Everest Group®

Everest Group Sustainable IT Services PEAK Matrix® Assessment 2025

Focus on NTT DATA

January 2025

PEAK MATRIX®

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Introduction

In today's rapidly evolving business environment, sustainable IT has become a critical priority for organizations aiming to minimize their environmental impact. This urgency arises from several key factors. First, IT infrastructure is often one of the largest sources of emissions for organizations, making it essential to adopt sustainable practices. Additionally, the rise of advanced technologies, such as generative AI (gen AI), comes with substantial energy demands due to increased requirements for high computing power and storage. Furthermore, many organizations face challenges in managing hidden emissions, particularly Scope 3 emissions, associated with public and hybrid cloud solutions. These emissions can be complex and difficult to measure, necessitating support from expert providers to navigate these challenges effectively. This shift toward sustainable IT highlights the need for organizations to collaborate with credible IT service providers who can help implement strategies that reduce carbon footprints of their clients' IT estate while enhancing operational efficiency.

In the research report, we provide an in-depth analysis and detailed profiles of 21 sustainable IT service providers featured on the Sustainable IT Services PEAK Matrix® Assessment 2025, based on Everest Group's rigorous assessment process for 2024.

Our assessment is grounded in Everest Group's rigorous annual Request for Information (RFI) process for 2024, extensive engagements with leading sustainable IT service providers, client reference checks, and continuous monitoring of the evolving market landscape.

The full report includes the profiles of the following 21 leading sustainable IT service providers featured on the Sustainable IT Services PEAK Matrix:

- **Leaders:** Accenture, Capgemini, HCLTech, IBM, NTT DATA, and TCS
- **Major Contenders:** Atos, Cognizant, Deloitte, DXC Technology, Fujitsu, Hitachi Digital Services, Infosys, Kyndryl, Lenovo, LTIMindtree, Tech Mahindra, and Wipro
- **Aspirants:** T-Systems, UST, and Zones

Scope of this report

Geography: global

Industry: cross industry

Services: sustainable IT services

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Sustainable IT Services PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, HCLTech, IBM, NTT DATA, and TCS

- Leaders provide mature, end-to-end sustainable IT offerings focusing on green cloud and IT infrastructure, sustainable software, sustainable digital workplace, and e-waste management
- They have a robust suite of niche solutions and assets to measure, monitor, and visualize environmental data across IT infrastructure and application's life cycle
- They have strong joint-GTM strategies with hyperscalers and niche green IT providers with a focus on co-innovating solutions on emerging themes such as sustainable gen AI and GreenOps
- They actively contribute to global sustainable IT efforts through consortiums such as the Green Software Foundation, shaping industry standards
- They invest in sustainable IT talent through in-house learning programs and partnerships with leading institutes such as MIT

Major Contenders

Atos, Cognizant, Deloitte, DXC Technology, Fujitsu, Hitachi Digital Services, Infosys, Kyndryl, Lenovo, LTIMindtree, Tech Mahindra, and Wipro

- While a few Major Contenders have begun investing in emerging areas such as GreenOps and sustainable software, the majority are still focused on data center/cloud sustainability and device life cycle management
- They are partnering with hyperscalers, with a central focus on energy-efficient cloud migration and IT modernization, and with niche green IT to leverage partner solutions for monitoring the carbon footprint of software and IT infrastructure
- They are developing sustainable IT talent through in-house and external courses and certifications, while collaborating with research institutes and technology providers to drive innovation
- For some Major Contenders, sustainable IT is a recent focus area, and they must accelerate their efforts to build market proof points across industries to establish a credible market presence

Aspirants

T-Systems, UST, and Zones

- Aspirants offer a limited range of services, concentrating on specific themes within the sustainable IT landscape such as efficient cloud migration or ITAD
- Their partnerships are limited to hyperscalers, with no involvement of niche green IT providers and little emphasis on joint-GTM strategies
- They are building market credibility by highlighting sustainability Key Performance Indicators (KPIs) in traditional client engagements, partnering with other IT service providers to expand their reach, and showcasing their internal sustainable IT efforts in market messaging
- To establish themselves as partners-of-choice in the sustainable IT landscape, they need to focus on building niche solutions targeting IT decarbonization and monitoring and reporting the environmental footprint of IT infrastructure and assets

