ISG Provider Lens™

Sustainability and ESG

IT Solutions and Services

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

Customized report courtesy of:

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European demand continues to accelerate, with provider portfolios recalibrating to key use cases

This year's ISG Provider Lens™ report highlights the rapidly evolving European market for digital solutions intentionally applied to improve an organization's environmental sustainability, social sustainability and/or corporate governance (*digital sustainability solutions*).

Despite economic uncertainty and cost pressures, most European organizations continue to be driven to increase transparency and demonstrate verifiable progress because of:

- Regulatory requirements, such as the Corporate Sustainability Reporting Directive (CSRD), the Corporate Sustainability Due Diligence Directive (CSDDD), the German Supply Chain Due Diligence Act (SCDDA), the Carbon Border Adjustment Mechanism (CBAM), the Taskforce on Nature-related Financial Disclosures (TNFD)
- Frameworks and incentives under the Green Deal and EU taxonomy
- Broader stakeholder expectations of ethical corporate behavior, risk management and growth in the sustainability market

As a result, enterprises are increasing their investments, and the competition to supply digital solutions for these challenges intensifies. ISG research estimates the global digital sustainability market at around $21 billion in 2024 with a compound annual growth rate (CAGR) of around 16 percent, reaching $34 billion by 2027 — roughly three times the growth rate of the overall digital transformation market. Thus, numerous providers from various sectors have entered the space, investing heavily and offering diverse solutions to capture market share.

Following last year's flood of new providers and solutions hitting the market, ISG is beginning to see some consolidation and recalibration

Broad **regulation remains the primary catalyst** of Europe's digital sustainability market.

of provider solution portfolios to better align with market demand and areas where they can succeed. More strategic partnerships have been announced, and acquisitions have continued at a pace similar to 2023. The application of AI and ML to accelerate and enhance the quality of solutions has become foundational rather than exceptional; however, several generative AI (GenAI)-powered solutions emerged this year, differentiating a few of the highest leaders.

Key trends in demand include:

- **Strategy and enablement services:** European organizations prefer technology partners with significant experience in their industry and region's relevant sustainability regulations and frameworks. Buyers increasingly prioritize mitigating risk and unlocking opportunities from the supply chain. As enterprises mature and consulting expertise becomes more stretched, more are performing specific strategic tasks in-house.
- **OT and industry-specific solutions and services:** Solutions leveraging AI, ML and IoT for asset-intensive industries such as power and utilities, manufacturing, transportation and eMobility continue to be most common in this quadrant.
- **IT solutions and services:** Investments in this area continue to be the slowest growing of the four quadrants, with IT's sustainability footprint generally being too small in relation to the enterprise overall to attract significant investment.
- **Data platforms and managed services:** It is the fastest-growing quadrant with the most competitive supply side, driven by global regulation. Service providers lead the market with advisory, integration and managed services that leverage proprietary and best-in-class third-party platforms for ESG data across the value chain. More buyers recognize that no one-size-fits-all solution exists, and operating models heavily influence how data capabilities are acquired and consumed.

More generally, the European market continues to be highly engaged on environmental and social topics. Climate change remains highly visible because of the increasing frequency and severity of extreme weather events and investor consideration of the effect that physical and transitional climate risks have on company financial values. Compliance with human rights regulations, protecting personal data, ethical use of AI, and improving gender equality are highly relevant to European organizations.

ISG's database now monitors over 300 providers of digital sustainability solutions, with 124 featured in the 2024 ISG Provider Lens reports for Australia, Brazil, Europe and the U.S. — up from 105 last year. This surge highlights that even appearing on an IPL positions a provider among the top market players, often within the top 25 percent.

Market demand overview

This section explores how regulation, economic factors and the business case for sustainability influence demand for digital sustainability solutions.

Regulation

The European regulatory landscape continues leading the world and progressing broadly as expected. There has been an ongoing consolidation of standards, with some watering down and further phasing, but each piece is passing its relevant legislative hurdles. Global regulators are watching closely for administrative burden and pushback, which may alter their phasing. The key challenge for European lawmakers is to achieve the balance of gaining more transparency with enabling action. Currently, many organizations are struggling with the reporting burden set to significantly increase, with opponents of this regulation stating concerns that compliance comes at the cost of progress.

From January 2025, the first groups of large publicly listed organizations will release their disclosures against the EU's comprehensive Corporate Sustainability Reporting Directive and prepare for the even further reaching Corporate Supply Chain Due Diligence Directive. For large organizations based or operating in the EU, these regulations dramatically increase the need for scalable and auditable ESG data capabilities. Over 50,000 companies will need to report over 1,100 ESG data points to comply with CSRD over the coming years, and a subset of these will already be reporting on the Germany Supply Chain Due Diligence Act, which took effect in 2024 and has similar requirements to the CSDDD. The potential fines for noncompliance with each European regulation vary by country. Germany is currently the most severe, with fines up to €10 million, 5 percent of the total annual turnover or twice the total profits made/losses avoided due to a breach of CSRD.

Through a mixture of regulatory compliance and international incentives, the EU's Green Deal and Carbon Border Adjustment Mechanism have encouraged companies operating in the EU to adopt digital solutions to drive emission reductions and improve supply chain visibility and efficiency. Further regulation on nature and biodiversity disclosures is on its way.

