ISG Provider Lens®

Oil & Gas Industry – Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

BROCHURE | JUNE 2026 | AMERICAS

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Introduction

The oil & gas market in 2026 is characterized by an interplay of energy security priorities, geopolitical dynamics, technological innovations and long-term sustainability objectives. While global supply remains relatively resilient, ongoing geopolitical tensions/conflicts, trade realignments, sanctions and economic uncertainties are resulting in volatility across commodity markets, supply chains and investment decisions. Energy companies must be agile to respond to the fast-changing market.

Producers, refiners and energy traders are facing the pressure of fluctuating demands, price volatility, regulatory requirements, security risks and stakeholder expectations around environmental responsibility. Concurrently, many firms are navigating workforce challenges, aging infrastructure and legacy technology environments.

To stay competitive, oil & gas companies are accelerating investments in digital transformation, with advanced technologies reshaping the industry value chain; AI, GenAI, industrial AI, industrial internet of things (IIoT), advanced analytics, digital twins and cloud platforms are being deployed at scale. Safety and operational integrity remain top industry priorities, with connected worker technologies, real-time monitoring, computer vision, autonomous inspections, robotics and AI-enabled risk management gaining attention.

Moreover, despite evolving regulatory approaches worldwide, oil & gas companies continue to invest in new energy initiatives as a part of portfolio diversification.

At the same time, industry stakeholders are increasingly integrating digital transformation, operational excellence and sustainability into a unified business strategy.

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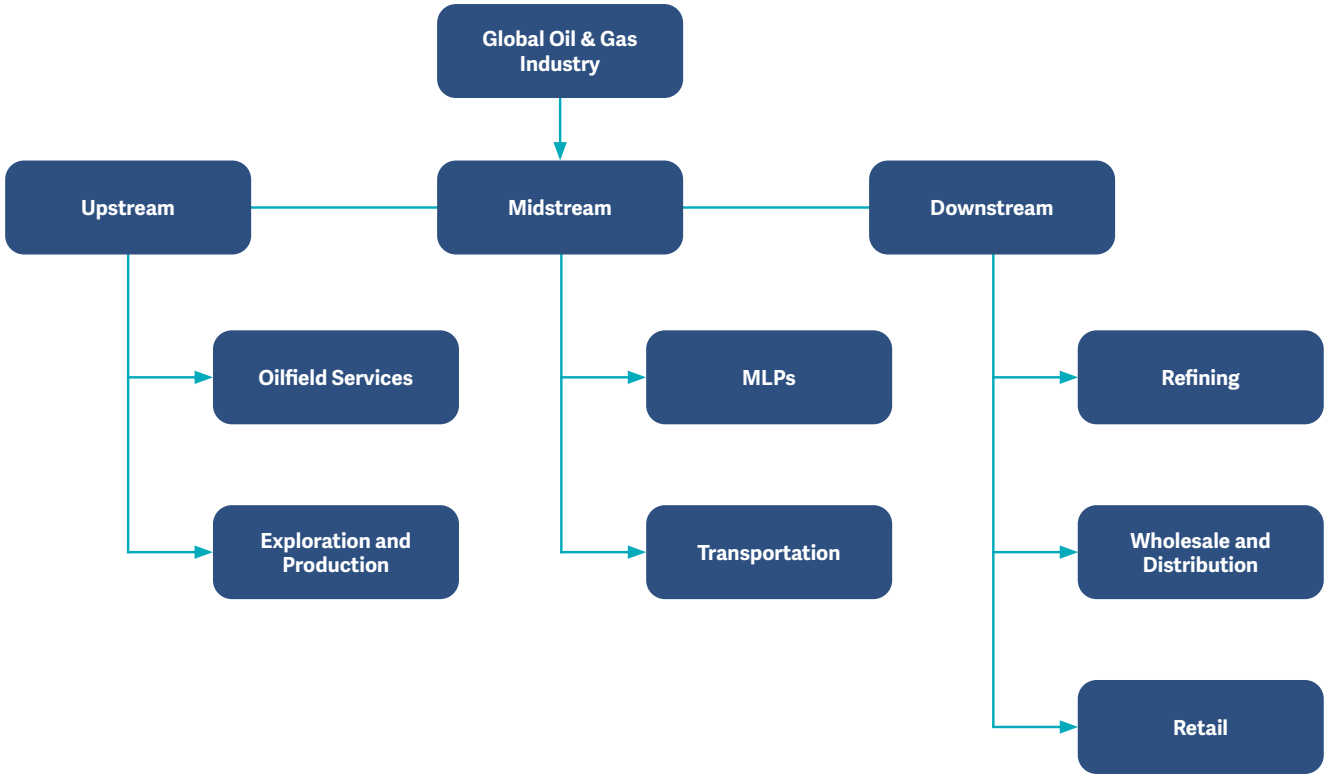
Oil & Gas Industry Structure



