ISG Provider Lens®

Digital Sustainability

Strategy and Enablement Services

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

QUADRANT REPORT | OCTOBER 2026 | EUROPE



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Table of Contents

Executive Summary 03

Provider Positioning 07

Introduction

Definition 14
Scope of Report 15
Provider Classifications 16

Appendix

Methodology & Team 25
Author & Editor Biographies 26
About Our Company & Research 28

Strategy and Enablement Services 17 - 23

Who Should Read This Section 18
Quadrant 19
Definition & Eligibility Criteria 20
Observations 21
Provider Profile 23

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Europe shifts from disclosure urgency to resilient, measurable sustainability execution

This ISG Provider Lens® Digital Sustainability study evaluates the competitive landscape for providers in Europe in 2026. The research covers the following quadrants: Strategy and Enablement Services; Asset, Product and Value Chain Solutions; and IT Solutions, assessing providers' capabilities, market positioning and execution across advisory, implementation and managed services within the defined scope of the study.

Market Context

Continued growth demonstrates sustainability value

ISG's research into the global digital sustainability market indicates a value of $34.3 billion in 2026, up 12 percent compared to 2025. While this growth represents a reduction from the 16 percent growth seen between 2024 and 2025, the continued growth despite heightened geopolitical disruption and AI's competing demand for technology investment indicates enterprises recognize the importance of sustainability in long-term competitiveness. Europe represents the largest regional market, with a 43 percent share.

Regulatory simplification shifts sources of market urgency

Europe remains the most mature digital sustainability market. However, the forces shaping it are being reordered. In 2025, the first EU Corporate Sustainability Reporting Directive (CSRD) reporting cycle and anticipated expansion of CSRD and Corporate Sustainability Due Diligence Directive (CSDDD) created broad disclosure-led urgency. In 2026, reductions and delays in these requirements narrowed the immediately regulated population and extended certain timelines. Although this has reduced the value of compliance-only propositions, it has not removed the structural need for reliable sustainability data or operating change. Imminent Extended Producer Responsibility (EPR) requirements, product and packaging rules, carbon-related trade measures

Digital sustainability remains central to Europe's **competitiveness, security** and **resilience.**

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and the EU AI governance regime still create overlapping obligations across products, supply chains and technology estates.

Resilience economics moves to the foreground

Conflict in the Middle East has renewed concern about energy security, logistics and access to critical inputs. For Europe, which remains exposed to imported energy and complex cross-border value chains, resource efficiency and decarbonization increasingly operate as resilience and cost mechanisms. The regional market is diverging from less regulated markets: sustainability remains connected to formal obligations, but investment timing is now more strongly shaped by energy cost, supply continuity and industrial competitiveness.

Technology is amplifying opportunity and constraint. AI, IoT, digital twins and automation make asset, product and value chain decisions more granular and timelier. However, rapid growth in GenAI and agentic AI also raises infrastructure energy demand and increases the importance of model governance, workload telemetry and sovereign compute.

Therefore, quadrant results should be read through a more nuanced lens than in 2025.

Enterprise priorities

From broad commitments to funded operating outcomes

Although European enterprises remain the most committed to sustainability, they are more selective about investment. Sustainability has continued to become more embedded in enterprise strategies and operating models, intensifying the shift toward value creation identified in 2025. Boards expect sustainability programs to compete for capital using the same cost, risk, resilience and growth logic as other transformations. Buyers are combining decarbonization with energy optimization, supply continuity, asset reliability and product compliance instead of maintaining separate ESG workstreams. As business functions integrate sustainability more fully, governance is changing. Sustainability functions provide expertise and direction, while finance, procurement, operations, product engineering, IT and risk functions share decision rights, data ownership and outcome accountability.

