ISG Provider Lens®

Digital Sustainability

IT Solutions and Services

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

Customized report courtesy of:

Atos

QUADRANT REPORT | DECEMBER 2025 | EUROPE AND GLOBAL

Table of Contents

Executive Summary 03

Provider Positioning 09

Introduction

Definition 22
Scope of Report 23
Provider Classifications 23

Appendix

Methodology & Team 33
Author & Editor Biographies 34
About Our Company & Research 37

IT Solutions and Services 25 - 31

Who Should Read This Section 26
Quadrant 27
Definition & Eligibility Criteria 28
Observations 29
Provider Profiles 31

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Report Author: Matt Warburton

The European market is shifting its focus from compliance to delivering measurable, resilient value

Europe remains the world's leading market for digital sustainability, in terms of value, volume and sophistication of digital solutions to enhance environmental, social and governance (ESG) performance. Its leadership is driven by regulatory and stakeholder pressure, energy system transformation and evolving business models. The European digital sustainability market is currently defined by two major shifts:

- Short-term clarity is emerging as the EU's Corporate Sustainability Reporting Directive (CSRD) begins its first reporting cycle for wave-one companies in 2025. However, the European Commission's Omnibus simplification package has significantly changed the landscape: thresholds for CSRD have been raised, removing about 90 percent of companies from the scope and leaving roughly 5,000 companies in scope. The package also pushes back deadlines — wave-two CSRD filers are now expected to report in 2028, and the Corporate Sustainability Due Diligence Directive (CSDDD) is postponed to 2029. While these changes reduce short-term burdens and aim to boost competitiveness, they create considerable uncertainty for smaller and non-EU firms in the medium term and raise concerns about decreased transparency and reduced effectiveness of the EU's sustainability framework.
- Buyer's sustainability priorities are shifting from pure compliance programs to operational efficiency and value creation at scale. Organizations are emphasizing energy efficiency, risk management, supply chain transparency and AI-assisted reporting, and rewarding providers that demonstrate measurable outcomes across industries. Enterprise-level, average data sets are no longer adequate for advanced buyers who require product-level, actuals-based data across the entire value chain. More fundamentally, European organizations

Decarbonization continues as buyers prioritize **energy efficiency** and **resilience.**

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

increasingly view sustainability as a way to boost competitiveness rather than solely a moral obligation.

As a result of these shifts, European-based organisations are increasing investments, and the competition to provide digital solutions to address these challenges is intensifying. ISG estimates that the overall digital sustainability market will expand from approximately $30.3 billion in 2025, with a forecasted compound annual growth rate (CAGR) of 16 percent, reaching $41 billion in 2027. Strategy and enablement services and OT and industry-specific solutions and services lead the subsegments, with estimated market value shares of 28 percent and 35 percent, respectively. The spending by Europe-headquartered organizations represents approximately $12.1 billion, or 40 percent, of the global market, growing slightly above the global CAGR at approximately 17 percent.

A major increase in case studies also signals market growth. In 2025, ISG's research identified approximately 1,200 new case studies, mostly attributed to client work in 2024 and 2025. ISG's database now contains nearly 2,500 case studies, with over 40 percent linked to European clients and the common industries being power and utilities (16 percent), manufacturing (14 percent), retail and CPG (12 percent) and the public sector (12 percent).

Market demand overview

Regulatory dynamics reshaping demand

While mandatory reporting requirements continue to evolve in line with global competitiveness and geopolitics, extensive voluntary reporting remains common. Despite delays in reporting regulations, companies recognize disclosure as a matter of when, not if. Key mandatory drivers include the following:

- Europe's core sustainability reporting regime, CSRD, is now active. The large Europe-based companies in wave-one — which were previously covered by the Non-Financial Reporting Directive — are reporting their FY24 sustainability data in 2025, in accordance with the European Sustainability Reporting Standards (ESRS). The European Commission's 2025 Omnibus package introduced a stop-the-clock provision for the later waves of smaller and non-EU-headquartered companies and a quick-fix delegated act to offer additional flexibility for FY25-26. Its proposals to narrow the scope of CSRD to companies with over 1,000 employees and €450 million in turnover are likely to be confirmed before the end of 2025.
- The EU's corporate due diligence regime requiring supply chain disclosures, CSDDD, will be implemented gradually by EU member nations, starting in 2028. It increases requirements for human rights and environmental due diligence and requires transition plans aligned with 1.5°C. Based on current Omnibus proposals, it appears likely that companies with more than 5,000 employees and over €1.5 billion in revenue will be required to report on FY28 data in 2029. All other companies previously considered in scope will likely be excluded, raising concerns that large companies will be unable to obtain accurate sustainability data throughout their value chains.
- The EU AI Act timelines are taking effect. While prohibited practices and AI literacy requirements came into force on February 2, 2025, governance, penalties and general-purpose AI (GPAI) rules were made effective on August 2, 2025. Most other rules will be applicable from August 2026, with high-risk systems needing full compliance by 2027. Fines can reach €35 million or 7 percent of global revenue.
- The carbon border adjustment mechanism (CBAM) will move to its final regime in 2026. On January 1, 2026, it will shift from its transitional phase to the final regime, coinciding with the phase-out of the EU emissions trading system (ETS) free allowances. From that date, importers of covered goods (iron, steel, cement, aluminum, fertilizers, electricity and hydrogen) into the EU must purchase CBAM certificates to account for embedded emissions.
- The Taskforce for Nature-related Financial Disclosures (TNFD) continues to develop, with adoption of its reporting standards rising. TNFD is a voluntary framework for expanding corporate disclosures from climate-related to nature-related topics, such as biodiversity and water, and integrating these considerations into corporate

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

governance, strategy, risk management and metrics. In 2025, more than 500 companies and 129 financial institutions, representing $17.7 trillion in assets, have adopted or tested TNFD-aligned reporting.

