ISG Provider Lens®

Digital Sustainability

IT Solutions

A research report on providers delivering digital solutions and services for sustainability outcomes



Customized report courtesy of:

NTT DATA

QUADRANT REPORT | OCTOBER 2026 | EUROPE

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Europe shifts from disclosure urgency to resilient, measurable sustainability execution

This ISG Provider Lens® Digital Sustainability study evaluates the competitive landscape for providers in Europe in 2026. The research covers the following quadrants: Strategy and Enablement Services; Asset, Product and Value Chain Solutions; and IT Solutions, assessing providers' capabilities, market positioning and execution across advisory, implementation and managed services within the defined scope of the study.

Market Context

Continued growth demonstrates sustainability value

ISG's research into the global digital sustainability market indicates a value of $34.3 billion in 2026, up 12 percent compared to 2025. While this growth represents a reduction from the 16 percent growth seen between 2024 and 2025, the continued growth despite heightened geopolitical disruption and AI's competing demand for technology investment indicates enterprises recognize the importance of sustainability in long-term competitiveness. Europe represents the largest regional market, with a 43 percent share.

Regulatory simplification shifts sources of market urgency

Europe remains the most mature digital sustainability market. However, the forces shaping it are being reordered. In 2025, the first EU Corporate Sustainability Reporting Directive (CSRD) reporting cycle and anticipated expansion of CSRD and Corporate Sustainability Due Diligence Directive (CSDDD) created broad disclosure-led urgency. In 2026, reductions and delays in these requirements narrowed the immediately regulated population and extended certain timelines. Although this has reduced the value of compliance-only propositions, it has not removed the structural need for reliable sustainability data or operating change. Imminent Extended Producer Responsibility (EPR) requirements, product and packaging rules, carbon-related trade measures

Digital sustainability remains central to Europe's **competitiveness, security** and **resilience.**

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and the EU AI governance regime still create overlapping obligations across products, supply chains and technology estates.

Resilience economics moves to the foreground

Conflict in the Middle East has renewed concern about energy security, logistics and access to critical inputs. For Europe, which remains exposed to imported energy and complex cross-border value chains, resource efficiency and decarbonization increasingly operate as resilience and cost mechanisms. The regional market is diverging from less regulated markets: sustainability remains connected to formal obligations, but investment timing is now more strongly shaped by energy cost, supply continuity and industrial competitiveness.

Technology is amplifying opportunity and constraint. AI, IoT, digital twins and automation make asset, product and value chain decisions more granular and timelier. However, rapid growth in GenAI and agentic AI also raises infrastructure energy demand and increases the importance of model governance, workload telemetry and sovereign compute.

Therefore, quadrant results should be read through a more nuanced lens than in 2025.

Enterprise priorities

From broad commitments to funded operating outcomes

Although European enterprises remain the most committed to sustainability, they are more selective about investment. Sustainability has continued to become more embedded in enterprise strategies and operating models, intensifying the shift toward value creation identified in 2025. Boards expect sustainability programs to compete for capital using the same cost, risk, resilience and growth logic as other transformations. Buyers are combining decarbonization with energy optimization, supply continuity, asset reliability and product compliance instead of maintaining separate ESG workstreams. As business functions integrate sustainability more fully, governance is changing. Sustainability functions provide expertise and direction, while finance, procurement, operations, product engineering, IT and risk functions share decision rights, data ownership and outcome accountability.

The leading priorities for 2026 are:

- Enterprises are refreshing strategies around regulatory exposure, energy and supply chain scenarios using prioritized road maps that connect targets to owners, investment gates and measurable business outcomes.
- Asset-heavy organizations are scaling energy, water and maintenance optimization through operational data, AI, IoT and digital twins, with deployment decisions based on verified savings, uptime and resilience rather than pilot activity.
- Product and procurement teams are building lifecycle assessment, product carbon footprint, traceability and digital product passport capabilities to respond to packaging rules, material constraints and customer demands at product and component level.
- CIOs are extending GreenOps principles from cloud efficiency into AI model choice, workload placement, data center power and water, green software, device longevity and supplier emissions.