Beyond governing how organizations report their sustainability efforts, the EU also leads the regulatory landscape for AI use, a highly dynamic and broad aspect affecting social sustainability. The EU AI Act was officially published in the EU's Official Journal, starting the clock on a two-year grace period before high-risk AI systems must comply. The regulation follows a risk-based approach, where AI implementations or systems categorized as high-risk — such as those used in healthcare, transportation and law enforcement — will require austere measures and obligations. The EU AI Act covers definitions, rules, governance and expectations of transparency, and prohibitions. A three-body system will govern the act, including an AI Office to oversee that advanced AI models comply with the EU AI Act, an AI Board to advise the European Commission in terms of implementation of regulation, and an advisory forum to provide technical expertise to the AI Board.

The consequences of noncompliance with the EU AI Act depend on the nature and severity of noncompliance. However, organizations can be fined up to €35 million or 7 percent of worldwide annual turnover for the preceding financial year, whichever is higher.

Along with the existing GDPR and industry standards, such as the European Aviation Safety Agency (EASA) Artificial Intelligence Roadmap and the EU's Operational Design Domain (ODD) for Autonomous Vehicles, the EU AI Act will likely provide clarity on the general rules and risks to AI implementations for each domain.

Economic landscape

Europe has experienced an economic slowdown and inflationary pressures throughout 2024. However, inflation has dropped to under 2 percent for the first time since March 2021, and EU's reliance on imported Russian gas since the beginning of the Ukraine war has dropped from 45 percent in 2021 to 18 percent in June 2024. According to the State of the Energy Union 2024 report, "significant progress has been made on renewable energy:

- In the first half of 2024, half of the EU's electricity generation came from renewable sources.
- Wind power overtook gas to become the EU's second-largest source of electricity behind nuclear energy.
- The EU's greenhouse gas emissions fell by 32.5 percent from 1990 to 2022, while the EU economy grew by around 67 percent in the same period."

The extent of energy security and renewable use available to organizations depends on each European country's energy mix. France, for example, relies on nuclear energy for around 70 percent of its electricity, whereas Poland generates only 12 percent of its energy from renewable sources. The U.K. has recently shut down its last coal-fired power plant, becoming the first of the G7 nations to eliminate coal-powered electricity.

Nonetheless, the demand for energy efficiency, renewable energy integration and energy management solutions continues to increase. The potential for immediate cost savings and

enhanced energy security and resilience are as significant — if not more so — for some organizations as the environmental benefits. Optimizing energy needs and reducing the emissions intensity of energy supply are the major forces behind many use cases for digital sustainability solutions, particularly in the OT segment, across asset-intensive industries such as energy and utilities, mining, transportation and manufacturing.

Circular economy principles and business models continue to gain traction across Europe. The EU has made the circular economy a cornerstone of its environmental policy with initiatives such as the Circular Economy Action Plan, which sets ambitious targets for waste reduction, recycling and resource efficiency. Investment in circular economy initiatives is rising, with public and private sectors allocating significant funds to support research, innovation and infrastructure development. More businesses across various sectors are embracing circular economy principles, from product design and manufacturing to waste management and supply chain optimization.

This is evident in an increasing number of companies adopting circular business models, such as products as a service and leasing and sharing platforms.

Sustainability literacy in Europe remains the highest globally, with consumer awareness of environmental issues and the circular economy continuing to grow. A 2024 PwC study of over 20,000 consumers, with a significant portion of European consumers, found that the intention to purchase more sustainable goods and services is resilient in the face of cost-of-living pressures:

- Eighty five percent of European consumers are experiencing climate change's effects and prioritizing sustainable consumption.
- Consumers are willing to spend an average of 9.7 percent more on sustainably produced or sourced goods, even with cost-of-living concerns.
- Forty six percent are buying more sustainable products to reduce their environmental impact, and 43 percent are making more considered purchases to reduce overall consumption.

These attitudes toward sustainability carry into employment preferences. However, the World Economic Forum (WEF) and European Commission have highlighted the growing skills gap in digital technologies and sustainability expertise, indicating a systemic issue that organizations will likely struggle with in the midterm. While technology service providers are enhancing training programs to address the skills gap, many employees are learning on the job. The result is that service providers deliver inconsistent client experiences, which increases the likelihood of organizations insourcing more work.

The business case for digital sustainability

While avoiding the risk of fines and brand damage from noncompliance with regulatory requirements is certainly a motivator for many investments in digital sustainability solutions, research indicates most European businesses want to become more sustainable anyway — provided they can find a way to do it profitably.

As a result, many European firms are asking key questions: *What is the business case for sustainability- and ESG-related investments? And how can the benefits be quantified?*

This year, ISG found more answers and successful strategies for those questions. A reoccurring theme for many business cases was the integration of sustainability objectives into broader digital transformation programs, as opposed to looking at the business case of sustainability in isolation. Where integrated with broader transformations, the incremental cost of the sustainability initiatives typically represented 5-10 percent of the overall program cost but shared the implementation cost with the wider program. Since many sustainability initiatives also reduce costs, boost customer loyalty and increase talent retention and attraction, this integration creates a true win-win for the enterprise.

At a macro level, more indicators are leading organizations to find ways to decouple financial growth from producing emissions and other negative sustainability impacts. The WEF recently announced that its alliance

of CEO Climate Leaders, which features over 130 companies across 26 countries in 12 industries and employing 12 million people, had reduced emissions by 10 percent while achieving 18 percent revenue growth in three years.

Taking a closer look at the enterprise level, in January 2024, ISG's in-depth survey of digital sustainability priorities, challenges and approaches brought new insights from over 256 participating global organizations. The following key insights are included:

- SME constraints persist, and the demand for green skills and solutions is rising. 76 percent of respondents recognize current or anticipated capability gaps within the next two years, with supply chain management and carbon emissions being the top priority areas.
- On average, the organizations represented in ISG's survey intend to spend approximately $7-8 million per annum on digital sustainability solutions in 2024 — however, this reaches up to an average of $14 million for organizations with revenue above $20 billion, and the largest organizations are spending much more. However, ISG's research indicates that many organizations will require additional funding to achieve their stated targets, such as net-zero goals.
- Providers are a key part of most organizations' strategy for meeting sustainability objectives, with over 60 percent of organizations surveyed expecting to engage them across all key sustainability initiative areas. Most organizations surveyed intend to seek new providers rather than relying purely on expanding the scope of their incumbents.