Together, for the organisations they affect, these measures shift budgets toward scalable, auditable ESG data platforms, due diligence workflows and AI governance. They also strengthen the business case for decarbonizing operations and supply chains.

Macro forces driving resilience, cost and decarbonization

Europe's economy continues to experience moderate growth and persistent inflationary pressures in 2025. According to the European Commission's Autumn 2025 forecast, real GDP is expected to grow by 0.9 percent in the euro area, with inflation forecasted to drop to 2.1 percent by 2026.

The European Commission's REPowerEU road map, published in May 2025, outlines a plan to completely end Russian gas imports by the end of 2027. Renewables have reached record levels in the EU power mix. In 2024, renewables produced 47.3 percent of total electricity, up 7.7 percent from 2023. In the second quarter of 2025, renewables supplied 54 percent of net electricity, with solar leading and becoming the single largest source in June 2025 at 22 percent of total output, surpassing nuclear (21.6 percent), wind (15.8 percent), hydro (14.1 percent) and natural gas (13.8 percent).

EU greenhouse gas (GHG) emissions fell by a record 8.3 percent in 2023 and 2.9 percent in 2024, reducing net emissions to 37 percent below 1990 levels. During the same period, the EU's GDP grew by 68 percent, indicating the ongoing decoupling of economic growth from emissions. Whether the EU can achieve its 2030 target of a 55 percent net reduction largely depends on U.S. pressure to accept coal and gas imports as part of trade deals.

Energy-intensive sectors, including energy and utilities, oil and gas, manufacturing, construction and transportation, are focusing on solutions that reduce consumption (such as AI-enabled process control, smart building and fleet optimization), incorporate renewables and enhance flexibility, supported by reliable metering and emissions data.

Shift in demand from compliance to value

Regulatory compliance remains the initial trigger, but Boards now expect measurable results, such as lower cost to serve, reduced risk premiums, faster reporting times, higher asset uptime and product growth, rather than just activity metrics. The following shifts among buyers stand out:

1. Enterprise ESG data management is becoming a priority. Companies recognize they must invest in creating a single integrated view of ESG data that aligns with financial records. They integrate and orchestrate complex data pipelines across ERPs, finance, procurement, HR, operations and OT systems, supported by managed services for data acquisition and controls.

2. Supply chain and product-level transparency are now essential. CSRD's double materiality and upcoming CSDDD require comprehensive visibility, especially in Scope 3 and human rights. Buyers prefer providers that combine due diligence expertise with scalable supplier data exchange and product carbon footprints (PCF) down to the SKU/BOM level. The EU's CBAM further accelerates emissions-grade data collection for exposed categories, and European consumers are increasingly seeking user-friendly transparency, such as QR codes for traceability.

3. AI with guardrails is moving into full production. Generative AI (GenAI) is being used to create sustainability report narratives, reconcile evidence and automate controls, while buyers expect AI risk management aligned with the EU AI Act and GDPR, model provenance and measurable productivity improvements in reporting and operations.

European consumer and capital market signals reinforce the shift toward sustainability. The 2025 Eurobarometer survey shows that 85 percent of EU citizens view climate change as a serious problem, and 38 percent feel personally exposed to climate-related risks; 81 percent support climate neutrality by 2050 and 88 percent want the EU to boost renewable energy and energy efficiency.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

The European Environment Agency reports that 59 percent of consumers in 2024 are willing to pay a premium for products that are easier to repair, recyclable and produced sustainably, despite inflation. According to the International Energy Agency (IEA) World Energy Investment 2025 report, EU investment in low-emission electricity reached $390 billion. The investment ratio of renewables to unabated fossil fuel power is rising to 35:1, up from 6:1 a decade ago.

Key demand areas across ISG's digital sustainability market segments and quadrants:

1. **Strategy and Enablement Services**

- **Global 2025 market value:** $8.4 billion (28 percent of total)
- **Global case studies in ISG database:** 566 (23 percent of total)
- **Key demand areas:** Organizations are adopting digitally enabled, data-driven, regulatory-grade double materiality and due diligence blueprints aligned with CSRD/CSDDD and sector specifics, featuring chief finance officer (CFO)-ready business cases that integrate with broader digital transformations rather than standalone programs. Digital scenario modeling supports the assessment of climate risks and circular business model pathways. Operating model design clarifies the roles of finance (e.g. ESG Controllers), sustainability, risk, procurement and IT, with clear responsible, accountable, consulted and informed (RACI) models for data ownership and assurance.

2. **OT and Industry-specific Solutions and Services**

- **Global 2025 market value:** $10.6 billion (35 percent of total)
- **Global case studies in ISG database:** 760 (31 percent of total)
- **Key demand areas:** Organizations are prioritizing energy and asset optimization using AI and IoT to reduce consumption and emissions intensity, integrating behind-the-meter renewables and flexibility and enabling circularity across design, maintenance and reverse logistics. The EU power mix's growing share of renewables strengthens the ROI of electrification and efficiency investments.