The leading priorities for 2026 are:

- Enterprises are refreshing strategies around regulatory exposure, energy and supply chain scenarios using prioritized road maps that connect targets to owners, investment gates and measurable business outcomes.
- Asset-heavy organizations are scaling energy, water and maintenance optimization through operational data, AI, IoT and digital twins, with deployment decisions based on verified savings, uptime and resilience rather than pilot activity.
- Product and procurement teams are building lifecycle assessment, product carbon footprint, traceability and digital product passport capabilities to respond to packaging rules, material constraints and customer demands at product and component level.
- CIOs are extending GreenOps principles from cloud efficiency into AI model choice, workload placement, data center power and water, green software, device longevity and supplier emissions.

Proof replaces promise

Table stakes in the digital sustainability market in Europe include regulatory literacy, materiality and risk methods, emissions baselining, data governance and access to the major cloud, enterprise and industrial ecosystems. Differentiation comes from execution evidence: before-and-after operational metrics, repeatable controls, product-level data, automated lineage and case studies that show sustained outcomes in the relevant country and industry. Buyers increasingly test whether a provider can move from assessment to implementation and managed improvement without losing accountability between advisory, engineering and operations.

This approach creates two important trade-offs. Enterprises can move quickly by adopting packaged accelerators but must avoid locking regulatory logic or sustainability data into an inflexible architecture. They can also pursue aggressive AI-enabled optimization, requiring human approval points, model and data provenance, energy telemetry and security controls to ensure automation does not weaken assurance. European organizations place

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greater weight on these controls than buyers in many other regions because sovereignty, privacy and regulatory exposure intersect with environmental performance.

Provider dynamics

Portfolios are becoming more integrated and delivery more industrialized. Leading providers connect advisory methods, engineering platforms, ecosystem technologies and managed operations through common data and governance. Laggards still present broad catalogues without a clear implementation path or rely on global references that do not demonstrate European regulatory, industry and country relevance.

Strategy and enablement services

Although competitive positions are relatively stable compared to 2025, system integrators with industry-specific consulting depth are gaining prominence alongside established consulting firms. Strong providers translate materiality, climate and supply chain analysis into operating models, investment portfolios and implementation roadmaps. Their mechanisms include scenario modeling, marginal abatement cost curves, governance design, solution evaluation, transformation offices and recurring impact measurement. They also connect sustainability choices to ERP, procurement and operational transformation instead of producing isolated strategies.

The decisive proof is no longer the quality of a strategic framework. Buyers look for European regulatory expertise, measurable methods and sufficient case evidence to show that recommendations survived implementation. Persistent gaps include limited country-specific outcomes, insufficient evidence for nature, water and circularity and weak continuity between strategy teams and delivery teams. The competitive boundary is moving from advice to governed execution.

Asset, product and value chain solutions

The asset, product and value chain solutions market is the fastest-maturing of the three markets in scope. More solutions have reached production scale, widening credible leadership since 2025. Although providers are converging around AI and ML, IoT, automation and digital twins, technology breadth is becoming less distinctive. Leading delivery providers combine IT and OT data, engineering knowledge and operational workflows to optimize energy, water, maintenance, safety and material use. For products and supply chains, lifecycle assessment, product carbon footprints, supplier traceability and digital product passports are being embedded into product lifecycle management, ERP and manufacturing systems.

Evidence quality separates industrialized capabilities from demonstrations. Buyers expect baselines, asset- or product-level calculations, verified savings, downtime or yield effects and controls that preserve traceability from source data to decision. Engineering and infrastructure specialists retain an advantage in complex physical environments, while broad service providers compete through integration and scale. Recurring gaps include fragmented asset data, limited interoperability and case evidence that measures environmental benefits without establishing the associated economic result.

IT Solutions

IT solutions remains the smallest market in the study. Constrained budgets mean many clients expect sustainability to be incorporated into continuous service improvement. The major change from 2025 is the speed at which responsible and sustainable AI has moved from being an emerging topic into a core design and operations requirement. Leading providers now extend assessment and engineering across cloud, data centers, software, networks, devices and AI workloads. Engagements commonly include the creation of resource baselines, GreenOps-enabled infrastructure optimization, workload placement, efficient model and architecture choices, software carbon measures, digital twin optimization for data centers, condition-based device refresh and circular asset disposition.

