

# Oil and Gas Industry – Services and Solutions

A research report comparing provider strengths,  
challenges and competitive differentiators



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## Introduction

The landscape of the oil and gas market in 2025 suggests robust supply; however, geopolitical tensions and market volatility expose a fragility that can abruptly alter supply dynamics. Stakeholders in the energy sector must remain vigilant and adaptive to these conditions.

Producers and refiners should brace themselves for supply-demand fluctuations and geopolitical uncertainties that could disrupt operations. Challenges including price volatility, high tariffs, regulatory pressures and much focus on sustainability require the oil & gas (O&G) industry to embrace innovative technologies to maintain a competitive edge and effectively address global energy requirements.

Developments in technology are revolutionizing the O&G value chain, ushering in enhanced efficiency, safety, environmental sustainability and profitability. Key advances driving this transformation include AI, Industrial IoT (IIoT), advanced analytics and digital twins. Investments in predictive maintenance, data integration and automation are

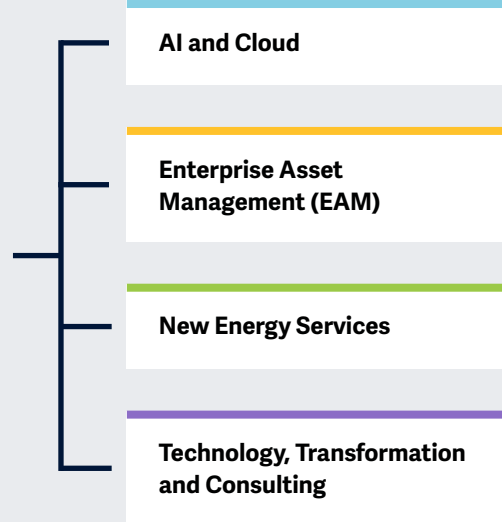
resulting in significant cost savings. Safety is being prioritized through VR training, real-time monitoring systems and AI-driven incident prevention strategies. Also, despite regulatory shifts in the U.S., O&G companies are committing to long-term investments in alternative energy projects to meet future demands.

Consequently, the O&G industry is interweaving digital transformation with sustainability efforts, expecting substantial benefits in terms of cost reduction and operational performance and positioning itself for environmental stewardship. Companies prioritizing innovation and adaptability are likely to lead this evolving energy landscape.



This study aims to understand the **oil & gas industry's** challenges and assess provider capabilities to address enterprise needs.