3. **IT Solutions and Services**

- **Global 2025 market value:** $1 billion (3 percent of total)
- **Global case studies in ISG database:** 359 (15 percent of total)
- **Key demand areas:** Organizations are deploying responsible, energy-efficient AI models across the lifecycle (design, training and inference) as well as remanufactured and refurbished laptops offering as-new functionality and quality at up to 30 percent lower cost.

4. **Data Advisory and Integration Services**

- **Global 2025 market value:** $4.1 billion (14 percent of total)
- **Global case studies in ISG database:** 235 (10 percent of total)
- Key demand areas: Organizations are investing in enterprise ESG data management strategy, architecture, design and integration services to connect internal corporate and external partner systems, while avoiding wasted investments in existing capabilities. As such, they are engaging in third-party integrations with suppliers and other industry partners.

5. **Data Platforms and Managed Services**

- **Global 2025 market value:** $6.2 billion (21 percent of total)
- **Global case studies in ISG database:** 439 (18 percent of total)
- **Key demand areas:** Organizations are adopting platforms that provide interoperable, automated data analytics and decision support modeling at enterprise- and product-levels, integrated with systems used by finance, procurement, manufacturing and logistics. These platforms include lineage, controls and evidence suitable for limited assurance today and scalable to reasonable assurance for CSRD, CSDDD and other key regulations. They also deploy GenAI to generate qualitative narratives for corporate sustainability reporting. They are also leveraging managed services for supplier outreach, data quality and continuous

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

controls monitoring, with AI-assisted narrative and query handling bound by the EU AI Act.

Country trends

Within Europe, while preparation for regulatory compliance continues to be an overarching theme, each country and region has several sub-trends:

- **Germany and DACH:** Strong momentum in supply chain due diligence (building on Germany's Supply Chain Act) and industrial decarbonization; emphasis on auditable supplier data exchange and OT/energy optimization in manufacturing and utilities
- **France and Benelux:** Advanced CSRD readiness in large caps, increased focus on TNFD/biodiversity and product level data in consumer, retail and chemicals
- **The Nordics:** High sustainability literacy and renewable penetration; demand for circular models, product passports and SKU-level Scope 3; recent power mix trends supporting electrification
- **Southern Europe:** Rapid growth in renewables and grid modernization; rising interest among diversified groups in distributed energy management and flexibility; CSRD data platforms
- **The U.K. and Ireland:** Strong compliance and assurance focus, reinforced by the U.K.'s coal phase-out milestone; rising demand for AI governance aligned with the EU AI Act for EU-exposed operations

Market supply overview

Following a rapid influx of providers in 2023-24 (as profiled in ISG's 2024 study), supply is beginning to rationalize. Vendors are refining their portfolios around clear use cases (e.g., CSRD-grade reporting, PCF and life cycle assessments (LCAs) at scale, energy and asset efficiency, circular business models) and forming strategic alliances among consultancies, platform vendors, hyperscalers, engineering firms and data specialists. These patterns align with 2024 findings that buyers prioritize measurable outcomes and industrialized delivery.

The following patterns are defining winners in 2025:

- **Outcome-focused plays:** These are characterized by providers that link offerings to financial (e.g., revenue growth from EU Taxonomy-aligned products, energy cost savings verified) and risk outcomes (e.g., days to disclose reduced, audit adjustments lowered, supplier non-conformances remediated) and support claims with referenceable case studies.
- **Industrialized delivery:** Companies are investing in repeatable data architectures, accelerators (materiality, PCF, due diligence), managed services for controls and evidence management and cross-functional teams (finance controllers, data engineers, sustainability SMEs, change leaders) to scale efficient delivery.

Digital sustainability talent remains a common challenge for both buyers and providers, with European organizations and market research highlighting ongoing skills gaps in digital and sustainability. The WEF Future of Jobs Report 2025 found that environmental stewardship was among the top 10 fastest-growing skills worldwide for the first time, underscoring urgent needs in sustainability reporting, corporate ESG initiatives, circular economy knowledge and climate-conscious business strategies. It also revealed that 85 percent of employers plan to upskill or reskill their workforce in sustainability, AI and digital literacy by 2030, a trend mirrored in 2025 IPL responses, with all participating providers indicating upskilling in sustainability as a top priority.

Key provider actions for success in 2025

- **Make finance a top-tier customer:** Provide CFO-grade ESG data controls, reconciliations and workflow integration with financial close processes designed for limited assurance now and reasonable assurance later.
- **Industrialize supply chain execution:** Combine due diligence expertise with scalable supplier data collection, PCF at SKU/BOM granularity and practical remediation (playbooks, financing, buying group incentives), aligned with CSDDD and CBAM.
- **Implement AI safely:** Integrate AI copilots for reporting and operations with clear model inventory, data governance, human oversight and risk management aligned with the EU AI Act.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

- **Prove results:** Standardize key metrics for buyers such as time to report, audit adjustments, cost savings, energy intensity reduction, supplier risk mitigation and revenue from low-carbon products.
- **Upskill at scale:** Close the skills gap through structured academies covering sustainability, data engineering, AI risk and finance controls, and prioritize cross-functional teams.