Investments in digital solutions continue to be widely viewed as an essential means by which to achieve sustainability goals:

- A survey by KPMG found 90 percent of organizations plan to increase their spending on ESG reporting, including on ESG-specific software (40 percent) and AI for data collection (58 percent). The survey also found that 76 percent of the respondents were planning to restructure their teams, and 71 percent planned to outsource ESG reporting within the next three years.
- BCG found that companies with automated digital solutions for measurement are two-and-a-half times more likely to measure their emissions comprehensively, for example, and unlock additional efficiency gains.
- *Capgemini Research Institute found two-thirds of executives agree that data and digital technologies are accelerators for climate tech adoption.*

Crucially, digital solutions are only part of the solution. ISG observes that progressive companies have begun to make more operating model changes as they adapt their organizations to incorporate the capabilities needed:

- More indicators suggest that ESG reporting work is increasingly being centralized under Finance, where existing enterprise data systems reside, and the analytical skill sets required to collate and process enterprise data sets are more abundant. A key example is the increasing popularity of the ESG controller role under the CFO, which mirrors the responsibilities of financial controllers for ESG data and is tasked with ensuring alignment and quality of externally reported ESG data.
- With an increased focus on regulatory compliance while simultaneously trying to deliver improvements, chief sustainability officers (CSOs) and environmental and social SMEs are stretched in more directions than ever. This presents a *buy versus recruit/build* dilemma.
- Increasingly, organizations treat change as *business as usual* and equip themselves accordingly. As knowledge becomes more democratized and accessible through AI, more of what consultants offer — such as benchmarks and frameworks — is available without them. However, some organizations will continue to want external validation of their direction and providers with sufficient expertise will continue to be in demand. All providers must avoid *competence greenwashing*.

- Sustainability initiatives are being driven more centrally from within integrated transformation offices that industrialize delivery alongside digital and other transformation agendas.

Therefore, depending on an enterprise's maturity and operating model, it may be more inclined to purchase software or a service. It also influences the type of enterprise buyer (e.g., chief financial officer [CFO] versus CSO) and their priorities.

Market supply overview

The supply of digital sustainability solutions and services is growing slightly slower than 12 months ago as the market's initial overexpansion begins to recalibrate to the amount of demand.

Two main factors are driving this trend. First, opportunist providers are now focusing on areas with strong demand; second, market consolidation has narrowed the variety of niche providers — although new startups are still emerging, particularly in the data sector.

Overall, ISG observed that more providers shared more case studies with more sustainability outcomes — but there remain wide variances in the volume, quality and distribution of these case studies.

The release of the first genuine GenAI solutions has created a new wave of optimism for how technology will meet sustainability challenges — particularly reporting. A key observation is the need for these AI solutions to be trained and applied to specific use cases and functions — such as compiling ESG reports — to achieve ROI and minimize the solution's negative impact.

Similar to last year, there is an above-average ratio of Leaders to the other segments, and many highly competitive Product Challengers with broad portfolios are striving to take market share from Leaders. This year, there are more Market Challengers, especially in the Data Platforms and Managed Services quadrant, showing that providers with well-defined solutions and strong brand propositions are starting to achieve scale.

New providers have entered each quadrant, with the most found in the OT and Industry-specific Solutions and Services quadrant. Many of these providers are not typically seen in technology markets. However, as every industry undergoes digitalization, consultancies and engineering firms have enhanced their digital capabilities, posing a challenge to traditional IT service providers.

Further observations are provided at the beginning of each quadrant.

Methodology updates

This year's study features several important updates:

- ISG's methodology has increased the focus on the quantity and quality of client case studies supplied by service providers to provide more differentiation in Portfolio Attractiveness. Also, some capabilities are more important to clients than 12 months ago — for example, a deep understanding of relevant sustainability regulations is now critical for providing strategy services.

  As a result of recalibrating the criteria and weightings, some providers have dropped down the Portfolio Attractiveness axis or have been removed from the grids. Each quadrant's Observation section provides specific details on how the evaluation process has been modified in 2024.
- Digital sustainability markets are highly dynamic and encompass numerous submarkets. Our research combines several submarkets into a single quadrant, meaning that different types of providers appear together and not all providers in a grid are competitors; some act as partners within a broader ecosystem. It is important to read each quadrant's Observation section to understand the different dynamics represented within each quadrant.
- The ESG Ratings and Benchmarks quadrant is not featured in 2024's study. This is because ISG observes a reduced reliance on ESG ratings by organizations as they engage more directly with the underlying

data that is most relevant to them. The Data Platforms and Managed Services quadrant incorporates access to underlying data, and the relevant benchmark capabilities have been incorporated into the Strategy and Enablement Services quadrant.

ISG encourages all digital sustainability solutions and services providers to provide feedback and actively participate in ISG's IPLs. ISG is particularly interested in hearing from mid- and small-scale providers challenging for places within the Contender segment.

As these markets continue to evolve, ISG will recalibrate, expand and enhance the depth of market analysis. Please contact ISG to discuss any specific areas of interest.

Regulation, energy costs and sustainability skill set shortages drive European organizations to invest in digital sustainability solutions to meet broad stakeholder expectations. Providers have continued to refine and expand their portfolios to best support clients, although client experience remains variable. The result is a highly competitive solution market, with demand beginning to catch up with provider supply.