Proof replaces promise

Table stakes in the digital sustainability market in Europe include regulatory literacy, materiality and risk methods, emissions baselining, data governance and access to the major cloud, enterprise and industrial ecosystems. Differentiation comes from execution evidence: before-and-after operational metrics, repeatable controls, product-level data, automated lineage and case studies that show sustained outcomes in the relevant country and industry. Buyers increasingly test whether a provider can move from assessment to implementation and managed improvement without losing accountability between advisory, engineering and operations.

This approach creates two important trade-offs. Enterprises can move quickly by adopting packaged accelerators but must avoid locking regulatory logic or sustainability data into an inflexible architecture. They can also pursue aggressive AI-enabled optimization, requiring human approval points, model and data provenance, energy telemetry and security controls to ensure automation does not weaken assurance. European organizations place

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greater weight on these controls than buyers in many other regions because sovereignty, privacy and regulatory exposure intersect with environmental performance.

Provider dynamics

Portfolios are becoming more integrated and delivery more industrialized. Leading providers connect advisory methods, engineering platforms, ecosystem technologies and managed operations through common data and governance. Laggards still present broad catalogues without a clear implementation path or rely on global references that do not demonstrate European regulatory, industry and country relevance.

Strategy and enablement services

Although competitive positions are relatively stable compared to 2025, system integrators with industry-specific consulting depth are gaining prominence alongside established consulting firms. Strong providers translate materiality, climate and supply chain analysis into operating models, investment portfolios and implementation roadmaps. Their mechanisms include scenario modeling, marginal abatement cost curves, governance design, solution evaluation, transformation offices and recurring impact measurement. They also connect sustainability choices to ERP, procurement and operational transformation instead of producing isolated strategies.

The decisive proof is no longer the quality of a strategic framework. Buyers look for European regulatory expertise, measurable methods and sufficient case evidence to show that recommendations survived implementation. Persistent gaps include limited country-specific outcomes, insufficient evidence for nature, water and circularity and weak continuity between strategy teams and delivery teams. The competitive boundary is moving from advice to governed execution.

Asset, product and value chain solutions

The asset, product and value chain solutions market is the fastest-maturing of the three markets in scope. More solutions have reached production scale, widening credible leadership since 2025. Although providers are converging around AI and ML, IoT, automation and digital twins, technology breadth is becoming less distinctive. Leading delivery providers combine IT and OT data, engineering knowledge and operational workflows to optimize energy, water, maintenance, safety and material use. For products and supply chains, lifecycle assessment, product carbon footprints, supplier traceability and digital product passports are being embedded into product lifecycle management, ERP and manufacturing systems.

Evidence quality separates industrialized capabilities from demonstrations. Buyers expect baselines, asset- or product-level calculations, verified savings, downtime or yield effects and controls that preserve traceability from source data to decision. Engineering and infrastructure specialists retain an advantage in complex physical environments, while broad service providers compete through integration and scale. Recurring gaps include fragmented asset data, limited interoperability and case evidence that measures environmental benefits without establishing the associated economic result.

IT Solutions

IT solutions remains the smallest market in the study. Constrained budgets mean many clients expect sustainability to be incorporated into continuous service improvement. The major change from 2025 is the speed at which responsible and sustainable AI has moved from being an emerging topic into a core design and operations requirement. Leading providers now extend assessment and engineering across cloud, data centers, software, networks, devices and AI workloads. Engagements commonly include the creation of resource baselines, GreenOps-enabled infrastructure optimization, workload placement, efficient model and architecture choices, software carbon measures, digital twin optimization for data centers, condition-based device refresh and circular asset disposition.

