

# Digital Sustainability

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



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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.

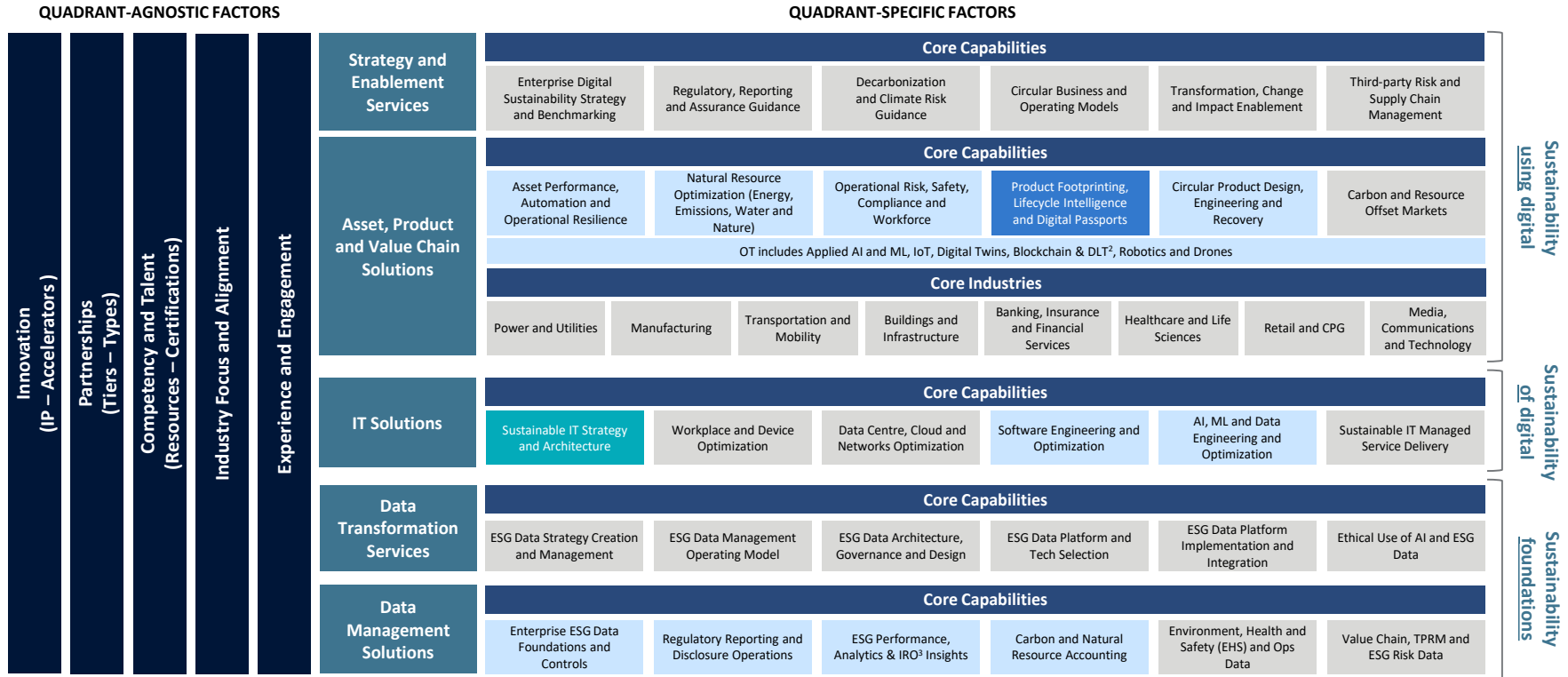
The shift toward embedding sustainability into enterprise-wide strategies requires organizations to invest in digital capabilities that reduce cost, emissions and resource use, while ensuring ethical operations.

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.



