ïSG Provider Lens™

Digital Sustainability

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

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The Digital Sustainability 2025 study assesses the providers offering digital solutions and services that enable organizations to achieve increasingly sustainable operations and value chains.

In the past five years, sustainability has moved from an optional concept to a core business strategy for many organizations worldwide. Having set targets to address the environmental, social, and governance (ESG) aspects of sustainability, these organizations have been forced to navigate complex and volatile regulatory and stakeholder attitudes.

However, the economic element of sustainability remains the same; organizations continue to drive improved financial results by optimizing natural capital consumption, managing climate and other sustainability risks and addressing stakeholder demands for increasingly ethical practices and products.

Organizations are, therefore, integrating sustainability into overall strategies. The scale and complexity of risks and opportunities necessitate significant investments

in enhancing digital capabilities, both technological and personnel. Leading organizations have broadened their digital transformation programs to integrate these digital capabilities and adapted their operating models to empower their workforce to make informed choices toward sustainability.

This study gives organizations the market intelligence they need to identify the providers that may be most suitable for their needs.

The study in 2024 revealed that while the number of new solutions continues to grow, the growth rate slowed with the commoditization and maturity of the offerings.
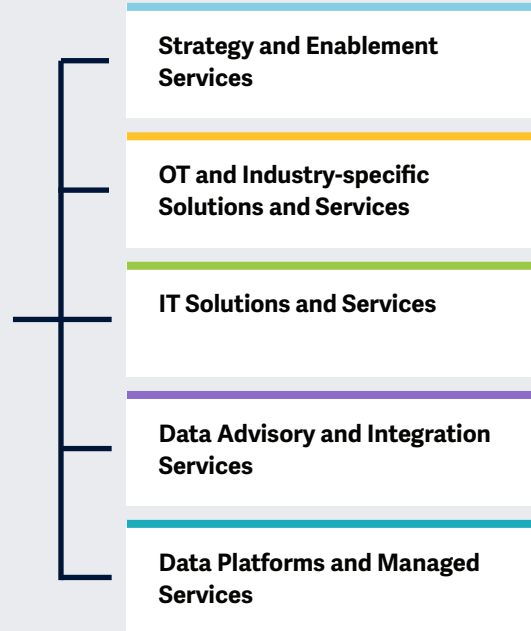
In 2025, the study will assess the way changing market dynamics impact provider offerings and how they are achieving differentiation.

Blueprint[1] Digital Sustainability (DS)

Left vertical columns:
- Innovation (IP – Accelerators)
- Partnerships (Tiers – Types)
- Competency and Talent (Resources – Certifications)
- Industry Focus and Alignment
- Experience and Engagement

Strategy & Enablement Services

Core Capabilities

| Digital Sustainability Strategy | Regulatory Guidance | Decarbonization & Climate Risk Guidance | Circular Business & Operating Models | Competitive Market Intelligence | Transformation & Enablement Programs | Procurement & Supplier Mgmt. Practices |

OT & Industry-specific Solutions & Services

Core Capabilities

| AI & ML | IoT | Digital Twins | Blockchain & DLT[2] | Robotics & Drones | Circular Product Design & Engineering | Sustainable Delivery Practices | Resource Consumption Value Chain Mapping | Renewable Energy Sourcing |

Core Industries

| Power & Utilities | Manufacturing | Transportation & Mobility | Buildings & Infrastructure | Banking, Insurance & Financial Services | Healthcare & Life Sciences | Retail & CPG | Media, Comms & Tech |

IT Solutions & Services

Core Capabilities

| Workplace Devices | Data Centres & Cloud | Connectivity & Networks | Application Engineering | AI and ML Engineering | IT Managed Service Delivery |

Data Advisory & Integration Services

Core Capabilities

| ESG Data Strategy Creation | ESG Data Architecture & Design | ESG Data Integration | ESG Data Platform & Tech Selection | ESG Data Management Operating Model | ESG Data Decision Support Design | Ethical Use of AI and ESG Data |

Data Platforms & Managed Services

Core Capabilities

| Enterprise ESG & IRO[3] Data Management | Regulatory Monitoring & Reporting | ESG Risk & Adverse News Monitoring | Carbon & Natural Resource Accounting | Environment, Health & Safety (EHS) Management | Operations and Value Chain Integrations | DPP, PLA and PCFs[4] | ESG Data Interpretation Services |

Right vertical labels:
- Sustainability by using digital
- Sustainability of digital
- Sustainability Foundations

1 Non-exhaustive. Excluded from ISG study scope: Renewable energy generation and storage technologies e.g., solar, batteries, CCAS, green hydrogen, nuclear etc.
2 Distributed Ledger Technologies. 3 Issues, Risks and Opportunities. 4 Digital Product Passports, Product Lifecycle Assessments, Product Carbon Footprints.

