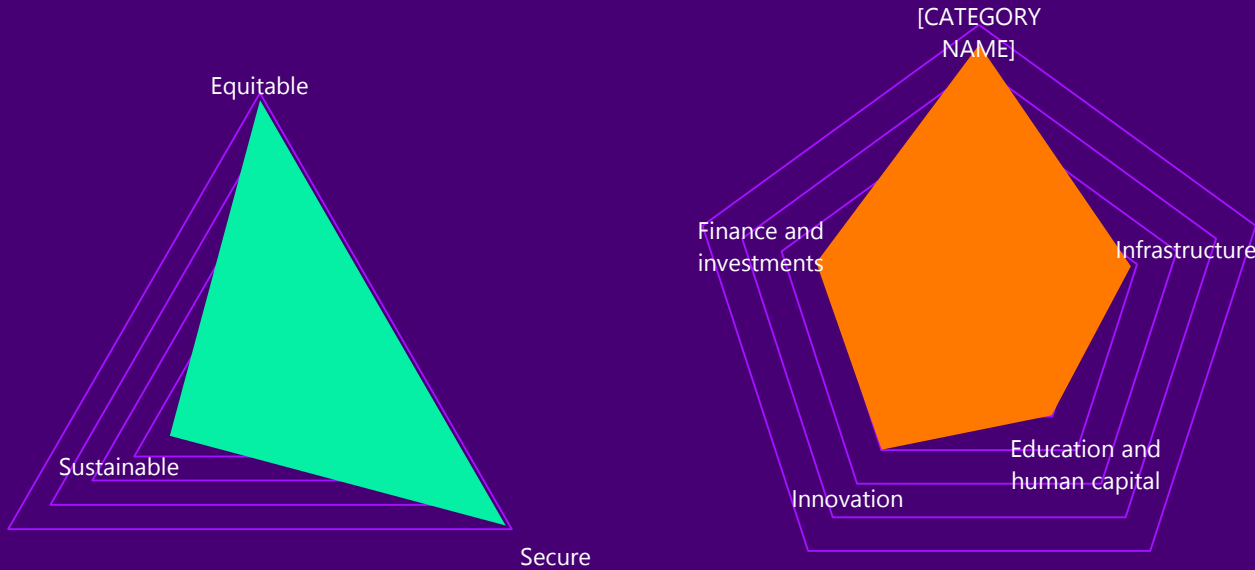
Key Macroeconomic and ETI Data



■ System performance

■ Transition readiness

■ Transition momentum

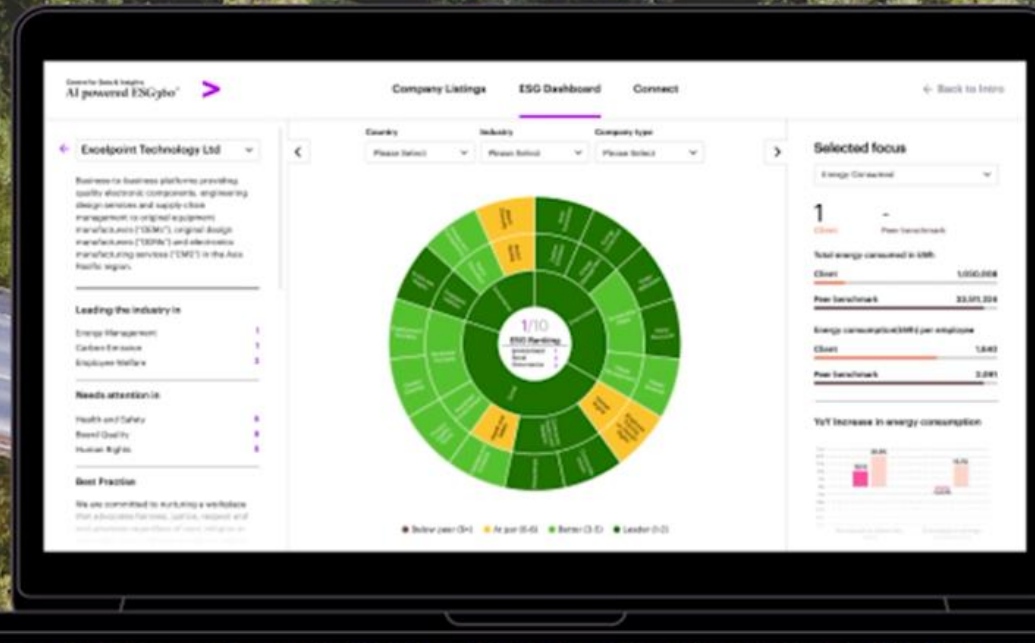


ESG 360° view - Data, Transparency, Comparison



AI powered ESG360°

A best in class in-house AI capability extracts ESG data from public disclosures and enhances with external data vendor, to fuel custom and transparent ESG scores and insights built for green decisions.



Poll question 2

How prepared do you feel your company is to meet Thailand's sustainability goals and international standards by 2030?

- A Very prepared
- B Somewhat prepared
- C Neither prepared or unprepared
- D Somewhat unprepared
- E Very unprepared

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Poll question 3

What are the biggest challenges you see?

- A Not enough understanding of actions needed
- B Not enough support from regulators
- C Not enough funding or investment
- D Not enough skill or talent
- E Other

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Destination

net zero



Destination net zero



37% of companies are committed to achieving net zero emissions

33% of companies are cutting emissions, but not fast enough

18% of companies are on track to reach net zero in operations by 2050

Decarbonization levers

Lever	Overall sample	Selected industry	Comparison industry 1	Comparison industry 3	Comparison industry 4
		Energy	Banking	Industrial (Equipment, freight and logistics)	Retail
	2000	118	138	362	196
Energy efficiency	82%	87%	84%	78%	82%
Waste reduction	80%	85%	80%	75%	82%
Renewables target	79%	86%	82%	76%	80%
Circular principles	68%	69%	62%	67%	81%
Buildings	61%	51%	75%	58%	69%
Supplier strategy	60%	66%	51%	59%	68%
New products	51%	54%	62%	53%	45%
Fleet decarbonization	42%	36%	39%	41%	53%
Material sourcing	41%	31%	22%	43%	61%