European differentiation increasingly joins sustainability with data sovereignty and security. Providers that can combine local or sovereign compute, workload-level telemetry, model governance and renewably powered infrastructure have a stronger answer for regulated buyers than those offering carbon

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estimates alone. However, data granularity remains a material weakness across the market. Buyers should challenge savings assumptions, allocation methods and the ability to measure AI inference, water use and supplier-generated emissions over time. Providers need clearer commercial models that share efficiency gains rather than treating sustainability as an unfunded reporting add-on.

Outlook

Over the next 12 to 24 months, Europe's digital sustainability market will grow through selective execution rather than returning to indiscriminate compliance spending. The strongest demand will sit where environmental improvement protects margin, access to markets, infrastructure capacity and supply continuity. Product regulation and traceability will keep investments in the sustainability of asset, product and value chain solutions on the fastest path, while AI growth will pull sustainable IT solutions closer to core architecture and sourcing decisions. Digital sustainability strategy and enablement services will remain influential when they convert uncertainty into sequenced investments and retain accountability through implementation.

Enterprises should monitor three leading indicators: investment plans addressing regulatory dynamism and complexity, energy and supply disruption changing operational economics and AI infrastructure constraints making workload efficiency and data sovereignty board-level issues. Their principal risk is optimizing the current rule set and building fragmented solutions that cannot adapt to the changing obligations or business conditions. They should establish modular data and control foundations, require outcome baselines with reduction targets aligned to their enterprise goals and govern sustainability through joint finance, operations, product and technology ownership.

Providers face different risks. Traditional IT providers must move beyond portfolio breadth and demonstrate evidenced sustainability outcomes. Management and environmental consultancies must demonstrate how their value extends into execution. In an increasingly educated customer market, providers must expand their technical sustainability expertise to retain credibility. A key differentiator will be the ability to offer technology foundations that can deliver on the promise of GenAI and agentic AI. Leadership will increasingly depend on connecting advisory, IT and OT execution while making economic and environmental performance visible through the same operating data.

The market's direction is clear even if regulation and geopolitical pressures remain fluid: digital sustainability investments continue to grow at approximately 12 percent CAGR year-on-year and are increasingly part of enterprise resilience, product and AI transformation. Knowledge of carbon accounting and CSRD is not enough. Providers that cannot demonstrate expert-level industry-specific knowledge and evidence outcomes will lose relevance.

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Provider Positioning

Page 1 of 7

	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
ABB	Not In	Market Challenger	Not In
Accenture	Leader	Leader	Leader
AECOM	Contender	Not In	Not In
AFRY	Product Challenger	Product Challenger	Not In
Akkodis	Not In	Product Challenger	Not In
Anthesis	Rising Star ★	Not In	Not In
Arup	Contender	Not In	Not In
Atos	Contender	Leader	Leader
Bain & Company	Product Challenger	Not In	Not In
BCG	Leader	Not In	Not In

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Provider Positioning

Page 2 of 7

	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
BDO	Product Challenger	Not In	Not In
Bosch	Not In	Contender	Not In
Bureau Veritas	Contender	Not In	Not In
Capgemini	Leader	Leader	Leader
CGI	Contender	Contender	Contender
Circular Computing	Not In	Not In	Contender
Cognizant	Leader	Leader	Leader
Computacenter	Not In	Not In	Market Challenger
Cyient	Not In	Contender	Not In
Dell Technologies	Not In	Not In	Contender