Provider Positioning

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	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services	Data Platforms and Managed Services
ABB	Not In	Product Challenger	Not In	Not In
Accenture	Leader	Leader	Leader	Leader
Achilles	Not In	Not In	Not In	Market Challenger
AECOM	Contender	Not In	Not In	Not In
Akkodis	Not In	Market Challenger	Not In	Not In
Anthesis	Rising Star ★	Not In	Not In	Not In
Arcadis	Contender	Not In	Not In	Not In
Arup	Market Challenger	Not In	Not In	Not In
Atos	Not In	Not In	Product Challenger	Not In
Avetta	Not In	Not In	Not In	Contender
AVEVA	Not In	Contender	Not In	Not In

Provider Positioning

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	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services	Data Platforms and Managed Services
AWS	Not In	Not In	Market Challenger	Market Challenger
Bain & Company	Product Challenger	Not In	Not In	Not In
BCG	Leader	Not In	Not In	Not In
Benchmark Gensuite	Not In	Not In	Not In	Product Challenger
Bosch	Not In	Contender	Not In	Not In
BSR	Contender	Not In	Not In	Not In
BT	Not In	Not In	Market Challenger	Not In
Bureau Veritas	Contender	Not In	Not In	Not In
Buro Happold	Contender	Contender	Not In	Not In
Capgemini	Leader	Leader	Leader	Leader
CGI	Market Challenger	Market Challenger	Leader	Not In

Provider Positioning

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	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services	Data Platforms and Managed Services
Circular Computing	Not In	Not In	Contender	Not In
Cloudera	Not In	Not In	Contender	Not In
CO2AI	Not In	Not In	Not In	Contender
Cognizant	Leader	Leader	Leader	Leader
Computacenter	Not In	Not In	Contender	Not In
Cority	Not In	Not In	Not In	Leader
Cyient	Not In	Contender	Not In	Not In
Dell Technologies	Not In	Not In	Market Challenger	Not In
Deloitte	Leader	Leader	Product Challenger	Not In
Deutsche Telekom	Market Challenger	Leader	Market Challenger	Product Challenger
Digital Realty	Not In	Not In	Contender	Not In

Provider Positioning

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	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services	Data Platforms and Managed Services
DNV	Market Challenger	Not In	Not In	Not In
DXC Technology	Not In	Contender	Product Challenger	Not In
EcoVadis	Not In	Not In	Not In	Leader
Equinix	Not In	Not In	Contender	Not In
Ericsson	Not In	Market Challenger	Not In	Not In
ERM	Leader	Not In	Not In	Product Challenger
ESG Book	Not In	Not In	Not In	Leader
ESG Playbook	Not In	Not In	Not In	Product Challenger
Eviden (Atos)	Contender	Contender	Not In	Not In
EY	Leader	Leader	Product Challenger	Not In
FirstCarbon Solutions	Not In	Not In	Not In	Product Challenger

Provider Positioning

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	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services	Data Platforms and Managed Services
Fujitsu	Not In	Product Challenger	Product Challenger	Not In
GE Vernova	Not In	Market Challenger	Not In	Market Challenger
Genpact	Not In	Not In	Contender	Product Challenger
GEP	Contender	Not In	Not In	Not In
Globant	Not In	Not In	Not In	Not In
Google	Not In	Not In	Market Challenger	Market Challenger
Greenly	Not In	Not In	Not In	Contender
HCLTech	Leader	Leader	Leader	Leader
Hexagon	Not In	Market Challenger	Not In	Not In
Hexaware	Not In	Contender	Product Challenger	Not In
Hitachi Digital Services	Product Challenger	Product Challenger	Leader	Product Challenger

Provider Positioning

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	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services	Data Platforms and Managed Services
Honeywell	Not In	Product Challenger	Not In	Market Challenger
HPE	Not In	Not In	Market Challenger	Not In
Huawei	Not In	Not In	Contender	Not In
IBM	Leader	Leader	Leader	Leader
ICF International	Product Challenger	Not In	Not In	Not In
Infosys	Leader	Leader	Leader	Leader
Intelex	Not In	Not In	Not In	Product Challenger
Isometrix	Not In	Not In	Not In	Product Challenger
Jacobs	Market Challenger	Not In	Not In	Not In
Johnson Controls	Not In	Market Challenger	Not In	Not In
Kearney	Contender	Not In	Not In	Not In

Provider Positioning

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	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services	Data Platforms and Managed Services
KPMG	Product Challenger	Product Challenger	Product Challenger	Not In
Kyndryl	Not In	Not In	Leader	Not In
Lenovo	Not In	Not In	Market Challenger	Not In
LTIMindtree	Contender	Product Challenger	Product Challenger	Leader
MarshMcLennan	Contender	Not In	Not In	Not In
McKinsey & Company	Leader	Not In	Not In	Not In
Microsoft	Not In	Not In	Leader	Leader
Mott MacDonald	Contender	Market Challenger	Not In	Not In
Mphasis	Not In	Contender	Product Challenger	Not In
NTT DATA	Not In	Leader	Leader	Product Challenger
Oracle	Not In	Not In	Not In	Market Challenger

Provider Positioning

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	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services	Data Platforms and Managed Services
Protiviti	Contender	Not In	Not In	Not In
PwC	Leader	Leader	Product Challenger	Not In
Ramboll	Contender	Not In	Not In	Not In
Salesforce	Not In	Not In	Not In	Market Challenger
SAP	Not In	Not In	Not In	Leader
Schneider Electric	Leader	Leader	Product Challenger	Not In
ServiceNow	Not In	Not In	Not In	Contender
SG Analytics	Not In	Not In	Not In	Contender
Siemens	Not In	Product Challenger	Not In	Not In
South Pole	Contender	Not In	Not In	Not In