European differentiation increasingly joins sustainability with data sovereignty and security. Providers that can combine local or sovereign compute, workload-level telemetry, model governance and renewably powered infrastructure have a stronger answer for regulated buyers than those offering carbon

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estimates alone. However, data granularity remains a material weakness across the market. Buyers should challenge savings assumptions, allocation methods and the ability to measure AI inference, water use and supplier-generated emissions over time. Providers need clearer commercial models that share efficiency gains rather than treating sustainability as an unfunded reporting add-on.

Outlook

Over the next 12 to 24 months, Europe's digital sustainability market will grow through selective execution rather than returning to indiscriminate compliance spending. The strongest demand will sit where environmental improvement protects margin, access to markets, infrastructure capacity and supply continuity. Product regulation and traceability will keep investments in the sustainability of asset, product and value chain solutions on the fastest path, while AI growth will pull sustainable IT solutions closer to core architecture and sourcing decisions. Digital sustainability strategy and enablement services will remain influential when they convert uncertainty into sequenced investments and retain accountability through implementation.

Enterprises should monitor three leading indicators: investment plans addressing regulatory dynamism and complexity, energy and supply disruption changing operational economics and AI infrastructure constraints making workload efficiency and data sovereignty board-level issues. Their principal risk is optimizing the current rule set and building fragmented solutions that cannot adapt to the changing obligations or business conditions. They should establish modular data and control foundations, require outcome baselines with reduction targets aligned to their enterprise goals and govern sustainability through joint finance, operations, product and technology ownership.

Providers face different risks. Traditional IT providers must move beyond portfolio breadth and demonstrate evidenced sustainability outcomes. Management and environmental consultancies must demonstrate how their value extends into execution. In an increasingly educated customer market, providers must expand their technical sustainability expertise to retain credibility. A key differentiator will be the ability to offer technology foundations that can deliver on the promise of GenAI and agentic AI. Leadership will increasingly depend on connecting advisory, IT and OT execution while making economic and environmental performance visible through the same operating data.

The market's direction is clear even if regulation and geopolitical pressures remain fluid: digital sustainability investments continue to grow at approximately 12 percent CAGR year-on-year and are increasingly part of enterprise resilience, product and AI transformation. Knowledge of carbon accounting and CSRD is not enough. Providers that cannot demonstrate expert-level industry-specific knowledge and evidence outcomes will lose relevance.

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Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
ABB	Not In	Market Challenger	Not In
Accenture	Leader	Leader	Leader
AECOM	Contender	Not In	Not In
AFRY	Product Challenger	Product Challenger	Not In
Akkodis	Not In	Product Challenger	Not In
Anthesis	Rising Star ★	Not In	Not In
Arup	Contender	Not In	Not In
Atos	Contender	Leader	Leader
Bain & Company	Product Challenger	Not In	Not In
BCG	Leader	Not In	Not In

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Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
BDO	Product Challenger	Not In	Not In
Bosch	Not In	Contender	Not In
Bureau Veritas	Contender	Not In	Not In
Capgemini	Leader	Leader	Leader
CGI	Contender	Contender	Contender
Circular Computing	Not In	Not In	Contender
Cognizant	Leader	Leader	Leader
Computacenter	Not In	Not In	Market Challenger
Cyient	Not In	Contender	Not In
Dell Technologies	Not In	Not In	Contender

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Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
Deloitte	Leader	Leader	Product Challenger
Deutsche Telekom / T-Systems	Leader	Leader	Leader
DNV	Contender	Not In	Not In
DXC Technology	Not In	Contender	Contender
ENGIE	Not In	Market Challenger	Not In
ERM	Leader	Not In	Not In
EY	Leader	Product Challenger	Product Challenger
Fujitsu	Not In	Product Challenger	Product Challenger
GE Vernova	Not In	Market Challenger	Not In
Genpact	Market Challenger	Not In	Not In