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Blueprint – Oil & Gas

Innovation (IP – Accelerators)

Partnerships (Tiers – Types)

Competency and Talent (Resources – Certifications)

Industry Focus and Alignment

Experience and Engagement

AI, Data & Digital Platforms

Capabilities

- Cloud Migration
- Cloud Storage
- Cloud Security
- Hybrid Cloud Services
- AI/GenAI and ML
- Data Governance
- Analytics Solutions
- RPA

Enterprise Asset Management and Intelligent Field Operations

Capabilities

- Asset Health Management
- Controls Management
- Field Service Management
- Predictive Maintenance
- Connected worker
- Drones and Robotics
- Fleet Monitoring
- CMMS
- Remote operations centers

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

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

- **AI, Data and Digital Platforms**
- **Enterprise Asset Management (EAM) and Intelligent Field Operations**
- **New Energy Services**
- **Technology, Transformation and Consulting**

Simplified Illustration Source: ISG 2026

Definition

The ISG Provider Lens® Oil & Gas Industry — Services and Solutions 2026 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.

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Definition

This quadrant assesses providers that support oil & gas companies to harness data, AI and modern digital technologies to improve operational performance, decision-making and business outcomes. Services include data strategy, governance, analytics, cloud platforms, AI/GenAI solutions, ML, industrial intelligence, digital platforms, automation and advanced visualization. With AI and related technologies, oil & gas companies can collect and analyze data in the cloud, leveraging tools that help generate actionable insights for timely asset maintenance, reduced unexpected outages and enhanced decisions.

Providers are evaluated on their ability to integrate enterprise and operational data, enable real-time insights, support predictive and prescriptive decision-making, and build scalable digital foundations. They focus on creating data-driven organizations that accelerate innovation, accrue efficiency, enhance resilience and unlock measurable business value across the energy value chain.

Eligibility Criteria

1. **Have successful AI, data and digital platform projects** with at least two oil & gas firms
2. **Can offer a combination (if not all)** of the following **across the value chain** in the Americas:
   - Data storage
   - Data management, analytics and governance
   - Data visualization and transformation
   - Data warehousing, federation and migration
   - Data governance
   - Analytics and business intelligence (BI) tools
   - Image recognition
   - AI and ML Ops
   - Industrial AI
   - Custom AI apps
   - Decision support systems
   - RPA
   - Cloud adoption, migration and security
   - Cloud optimization
   - IoT and edge
   - Supply chain solutions
3. Have experience in **optimizing business processes** for leading firms
4. **Show expertise in using advanced technologies**, including automation, analytics, IoT, AI, cybersecurity, cloud computing and blockchain
5. **Partner** with industry associations, regulatory bodies, technology firms and startups
6. **Have referenceable case studies** across the oil & gas value chain, involving **AI, GenAI and other next-gen technologies**

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Definition

This quadrant evaluates providers that enable oil & gas companies to optimize asset performance, reliability and field operations through digital technologies, encompassing EAM, predictive maintenance, asset performance management, field service management, reliability engineering, digital twins, connected worker solutions, remote operations, robotics, drones and operational monitoring. Oil & gas companies require EAM solutions that combine software and services to optimize asset use throughout their lifecycle, increase production uptime and reduce operational costs.