Provider Positioning

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	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services	Data Platforms and Managed Services
Sphera	Not In	Not In	Not In	Rising Star ★
SustainIQ	Not In	Not In	Not In	Contender
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Rising Star ★	Rising Star ★	Product Challenger
T-Systems	Not In	Leader	Leader	Product Challenger
T-Systems/Detecon	Leader	Not In	Not In	Not In
Unisys	Not In	Not In	Contender	Not In
Valantic	Contender	Not In	Not In	Not In
VelocityEHS	Not In	Not In	Not In	Leader
Verizon	Not In	Contender	Contender	Not In

Provider Positioning

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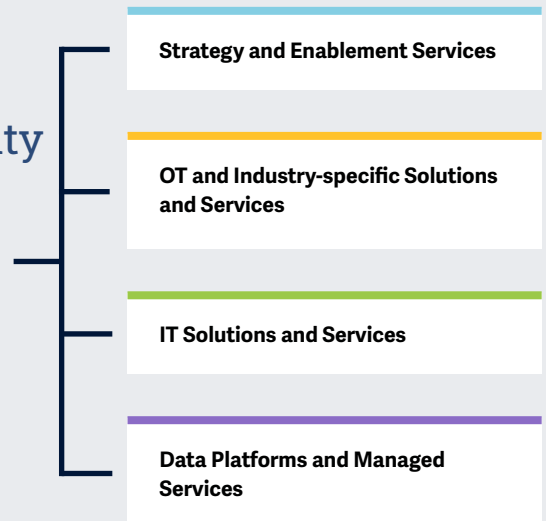
	Strategy and Enablement Services	OT and Industry-specific Solutions and Services	IT Solutions and Services	Data Platforms and Managed Services
Watershed	Not In	Not In	Not In	Contender
Wipro	Leader	Leader	Leader	Leader
Wolters Kluwer	Not In	Not In	Not In	Leader
Workday	Not In	Not In	Not In	Market Challenger
Workiva	Not In	Not In	Not In	Product Challenger
WSP	Market Challenger	Not In	Not In	Not In

This study categorizes the **digital sustainability and ESG market** into consulting, technology solutions and delivery, and managed services.



Simplified Illustration Source: ISG 2024

Definition

The ISG Provider Lens™ Sustainability and ESG 2024 study offers business and IT decision-makers an independent evaluation of providers and vendors across each core digital capability area of sustainability.

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

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

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

The definition of each quadrant is intended to be as mutually exclusive and collectively exhaustive as possible, noting the dynamic nature of the market. However, where provider capabilities and case studies align to multiple quadrants, recognition is given across each quadrant.

Please refer to the Executive Summary and Observation sections of each quadrant for important details of methodology updates in this year's study. This includes adjustment of Portfolio Attractiveness criteria and weightings, a greater explanation of how ecosystems of partnered and competing providers are represented within the same quadrant, and the exclusion of the ESG Ratings and Benchmarks quadrant in the 2024 study.

ISG's Digital Sustainability Framework

To provide more granularity and structure to the digital sustainability market, ISG's Digital Sustainability Framework (DSF) classifies the four quadrants described on the previous page into a 36-dimension visualization of the objectives, initiatives and capabilities organizations use.

The DSF is organized into three layers:

- Six inner hexagons (darkest color) that represent **themes of objectives**.
- Six middle hexagons (lighter color) that represent **themes of initiatives** to achieve the objectives.
- Thirty-six outer hexagons (white fill) represent the **most common initiatives** requiring **digital sustainability capabilities**. They are organized in order of how mature an organization is likely to be before they consider the initiative, with the inner hexagon expected of the least mature organizations and the arrows indicating the direction of initiative/organization maturity.

The following page defines the **six themes of objectives** and how they map to the **four IPL quadrants**.

The **six themes of objectives** are as follows:

1. **Determine compliance requirements and ambition** – Defines the why, what and when of an organization's overall sustainability strategy, including whether compliance alone is the objective or if it wants a competitive advantage. Digital capabilities include legislation monitoring tools, materiality assessment tools and scenario planners.
2. **Retain and grow stakeholder buy-in** – Establishes credibility and comparability of an organization's reporting, including the formats needed for regulatory compliance and retaining stakeholder trust. Digital advisory and managed services play a key role here, providing the external expertise required to understand and align with global best practices, upskill the workforce in technology's role and automate auditability aspects.
3. **Scale visibility of sustainability impacts** – Underpins and enables internal and external reporting through scalable, data-orientated capabilities to engage wider stakeholder groups. Organization-scale data platforms and services are the key digital capabilities required to achieve this objective, with a range of specialist software tools to cover the many data points and modeling requirements.
4. **Deliver sustainable business** – Includes the industry-specific digital capabilities required to achieve sustainability goals within the organization's operations. This involves all industry-specific OT capabilities and advisory services to integrate digital sustainability skills into the operating model and adopt a data-driven sustainability culture through holistic value chain and circular process engineering.
5. **Deliver sustainable IT** – Includes all capabilities required to drive sustainability within a traditional CIO organization, excluding organization OT (see Deliver Sustainable Business). Examples include data center and cloud optimization, green coding and workplace device optimization.
6. **Deliver sustainable supply chain** – Provides transparency and integrity of ESG risks and opportunities within the supply chain. Also includes digital capabilities delivered by a broad range of platforms, advisory and managed services focused on extracting actionable insights from complex data.