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Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
GEP	Contender	Not In	Not In
Globant	Not In	Not In	Contender
HCLTech	Leader	Leader	Leader
Hexagon	Not In	Product Challenger	Not In
Hexaware	Not In	Contender	Contender
Hitachi Digital Services	Product Challenger	Leader	Rising Star ★
Honeywell	Not In	Product Challenger	Not In
HPE	Not In	Not In	Contender
IBM	Leader	Leader	Leader
ICF	Contender	Not In	Not In

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Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
Infosys	Leader	Leader	Leader
Jacobs	Contender	Not In	Not In
Johnson Controls	Not In	Contender	Not In
Kearney	Contender	Not In	Not In
KPMG	Product Challenger	Product Challenger	Contender
Kyndryl	Not In	Product Challenger	Leader
Lenovo	Not In	Contender	Leader
LTM	Contender	Rising Star ★	Product Challenger
LTTS	Not In	Leader	Not In
Lufthansa Industry Solutions	Product Challenger	Product Challenger	Contender

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Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
Marsh McLennan	Contender	Not In	Not In
McKinsey & Company	Leader	Not In	Not In
Mott MacDonald	Contender	Contender	Not In
Mphasis	Not In	Contender	Product Challenger
NTT DATA	Leader	Leader	Leader
PwC	Leader	Leader	Product Challenger
Ramboll	Contender	Not In	Not In
Rockwell Automation	Not In	Product Challenger	Not In
Schneider Electric	Product Challenger	Leader	Product Challenger
Siemens	Not In	Leader	Not In

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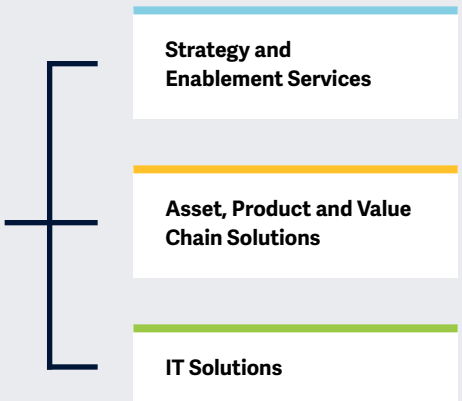
Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
SLR	Product Challenger	Not In	Not In
Sweco	Contender	Contender	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger
ThoughtWorks	Not In	Not In	Product Challenger
Unisys	Not In	Not In	Contender
Wipro	Leader	Leader	Leader
WSP	Market Challenger	Market Challenger	Not In

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This study evaluates how providers deliver sustainability outcomes through their advisory, AI, data and managed service capabilities.



Simplified Illustration Source: ISG 2026

Definition

The Digital Sustainability 2026 study assesses providers offering digital solutions and services that enable organizations to achieve more sustainable operations, assets, products and value chains.

Over the past six years, sustainability, viewed through the combined lens of economic, environmental, social and governance (ESG) factors, has evolved from an optional consideration to a core business objective. Despite a complex and volatile landscape of regulation, stakeholder expectations and geopolitical forces, the market has recalibrated rather than slowed. Growth has moved between regions and shifted from disclosure-led demand to execution and value creation. Organizations remain committed with increased investment planned, although they are more selective and less vocal.

The economic fundamentals remain unchanged. Recent conflict in the Middle East has highlighted the scale and speed with which supply chain disruptions can affect countries and organizations. In response, organizations continue to prioritize energy security, operational resilience and cost reduction by optimizing resource consumption, managing climate and sustainability risks, and addressing increasing demand for ethical and transparent practices.

The shift toward embedding sustainability into enterprise-wide strategies requires organizations to invest in digital capabilities that reduce cost, emissions and resource use, while ensuring ethical operations.

This study provides the market intelligence needed for:

- Buyers to identify the providers best suited to their sustainability requirements.
- Providers to assess the performance of their current offerings and identify opportunities to maximize their growth in the market.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following three quadrants for services/ solutions: Strategy and Enablement Services; Asset, Product and Value Chain Solutions; and IT Solutions.