Outlook

The digital sustainability market in Europe remains in a growth phase. Regulations and risk management continue to drive action among buyers, as CSRD disclosures are made, supply chain data is collected for CSDDD, governance is established to comply with the AI Act and CBAM transforms international trade terms. Beyond compliance, organizations of all sizes are aligning their strategies with the renewable energy transition, investing in operational efficiency and resilience, and responding to signals from consumers and investors that favor companies turning sustainability into a competitive advantage.

Although uncertainty in global trade and geopolitics may constrain growth, the overall macro trends support increased investment in digital sustainability transformation. Providers that align portfolios to measurable outcomes, industrialize delivery with robust data and AI governance and combine deep industry and finance expertise will lead as demand catches up with supply across Europe in 2026.

ISG Provider Lens® Methodology updates

This 2025 study features several important updates:

- The 2024 IPL quadrant Data Platforms and Managed Services, which included advisory and integration services, has been divided into two quadrants: Data Advisory and Integration Services and Data Platforms and Managed Services (DPMS). Due to this split, providers' standings in the DPMS quadrant in 2024 cannot be directly compared with those in 2025. Please contact ISG for more information.
- ISG has enhanced its analysis of provider revenue, partners, employees, service coverage and R&D investments relevant to digital sustainability. As a result, providers may have moved on the Market Strength axis compared with last year, even if the provider's data in these respects has not changed.
- ISG's methodology has enhanced the emphasis on the quantity and quality of client case studies provided by service providers to differentiate in Portfolio Attractiveness. Some capabilities are now more important to clients than they were 12 months ago. For example, technical knowledge and practical application of regional sustainability regulations are now essential for delivering strategy services. Due to recalibrating the criteria and weightings, some providers have moved lower on the Portfolio Attractiveness axis or have been removed from the grids. Each quadrant's Observation section offers specific details on how the evaluation process has been adjusted in 2025.
- Digital sustainability markets are highly dynamic and include many submarkets. Our research groups several submarkets into a single quadrant, which means different types of providers are shown together, and not all providers in a grid are competitors; some serve as partners within a larger ecosystem. It is essential to read each quadrant's Observation section and contact ISG to understand the different dynamics within each one.

After a year of portfolio recalibration, leading providers now focus on fewer, stronger solutions driven by GenAI that link regulatory compliance to value creation. Clients increasingly integrate sustainability into transformation programs and expect measurable gains in cost, risk and growth — from smarter energy assets to auditable CSRD-grade ESG data across complex supply chains at the product and component levels.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Europe Quadrants

Page 1 of 7

	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services
ABB	Not In	Product 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	Product Challenger	Not In	Not In
Arup	Contender	Not In	Not In
Atos	Contender	Product Challenger	Leader
AWS	Not In	Not In	Market Challenger
Bain & Company	Product Challenger	Not In	Not In

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Europe Quadrants

Page 2 of 7

	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services
BCG	Leader	Not In	Not In
Bosch	Not In	Contender	Not In
BT	Not In	Not In	Contender
Bureau Veritas	Contender	Not In	Not In
Buro Happold	Contender	Contender	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

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Europe Quadrants

Page 3 of 7

	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services
Cyient	Not In	Contender	Not In
Dell Technologies	Not In	Not In	Contender
Deloitte	Leader	Leader	Product Challenger
Deutsche Telekom/T-Systems	Leader	Leader	Leader
DNV	Contender	Not In	Not In
DXC Technology	Not In	Contender	Product Challenger
ENGIE	Not In	Market Challenger	Not In
Ericsson	Not In	Contender	Not In
ERM	Leader	Not In	Not In
EY	Leader	Leader	Product Challenger

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Europe Quadrants

Page 4 of 7

	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services
Fujitsu	Not In	Product Challenger	Product Challenger
GE Vernova	Not In	Market Challenger	Not In
Genpact	Rising Star ★	Not In	Not In
GEP	Contender	Not In	Not In
Globant	Not In	Not In	Contender
Google	Not In	Not In	Market Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Not In	Contender	Product Challenger
Hitachi Digital Services	Product Challenger	Leader	Product Challenger
Honeywell	Not In	Product Challenger	Not In

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Europe Quadrants

Page 5 of 7

	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services
HPE	Not In	Not In	Contender
IBM	Leader	Leader	Leader
ICF	Product Challenger	Not In	Not In
Infosys	Leader	Leader	Leader
Jacobs	Contender	Not In	Not In
Johnson Controls	Not In	Market Challenger	Not In
Kearney	Contender	Not In	Not In
KPMG	Product Challenger	Product Challenger	Product Challenger
Kyndryl	Not In	Product Challenger	Leader
L&T Technology Services	Not In	Leader	Not In

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Europe Quadrants

Page 6 of 7

	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services
Lenovo	Not In	Not In	Market Challenger
LTIMindtree	Contender	Product Challenger	Rising Star ★
MarshMcLennan	Contender	Not In	Not In
McKinsey & Company	Leader	Not In	Not In
Microsoft	Not In	Not In	Leader
Mott MacDonald	Contender	Contender	Not In
Mphasis	Not In	Contender	Product Challenger
NTT DATA	Product Challenger	Leader	Leader
PwC	Leader	Leader	Product Challenger
Ramboll	Contender	Not In	Not In

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Europe Quadrants

Page 7 of 7

	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services
Rockwell Automation	Not In	Product Challenger	Not In
Schneider Electric	Product Challenger	Leader	Product Challenger
Siemens	Not In	Rising Star ★	Not In
South Pole	Contender	Not In	Not In
Sweco	Contender	Contender	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger
Unisys	Not In	Not In	Contender
Wipro	Leader	Leader	Leader
WSP	Market Challenger	Market Challenger	Not In