# Digital Sustainability IPL 2026 - Study Scope



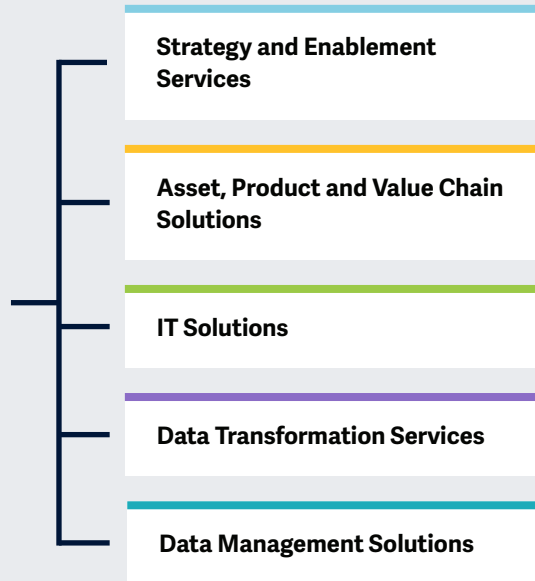
Added
Updated
Moved between Quadrants

1 Non-exhaustive. Excluded from ISG study scope: Renewable energy generation and storage technologies; for example, solar, batteries, CCAS, green hydrogen and nuclear.  
 2 Distributed Ledger Technologies. 3 Issues, Risks and Opportunities.



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

Simplified Illustration Source: ISG 2026



### Scope of the report

**The ISG Provider Lens® Digital Sustainability study offers the following to business and IT decision-makers:**

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including Europe, the U.S. and Global.

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



## Strategy and Enablement Services

### Definition

This quadrant assesses providers that offer strategic advisory services to help organizations understand how technology can enable them to achieve their sustainability goals, including compliance with regulations and standards, decarbonization, and mitigation of climate, resilience and brand risks. It also covers advisory on other ESG topics such as circular business and operating models, human rights, third-party risks, corporate risks and governance.

The services typically focus on identifying an organization's material sustainability goals and integrating them with its digital ambitions and broader business strategies. Providers use digital tools and accelerators to analyze, define and enable strategic outcomes across value chains.

This quadrant also assesses providers on their advisory and managed services that enable organizations to implement their transformation plans. These services include organizational change management, procurement and supplier management, and impact measurement.

### Eligibility Criteria

1. Assess and recommend ways to **integrate sustainability and technology at the enterprise strategy level** across different industry value chains
2. Accelerate and augment the creation and management of enterprise sustainability strategies using digital solutions for key processes such as:
  - **materiality assessments**
  - **target setting**
  - **regulatory compliance and reporting**
  - **scenario modeling**
3. Advise on how **business, governance, operating and organizational models** must adapt to leverage digital sustainability capabilities, including transformation program design and delivery and change management
4. Provide digitally guided advice on global, national and industry-specific **sustainability policies, regulations, frameworks and standards**, with audit and assurance services
5. Offer **competitive market intelligence** on sustainability and ESG across industries, including peer analysis and recommendations for improvement
6. Design, adapt and implement **sustainability transformation, third-party risk management** and supplier engagement programs



### Definition

This quadrant assesses providers that deliver industry-specific digital solutions and services to improve the sustainability of assets, products, processes and value chains across eight industry groups (see Eligibility Criteria).

By deploying solutions and services, including OT, that integrate sustainability data with decision support tools, organizations can reduce costs, improve operational resilience, optimize natural resource use, minimize environmental impact and enhance workforce safety and well-being.

This approach requires improved workforce access to granular, contextualized and real-time operational data across workflows, products and components. IoT- and AI-powered simulation and autonomous capabilities augment human judgment.

Providers in this quadrant also offer consulting and engineering services; OT solutions using AI, ML, digital twins, IoT, blockchain, drones, light detection and ranging (LiDAR), geospatial, robotics and satellites; analytical solutions, such as lifecycle assessment tools; and managed services.

