*ISG Provider Lens™

Sustainability and ESG (Environmental, Social, Governance)

A research report on providers delivering technologies, managed services and accreditation around sustainability

Customized report courtesy of:

HCLTech

QUADRANT REPORT | DECEMBER 2023 | U.S.

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Supply of solutions currently exceeds demand, yet significant market growth is anticipated

Following the inaugural Environmental, Social & Governance (ESG) quadrant featured in the Digital Business Solutions IPL in 2022, ISG is excited to introduce an expanded and dedicated IPL to reflect the rapidly evolving digital sustainability and ESG services market. The scope of this IPL report is one of the largest ISG has performed, with new grids, criteria and assessed provider lists.

Although the demand for digital sustainability and ESG services in the U.S. is lower than in Europe, it is influenced by similar factors, including global geopolitics, investor preferences, government regulations and incentive packages, climate and energy crises, and consumer buying behaviors. Depending on the industry, different risk levels exist for brand and reputation, high capital costs, physical asset damage caused by extreme weather conditions and impending regulations.

These risks require mitigation strategies, investments and action. Consequently, many U.S. organizations need to clearly understand, report and improve their sustainability and ESG performance. Unsurprisingly, the highest demand for digital sustainability and ESG services is observed among established multinational enterprises that must navigate complex transformational journeys.

However, there is also an opportunity — a growing number of enterprises have been able to convert validated sustainability progress into incremental brand value, increasing profit margins and revenue. Often, the actions undertaken to improve sustainability are similar to those implemented for reducing costs, such as optimizing resource consumption and minimizing operational waste.

Due to this broad-impact range of macro drivers, the global digital sustainability and ESG services market will probably grow from approximately $50 billion in 2022 to over $100 billion by 2030. Many U.S. firms have already established their presence in this market.

Despite domestic regulatory uncertainty, U.S. firms can benefit from global market growth.

Executive Summary

Sustainability and ESG are more than a moral matter; they can affect companies' bottom lines and shareholders' portfolios positively or negatively. However, it is also clear that contrary views are held, and the legal challenge to including ESG principles by financial institutions when selecting investments could serve as a potential counterweight to the demand for the solutions outlined in this report.

At the geopolitical level, the ongoing Russia–Ukraine conflict has created an energy crisis with significant repercussions for the U.S. As a net energy exporter, the U.S. profits from high global energy prices. However, consumers and companies in the U.S. bear the burden of these high prices, which, in turn, contribute to increased inflation and reduced economic growth. Gasoline prices have more than doubled since the conflict's inception, reaching unprecedented highs in June 2022. The surge in energy prices, including natural gas, has also caused an increase in electricity prices. The inflation rate — the highest in the last four decades — has led to the U.S. Federal

Reserve increasing interest rates to mitigate the situation, potentially slowing the U.S. economy and raising recession risks. Economic impacts and the record heatwaves and wildfires burning in Hawaii, California and Canada highlight the corporate and consumer imperatives for more action. Considering the scale and complexity of these challenges, it is unsurprising that digital technologies and sustainable practices are rising.

In response, the Biden Administration's Inflation Reduction Act of 2022, which included an investment of $369 billion into clean energy and climate change mitigation measures, marks the most significant climate action investment in U.S. history. In addition to its goal of reducing energy costs and strengthening energy sovereignty, this additional stimulus should benefit technology companies servicing electric vehicle manufacturers, solar and battery manufacturers, and other energy-intensive industries. Specifically, operational technologies such as digital twins powered by AI and IoT can optimize manufacturing processes to reduce energy and better harness renewable energy sources.

The demand for ESG solutions also comes from investors and financial services that have played a pivotal part in creating macro demand for more sustainable businesses. With greater interest and appreciation of the positive relationship between mitigating ESG risks and enhancing companies' overall market value, the demand for transparency for ESG risks and opportunities and analysis of more sustainable and circular business models have increased. All of these factors necessitate significant business transformation, for which digital services are essential.

Amidst concerns over data quality and information gaps for investors, the U.S. Securities Exchange Commission (SEC) has proposed new rules that, if adopted, would require public and private companies to provide detailed reporting of their climate-related risks, emissions and decarbonization plans. The proposed regulation is expected to be enforced on U.S. companies filing 10-K forms and foreign private entities submitting 20-F forms to the SEC. Large corporations would be required to disclose most of this information in FY23, which implies that they would commence

filing forms beginning 2024. However, the rules are subject to opposition from sections of public companies and politics, contesting the compliance cost and implications from consequential diverted capital flows. Meanwhile, in California, two major climate disclosure laws have been enacted (SB 253, Climate Corporate Data Accountability Act and SB 261, Climate-Related Financial Risk Act), requiring similar data as proposed by the SEC to be disclosed. California — which would be the fifth-largest economy worldwide and is the largest subnational economy — has made SB 253 and SB 261 applicable to any business operating in the state with annual revenue over $1 billion and $0.5 billion, respectively. As many as 10,000 firms will be required to report in some form by 2026, and fines of up to $500,000 may apply for noncompliance.