Providers are assessed on their ability to improve asset availability, reduce downtime, enhance safety and optimize production. They do so by establishing intelligent, connected operations that leverage real-time data and automation to maximize asset life, ensure operational efficiency, and enhance workforce productivity and overall business performance.

Eligibility Criteria

1. Have experience in EAM **in the O&G** industry in the Americas
2. **Show successful EAM and field operations engagements** with at least **2-3** industry firms
3. Have offerings in minimum **three of the following areas:**
   - Asset performance management (APM)
   - Asset lifecycle management (ALM)
   - Asset investment planning (AIP)
   - Failure prediction
   - Geographic Information Systems (GIS)
   - Digital EAM solutions based on AI and ML
   - Work and labor management, including EHS
   - Computerized system for managing maintenance
   - Regulatory compliance
   - Connected worker
   - Smart field
   - Remote operations centers
   - Drones
   - Robotics
   - Edge computing
   - Digital twin operations
   - Production optimization
4. Demonstrate expertise in **next-gen technologies** — automation, analytics, IoT, AI, cybersecurity, cloud computing and blockchain
5. **Partner** with industry associations, regulatory bodies, technology firms and startups in the oil & gas industry
6. **Have referenceable case studies** across the industry value chain, involving **AI, GenAI and other next-gen technologies**

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Definition

This quadrant assesses providers supporting oil & gas companies in transitioning to diversified, low-carbon energy portfolios with services encompassing carbon capture, utilization and storage (CCUS); hydrogen; renewable energy integration; biofuels; sustainable fuels; carbon management; emissions reduction; energy management; climate risk management; and sustainability strategy. Energy transition requires long-term strategies and focused investments, with several energy companies continuing to focus on compliance, net zero and decarbonization by investing in ESG initiatives.

Providers are evaluated on their ability to support clients in achieving their decarbonization objectives while maintaining operational and financial performance. They focus on enabling energy companies to navigate energy transition, meet regulatory and stakeholder expectations, develop new revenue streams and build sustainable business models for the future.

Eligibility Criteria

1. Have the ability to **offer the following energy transition services** to oil & gas companies in the Americas in one or more areas across the value chain:
   - Digital energy transition
   - Analytics and AI/GenAI
   - Climate risk management
   - Health and environmental services
   - Emission management and reporting
   - Carbon intelligence
   - Carbon marketplaces
   - Advisory, process management and technology implementation services
   - Scope 3 emissions accounting
   - AI-driven greenhouse gas (GHG) accounting
   - Carbon capture technologies
   - Hydrogen production and infrastructure solutions
   - AI and ML for new energy optimization
   - Methane management
2. Demonstrate **deep domain knowledge** and awareness of local compliance requirements
3. Have experience in **optimizing business processes** and supporting oil & gas companies in their energy transition journeys
4. Show expertise in **leveraging emerging technologies**, including automation, analytics, IoT, AI/GenAI, cybersecurity, cloud computing and blockchain
5. **Have strong partnerships with industry** associations, regulatory bodies, technology firms and startups
6. **Showcase referenceable case studies on** strengths and capabilities in the industry

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Definition

This quadrant evaluates providers that support oil & gas companies to modernize technology landscapes, transform business processes and execute large-scale digital transformations. Services include business and technology consulting, IT/OT integration, enterprise architecture, ERP transformation, application modernization, cloud transformation, operating model redesign, change management and industry-specific advisory. Industry firms seek transformation by simplifying processes and through re-engineering with digital tools that align with their objectives to increase revenue, optimize costs, achieve operational excellence and enhance process efficiency.