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Provider Positioning

Page 3 of 7

	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
Deloitte	Leader	Leader	Product Challenger
Deutsche Telekom / T-Systems	Leader	Leader	Leader
DNV	Contender	Not In	Not In
DXC Technology	Not In	Contender	Contender
ENGIE	Not In	Market Challenger	Not In
ERM	Leader	Not In	Not In
EY	Leader	Product Challenger	Product Challenger
Fujitsu	Not In	Product Challenger	Product Challenger
GE Vernova	Not In	Market Challenger	Not In
Genpact	Market Challenger	Not In	Not In

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Provider Positioning

Page 4 of 7

	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
GEP	Contender	Not In	Not In
Globant	Not In	Not In	Contender
HCLTech	Leader	Leader	Leader
Hexagon	Not In	Product Challenger	Not In
Hexaware	Not In	Contender	Contender
Hitachi Digital Services	Product Challenger	Leader	Rising Star ★
Honeywell	Not In	Product Challenger	Not In
HPE	Not In	Not In	Contender
IBM	Leader	Leader	Leader
ICF	Contender	Not In	Not In

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Provider Positioning

Page 5 of 7

	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
Infosys	Leader	Leader	Leader
Jacobs	Contender	Not In	Not In
Johnson Controls	Not In	Contender	Not In
Kearney	Contender	Not In	Not In
KPMG	Product Challenger	Product Challenger	Contender
Kyndryl	Not In	Product Challenger	Leader
Lenovo	Not In	Contender	Leader
LTM	Contender	Rising Star ★	Product Challenger
LTTS	Not In	Leader	Not In
Lufthansa Industry Solutions	Product Challenger	Product Challenger	Contender

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Provider Positioning

Page 6 of 7

	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
Marsh McLennan	Contender	Not In	Not In
McKinsey & Company	Leader	Not In	Not In
Mott MacDonald	Contender	Contender	Not In
Mphasis	Not In	Contender	Product Challenger
NTT DATA	Leader	Leader	Leader
PwC	Leader	Leader	Product Challenger
Ramboll	Contender	Not In	Not In
Rockwell Automation	Not In	Product Challenger	Not In
Schneider Electric	Product Challenger	Leader	Product Challenger
Siemens	Not In	Leader	Not In

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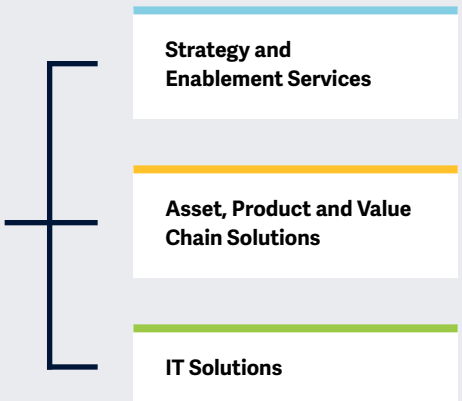
Provider Positioning

Page 7 of 7

	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
SLR	Product Challenger	Not In	Not In
Sweco	Contender	Contender	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger
ThoughtWorks	Not In	Not In	Product Challenger
Unisys	Not In	Not In	Contender
Wipro	Leader	Leader	Leader
WSP	Market Challenger	Market Challenger	Not In

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



Simplified Illustration Source: ISG 2026

Definition

The Digital Sustainability 2026 study assesses providers offering digital solutions and services that enable organizations to achieve more sustainable operations, assets, products and value chains.

Over the past six years, sustainability, viewed through the combined lens of economic, environmental, social and governance (ESG) factors, has evolved from an optional consideration to a core business objective. Despite a complex and volatile landscape of regulation, stakeholder expectations and geopolitical forces, the market has recalibrated rather than slowed. Growth has moved between regions and shifted from disclosure-led demand to execution and value creation. Organizations remain committed with increased investment planned, although they are more selective and less vocal.

The economic fundamentals remain unchanged. Recent conflict in the Middle East has highlighted the scale and speed with which supply chain disruptions can affect countries and organizations. In response, organizations continue to prioritize energy security, operational resilience and cost reduction by optimizing resource consumption, managing climate and sustainability risks, and addressing increasing demand for ethical and transparent practices.