Each of these objective themes maps back to the **four IPL quadrants**:

1. **Strategy and Enablement Services** - Objective Themes 1, 2 and 6
2. **OT and Industry-specific Solutions and Services** - Objective Theme 4
3. **IT Solutions and Services** - Objective Theme 5
4. **Data Platforms and Managed Services** - Objective Theme 3

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four quadrants for services/solutions: Strategy and Enablement Services, OT and Industry-specific Solutions and Services, IT Solutions and Services and Data Platforms and Managed Services.

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

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

IT Solutions and Services

Who Should Read This Section

This report is relevant to organizations operating in European industries. It identifies new market trends, strengths, weaknesses and opportunities for service providers offering solutions and services that improve IT sustainability.

European CIOs are increasingly expected to contribute to their businesses' environmental sustainability goals by reducing IT operations' emissions, water and waste. While IT's environmental footprint may form a small proportion of a business's overall footprint, the rise of AI use and the associated increase in data center demand are setting IT on a much steeper trajectory.

IT also plays a key role in ensuring applications are accessible for neuro-diverse individuals and that devices used have not been manufactured by forced labor or resulted from other forms of human rights abuse.

Therefore, CIOs and their teams are increasingly looking to enhance the sustainability of compute, storage, network infrastructure and end-user devices, data software platforms, application architecture, and AI and ML algorithms.

Key use cases revolve around decreasing energy consumption and maximizing renewable energy usage in data centers, whether on premises or cloud-based. Organizations prioritizing sustainable IT seek energy-efficient architectures and programming for applications and algorithms. Providers in this quadrant may offer managed services that focus on minimizing sustainability impacts associated with the devices and services they oversee.

CIOs, CTOs and other executives should read this report to understand how their choices can influence IT's contribution toward enterprise sustainability goals.

IT procurement professionals should read this to understand what services are available to reduce the impact of managed services and hardware.

Technology and IT managers responsible for implementing and managing solutions within organizations should read this report to understand the trends and opportunities in sustainable technology.

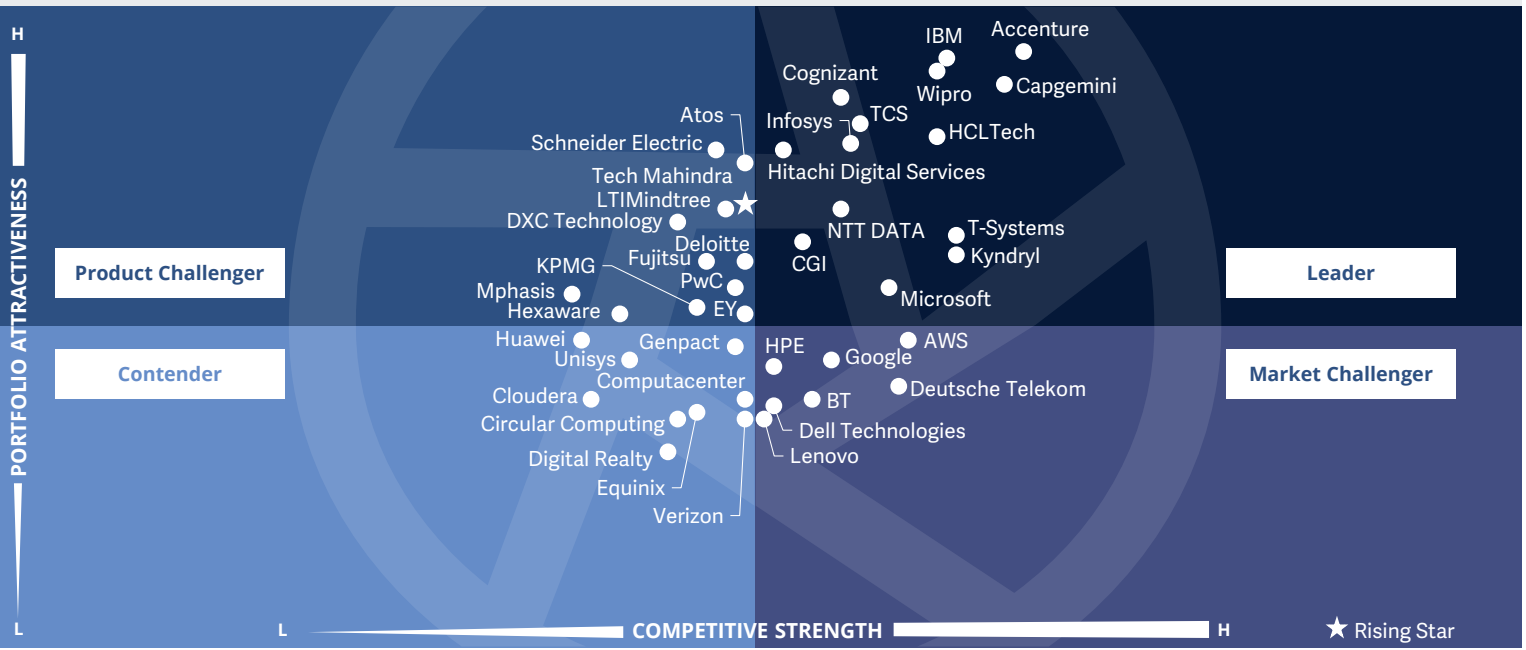
Environmental and sustainability professionals within enterprises should read this report to align their strategies with adopting eco-friendly technological solutions.