### Eligibility Criteria

1. Offer solutions and services tailored to organizations and use cases in the following industries:
  - power and utilities
  - manufacturing
  - transportation and mobility
  - buildings and infrastructure
  - banking and financial services
  - healthcare and life sciences
  - retail and consumer packaged goods
  - media, communication and technology
2. Offer technologies that improve the outcomes of key metrics such as:
  - energy
  - water
  - nature
  - safety
  - workforce
3. Provide solutions that enable monitoring, predictive maintenance, digital twins, robotics, autonomous operations, resource recovery and use of low-emission energy sources
4. Offer process re-design and reengineering services that use process tools to understand, design and implement increasingly sustainable, circular and compliant industry value chains across environmental and social use cases
5. Deliver product- and value chain-level capabilities such as **product lifecycle assessments (PLA)**, **product carbon footprints (PCF)**, **digital product passports (DPP)** and other product traceability solutions



### 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



### Definition

This quadrant assesses providers that offer strategic advisory and engineering services, enabling organizations to plan, design and build the transformation of their ESG data management, operating models and processes.

Providers must deliver scalable, automated and auditable data systems that meet an organization's transformation objectives such as reducing regulatory compliance costs, improving risk management, enhancing business intelligence and unlocking the opportunities of circular business models.

Services assessed for this quadrant include defining the ESG data management strategy; designing and architecting key workflows for ingestion, cleansing, categorization and alignment to relevant reporting taxonomies; and conducting data integrity, quality and gap analyses, with assessments and recommendations.

The quadrant also assesses services and tools that assist organizations in developing frameworks and determining governance for the ethical use of AI and ESG data sets.

### Eligibility Criteria

1. Develop and deliver **ESG data management strategies, roadmaps and operating models** that enable organizations to achieve their overall sustainability objectives
2. Design ESG data **architectures, governance models, taxonomies, controls and data foundations** that support scalable, auditable and trusted data management
3. Offer **solution evaluation and selection services** to determine the optimal data platforms and technologies that meet organizations' ongoing ESG data management needs
4. **Integrate data from internal systems of record**, including:
  - ERP
  - HCM
  - supply chain management (SCM)
  - GRC
  - third-party risk management (TPRM)
  - customer relationship management (CRM)
  - building management (BM) systems and other physical assets systems such as manufacturing execution systems (MES) supervisory control and data acquisition (SCADA)
5. Provide integration services to aggregate and utilize **external ESG data** effectively, including from suppliers and ecosystem partners
6. Establish **frameworks for the ethical and inclusive use of ESG datasets**, including those used for AI model training and deployment



### Definition

This quadrant assesses data solutions and managed service providers that equip organizations with the ongoing capabilities to monitor, analyze and utilize ESG data across their value chain. The primary purpose of these offerings is to operate as the organizations' ESG system of record, making ESG data available in the right context for other sustainability initiatives.

Achieving sustainability objectives requires ESG data from every part of the value chain. However, much of this data lacks granularity or accuracy, cannot be easily adapted to sustainability frameworks and use cases, exists in isolated spreadsheets or is missing.

With considerable uncertainties in corporate sustainability reporting requirements, organizations must invest in dynamic, scalable data foundations that allow GenAI and agentic AI to analyze and prepare data while retaining transparency and auditability.

Providers assessed for this quadrant also offer data solutions, platforms and/or managed services.

### Eligibility Criteria

1. **Continuously capture, organize, govern, calculate, control and make ESG data available as a trusted and auditable system of record across different industry value chains**
2. **Operate as the ESG system of record, providing:**
  - sustainability data lakes/hubs
  - taxonomies
  - calculation engines
  - emissions factor management
  - data quality
  - lineage and controls
  - evidence collection workflows
  - user access controls and auditability
3. **Accommodate all ESG data types, including, but not limited to:**
  - carbon
  - water
  - waste
  - nature and biodiversity
  - environmental health and safety (EHS)
  - third party and supplier
  - social and community
  - corporate governance and risk
4. **Manage and monitor ESG data from internal and external sources such as ERPs, HCMs, SCMs, GRCs, TPRMs, CRMs, BMs, MES or SCADA systems**
5. **Enable and accelerate recurring regulatory and voluntary reporting**, disclosures, analytics, dashboards and impact, risk and opportunity insights
6. **Provide sustainability performance management; impact, risk and opportunity (IRO) insights**, optimization analysis; benchmark insights; data quality and reporting; and monitoring and alerts
7. **Deliver recurring enablement, operational support or managed services**





## Quadrants by Region

As part of this ISG Provider Lens® quadrant study, we are introducing the following five quadrants on Digital Sustainability 2026:

Quadrant	Europe	U.S.	Global
Strategy and Enablement Services	✓	✓	
Asset, Product and Value Chain Solutions	✓	✓	
IT Solutions	✓	✓	
Data Transformation Services			✓
Data Management Solutions			✓



The research phase falls in the period between May and July 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in October 2026.