This ISG Provider Lens® study offers business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants) on their competitive strengths and weaknesses
- Focus on the Europe market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

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Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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IT Solutions

Who Should Read This Section

This report is valuable for providers offering IT solutions and services in Europe to understand their market position and for enterprises looking to evaluate these providers. Enterprises must improve the sustainability of foundational IT capabilities, including computing, storage, networks, software, devices and AI. They face pressure to reduce energy use, manage device lifecycles, address AI-related impacts and improve accessibility. Providers are responding with solutions that help enterprises optimize IT operations while meeting sustainability expectations.

CIOs, CTOs and other executives

CIOs, CTOs and other executives should read this report to understand how sustainable IT strategies can reduce emissions, manage AI-related energy demand and improve operational resilience. The report explains how providers support less energy-intensive architectures, sourcing models, responsible outsourcing and policies that align IT transformation with ESG goals and evolving stakeholder expectations.

Technology and IT managers

Technology and IT managers should read this report to evaluate providers' approaches to optimizing computing, storage, network and application environments. The report highlights how green IT practices, software efficiency, workload optimization, device lifecycle management and sustainable AI engineering can reduce resource use while improving readiness for digital and environmental compliance.

Environmental and sustainability professionals

Environmental and sustainability professionals should read this report to understand how IT functions can contribute to enterprise carbon, circularity and accessibility goals. The report illustrates how provider capabilities in data center optimization, AI sustainability, end-user device management and inclusive digital design can strengthen ESG performance across industries.

Government and regulatory bodies

Government and regulatory bodies should read this report to understand how providers and enterprises are addressing the sustainability impacts of IT, including data centers, AI workloads, software design, device sourcing and e-waste. The findings can inform pragmatic policies that encourage efficient, inclusive and accountable digital infrastructure.

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This quadrant evaluates solutions that enhance the **sustainability of IT**, focusing on core digital infrastructure such as platforms, applications, AI and ML, and devices that support business operations.

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Definition

This quadrant assesses providers that offer sustainability solutions and services for foundational IT capabilities used in all industries, often referred to as the sustainability of IT or Green IT. Providers in this space offer consulting, engineering, IT and managed services.

The solutions and services considered for this quadrant aim to improve the environmental and social sustainability of IT functions such as compute, storage and network infrastructure, end-user devices, software and AI.

The sustainability of AI is the most consequential driver in this quadrant. As a result, one of the highest priorities for many firms is to understand and optimize GenAI and agentic AI workloads and the resulting infrastructure energy consumption, while reducing associated environmental impacts.

This quadrant also evaluates the social considerations of IT use, such as enhancing IT accessibility for users with disabilities and neurodiverse requirements.

Eligibility Criteria

1. Provide horizontal and foundational IT capabilities, including industry-agnostic platforms that **enable organizations to use technologies more sustainably**
2. Assess, design or govern more sustainable:
   - **IT strategies**
   - **Architectures**
   - **Sourcing models**
   - **Operating policies**
3. **Rationalize and re-architect application portfolios** to optimize utilization and **reengineer applications, AI and ML algorithms and data platforms** for energy efficiency and bias prevention
4. Enable organizations to re-architect, optimize and manage the consumption of:
   - **Compute**
   - **Storage**
   - **Network**
5. Manufacture and supply end-user devices or offer end-of-life services for end-user devices that **maximize circular resource flows and enable inclusivity**
6. Provide services to assess and **optimize the aggregated and individual utilization of end-user devices**, including guidance on adapting policies and sourcing criteria to prolong device usage and lifespan
7. Offer **IT outsourcing services with integrated sustainability commitments** such as reducing emissions generated by the service over time

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Observations

The market for solutions that improve the sustainability of IT is valued at $1.5 billion or four percent of the global digital sustainability market. European buyers account for about 43 percent of this value and 56 percent of sustainable IT case studies in ISG's digital sustainability database. Although the demand for services related to IT sustainability in Europe is the highest worldwide, budgets remain limited, with most buyers expecting IT services to become more sustainable through continuous improvements.