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Global Quadrants

Page 1 of 6

	Data Advisory and Integration Services	Data Platforms and Managed Services
Accenture	Leader	Leader
Achilles	Not In	Contender
AFRY	Contender	Not In
AMCS	Not In	Product Challenger
Anthesis	Product Challenger	Not In
Atos	Product Challenger	Contender
AWS	Not In	Market Challenger
Benchmark Gensuite	Not In	Contender
Capgemini	Leader	Leader
CGI	Contender	Not In

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Global Quadrants

Page 2 of 6

	Data Advisory and Integration Services	Data Platforms and Managed Services
CO2 AI	Not In	Contender
Cognizant	Leader	Leader
Cority	Market Challenger	Leader
Deloitte	Leader	Not In
Deutsche Telekom/T-Systems	Rising Star ★	Product Challenger
EcoVadis	Not In	Leader
ERM	Product Challenger	Product Challenger
ESG Book	Not In	Product Challenger
EY	Leader	Not In
Fujitsu	Contender	Not In

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Global Quadrants

Page 3 of 6

	Data Advisory and Integration Services	Data Platforms and Managed Services
GE Vernova	Contender	Contender
Genpact	Leader	Leader
Globant	Contender	Not In
Google	Not In	Market Challenger
HCLTech	Leader	Leader
Hexaware	Contender	Not In
Hitachi Digital Services	Product Challenger	Product Challenger
Honeywell	Not In	Contender
IBM	Leader	Leader
Infosys	Leader	Leader

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Global Quadrants

Page 4 of 6

	Data Advisory and Integration Services	Data Platforms and Managed Services
Intelex	Not In	Contender
KPMG	Product Challenger	Not In
Kyndryl	Contender	Product Challenger
LTIMindtree	Leader	Product Challenger
Microsoft	Not In	Leader
NTT DATA	Product Challenger	Product Challenger
Oracle	Not In	Market Challenger
osapiens	Not In	Product Challenger
Persefoni	Not In	Contender
PwC	Leader	Not In

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning - Global Quadrants

Page 5 of 6

	Data Advisory and Integration Services	Data Platforms and Managed Services
Salesforce	Not In	Market Challenger
SAP	Not In	Leader
Schneider Electric	Product Challenger	Product Challenger
ServiceNow	Not In	Contender
Sphera	Market Challenger	Leader
Sweep	Not In	Contender
TCS	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger
UL Solutions	Not In	Market Challenger
Unisys	Contender	Not In

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

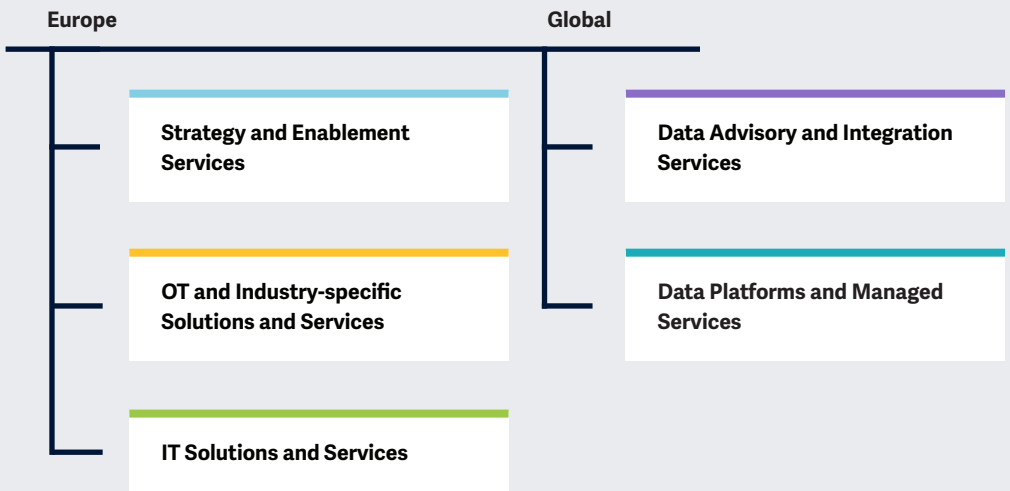
Provider Positioning - Global Quadrants

Page 6 of 6

	Data Advisory and Integration Services	Data Platforms and Managed Services
VelocityEHS	Not In	Market Challenger
Watershed	Not In	Product Challenger
Wipro	Leader	Leader
Wolters Kluwer	Market Challenger	Leader
Workday	Not In	Market Challenger
Workiva	Not In	Leader

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

The study assesses **digital sustainability solutions,** focusing on advisory services, AI, IoT, SaaS platforms and managed services.



Simplified Illustration Source: ISG 2025

Definition

The ISG Provider Lens™ Digital Sustainability 2025 study offers business and IT decision-makers an independent evaluation of providers and vendors across each core digital capability area of sustainability.