ISG Provider Lens™

Source: ISG RESEARCH

Sustainability and ESG IT Solutions and Services

Europe 2024



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

Matt Warburton

Definition

Providers in this quadrant offer IT solutions and implementation services for the horizontal technology capabilities used across industries and enable the digitalization of business operations and processes. These solutions and services are designed to make compute, storage and network infrastructure, end-user devices, data software platforms, and the architecture and coding of applications and AI and ML algorithms more environmentally and socially sustainable. These solutions and services are usually bought and managed by the Chief Information Officer's department.

Common use cases include reducing the energy consumption of and maximizing renewable energy used by data centers - including on-premise and those utilized by cloud providers. Other critical priorities for organizations wanting to use IT more sustainably include implementing more energy-efficient system architectures and coding for applications and algorithms.

Providers assessed in this quadrant may also provide managed services that commit to continuously reducing the environmental impacts of the devices and services they supply and manage. By allowing a managed service provider to control more IT processes from end-to-end they can shift resource consumption patterns from linear to circular, reusing more physical components than otherwise possible and reducing emissions, water and waste.

The social considerations of IT use are also evaluated within this quadrant. This may include the use of devices or supply of services that increase accessibility for disabled and neuro-diverse members of the workforce.

Eligibility Criteria

1. Provide horizontal **IT capabilities, including industry-agnostic platform capabilities** that enable organizations to use technologies more sustainably
2. Offer solutions and services to **rationalize and rearchitect application portfolios that optimize utilization** and reengineer applications, algorithms and data platforms for energy efficiency and bias prevention
3. Enable **organizations to rearchitect, optimize and manage compute, storage** and network resource consumption
4. Provide services **to assess and optimize end-user devices in an aggregate** and at an individual asset level, including **offering guidance on how to adapt policies and sourcing criteria to prolong** device utilization and lifespan

Observations

The European sustainable IT market is the slowest-growing among the four quadrants in this report, with a growth rate of about 5 percent compared with 2023. Due in large part to the economic slowdown, reducing IT's sustainability impacts has become a lower priority. However, this may shift over the next 12 months as increased GenAI usage, especially in financial services, where IT emissions are a significant portion of the organization's overall emissions, raises data center emissions concerns.

The Portfolio Attractiveness axis has been recalibrated to better reflect the full range of sustainable IT capabilities that European organizations seek in 2024, including the supply of more sustainable workplace devices, advisory and managed services for optimizing the lifecycle of these devices and more inclusive and accessible IT services. GreenOps services that optimize data centers and cloud environments continued to be the most heavily contested area of the IT market, with increasing maturity and depth of analytics.

Notable new services in the market included emissions analytics for project delivery teams and detailed assessments and advisory for optimizing AI deployments. Decarbonization-level agreements (DLAs) and similar sustainability metrics are becoming more common.

The fact that 62 percent of the providers in the quadrant are placed above the midpoint on the Portfolio Attractiveness axis reflects that many can significantly enhance organizational value. Case studies and the scale of existing IT managed services are the main differentiators between Product Challengers and Leaders.

From the 254 companies assessed for this study, 42 qualified for this quadrant, with 14 being Leaders and one a Rising Star.

accenture

Accenture excels in estimating carbon emissions and identifying application reduction opportunities. Its accelerators and tools offer rapid ROI. The company has maintained strategic partnerships with SAP and other key players for sustainable IT solution development.

Capgemini

Capgemini analyzes carbon emission data analysis and applies lifecycle assessment methodologies for decarbonization. It focuses on workforce engagement for sustainable change.

CGI

CGI's sustainable IT portfolio focuses on digital solutions that promote energy efficiency, minimize carbon footprints and drive sustainable growth, aiding organizations in achieving their environmental goals.

cognizant

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

HCLTech

HCLTech's intelligent Facility Management System (iFMS) transitions enterprises to smart facilities. The company offers green software engineering, tools and services for efficient, low-carbon software development.

Hitachi Digital Services

Hitachi Digital Services provides in-depth carbon insights with a product emissions tool, offering detailed analytics for optimal cloud migration strategies. It also provides solutions for renewable energy supply to reduce emissions from IT infrastructure.

IBM

IBM's long-standing expertise in energy-efficient technologies extends to optimizing resource usage and managing energy consumption. Its offerings include IBM Turbonomic for cloud-based application optimization.

Infosys

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

kyndryl

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

Microsoft

Microsoft emphasizes carbon-neutral solutions through its Cloud for Sustainability platform, helping organizations reduce emissions via tools such as Azure for resource optimization and Microsoft 365 for energy-efficient IT infrastructure and application management.

NTT DATA

NTT DATA offers sustainability solutions tailored to IT and OT convergence. Its services optimize energy consumption, integrate AI-driven insights for sustainable manufacturing and provide cloud migration strategies that align with net-zero goals.

TCS TATA CONSULTANCY SERVICES

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

T-Systems

T-Systems offers cloud computing solutions designed to be more energy efficient and sustainable, focused on clients' needs through its co-creation advisory initiative.

wipro

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

TECH mahindra

Tech Mahindra (Rising Star) offers a broad range of solutions under its Green IT portfolio that reduce the environmental impact of customer IT environments. It partners with hardware and software providers to enhance these offerings.

Leader

"Kyndryl has built impressive sustainable infrastructure services in a very short period, with further expansion of services on the horizon. European CIOs and CTOs with large data centers and evolving needs may find the company an excellent partner."

Matt Warburton

Kyndryl

Overview

Kyndryl is headquartered in New York, U.S. It has more than 80,000 employees and operations across more than 60 countries. In FY24 the company generated $16.1 billion in revenue, with Principal Markets as its largest segment. Kyndryl has established one of the largest data center portfolios accepted into the EU Code of Conduct for Energy Efficiency in Data Centres. The company helps reduce customers' energy usage by up to 85 percent through alliances with Microsoft, Google, and AWS. It also leverages automation and AI to analyze large volumes of customer value chain data, identifying key opportunities to enhance efficiency and sustainability.