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

Simplified Illustration Source: ISG 2025

Strategy and Enablement Services

OT and Industry-specific Solutions and Services

IT Solutions and Services

Data Advisory and Integration Services

Data Platforms and Managed Services

Scope of the report

The ISG Provider Lens™ Digital Sustainability 2025 study offers 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 the U.S., Europe and certain Global markets.

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 sustainability goals — such as efficient compliance with regulations, ambitious net zero goals and diversity, equity and inclusion (DEI) targets Other ESG topics addressed include circular products and business models, human rights and modern slavery, and corporate risk and governance.

Their services are typically focused on identifying and integrating the material aspects of an organization's sustainability goals with its digital ambitions and broader business strategies. The providers use digital tools and accelerators to deliver outcomes across an organization's operations and value chain.

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

Eligibility Criteria

1. Ability to assess and recommend ways to **integrate sustainability and technology at the enterprise strategy level** across different industry value chains.

2. Ability to accelerate and augment the creation and management of enterprise sustainability strategies using digital solutions for key processes such as **materiality assessments, regulatory compliance, scenario modelling, net-zero pathway assessments, climate risk analysis and circular business model creation.**

3. Offer advice on how **operating and organizational models** must adapt to leverage digital sustainability capabilities, including transformation program design and delivery, and change management.

4. Render digitally guided advice on global, national and industry-specific **sustainability policies, regulations, frameworks and standards,** with audit and assurance services.

5. Provide **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.

OT and Industry-specific Solutions and Services

Definition

This quadrant assesses providers that offer OT solutions and implementation services, designed to create more sustainable operations and processes unique to an industry.

By deploying OT that integrates sustainability data with decision support tools, organizations can reduce costs, improve operational resilience, optimize natural resource usage, reduce environmental impact and improve workforce safety and well-being.

This approach requires improved workforce access to granular, contextualized and real-time operational data across processes; in this case, IoT- and AI-powered simulation and autonomous capabilities augment human judgment.

The providers assessed for this quadrant offer consulting, engineering, OT solutions (using AI, ML, digital twins, IoT, blockchain, drones, light detection and ranging (LiDAR), geospatial, robotics, satellites or similar capabilities) and/or managed services.

Eligibility Criteria

1. **Offer process re-design and re-engineering services,** including using process tools to understand, design and implement increasingly sustainable industry value chains in environmental and/or social use cases.

2. Offer industry-specific technologies that **enhance the sustainability of physical assets** (such as vehicles, energy or utility plants, buildings, factories, and spaces), including optimizing for the use of low-emission energy sources.

3. Provide technologies that **enhance the sustainability of operational processes** and are industry-specific, focusing on clients 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; and media, communication, and technology.**

4. Ability to provide solutions and advisory services, enabling clients to source **renewable and low-emission energy** and high-quality carbon offsets.

IT Solutions and Services

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 GreenIT. 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.

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 maximise 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.

Data Advisory and Integration Services

Definition

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

The providers need to deliver scalable, automated and auditable data systems to meet an organization's transformation objectives. These include reduced regulatory compliance costs, improved risk management, enhanced business intelligence, and unlocking the opportunities of circular and other transformative business models.

Services assessed for this quadrant include: creating the overall ESG data management strategy; designing and architecting key workflows for ingestion, cleansing, categorization and alignment to relevant reporting taxonomies; and ensuring data integrity and quality, gap analysis, assessments and recommendations to address issues.

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

Eligibility Criteria

1. Develop and deliver ESG **data strategies, plans, architectures and operating models that** organizations need to achieve their overall sustainability objectives.

2. Provide **integration services** to aggregate and utilize enterprise internal and external ESG data effectively.

3. Offer **solution assessment services** to determine the optimal data platforms or managed service to meet an organization's ongoing ESG data management needs.

4. **Integrate data from systems of record** such as ERP, HCM, supply chain management (SCM), Governance, Risk and Compliance (GRC), third party risk management (TPRM), customer relationship management (CRM), building management (BM) systems and other management systems for physical assets, for example, Manufacturing Execution Systems (MES) or Supervisory Control and Data Acquisition (SCADA) systems.

5. Offer services that **create the frameworks for ethical and inclusive use of ESG data sets,** including those for **AI model training and use.**

Data Platforms and Managed Services

Definition

This quadrant assesses data platform and managed service providers that enable organizations with the ongoing capabilities to monitor, analyze and utilize ESG data across their value chain to comply with regulations and achieve other sustainability objectives.

ESG data is required from every part of the value chain to achieve efficient compliance, decarbonization targets and other sustainability goals. However, much of the required data is not granular or accurate, 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 solutions.

With emerging technologies such as generative AI (GenAI), agentic AI, and traditional AI and ML, organizations must optimize investments to expand and scale their data capabilities at a pace that allows them to derive value without incurring new technical debt.