ISG's research shows that case studies for sustainable IT are amongst the most likely to have achieved direct measurable environmental or social benefits.

Demand is also growing rapidly for sustainable and responsible AI services. The explosion in enterprises' use and cost of GenAI and agentic AI has led to all leading providers enhancing their advisory and engineering services in these areas. Environmental data granularity continues to be a key challenge in optimizing AI use; IT providers with strong GreenOps capabilities are addressing these gaps, while sovereign compute offerings are emerging as comprehensive solution options for European firms seeking greater control over the sustainability and security of their data.

Traditional IT providers are well placed to address client demands in this market, although the ones with established consulting capabilities can influence buyer journeys earlier through their role in designing sustainable IT strategies with CIOs and CTOs.

From the 68 companies assessed for this study, 34 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

accenture

Accenture offers sustainable IT consulting and engineering across cloud, data centers, software, devices and AI, differentiated by the Sustainable AI Quotient, green software and hyperscaler-led lifecycle optimization for complex enterprise estates.

Atos

Atos provides sustainable IT services across strategy, cloud, data centers, software, AI and digital workplace, anchored by Eviden and the sustainable AI stack, with sovereign technology, workload telemetry and managed carbon accountability.

Capgemini

Capgemini combines engineering-led green IT for cloud, data centers, software, devices and AI with Sustainable AI Navigator, identifying energy, water, materials and cost trade-offs before scaling workloads across the technology lifecycle.

cognizant

Cognizant provides sustainable IT for enterprises in Europe, combining its Sustainable IT Framework, carbon baseline, cloud and infrastructure optimization, green software and managed delivery across applications, devices and AI workloads.

Deutsche Telekom/T-Systems

Deutsche Telekom/T-Systems offers sovereign, renewable AI and cloud infrastructure, alongside ALCAI Green IT measurement, circular Device-as-a-Service and GreenOps, giving European buyers auditable energy, carbon and lifecycle controls.

HCLTech

HCLTech offers EcoSustain- and DecarbonizIT-led sustainable IT consulting, engineering and managed services across cloud, data centers, networks, applications, devices and AI, with DCxTwin, NIO and WorkBlaze supporting infrastructure transformation.

IBM

IBM combines green IT consulting, Turbonomic, Cloudability, Envizi and efficient infrastructure to align workload performance, cloud cost, carbon and lifecycle recovery, giving European CIOs a broad but distributed optimization portfolio.

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Infosys offers sustainable IT through Responsible by Design, Green IT Framework, Sopht GreenOps, carbon-proxy metrics and managed delivery across software, cloud, infrastructure, devices and AI, with accessibility adding an inclusive engineering dimension.

Kyndryl provides managed hybrid-IT operations through Sustainability Advisor, Unify and modernization services across cloud, data centers, applications, devices and AI, translating estate visibility into energy, carbon, resilience and cost action.

Lenovo combines OEM-led sustainable IT lifecycle services, including TruScale Device-as-a-Service, Certified Refurbished recovery, AI-ready infrastructure and Carbon Impact Portal, linking procurement, deployment, reuse, data-center efficiency and reporting.

NTT DATA offers sustainable AI services, carbon insights and Green Software Foundation expertise alongside circular IT, network and data-center optimization, giving European CIOs granular measurement from workloads and code through technology lifecycles.

TCS provides a sustainable IT toolkit spanning GreenOps, software and AI optimization, workplace circularity, responsible AI and the Sustainability Command Center, with managed ITO/BPO delivery, linking technology efficiency to governance.