Strengths

Infrastructure expertise: Kyndryl focuses on improving support for its diverse client base by optimizing data centers, including reducing cooling power consumption and boosting overall energy efficiency. By utilizing insights from the Sustainability Advisor tool on the Kyndryl Bridge platform, clients can access a comprehensive dashboard with real-time monitoring, predictive analytics and tailored optimization suggestions. These resources help manage energy, water, waste and emissions across various hybrid IT environments, including public cloud, private cloud and on-premises data centers.

Digital workplace services: Kyndryl integrates sustainability features into its digital workplace services, effectively extending the lifespan of devices while minimizing maintenance problems and the need for new equipment. Its Digital Experience Management service employs persona-driven policies to tailor device specifications based on the intensity of tasks. By continuously monitoring compute utilization, it ensures that each task is matched with the appropriate device, reducing the chance of devices being prematurely viewed as obsolete.

Cloud migration: Kyndryl assists clients in understanding the environmental impact of cloud migration, offering predictive analysis and scenario planning to optimize configurations for sustainability, productivity and other priorities.

Caution

Kyndryl should strengthen its advisory services in areas such as architecture and application optimization to maintain its leadership status in the competitive European market. Its services should provide engineering blueprints and real-time insights to vertically optimize throughout the application lifecycle.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till September 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Sustainability and ESG** services.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Legal/Compliance

▼ **Least satisfied**
Shared Services Operations

Region

▲ **Most satisfied**
Eastern Europe

▼ **Least satisfied**
Australia/New Zealand

Industry

▲ **Most satisfied**
Travel, transportation and leisure

▼ **Least satisfied**
Public sector

Industry Average CX Score

▲ **Highest CX: 88.3**
▼ **Lowest CX: 71.2**

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 661

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	56%
Nearshore	25.3%
Offshore	18.7%

Appendix

Methodology & Team

The ISG Provider Lens 2024 – Sustainability and ESG study analyzes the relevant software vendors/service providers in the Europe market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Iain Fisher

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Shaurya Vineet

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Sreya Ghosh

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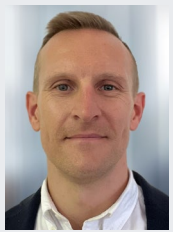
The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse 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.

The study was divided into the following steps:

1. Definition of Sustainability and ESG market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation



Lead Author

Matt Warburton

Principal Consultant and Sustainability Lead

Matt Warburton specializes in the research and delivery of digital sustainability solutions, with nearly 20 years of experience as a digital transformation practitioner and commercial leader.

Warburton focuses on accelerating sustainable outcomes and works closely with organizations to maximize the positive impact of technology. He's led multiple engagements for large clients in technology, aviation, financial services, healthcare, mining and retail.

These range from providing strategic and practical advice on what digital sustainability capabilities organisations need and how to get them, to designing and delivering ESG risk assessments on hundreds of suppliers.

Warburton also works with technology providers to develop successful go-to-market strategies, leveraging his unique experience of both sides of the digital sustainability market.

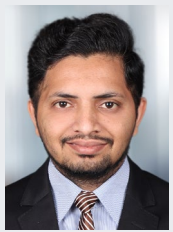
Lead Author

Monica K

Assistant Manager & Lead Research Specialist

Monica K is an Assistant Manager and Lead Research Specialist at ISG, where she also serves as a digital expert. She co-authors Provider Lens™ studies, the global summary report, and the enterprise perspective for the cybersecurity, ESG, and sustainability markets. Her responsibilities include managing comprehensive research projects and collaborating with internal stakeholders on diverse consulting initiatives.

With over a decade of experience in technology, business, and market research, Monica brings valuable expertise to ISG clients. Previously, she worked at a research firm specializing in IoT, product engineering, vendor profiling, and talent intelligence.



Research Analyst

Akshay S Hiremath

Senior Research Analyst

Akshay S Hiremath is a research analyst at ISG and supports ISG Provider Lens™ studies on HCM Technology Platforms, Payroll Solutions and Services, and HR-related studies. He supports the lead analysts in the research process and authors the global summary report. He also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. He has been associated with ISG since 2022.

Prior to this role, he was involved in preparing customized reports for various clients mainly related to HR services such as Permanent Recruitment, Temporary Staffing, and Corporate Learning and Development., through secondary research that included market analysis, supplier analysis and profiling, and industry best practices.

Research Analyst

Khyati Tomar

Senior Research Analyst

Khyati Tomar is a Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on the Microsoft Partner Ecosystem, the Future of Work – Services and Solutions, and OCM. Khyati has over 4 years of experience in the IT research industry. Before this role, she gained over 2.5 years of experience in the technology research industry, where she conducted various consulting and custom projects and co-authored CIS reports, primarily focusing on the public sector vertical. In her current role, she supports lead analysts in the research process, authors the Enterprise Context and Global Summary reports, and co-authors focal points and quadrant reports.

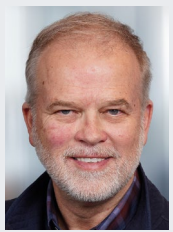
Study Sponsor

Iain Fisher

Director

Iain leads ISG's Future of Work, Customer Experience and ESG solutioning redefining business models and operating models to drive out new ways of working with a CX and ESG focus. He joins up end to end value chains across a number of markets and advises clients on where digital and technology can be used to maximise benefit. A regular Keynote speaker and online presenter, Iain has also authored several eBooks on these subjects.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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.

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™

DECEMBER, 2024

REPORT: SUSTAINABILITY AND ESG