Organizations subject to the directives will need to report hundreds of ESG data points annually — many of which are either not recorded today or exist in disparate systems.

While these organizations must find a way to report these data points accurately, it is even more critical for them to focus on the key 25–50 metrics that are most significant for their specific businesses.

While the uncertain landscape has dampened enterprise demand growth in the U.S., service providers have forged ahead with new and expanded digital sustainability and ESG services. Notably, providers from non-IT backgrounds have demonstrated impressive adaptability in entering this market. Key players have entered the industrial, engineering, and environmental markets, with each becoming increasingly digitized, and the overlap with the digital sustainability and ESG markets has grown significantly. While many partnerships exist among players, if revenues do not quickly rise as mainstream demand escalates in the next two to five years, it is possible that the market would probably have too many solutions and providers will need to rationalize their portfolios. Currently, there is not enough demand in the market to sustain all the available solutions. If this continues, it would trigger market exits or mergers.

AI plays a pivotal role in understanding how leading organizations distinguish valuable insights from extraneous information. By refining ESG materiality assessments, organizations better understand how external risks (such as extreme weather) affect their business and how their businesses impact the world (such as deforestation) — a concept known as double materiality. This approach enables an in-depth focus on mitigating risks and turning them into advantages. It implies that more complex scenarios must be considered, requiring more relevant data with highly tailored AI and efficient compute to plot optimal pathways for sustainable and circular business. For instance, insurers should simulate global weather patterns and resulting risks to insured assets to best estimate appropriate premiums; this involves extracting insights from varied sources, including weather and geospatial data, satellite imagery, urban environments and asset construction.

The significant expansion of this market is reflected in this IPL report, which is divided into four regional quadrants and an additional global quadrant:

1. Strategy and Enablement Services

2. Tech Solutions and Implementation Services - Information Technology (IT)

3. Tech Solutions and Implementation Services - Operational Technology (OT)

4. Data Platforms and Managed Services

5. Rating and Benchmarking Services (Global)

Because most providers offer global solution portfolios, the supply side of the U.S. market is very similar to Europe.

Across all quadrants, there is a higher-than-average ratio of Leaders to the other segments compared to other Provider Lens reports. This reflects the competition and relative market penetration that most established providers have achieved. Traditional IT service providers predominantly occupy the Leader segments.

However, the increasing presence of strong providers from the non-IT markets is clear.

Beyond the Leaders, we observe many organizations offering a broad range of solutions, hence the high number of Product Challengers. However, these providers appear to be either at an early stage in their business development or face challenges in differentiating themselves, resulting in them not achieving the same level of success as the Leaders.

The scarcity of Market Challengers reflects the low maturity of market depth. Essentially, the existing demand has been orientated toward the established players that have developed holistic portfolios and have been able to either utilize their existing client relationships for expansion or demonstrate relevant and impactful case studies.

Further observations are provided at the beginning of each quadrant.

Executive Summary

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

Given the annual investment of tens of billions of U.S. dollars in digital sustainability solutions and market consensus highlighting double-digit CAGR, it is unsurprising that this ISG Provider Lens study has identified some of the most tightly and fiercely contested Leader segments since the inception of the IPL format.

Provider Positioning

Provider Positioning

	Strategy and Enablement Services	Technology Solutions and Implementation Services-IT	Technology Solutions and Implementation Services-OT	Data Platforms and Managed Services	Rating and Benchmarking Services (Global)
3Degrees	Contender	Not In	Not In	Not In	Not In
ABB	Not In	Product Challenger	Product Challenger	Not In	Not In
Accenture	Leader	Leader	Leader	Leader	Not In
AECOM	Contender	Not In	Not In	Not In	Not In
Agrotools	Not In	Not In	Not In	Product Challenger	Not In
Anthesis	Product Challenger	Not In	Not In	Not In	Not In
Arcadis	Product Challenger	Not In	Not In	Contender	Not In
Arup	Product Challenger	Not In	Not In	Not In	Not In
AT&T	Not In	Not In	Contender	Not In	Not In
Atos	Product Challenger	Product Challenger	Contender	Not In	Not In
Avetta	Not In	Not In	Not In	Contender	Not In
AWS	Not In	Not In	Not In	Market Challenger	Not In