Employee behavior	40%	40%	57%	39%	34%
Customer behavior	35%	27%	51%	32%	55%
Offset usage	27%	41%	38%	19%	18%
Packaging disposal	26%	12%	4%	22%	58%
Employee incentives	23%	38%	21%	19%	17%
Digital tech	21%	31%	14%	25%	15%
Travel policy	16%	4%	24%	15%	16%
Carbon removal	15%	31%	17%	11%	9%
Carbon pricing	15%	20%	14%	12%	8%
Business model change	12%	21%	13%	11%	8%
Green IT	11%	8%	23%	9%	5%



Poll question 4

What is the most significant value driver for your business when implementing sustainability practices?

- A Increased revenue through new markets and products
- B Cost reduction through energy efficiency
- C Improved brand, reputation and customer loyalty
- D Risk mitigation and regulatory compliance

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Find the hidden G.E.M.S.

These decarbonization levers can accelerate your company toward more value

Find the hidden G.E.M.S.

These decarbonization levers can accelerate your company toward more value

G

Green IT and
digital tech

E

Energy
efficiency

M

Material
efficiency and
circular
principles

S

Sustainable
products
and services

Risk reduction

Foundational



By 2040, IT&C share of
the world's carbon
footprint will reach

14%



Sustainability **by**
technology



Sustainability **in** technology

G

Green IT and
digital tech

Case study: Accenture – Land Assessment and Tracing, Green Software Foundation

Cost savings

Cost-cutting



With energy-efficient technologies and practices, Thai manufacturers can save up to

30% on energy costs

Reducing energy demand and transitioning to renewables, represents the biggest short-term opportunity

- **Energy efficiency:** New tech and data analytics drive cost savings and support net-zero goals.
- **Data-driven renewable sourcing:** Advanced data and analytics enable efficient, round-the-clock renewable energy procurement.