Simplified Illustration Source: ISG 2025

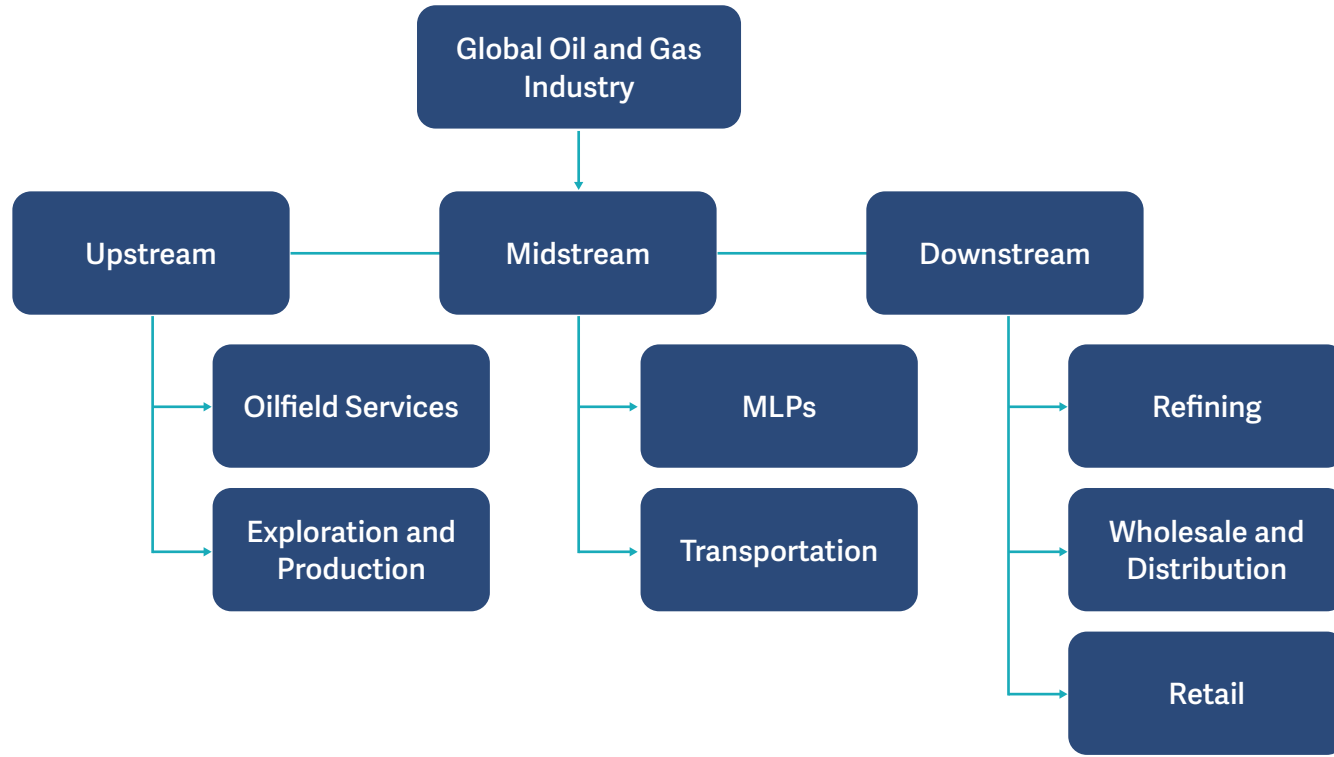


**The ISG Provider Lens® Oil & Gas Industry – Services and Solutions 2025 study offers the following to business and IT decision-makers:**

- 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 the market in the Americas

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.





## Blueprint of Oil & Gas Industry

### Blueprint\* – Oil & Gas

Innovation (IP – Accelerators )	Partnerships Tiers – Types)	Competency and Talent (Resources – Certifications)	Industry Focus and Alignment	Experience and Engagement	AI and Cloud	Capabilities							
						Cloud Migration	Cloud Storage	Cloud Security	Hybrid Cloud Services	AI/GenAI and ML	Data Governance	Analytics Solutions	RPA
					Enterprise Asset Management	Capabilities							
						Asset Health Management	Controls Management	Field Service Management	Predictive Maintenance	ALM	Monitoring	Fleet Monitoring	CMMS
					New Energy Services	Capabilities							
						Digital Energy Transition	Sustainability Program Tracking	Climate Risk Management	Emission Management	Energy Management	CCUS and Hydrogen Solutions	Hedging and Pricing	Charging Infrastructure
					Technology Transformation and Consulting	Capabilities							
						Digital Twins/Digital Thread	Application Development and Maintenance	End-user Computing	ERP	ETRM	Cost and Productivity	Legacy Systems Modernization	IT/OT Integration

\*Non-exhaustive



### Definition

This quadrant assesses providers offering AI tools and cloud services to O&G companies across various segments. The industry generates significant volumes of production, operational and accounting data. Historically, the companies collected and analyzed data, deriving insights and making decisions in silos. With AI and other related technologies, they can collect and analyze data in the cloud, leveraging AI tools to gain actionable insights for timely asset maintenance, reduced unexpected outages and enhanced decisions. Seamless and secure integration of large volumes of historical O&G data is daunting.

Cloud computing allows O&G companies to scale data management and storage, achieving much flexibility in infrastructure costs. The high computing power of cloud platforms supports processes such as intelligent management of physical assets, ensuring operational efficiency. Cloud computing enables companies to remotely monitor and maintain wells, fields and production units.

### Eligibility Criteria

1. **Successful AI and cloud projects** with minimum **2-3** O&G firms
2. **Ability to offer a combination (if not all)** of the following to enterprises **across the value chain** with expertise in the assessed region:
  - \* Data storage
  - \* Data management, analytics and governance
  - \* Data visualization and transformation
  - \* Data warehousing, federation and migration
  - \* Analytics and business intelligence (BI) tools
  - \* Image recognition
  - \* AI and ML Ops
  - \* Custom AI apps
  - \* Decision support systems
3. Experience in **optimizing business processes** for leading firms
4. **Expertise in using advanced technologies**, including automation, analytics, IoT, AI, cybersecurity, cloud computing and blockchain
5. **Partnerships** with industry associations, regulatory bodies, technology firms and O&G startups
6. **Referenceable case studies** for services/solutions across the O&G value chain, involving **AI, GenAI and other new age technologies**
  - \* RPA
  - \* Cloud adoption, migration and security
  - \* Cloud optimization
  - \* IoT and edge
  - \* Supply chain solutions





## Enterprise Asset Management (EAM)

### Definition

This quadrant assesses providers that offer EAM services and solutions to clients in the O&G industry. The services cover asset lifecycle management; maintenance, repair and overhaul (MRO); labor management; control management; supply chain solutions; cloud services; asset health management; Geographical Information System (GIS); digital enablement service; and remote monitoring. These services enhance asset life and performance and reduce operational costs.