Providers assessed for this quadrant offer SaaS platforms and/or managed services that leverage AI and advanced analytics.

Eligibility Criteria

1. **Capture, organize, analyze and audit ESG data** across different industry value chains.

2. **Manage and monitor ESG data from internal and external sources** such as ERPs, HCMs, SCMs, GRCs, TPRMs, CRMs, BMs, MES or SCADA systems.

3. Accelerate and **enhance reporting for voluntary and mandatory sustainability requirements,** including regional and industry-specific variants.

4. Provide **sustainability performance management,** optimization analysis, benchmark insights, data quality and reporting, and monitoring and alerts.

5. Create and manage **Product Lifecycle Assessments** (PLA), **Product Carbon Footprints** (PCF) and **Digital Product Passports** (DPP)

6. Enable organizations to derive **Impact, Risk and Opportunity (IRO) insights** from their data and continually make informed decisions.

7. Provide **best-in-breed SaaS solutions** for distinct or industry-specific data sets, for instance, carbon accounting; biodiversity management; Environmental Health and Safety (EHS); or Diversity, Equity and Inclusion (DEI) insights.

ISG's Digital Sustainability Framework

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the Digital Sustainability market and helps connect them to digital solutions
- Represents the entire value chain of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities, with unique market-leading providers and solutions
- Green tiles represent an area in which ISG Software Research will produce a Buyer's Guide in 2025

Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on Digital Sustainability — 2025:

Quadrant	Europe	U.S.	Global
Strategy and Enablement Services	✔	✔	
OT and Industry-specific Solutions and Services	✔	✔	
IT Solutions and Services	✔	✔	
Data Advisory and Integration Services			✔
Data Platforms and Managed Services			✔

The research phase falls in the period between July and September 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in January 2026.

Milestones	Beginning	End
Survey Launch	July 9, 2025	
Survey Phase	July 9, 2025	August 15, 2025
Sneak Preview	October 2025	
Press Release & Publication	January 2026	

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

Please refer to the link to view/download the ISG Provider Lens™ 2025 research agenda.

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 IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research published in 2024. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

ISG collects data for the purposes of writing 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 concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, 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 will be 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 context of 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.

It is our vision that the Star of Excellence™ will be recognized 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 Client nomination 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

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens 2025 – Digital Sustainability research study analyzes the relevant software vendors/service providers in the global 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:
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Research Analyst:
Bhuvaneshwari Mohan

Data Analyst:
Akshay Rathore

Project Manager:
Sreya Ghosh

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The research and analysis presented in this study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

Contacts For This Study

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Data Analyst

Sreya Ghosh
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ISG Provider Lens Advisors 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 advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures 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 QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT 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.

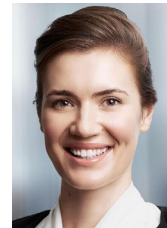## ISG Advisors to this study

Kathy Rudy

Chief Data and Analytics Officer

Tanja Kruse Jones

Service Line Director, Adaptive Organizations

Dorotea Baljević

Principal Consultant, Engineering Services

Invited Companies

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*	Deutsche Telekom*	Google*
Accenture*	BT*	DNV*	Greenly*
Achilles*	Bureau Veritas*	DXC Technology*	HCLTech*
AECOM*	Buro Happold*	EcoVadis*	Hexaware*
AFRY	Capgemini*	ENGIE	Hitachi Digital Services*
Akkodis*	CGI*	Ericsson*	Honeywell*
AMCS*	Circular Computing*	ERM*	HPE*
Anthesis*	CO2 AI*	ESG Book*	IBM*
Apple	Cognizant*	EY*	ICF International*
Arup*	Computacenter*	Fujitsu*	Infosys*
Atos*	Cority*	GE Vernova*	Intelex*
AWS*	Cyient*	Genpact*	Jacobs*
Bain & Company*	Datamaran	GEP*	Johnson Controls*
BCG*	Dell Technologies*	GHD*	Kearney*
Benchmark Gensuite*	Deloitte*	Globant*	KPMG*

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* Rated in previous iteration

Kyndryl*

Lenovo*

LTIMindtree*

LTTS*

MarshMcLennan*

McKinsey & Company*

Microsoft*

Mott MacDonald*

Mphasis*

NTT DATA*

Oracle*

osapiens

Persefoni*

PwC*

Ramboll*

Rockwell Automation

Salesforce*

SAP*

Schneider Electric*

ServiceNow*

Siemens*

South Pole*

Sphera*

Sweco

Sweep

TCS*

Tech Mahindra*

T-Systems/Detecon*

UL Solutions

Unisys*

VelocityEHS*

Verizon*

Watershed*

Wipro*

Wolters Kluwer*

Workday*

Workiva*

WSP*

Zones*

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, while 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.

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ISG

ISG (Nasdaq: III) is a 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.

ISG Provider Lens™