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

This study provides the market intelligence needed for:

- Buyers to identify the providers best suited to their sustainability requirements.
- Providers to assess the performance of their current offerings and identify opportunities to maximize their growth in the market.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following three quadrants for services/ solutions: Strategy and Enablement Services; Asset, Product and Value Chain Solutions; and IT Solutions.

This ISG Provider Lens® study offers business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants) on their competitive strengths and weaknesses
- Focus on the Europe market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market 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).

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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 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.

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Strategy and Enablement Services

Who Should Read This Section

This report is valuable for providers offering strategy and enablement services in Europe to understand their market position and for organizations looking to evaluate these providers. Organizations face pressure to align sustainability goals with AI-driven business strategies, dynamic stakeholder expectations and complex sustainability regulations. They need partners that can simplify their priorities, enable informed decisions and transform operations and the value chain with cost efficiency, resilience and new revenue sources.

CEOs, CFOs and CIOs

CEOs, CFOs and CIOs should read this report to understand how strategy and enablement services can align sustainability priorities with strategy, investment planning and digital transformation. The report helps leaders evaluate providers that support target setting, governance design, risk mitigation, compliance readiness and long-term value creation.

CSOs, sustainability and ESG professionals

CSOs, sustainability and ESG professionals should read this report to explore how providers use digital tools, accelerators and advisory services to turn sustainability ambitions into executable programs. The report highlights support for materiality assessments, target setting, regulatory compliance, reporting, climate and nature risk analysis and impact measurement.