The O&G industry is among the most asset-intensive industries in the world, requiring substantial CapEx to purchase, maintain and repair assets. O&G companies require effective EAM solutions, combining software and services, to optimize the use of assets throughout their lifecycle, increase production

uptime and reduce operational costs. EAM solutions track asset health across locations, helping with maintenance; planning and scheduling; and environmental, health and safety (EHS) initiatives.

### Eligibility Criteria

1. Experience in EAM in the **regional O&G industry**
2. **Successful EAM projects** with minimum **2-3** oil & gas firms
3. Offerings in **at least three of the areas** below:
  - \* Asset performance management (APM)
  - \* Asset lifecycle management (ALM)
  - \* Asset investment planning (AIP)
  - \* Failure prediction
  - \* GIS
  - \* Digital EAM solutions based on AI and ML
  - \* Work and labor management, including EHS
  - \* Computerized system for managing maintenance
- \* Regulatory compliance
- \* Field services management
- \* Controls management
- \* Warranty management
- \* Inventory and spare parts management
- \* Analytics and reporting
- \* Work order management
4. Expertise in **next-generation technologies** — automation, analytics, IoT, AI, cybersecurity, cloud computing and blockchain
5. **Partnerships** with industry associations, regulatory bodies, technology firms and O&G startups
6. **Referenceable case studies** for services/solutions across the O&G value chain, involving **AI, GenAI and other new age technologies**





### Definition

This quadrant assesses providers offering new energy transition services to O&G companies worldwide. These services empower enterprises to navigate energy transition, meet net-zero carbon transition targets, apply energy efficiency initiatives, ease carbon capture and storage (CCS) and hydrogen production, and establish business models that align with the evolving energy ecosystem.

Energy transition requires long-term strategies and focused investments. Several energy companies continue to focus on compliance, net zero and decarbonization, investing in ESG initiatives. Many have successfully created green portfolios. However, requirements such as making onshore wind and solar the most economically competitive forms of energy in

many markets, driving renewable levelized cost of energy (LCOE) and achieving zero-emission targets remain elusive. Critical initiatives are needed to incorporate both decarbonized and sustainable energy sources.

### Eligibility Criteria

1. Ability to **offer the following energy transition services** to O&G companies in one or more areas across the value chain, with expertise in the assessed region:
  - \* Digital energy transition
  - \* Analytics and AI/GenAI
  - \* Climate risk management
  - \* Health and environmental services
  - \* Emission management and reporting
  - \* Advisory, process management and technology implementation services
  - \* Sustainable supply chains
  - \* Scope 3 emissions accounting
  - \* AI-driven greenhouse gas (GHG) accounting
  - \* Carbon capture technologies
2. Demonstrate **deep domain knowledge of the O&G industry** and local regulatory and compliance requirements
3. Experience in **optimizing business processes** and supporting O&G companies in their energy transition journeys
4. Expertise in **leveraging emerging technologies**, including automation, analytics, IoT, AI/GenAI, cybersecurity, cloud computing and blockchain
5. **Strong partnerships with industry** associations, regulatory bodies, technology firms and O&G startups
6. **Referenceable case studies**, showcasing strengths and capabilities in the industry
  - \* Hydrogen production and infrastructure solutions
  - \* AI and ML for new energy optimization
  - \* Digital twins for new energy assets



### Definition

This quadrant assesses providers that offer consulting and digital transformation services that help O&G companies modernize and transform their IT infrastructure to streamline operations, improve efficiency and support business transformation initiatives. The offerings include application development and maintenance (ADM), infrastructure services (data center management, cloud and network solutions, workplace support and cybersecurity) and systems integration involving new applications across the value chain. These services enable companies to ensure compliance, minimize costs, optimize assets and maximize customer satisfaction.

O&G firms aim to achieve transformation by simplifying processes and through extensive re-engineering, using digital tools that align with their strategic objectives to improve revenue, optimize costs, achieve operational excellence and enhance process efficiency.

