



Multi- and Water Utilities

Driving forces

The multi - and water-utilities industry is being transformed on many different fronts. The electricity market is undergoing a major transformation caused by the decarbonization and decentralization of power generation. These utilities need to develop innovative business models that adapt to new political, economic and technical constraints. Gas markets, on the other hand, are being reshaped by the development of unconventional resources and the fact that natural gas is a cleaner and more flexible alternative to coal in power generation. However, gas utilities remain exposed to the risk of the long-term phasing out of all fossil fuels. For water utilities, aging distribution and collection networks and opposition to privatization are key challenges in developed countries. In emerging markets, increasing water stress and deteriorating water quality represent challenges, whereas increasing consumption and rapid infrastructure expansion are driving market growth. Leading companies perform active resource management, reduce water losses during distribution and foster demand-side efficiency.

Highlighted criteria & Dimension weight

- Economic Dimension 32%
 - Corporate Governance
 - Market Opportunities
 - Codes of Business Conduct
- Environmental Dimension 42%
 - Electricity Generation
 - Operational Eco-Efficiency
 - Climate Strategy
 - Water Related Risks
- Social Dimension 26%
 - Stakeholder Engagement
 - Talent Attraction & Retention

Sustainability leaders 2019

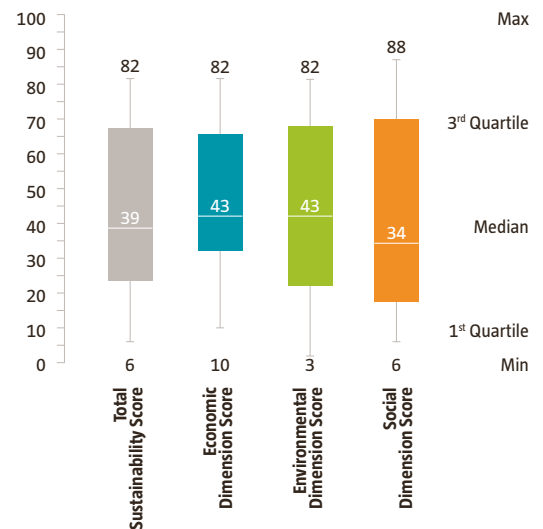
SAM Gold Class ●	
Engie SA	France
SAM Silver Class ●	
Sempra Energy	United States
Suez	France
SAM Bronze Class ●	
United Utilities Group PLC *	United Kingdom
Veolia Environnement SA	France

* SAM Industry Mover

Industry statistics

Number of companies in universe	39
Number of companies assessed in 2018	28
Assessed companies to total companies in universe	72%
Market of assessed companies to total market	90%

Results at industry level



The box-and-whisker plot describes the distribution of scores in the industry, based on all assessed companies. More information is available in the Reading Instructions in the introduction.