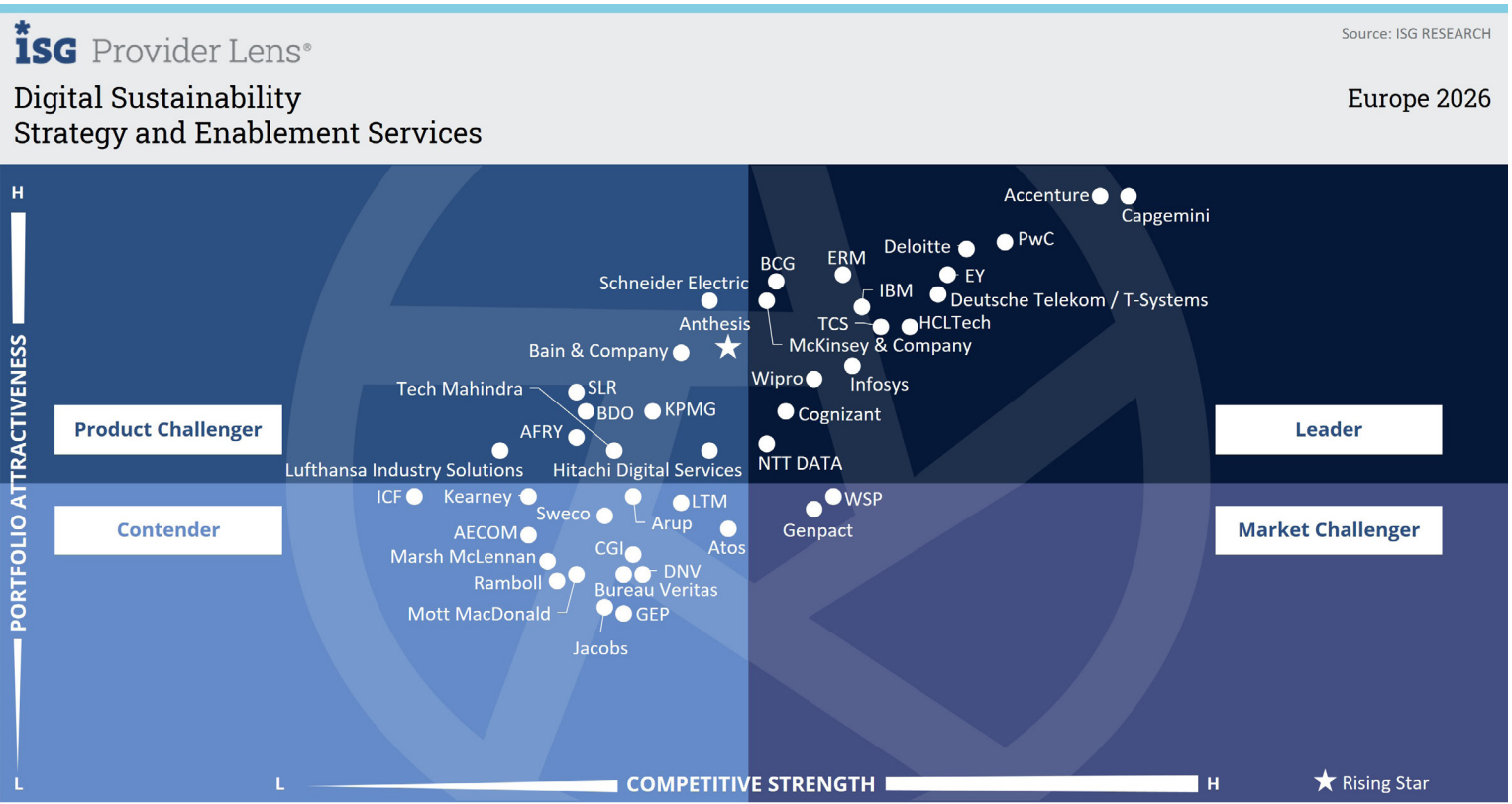
Strategy professionals

Strategy professionals should read this report to identify providers that can embed sustainability into business, governance and operating models. The report shows how advisory and enablement services can connect sustainability goals with enterprise objectives, value chain transformation, circular models, supplier engagement and measurable performance outcomes.

Consulting professionals

Consulting professionals should read this report to stay updated on providers' capabilities in digital sustainability strategy, transformation enablement and managed services. The insights provided can help them advise clients on selecting partners that combine policy knowledge, digital tools, change management, supplier programs and impact measurement.

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This quadrant assesses service providers offering **advisory services** to integrate sustainability into technology and business strategies and providing program and change management **enablement services to deliver long-term transformation**.

Matt Warburton and Bhuvaneshwari Mohan

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Definition

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

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

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

Eligibility Criteria

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

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Observations

ISG's analysis reports a three percent growth in the global digital sustainability strategy market since 2025, with Europe growing slightly faster at five percent. In 2026, the global market value for strategy services was estimated at $8.6 billion, or 25 percent of the total digital sustainability market, and Europe accounted for 42 percent of case studies featuring these services in ISG's digital sustainability database.

The demand for European sustainability strategy and enablement services has been reignited by the combined forces of regulation shifts, including reductions and delays in CSRD and CSDDD requirements and imminent regulations for extended producer responsibilities (EPR), and disruption to operations and supply chains driven by the war in the Middle East. Decarbonization integrated with compliance, resilience and cost optimization are central objectives for updated enterprise strategies.

In 2026, provider positions in quadrants are relatively consistent with those in 2025. Leading consulting firms continue to experience the highest demand, although SIs with strong industry-specific consulting experience are growing in prominence.

Leading providers tend to have extensive consulting and research functions, deep regulatory knowledge and strong measurement methodologies. Beyond technical capability and regional presence, the quantity and quality of relevant case studies are the primary differentiating factors between Leaders and non-Leaders. This quadrant features a broad range of specialists including infrastructure engineering firms.

From the 68 companies assessed for this study, 43 qualified for this quadrant, with 16 being Leaders and one a Rising Star.

accenture

Accenture offers Sustainability Services. AI, combining data, technology and advisory expertise to help European enterprises move from materiality and regulatory requirements to embedded ESG governance, operating-model change and measurable transformation.