Milestones	Beginning	End
Survey Launch	May 5, 2026	
Survey Phase	May 5, 2026	June 2, 2026
Sneak Preview	August 2026	September 2026
Press Release & Publication	October 2026	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider’s position in the IPL quadrant and the awards.

Please refer to the [ISG Provider Lens® 2026](#) research agenda to view and download the list of other studies conducted by ISG Provider Lens®.

**Access to Online Portal**

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

**Buyers Guide**

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Digital Sustainability 2026 IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the [Buyers Guide research schedule](#).

**Research Production Disclaimer:**

ISG collects data for the purposes of conducting research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens® reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



### ISG Star of Excellence® — Call for nominations

The Star of Excellence® is an independent recognition of excellent service delivery based on the Voice of the Customer concept. ISG has designed the Star of Excellence® program to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts are continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

Our vision for the Star of Excellence® is to become acknowledged as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement, please use the "Nominate (for Providers)" section on the Star of Excellence® [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:  
[star@cx.isg-one.com](mailto:star@cx.isg-one.com)



**ISG Star of Excellence**



The ISG Provider Lens® 2026 – Public Sector Services and Solutions study analyzes the relevant software vendors/service providers in the Australia, Brazil, U.K. and U.S. 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 May 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.



## Contacts For This Study

### Study Sponsor



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**Study Sponsor**



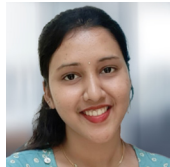
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**Project Manager**



**ISG Provider Lens® Involvement Program**

ISG Provider Lens® offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process. The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

**ISG Advisors for this study**



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**If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.**

\* Rated in previous iteration

ABB*	Bosch*	EcoVadis*	Honeywell*
Accenture*	BT*	ENGIE*	HPE*
AECOM*	Bureau Veritas*	Ericsson*	IBM*
AFRY*	C3.AI	ERM*	ICF*
Akkodis*	Capgemini*	EY*	Infosys*
AMCS*	CGI*	Fujitsu*	InteleX*
Anthesis*	Circular Computing*	GE Vernova*	Jacobs*
Arup*	Cognizant*	Genpact*	Johnson Controls*
Arvato Systems	Computacenter*	GEP*	Kearney*
Atos*	Cority*	GHD*	KPMG*
AWS*	Cyient*	Google*	Kyndryl*
Bain & Company*	Dell Technologies*	HCLTech*	LTTS*
BCG*	Deloitte*	Hexagon	Lenovo*
BDO	DNV*	Hexaware*	Locus Technologies*
Benchmark Gensuite*	DXC Technology*	Hitachi Digital Services*	LTM*



## Invited Companies

Lufthansa Industry Solutions  
MarshMcLennan\*  
McKinsey & Company\*  
MESA\*  
Microsoft\*  
Minsait (Indra Sistemas)  
Mott MacDonald\*  
Mphasis\*  
Nasdaq  
NTT DATA\*  
Onestream  
Oracle\*  
osapiens\*  
Position Green  
PwC\*  
Ramboll\*  
Rockwell Automation\*  
RSM US

Salesforce\*  
SAP\*  
Schneider Electric\*  
ServiceNow\*  
Siemens\*  
SLR Consulting  
Sphera\*  
Sweco\*  
Sweep\*  
T-Systems  
TCS\*  
Tech Mahindra\*  
ThoughtWorks  
UL Solutions\*  
Unisys\*  
VelocityEHS\*  
Verizon\*  
Verso

Watershed\*  
Wipro\*  
Wolters Kluwer\*  
Workday\*  
Workiva\*  
WSP\*



## 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](#).

## 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 and cities) and higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).

## 

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](http://isg-one.com).





**APRIL, 2026**



**REPORT: DIGITAL SUSTAINABILITY**