Providers are assessed on their ability to align technology investments with business objectives, innovations, operational efficiency and transformation risks. They focus on strategic guidance and execution, enabling companies to modernize, adapt to the changing market and achieve a long-term competitive advantage.

Eligibility Criteria

1. Have initiatives in **business and operations strategy,** change management and end-to-end transformation
2. Show experience in aligning **IT operating models** with changing business demands such as GCCs, nearshoring, offshoring and agility
3. Can **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
   - 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
   - Blockchain
   - Energy trading and risk management (ETRM)
   - ERP
   - M&A advisory
   - Operational consulting
   - Industry 4.0 initiatives (IT/OT integration)
   - Cybersecurity and OT security
   - Omnichannel experience
   - CRM systems
   - Fuel retailing solutions
   - LNG solutions
   - GCC strategy and implementation
4. **Partner** with industry associations, regulatory bodies, technology firms and startups
5. **Show experience in large transition projects** that include post-merger integration, business transformation and cybersecurity
6. **Have referenceable case studies** across key areas in the value chain

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Quadrants by Region

As a part of this ISG Provider Lens® quadrant study, we are introducing the following four quadrants in the Oil & Gas Industry — Services and Solutions 2026 study:

Quadrant	Americas
AI, Data and Digital Platforms	✔
Enterprise Asset Management (EAM) and Intelligent Field Operations	✔
New Energy Services	✔
Technology, Transformation and Consulting	✔

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ISG's Oil & Gas Framework

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the ISG Provider Lens® Oil & Gas Industry — Services and Solutions 2026 market study and helps connect them to digital solutions
- Represents the entire value chain of supply and demand in 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

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The research phase falls in the period between June and September 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in January 2027.

Milestones	Beginning	End
Survey Launch	18 June, 2026	
Survey Phase	18 June, 2026	10 August, 2026
Sneak Preview	26 October, 2026	6 November, 2026
Press Release & Publication	November, 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 link to view/download the ISG Provider Lens® 2026 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to the instructions 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 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.

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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

ISG Star of Excellence

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The ISG Provider Lens® 2026 – Oil & Gas Industry — Services and Solutions study analyzes the relevant 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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Priyanka A

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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 June 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.

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ISG Provider Lens® Involvement Program

ISG Provider Lens® offers market assessments incorporating practitionerinsights, reflecting regional focus and independent research. ISG ensuresadvisor 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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Business Development Excecutive

Dale Hearn

Partner,Energy & Utilities Bill

Shannon Collins

Energy Business Development Executive Director

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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

Accenture*
Akkodis
Alten
Apexon
Atos / Eviden
Bahwan Cybertek
Bain & Company
BairesDev
BCG
Birlasoft*
Brillio
BT Business
C3 AI
Capgemini*
CDW
CGI*
ChampionX
CI&T
Coforge
Cognite
Cognizant*
Computacenter
Concentrix
Cyient*
Deloitte*
Devoteam
DXC Technology*
Endava
EPAM Systems
EXL
EY*
FPT Software*
FTI Consulting
Fujitsu*
Genpact*
GEP
Globant*
Happiest Minds
HCLTech*
Hexaware
Hitachi Digital Services*
Huron Consulting*
IBM*
IndX
Infosys*
Insight Enterprises
KaarTech*
Kongsberg Digital
KPMG*
Kyndryl*
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NEC
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* Rated in previous iteration

Oliver Wyman
Orange Business
Perficient
Persistent Systems
Presidio
Publicis Sapient*
PwC*
Qualitest
Quest Global*
Rackspace Technology
Reply
Samsung SDS
Sasken
ScienceSoft USA Corporation
SHI International
Siemens Advanta
SII
Slalom
Sofftek
Softdel
SoftServe
SoftwareOne
Sonata Software
Sonda
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Stefanini
Sutherland
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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™

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ISG

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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.

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ISG Provider Lens®

JUNE, 2026

BROCHURE: OIL & GAS INDUSTRY — SERVICES AND SOLUTIONS

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