### Eligibility Criteria

1. Initiatives in **business and operations strategy**, change management and end-to-end transformation
2. Experience in aligning **IT operating models** with changing business demands (such as GCCs, nearshoring, offshoring and agility)
3. Ability to **offer a combination (if not all)** of the following to enterprises across the value chain:
  - \* Cost and productivity
  - \* Net-zero and decarbonization strategies
  - \* Regulatory, compliance and market design advisory
  - \* Digital strategy and road map development
  - \* Cloud migration and infrastructure modernization
  - \* Enterprise data management and analytics platforms
  - \* AI and ML integration
  - \* Workforce digital enablement solutions
  - \* Change management
  - \* Training, onboarding and knowledge automation
  - \* GenAI for digital twin and asset optimization
  - \* Blockchain
  - \* Energy trading and risk management (ETRM)
  - \* ERP
  - \* M&A advisory
  - \* Operational consulting
  - \* Automation
  - \* Industry 4.0 initiatives (IT/OT integration)
  - \* Cybersecurity and OT security
  - \* Omnichannel experience
  - \* CRM systems
  - \* Fuel retailing solutions
  - \* LNG solutions
4. **Partnerships** with industry associations, regulatory bodies, technology firms and O&G startups
5. **Experience in large transition projects** that include post-merger integration, business transformation and cybersecurity
6. **Referenceable case studies** for services/solutions across key areas in the value chain



## Quadrants by Region

As a part of this ISG Provider Lens® quadrant study, we are introducing the following four quadrants in the Oil and Gas Industry – Services and Solutions 2025 report:

Quadrant	Americas
AI and Cloud	✓
Enterprise Asset Management (EAM)	✓
New Energy Services	✓
Technology, Transformation and Consulting	✓





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 14, 2025	
Survey Phase	July 15, 2025	August 22, 2025
Sneak Preview	November 2025	December 2025
Press Release & Publication	January 2026	

Please refer to the [ISG Provider Lens® 2025 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 Oil and Gas Industry 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 2025. 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](mailto:star@cx.isg-one.com)



**ISG Star of Excellence**



The ISG Provider Lens® 2025 – Oil and Gas Industry – Services and Solutions 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.

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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

### Study Sponsor



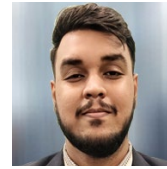
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Swadhin  
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Americas**



Arnab  
Das

**Research Analyst -  
Americas**



Anuj  
Sharma

**Data Analyst**



Tanvi  
Nandvikar

**Senior Project  
Manager**



### 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



Dale  
Hearn

**Partner —  
Energy & Utilities, U.S.**



Brad  
Thompson

**Business Development  
Executive – Sales Market**



## 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

1st choice	Bahwan Cybertek	Centum	Enablon
ABS Group	Bain	CGI*	Encora
Accenture*	BairesDev	CMS IT Services	Endava
Aerodyne Group	Baringa	Coeus Consulting	Engineering Industries eXcellence
Afry	BIP Group	Cognizant*	ERM
Akkodis	Birlasoft*	Cohesive	E-Source
Altair	BJSS	Collabera	Expleo
ALTEN	Bosch SDS	Computacenter	EY*
Ampcus	BPD Zenith	Credera	Firstsource
Arcadis Gen Holdings	Bursys	Cyient*	FMIS
Artech Infotech Systems	C3.ai	Deloitte*	FPT Software
Arvato Systems	Capgemini*	Driivz	FTI Consulting
Aspen Tech	Caresoft Global	DXC Technology*	Fujitsu
Atos	Cascadia Consulting Group	EDAG	Genpact



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\* Rated in previous iteration

Globant	Kyndryl*	Orange Business	Ranosys
GNC Consulting	Leidos	PA Consulting	RPS Group
Happiest Minds	LTIMindtree*	Paradigm Technology	SAP
HCLTech*	LTTS*	Penspen	ScienceSoft USA
Hexaware Technologies	Lumen Technologies	Perficient*	Serco
Hitachi Digital Services*	MACS	Pinnacle	Sigma
Huron Consulting	Mastek	Prolifics	SII
IBM*	Microland*	Prometheus Group	Softdel
Infosys*	Mphasis	Protiviti	Softtek Development
Innova Solutions	Nagarro	Publicis Sapient*	Softserve
Innover Digital	NEC	PwC*	Softtek
Inspirage	N-iX	Qualitest	Sopra Steria
KaarTech	NTT DATA*	Quest Global*	Sphera
KPMG*	Oracle	Ramboll	Stefanini



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\* Rated in previous iteration

Sutherland

YASH Technologies

Synoptek

Zentech

T Systems\*

Zones

TCS\*

Tech Mahindra\*

The Ascent Group

The Silicon BlackGroup

TietoEVERY

ThoughWorks

ValueCoders

Wipro\*

WNS

Workvia

World Wide Technology



### 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.

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](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](https://research.isg-one.com).

### 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](https://isg-one.com).





**JULY, 2025**

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