Case study: Metro de Madrid, Accenture

E

Energy
efficiency



M

Material
efficiency and
circular
principles

The top two cost savings from material efficiency are:

Optimizing sourcing while
minimizing waste

50%

Adopting circular
design principles

40%

which is to design for durability, repairability and recyclability.

Case study: Global pharmaceuticals and Japan F&B

Case study: Global building materials



S

Sustainable
products
and services

Revenue growth

Growth



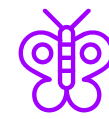
Growth in demand for green goods and services is predicted to add

\$10.3 trillion

to global GDP by 2050



Consumers are increasingly demanding



Opportunity to reinvent your business and seek out the "new"

Case study: Global Consumer Brand and Global Auto Maker



Q&A



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Poll question 5

What would you like
your legacy to be on
sustainability?



Opportunities
Everywhere

Hidden GEMS

Data and
Foundations



Take the *Destination net zero* survey at
Insight.9lenses.com





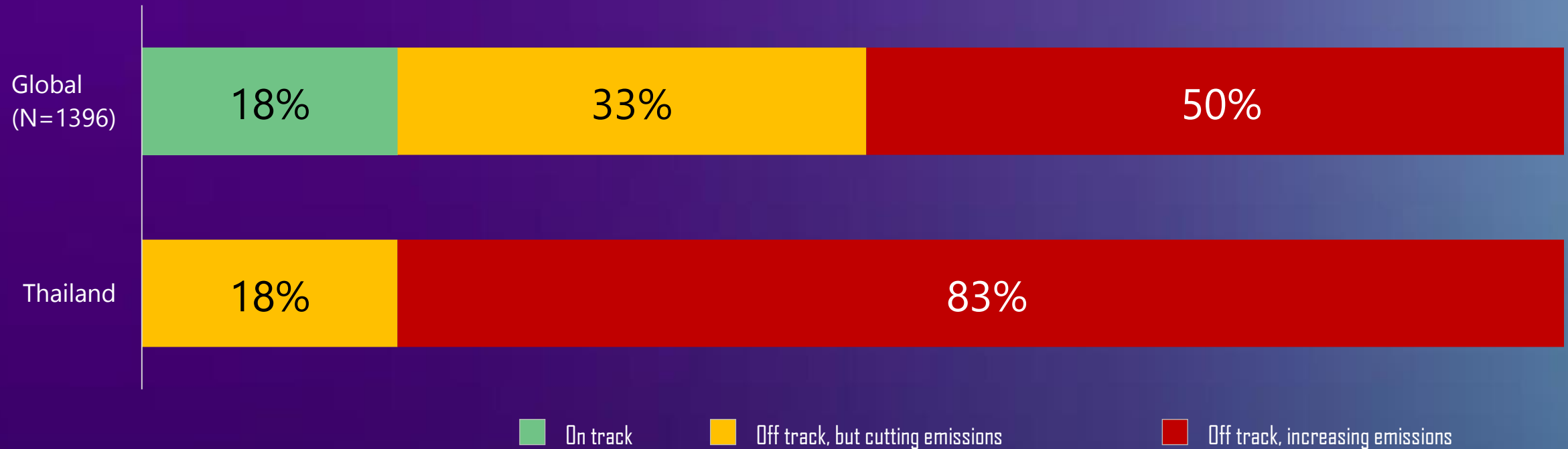


Thank you

Are firms on track to reach Net Zero by 2050?

83% of Thailand's largest businesses by revenue are OFF Track and increasing emissions

Net zero operational emissions by 2050 status (based on CAGR since 2016; n=1396)



Notes: Total sample of 62000 with emissions data in the selected period is 1396. Proportions are based on those with emissions data that have cut emissions between 2016 and their latest available year (2020 or 2021). "On track by 2050" refers to whether company is projected to reach net zero in Scope 1 and 2 (defined here as achieving 5% of 2021 emissions by 2050). The proportions of those on track to hit net zero are calculated based on emissions CAGRs from 2016 to the latest available year.