These providers possess the ability to deliver solutions and services within one or more of the following:

- Digital sustainability strategy and transformation enablement services
- Operational and information technologies (OT and IT) and implementation services to deliver sustainability outcomes
- Advisory and integration services to operationalize ESG data flows
- Platforms and services to manage ESG data

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

This study covers the U.S., Europe and certain Global markets and serves as an important decision-making tool for positioning key relationships and go-to-market considerations. ISG advisors and enterprise clients use information from these reports to evaluate their current vendor relationships and potential engagements.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five (spell out the number of quadrants: do not use a digit) quadrants for services/solutions: Strategy and Enablement Services, OT and Industry-specific Solutions and Services, IT Solutions and Services, Data advisory and integration services and Data platforms and managed services.

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

- Transparency on the strengths and weaknesses of relevant service providers
- A differentiated positioning of providers by segments
- Focus on the U.S., Europe and certain Global markets

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).

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

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 a 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.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

IT Solutions and Services

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 their foundational IT capabilities by adopting practices that align with digital and environmental regulations. They face challenges in reducing energy use, managing e-waste and ensuring ethical sourcing. In response to this, providers are evolving their IT services to become more sustainable, as enterprises expect this as part of continuous improvement programs.

CIOs, CTOs and other executives

Should read this report to understand how sustainable IT strategies, such as energy-efficient infrastructure, green coding and responsible outsourcing, can reduce emissions, cut costs and future-proof operations against evolving ESG regulations and stakeholder expectations. They can also learn about the latest techniques being used by providers to deliver more sustainable AI.

Technology and IT managers

Should read this report to explore how optimizing compute, storage and network resources, adopting circular device practices and integrating sustainability data into decision-making can reduce energy use and prepare IT systems for future sustainability benchmarks and digital compliance standards. The report also highlights the latest provider approaches to building bias-aware AI and integrating accessibility functionality.

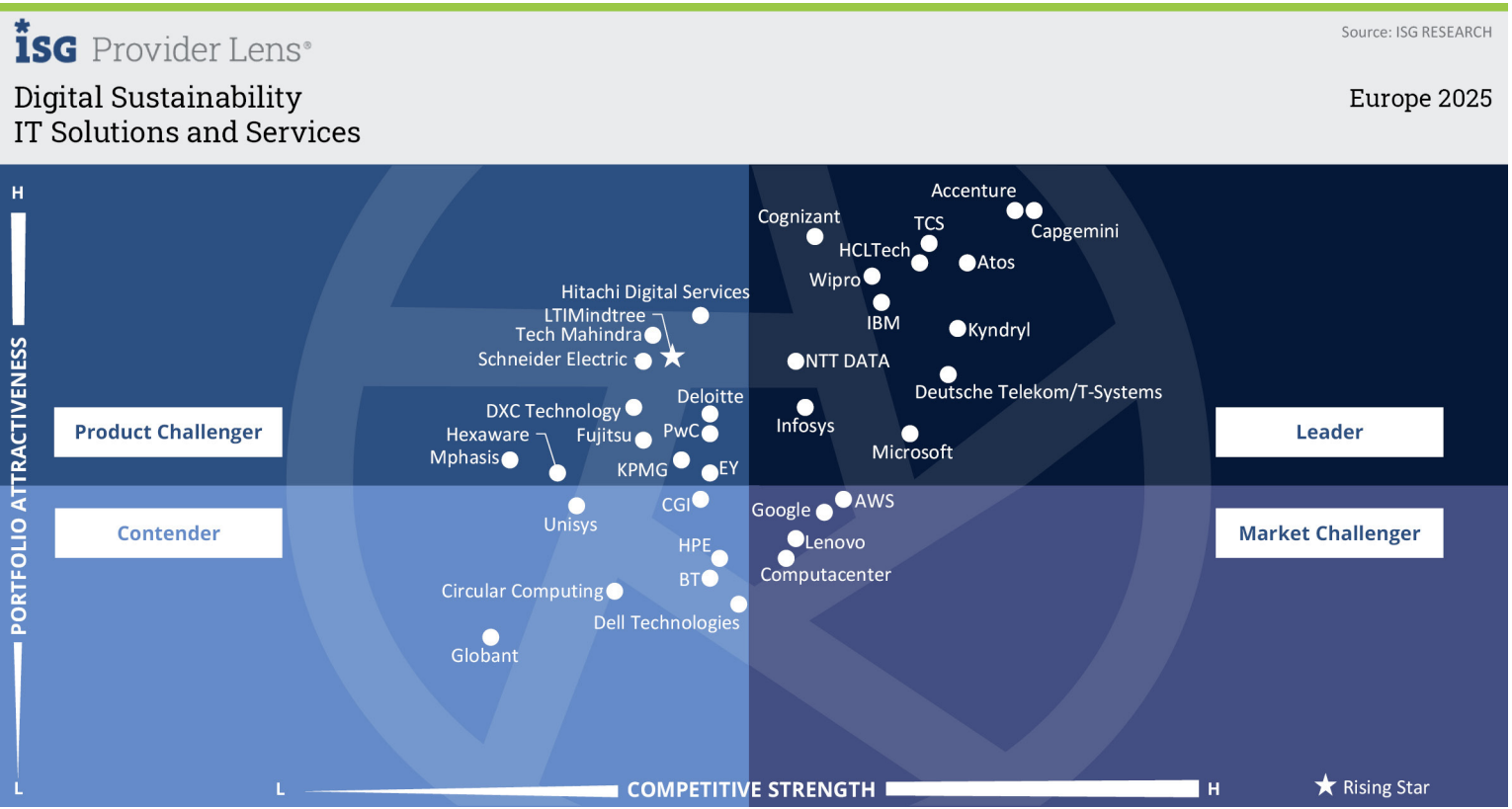
Environmental and sustainability professionals

Within enterprises should read this report to understand how to align their goals with IT initiatives that support carbon reduction, renewable energy adoption and circularity. Understanding key trends such as AI sustainability and device lifecycle management enables stronger ESG performance, especially in industries where IT represents a large proportion of the overall ESG footprint.