BCG

BCG is a global management consulting firm that combines sustainability strategy, digital innovation and transformation expertise to help European organizations embed sustainability into business strategy, operations and enterprise-wide transformation.

Capgemini

Capgemini brings engineering-led strategy, risk modeling and its Sustainability Business Value Framework to European organizations, translating resilience, adaptation, decarbonization and autonomy priorities into sequenced, investable transformation.

cognizant

Cognizant provides sustainability advisory, digital engineering and delivery services that guide European enterprises from net-zero pathways and regulatory readiness through ESG data, operating model change and implementation at scale.

Deloitte.

Deloitte combines audit, advisory, GreenLight, Sustainability Reporting Catalyst and climate analytics to help European enterprises turn CSRD, climate risk, decarbonization and value chain priorities into governed digital transformation programs.

Deutsche Telekom/T-Systems

Deutsche Telekom/T-Systems provides strategic advice, implementation support and operational optimization through T-Systems, Detecon and its one B2B model, helping European clients connect regulatory readiness, climate action, digital innovation and run-state delivery.

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ERM

ERM offers lifecycle sustainability strategy grounded in environmental, environment, health and safety (EHS) and regulatory expertise, combining carbon data management, financed emissions analysis, climate risk, nature, human rights and implementation support for complex enterprises.

EY brings ESG strategy, EY-Parthenon, the EY Sustainable Operating Blueprint and EY ESG Suite together to help European organizations assess maturity, interpret regulation, plan decarbonization and embed sustainability into enterprise decisions.

HCLTech

HCLTech provides EcoSustain-led sustainability consulting, digital execution and partner-enabled transformation, helping European enterprises connect regulatory readiness, AI and SAP capabilities, sector change and implementation across complex programs.

IBM combines sustainability consulting, IBM Garage, Envizi, AI and transformation methods to help European enterprises convert regulatory, climate and circularity ambitions into operating-model change, governed data and executable programs.

Infosys offers sustainability advisory, regulatory knowledge and digital delivery through structured maturity pathways, helping European enterprises turn ESG goals into decarbonization, circularity, supplier transformation and measurable operating change.

McKinsey & Company

McKinsey & Company brings strategy, Catalyst Zero, climate risk analytics and transformation support to European clients, connecting materiality, decarbonization, sustainable materials, scenario planning and capability building with transition execution.

NTT DATA provides sustainability advisory through Syntphony, industry expertise and partner platforms, helping European organizations orchestrate regulatory readiness, resource strategy, circularity, climate intelligence and technology-enabled business transformation.

PwC combines local regulatory expertise, CSRD QuickScan, Climate Excellence, assurance and cross-functional advisory to help European organizations move from disclosure obligations and climate risk assessment to transition governance and enterprise value creation.

TCS offers sustainability advisory through its Global Sustainability Service Unit, connecting European regulation, industry strategy, data architecture and transformation delivery to business resilience, operational efficiency, governance and compliance outcomes.

Wipro combines sustainability strategy, Impact Intelligence, transformation governance and enterprise delivery to help European organizations move from climate transition planning and ESG assessment to accountable operating change and technology-enabled execution.

Anthesis

Anthesis (Rising Star) provides pure-play sustainability advisory, Anthesis Intelligence and managed services, helping European enterprises turn climate, regulatory, supply chain and product priorities into practical strategy, data, capability building and operating change.

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Leader

"NTT DATA offers sustainability strategy and orchestration services by combining European regulatory depth, sector expertise and AI-enhanced Syntphony data assets. It has built an impressive ecosystem of impact partners, including the UN and the UNICEF."