Wipro combines green IT consulting and managed delivery through the Sustainable Technology Framework, spanning software, cloud, data centers, workplace and asset lifecycles, with Impact Intelligence linking technology improvements to business value.

Hitachi Digital Services (Rising Star) provides sustainable digital infrastructure and RitaDCARB, delivering granular energy, carbon and cost visibility across data centers, cloud, applications and business services, backed by IT/OT engineering and GlobalLogic.

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Leader

"NTT DATA stands out in Europe for its deep measurement capabilities across the full IT estate, while concurrently operationalizing sustainable AI, green software, networks, data centers and operational efficiency."

Matt Warburton and Bhuvaneshwari Mohan

NTT DATA

Overview

NTT DATA is headquartered in Tokyo, Japan. It has more than 197,000 employees across over 70 countries. In FY25, the company generated ¥4,638.7 billion in revenue. NTT DATA has a large sustainable IT practice in Europe, expanding sustainable AI, circularity and data center services, with increasingly strong regulatory alignment. Its end-to-end strategy spans baseline assessment through to governance. Its offering, Syntphony Beyond Net Zero, including Carbon Insights assets, supports sustainable IT measurement, while Carbon IMPACT Waves ensures phased transformation across an IT estate.

Strengths

Sustainable AI: NTT DATA's sustainable AI services include a structured program to guide clients through the challenge of reducing the environmental impact of the use of AI. It begins with establishing a 4-8 week workload-energy baseline, then defines a decarbonization plan, including finding ways to improve model and infrastructure. Clients leverage NTT DATA assets such as SOLO alongside partners' solutions, including CompactifAI and Kove:SDM, to address the issues of token waste, model size and memory use.

Full-estate impact measurement: NTT DATA's real estate carbon insights extend Syntphony Carbon Insights to buildings, offices, retail sites and data centers, with carbon, energy and water measurement, to build KPIs and AI-supported forecasting. The company recently announced that its partnership with ENGIE will include co-innovation involving the use of renewable energy in data centers.

Standards-aligned green software: NTT DATA continues to be a thought leader in the industry on sustainable software development, with a role as the chair of the Green Software Foundation (GSF), undertaking critical work on standards such as the Software Carbon Intensity (SCI). Its own EcoDev tool embeds sustainability rules and an EcoDev Index in the software development process, letting development teams assess code efficiency in existing quality processes.

Caution

NTT DATA should maximize its connections with the GSF and associated expertise to further demonstrate its green software and sustainable AI capabilities. Publishing flagship case studies and thought leadership that demonstrate client-specific outcomes would strengthen market awareness of its expertise.

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Appendix

The ISG Provider Lens® 2026 – Digital Sustainability study analyzes the relevant software vendors/service providers in the European market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of October 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Digital Sustainability market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

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Matt Warburton specializes in the research and delivery of digital sustainability solutions, with 20 years of experience as a digital transformation practitioner and commercial leader.

Warburton focuses on accelerating sustainable outcomes and works closely with organizations to maximize the positive impact of technology. He has led engagements for large clients in technology, aviation, financial services, healthcare, mining and retail. These range from providing strategic and practical advice on the digital sustainability capabilities organizations need and how to get them, to designing and delivering ESG risk assessments on hundreds of suppliers.

Warburton also works with technology providers to develop successful go-to-market strategies, leveraging his unique experience of both sides of the digital sustainability market.



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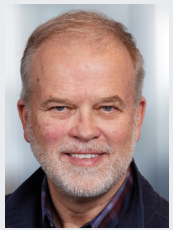
Iain Fisher

Executive Director, Research

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross-industry research with an eye on technology-led digital innovation, creating new strategies, products, services, and experiences by analyzing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross-industry solutioning, Iain provides major market insights leading to changes to business and operating models driving new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer-focused delivery of services and solutions in challenging situations. Fisher is also a regular keynote speaker and online presenter, having authored several eBooks on these subjects.

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry.

Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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ISG Provider Lens®

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