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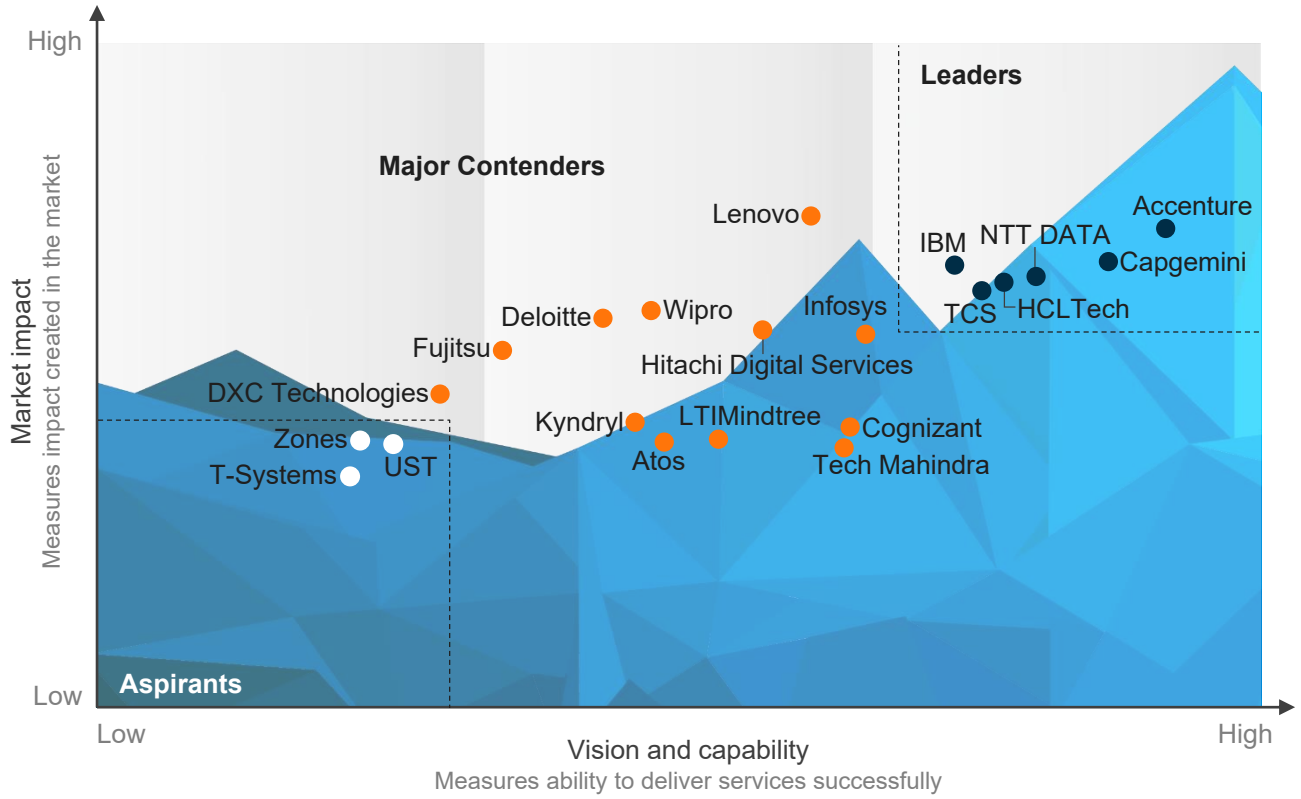
Everest Group PEAK Matrix®

Sustainable IT Services PEAK Matrix® Assessment 2025 | NTT DATA is positioned as a Leader

Everest Group Sustainable IT Services PEAK Matrix® Assessment 2025[1]

- Leaders
- Major Contenders
- Aspirants



1 Assessments for Accenture, Atos, Deloitte, DXC Technologies, Fujitsu, and T-Systems excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group interactions with buyers
Note: Assessment for LTIMindtree 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 (2025)

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NTT DATA profile

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths

- NTT DATA offers a robust portfolio focused on cloud energy management, green software, and IT asset life cycle management
- It introduced Green Function-as-a-Service (FaaS) to enhance software sustainability by selecting eco-friendly data centers for each function call
- NTT DATA has developed lightweight, low-power language models to improve operational efficiency to promote sustainable and scalable gen AI solutions
- It collaborates closely with OEMs on e-waste circularity programs and managing IT hardware carbon footprints
- It partnered with the Green Software Foundation to develop the SCI standard and promotes global green IT agenda through multiple events
- Clients value NTT DATA for domain and technical expertise in sustainable IT and strong account management skills

Limitations

- NTT DATA lags peers in a joint solutioning approach with hyperscalers and leading niche green IT providers such as GreenOps providers, green data center solution providers, and software intelligence platforms
- It has not effectively incorporated themes of accessibility and digital ethics into its sustainable software offerings compared to some of its leading peers
- Clients expect NTT DATA to be more agile in adapting to their evolving needs and to enhance communication for better engagement and delivery
- They also pointed out the need to improve its platform architecture to reflect the industry best practices in gen AI