Matt Warburton and Bhuvaneshwari Mohan

NTT DATA

Overview

NTT DATA is headquartered in Tokyo, Japan. It has more than 197,000 employees across over 70 countries. In FY25, the company generated ¥4,638.7 billion in revenue. NTT DATA reports substantial year-on-year sustainability growth and is investing further in the UK, Ireland, DACH and APAC. NTT DATA advances its sustainability management globally under its Three Positives framework — Planet Positive, Prosperity Positive and People Positive. This covers 13 material topics, including climate change, circularity, water management, responsible technology and AI ethics, sustainable supply chains, human rights, diversity and inclusion and digital accessibility.

Strengths

Broad advisory services: NTT DATA uses sustainability as a design principle and structures its strategy and enablement services primarily within three service pillars: climate and nature for net zero and climate adaptation strategies, environmental markets and nature-positive programs; corporate sustainability for strategic transformation and ESG reporting and disclosures; and sustainable value chain for lifecycle assessment, circularity, traceability and supply chain improvement.

Supply chain intelligence: NTT DATA's new Syntphony module uses CDP data to estimate supply chain emissions, extending advisory work from materiality and targets into Scope 3 prioritization. NTT DATA can combine the output with supplier maturity assessments, due diligence, engagement and traceability, creating a practical path from emissions estimation to procurement and operating decisions.

Diverse industry experience: NTT DATA has continued to refine and verticalize value propositions for 12 core industries, with its European business mostly concentrated in the public sector. Notable projects include delivering a DPP solution for infrastructure for a public authority, carbon and energy certificate services for a multi-country utility and AI-enabled ESG peer benchmarking, demonstrating relevance beyond reporting in asset-intensive and regulated settings.

Caution

Compared to Europe's leading sustainability strategy providers, NTT DATA has limited public evidence of enterprise-scale consulting. Demonstrating how its advisory work shapes decarbonization, circularity and operating model decisions would strengthen its business orchestrator positioning among CEOs and COOs.

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Appendix

The ISG Provider Lens® 2026 – Digital Sustainability study analyzes the relevant software vendors/service providers in the European market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of October 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.

The study was conducted in the following steps:

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

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Lead Author

Matt Warburton

Principal Consultant and Sustainability Lead

Matt Warburton specializes in the research and delivery of digital sustainability solutions, with 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 has led engagements for large clients in technology, aviation, financial services, healthcare, mining and retail. These range from providing strategic and practical advice on the digital sustainability capabilities organizations 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 Analyst and Co-Author

Bhuvaneshwari Mohan

Lead Analyst

Bhuvaneshwari Mohan is a Lead Analyst at ISG Research, focusing on cybersecurity solutions and services, with primary responsibility for ISG Provider Lens® studies across the U.K. and U.S. public sector. She contributes to research and advisory insights spanning digital sustainability services and supply chain services, with a focus on market positioning, service evolution and enterprise adoption patterns.

With over a decade of industry experience, Bhuvaneshwari specializes in market intelligence, competitive benchmarking and enterprise-focused research. She contributes to thought leadership on cybersecurity, enterprise resilience and evolving service delivery models, and collaborates closely with ISG advisors to deliver strategic, client-specific research. Prior to ISG, she worked in research and enablement roles within IT and digital engineering services organizations, strengthening her expertise in translating market dynamics into actionable business insights.

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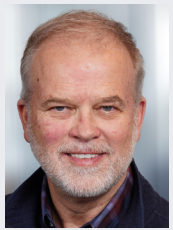
Iain Fisher

Executive Director, Research

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross-industry research with an eye on technology-led digital innovation, creating new strategies, products, services, and experiences by analyzing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross-industry solutioning, Iain provides major market insights leading to changes to business and operating models driving new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer-focused delivery of services and solutions in challenging situations. Fisher is also a regular keynote speaker and online presenter, having authored several eBooks on these subjects.

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Jan Erik Aase

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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 partner 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.

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ISG Provider Lens®

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REPORT: DIGITAL SUSTAINABILITY

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