Government and regulatory bodies

Should use this report to shape policies that promote sustainable IT practices by tracking opportunities and challenges faced by enterprises and providers in areas such as data centers, device sourcing and software design. When optimally calibrated for the current and future trends, these policies can achieve the balance of ambition and pragmatism that drives long-term digital sustainability.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.



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

Matt Warburton

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Definition

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

The solutions and services considered for this quadrant are targeted at improving the environmental and social sustainability of IT assets and services such as compute, storage and network infrastructure, end-user devices, software, and AI and ML algorithms.

Common use cases include reducing energy consumption and maximizing the use of renewable energy in data centers. Other critical priorities include implementing energy-efficient system architectures and coding for applications and algorithms.

This quadrant also evaluates the social considerations of IT use. This includes assessing solutions and services that enhance IT accessibility for the physically challenged and neurodiverse members of the workforce.

This quadrant also evaluates the social considerations of IT use. This includes assessing solutions and services that enhance IT accessibility for the physically challenged and neurodiverse members of the workforce.

Eligibility Criteria

1. Ability to **rationalize and rearchitect application portfolios** to optimize utilization and **reengineer applications, AI and ML algorithms and data platforms** for energy efficiency and bias prevention.
2. Enable organizations to **rearchitect, optimize and manage compute, storage and network** resource consumption.
3. **Manufacture and supply end-user devices or offer end-of-life services** for end-user devices, that maximize circular resource flows and enable inclusivity.
4. Provide services to assess and **optimize the aggregated and individual utilization of end-user devices**, including offering guidance on how to adapt policies and sourcing criteria to prolong device utilization and lifespan.
5. Have horizontal and foundational IT capabilities, including industry-agnostic platform capabilities that **enable organizations to use all technologies more sustainably**.
6. Offer **IT outsourcing services with integrated sustainability commitments**, such as reducing emissions generated by the service over time.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Observations

The global market for solutions that improve IT sustainability remains the smallest among the five quadrants, valued at $1 billion or 3 percent of the total digital sustainability market. European buyers account for about 42 percent of this value and 62 percent of sustainable IT case studies in ISG's digital sustainability database. Although the demand for these services in Europe is the highest globally, budgets remain limited, with most buyers expecting IT services to become more sustainable through continuous improvements.

The main exception to this trend is the demand for energy-efficient AI, where organizations acknowledge the link between compute, emissions and costs for well-designed, trained and operated algorithm models. Responsible AI is also a common investment, as private and public sector organizations evaluate their exposure to AI developed with inadequate practices and governance.

Recent features addressing AI's resource demands include technologies that optimize deployment by choosing cost-effective models for tasks and Retrieval-Augmented Generation (RAG) methods that improve efficiency by accessing data only when necessary. A key challenge that buyers continue to face is accurately measuring and reducing emissions from cloud providers due to insufficiently granular data representing all three scopes. Sixty-nine percent of providers are above the midpoint on the Portfolio Attractiveness axis, showing that sustainable IT has become an essential service despite its small market size.

From the 70 companies assessed for this study, 36 qualified for this quadrant, with 13 being Leaders and one Rising Star.

Accenture helps in estimating and reducing IT carbon emissions across applications, infrastructure and devices. Its accelerators and tools are designed to offer rapid ROI. The company maintains strategic partnerships with SAP and other key players for sustainable IT solution development.

Atos delivers sustainability-integrated IT services across Europe, including eco-designed infrastructure, digital workplace optimization and AI-enabled software engineering.

Capgemini conducts carbon emissions analysis and applies lifecycle assessment methodologies for decarbonization. It focuses on workforce engagement to drive sustainable change.

Cognizant's portfolio includes application resource optimization, hybrid cloud sustainability, infrastructure utilization, e-waste management and green IT portfolio management.

Deutsche Telekom/T-Systems offers cloud computing solutions designed to be more energy efficient and sustainable, with a focus on clients' needs through its cocreation advisory initiative.

HCLTech's Net Zero Intelligent Operations solution integrates IT and building data to provide a holistic view of IT sustainability. The company offers green software engineering, along with tools and services for efficient, low-carbon software development.

IBM has deep expertise in energy-efficient technologies that extends to optimizing resource usage and managing energy consumption. Its offerings include IBM Turbonomic for cloud-based application optimization.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Infosys offers a comprehensive portfolio for IT sustainability, including carbon footprint solutions, cloud migration and equipment management. It also uses blockchain for product traceability and renewable energy certificates.

Kyndryl focuses on IT infrastructure sustainability, helping clients optimize energy use, reduce carbon footprints and improve resource management through partnerships that enhance data center efficiency and promote renewable energy adoption.

Microsoft offers carbon-neutral solutions through its Cloud for Sustainability platform, supporting emission reduction with tools such as Azure for resource optimization and Microsoft 365 for energy-efficient IT infrastructure and application management.

NTT DATA offers sustainability solutions tailored to IT/OT convergence. Its services include optimizing energy consumption, integrating AI-driven insights to support sustainable manufacturing and providing cloud migration strategies aligned with net-zero goals.