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Appendix

PEAK Matrix® framework

FAQs

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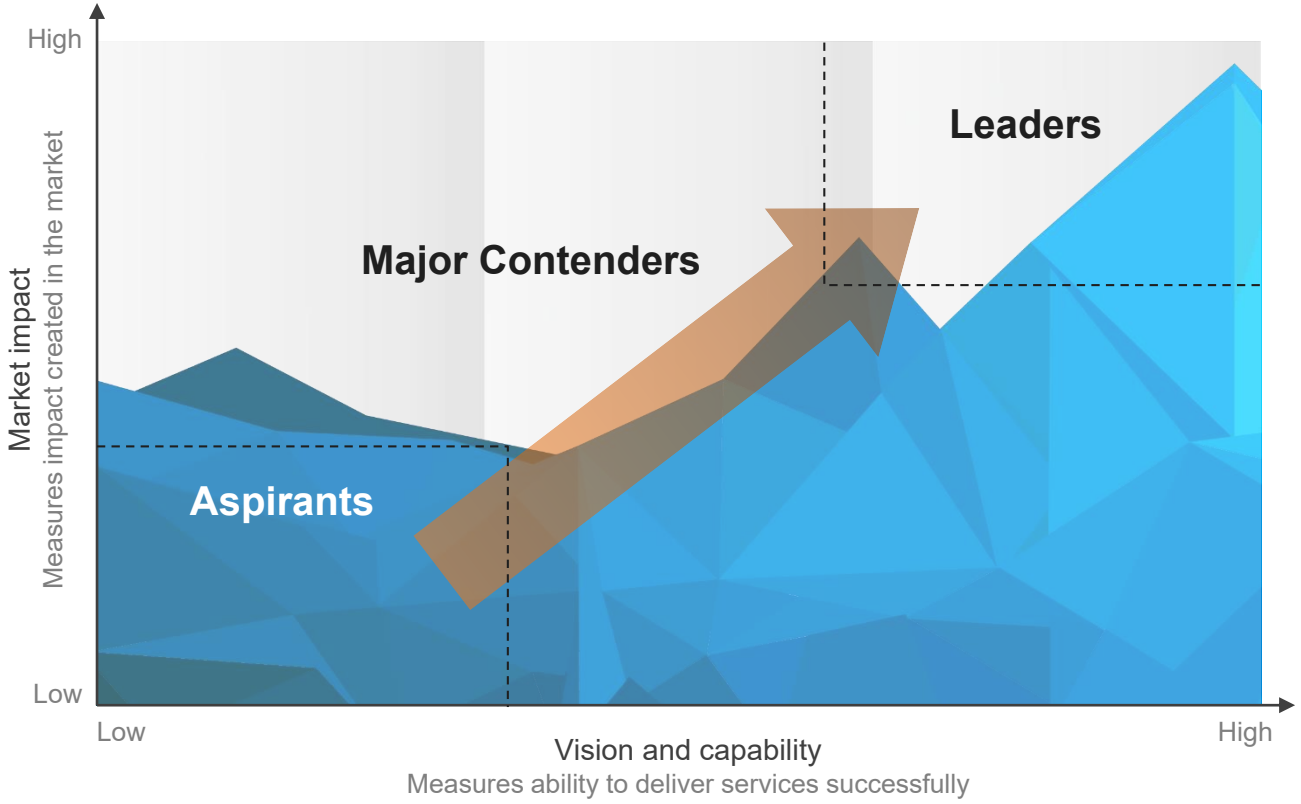
Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



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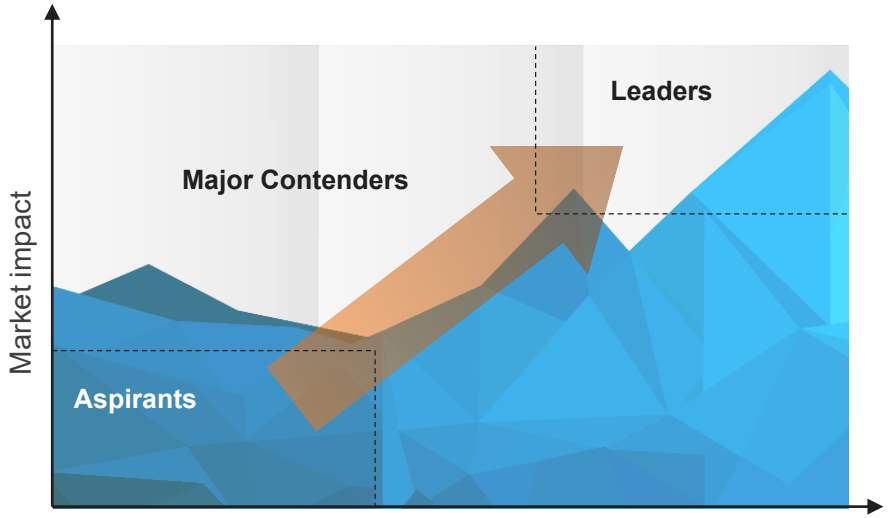
Services PEAK Matrix® evaluation dimensions

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

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FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: 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.

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

A: 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.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: 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.

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

A: 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 in included in our research reports

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

A: 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

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

A: 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.

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