TCS offers over 200 sustainability solutions, including TCS Envirozone™ for tracking and mitigating supplier sourcing risks and TCS Clever Energy™, a platform for reducing energy consumption and carbon emissions.

Wipro integrates ESG across its services, leveraging partnerships for its Impact Intelligence program. The company offers robust solutions for financial services and a comprehensive value chain framework to support sustainable technology.

LTIMindtree (Rising Star) delivers modular, AI-powered IT sustainability solutions across infrastructure, applications and data platforms, supported by a practitioner-led team and a growing portfolio of proprietary intellectual property.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Leader

"Atos delivers IT services designed for sustainability, differentiating through circular workplace services, high-performance computers, green software engineering and accessibility features. These complement its broader OT and data capabilities."

Matt Warburton

Atos

Overview

Atos Group is headquartered in Bezons, France. It has more than 70,000 employees across 67 countries under two brands — Atos for services and Eviden for products. In FY24, the company generated €9.6 billion in revenue, with Tech Foundations as its largest segment. Atos leads in sustainable IT, with over a decade of experience in digital decarbonization and extensive operations in Europe, which represents the vast majority of its sustainability revenue. The company's sustainability services cover the full IT stack, from infrastructure to end-user devices, and are supported by proprietary platforms and strategic partnerships.

Strengths

Comprehensive portfolio: Atos' sustainable IT offering, including solutions such as Sustainable Digital Workplace and partnerships with Greenspector, SAP and Microsoft, provides a broad approach to understanding and transforming the enterprise technology landscape. It includes assessments for IT's entire carbon footprint, modernization strategies, energy-efficient high-performance computing, application and AI optimization and device lifecycle asset management. It also provides actionable dashboards for different IT users and leaders, and it pioneered decarbonization-level agreements in IT outsourcing, a contractual commitment to reduce emissions in managed services over time.

Sustainable workplace expertise: Atos offers a suite of services to optimize end-user devices for sustainability at scale. For example, under a recent contract for the U.K. Department for Environment, Food and Rural Affairs (DEFRA), Atos will deliver the most environmentally friendly and sustainable U.K. government digital workplace solution available, with circular economy principles embedded throughout. This approach will include rethinking device lifecycle refresh and adopting refurbished laptops with circular computing. These are high-performing devices that help reduce carbon emissions and e-waste.

Caution

To strengthen its position in Europe, Atos needs to efficiently integrate Atos and Eviden portfolios. Creating an overarching portfolio brand, streamlining delivery and clarifying solution ownership will enhance client confidence and support cost competitiveness across European engagements.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Appendix

The ISG Provider Lens® 2025 – Digital Sustainability study analyzes the relevant software vendors/service providers in the Europe market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Iain Fisher

Lead Author:
Matt Warburton

Editors:
Upasana Hembram and Padma Mohapatra

Research Analyst:
Bhuvaneshwari Mohan and Monica K

Data Analyst:
Akshay Rathore

Consultant Advisors:
Tanja Kruse-Jones and Dorotea Baljević

Project Manager:
Sreya Ghosh

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of, Information Services Group Inc.

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 November 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

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Lead Author

Matt Warburton

Principal Consultant and Digital Sustainability Lead

Matt Warburton specializes in the research and delivery of digital sustainability solutions, with nearly 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.

Research Analysts

Bhuvaneshwari Mohan

Lead Analyst

Bhuvaneshwari is a Lead Analyst at ISG Research, specializing in authoring ISG Provider Lens® quadrant reports on Cybersecurity Solutions and Services for the U.K. and U.S. Public Sector regions. She plays a pivotal role in advancing research, analysis, and insights for IPL studies focused on Digital Sustainability Services, Supply Chain Services, and Global Capability Centers (GCC) Services. With a decade of industry experience, Bhuvaneshwari is a versatile research professional skilled in developing enterprise context, analyzing market trends and opportunities, competitive benchmarking, and talent intelligence.

She contributes articles on emerging topics and collaborates with ISG advisors to deliver custom research reports. Prior to joining ISG, she honed her research expertise in sales enablement roles within IT and digital engineering service providers.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Research Analyst

Monica K
Manager, Research

Monica K is a Manager, Research at ISG, where she also serves as a digital expert. In her current role, Monica co-authors Provider Lens® studies, as well as the global summary report and the enterprise perspective for the cybersecurity, ESG, and sustainability markets. Her responsibilities include managing comprehensive research projects, collaborating with internal stakeholders on a wide range of consulting initiatives, and leading the research analyst team to ensure high-quality deliverables.

Prior to joining ISG, Monica worked at a research firm specializing in IoT, product engineering, vendor profiling, and talent intelligence. With more than a decade of experience in technology, business, and market research, Monica brings deep expertise and valuable insights to ISG's clients.

Study Sponsor

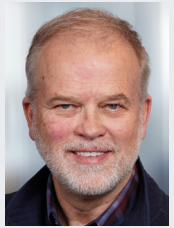
Iain Fisher
Director, Research

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 analysing 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. He provides major market insights leading to changes to business models and operating models to drive out 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.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

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.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners.
ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

© 2025 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

ISG Provider Lens®

DECEMBER, 2025

REPORT: DIGITAL SUSTAINABILITY

© 2025 Information Services Group, Inc.
All Rights Reserved