Provider Positioning

	Strategy and Enablement Services	Technology Solutions and Implementation Services-IT	Technology Solutions and Implementation Services-OT	Data Platforms and Managed Services	Rating and Benchmarking Services (Global)
Bain & Company	Leader	Not In	Not In	Not In	Not In
BCG	Leader	Not In	Not In	Not In	Not In
Benchmark Gensuite	Not In	Not In	Not In	Product Challenger	Not In
Bloomberg	Not In	Not In	Not In	Not In	Leader
Bosch	Not In	Product Challenger	Contender	Not In	Not In
BSR	Product Challenger	Not In	Not In	Not In	Not In
Capgemini	Leader	Leader	Leader	Not In	Not In
CDP	Not In	Not In	Not In	Not In	Leader
CGI	Leader	Leader	Product Challenger	Not In	Not In
Cloudera	Not In	Contender	Contender	Not In	Not In
Cognizant	Leader	Leader	Leader	Leader	Not In
Computacenter	Not In	Contender	Not In	Not In	Not In

Provider Positioning

	Strategy and Enablement Services	Technology Solutions and Implementation Services-IT	Technology Solutions and Implementation Services-OT	Data Platforms and Managed Services	Rating and Benchmarking Services (Global)
Conservice ESG	Contender	Not In	Not In	Not In	Not In
Cority	Not In	Not In	Not In	Leader	Not In
Dell Technologies	Not In	Market Challenger	Not In	Not In	Not In
Deloitte	Leader	Leader	Leader	Not In	Not In
Deutsche Telekom GK	Not In	Product Challenger	Product Challenger	Not In	Not In
Digital Realty	Not In	Contender	Not In	Not In	Not In
DXC Technology	Not In	Contender	Not In	Not In	Not In
EcoVadis	Not In	Not In	Not In	Leader	Leader
Equinix	Not In	Contender	Contender	Not In	Not In
Ericsson	Not In	Market Challenger	Market Challenger	Not In	Not In
ERM	Leader	Not In	Not In	Not In	Not In
ESG Analytics	Not In	Not In	Not In	Not In	Contender

Provider Positioning

Provider Positioning

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	Strategy and Enablement Services	Technology Solutions and Implementation Services-IT	Technology Solutions and Implementation Services-OT	Data Platforms and Managed Services	Rating and Benchmarking Services (Global)
ESG Book	Not In	Not In	Not In	Not In	Leader
EthiFinance ESG Ratings	Not In	Not In	Not In	Not In	Contender
Ethos ESG	Not In	Not In	Not In	Not In	Product Challenger
Eviden	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
EY	Leader	Leader	Leader	Not In	Not In
FactSet	Not In	Not In	Not In	Not In	Leader
FirstCarbon Solutions	Not In	Not In	Not In	Contender	Not In
FTSE Russell (LSEG)	Not In	Not In	Not In	Not In	Contender
Fujitsu	Not In	Contender	Contender	Not In	Not In
General Electric	Not In	Market Challenger	Market Challenger	Not In	Not In
Genpact	Not In	Product Challenger	Not In	Product Challenger	Not In
GEP	Product Challenger	Not In	Not In	Not In	Not In

Provider Positioning

	Strategy and Enablement Services	Technology Solutions and Implementation Services-IT	Technology Solutions and Implementation Services-OT	Data Platforms and Managed Services	Rating and Benchmarking Services (Global)
Globant	Product Challenger	Not In	Not In	Not In	Not In
Google Cloud	Not In	Not In	Not In	Market Challenger	Not In
Greenly	Not In	Not In	Not In	Contender	Not In
GRESB	Not In	Not In	Not In	Not In	Market Challenger
HCLTech	Leader	Leader	Leader	Leader	Not In
Hexaware	Not In	Product Challenger	Product Challenger	Not In	Not In
Hitachi Digital Services	Rising Star ★	Rising Star ★	Product Challenger	Product Challenger	Not In
Honeywell	Not In	Market Challenger	Product Challenger	Not In	Not In
Huawei	Not In	Contender	Contender	Not In	Not In
IBM	Leader	Leader	Leader	Leader	Not In
ICF International	Market Challenger	Not In	Not In	Not In	Not In
Infosys	Leader	Leader	Leader	Leader	Not In

Provider Positioning

	Strategy and Enablement Services	Technology Solutions and Implementation Services-IT	Technology Solutions and Implementation Services-OT	Data Platforms and Managed Services	Rating and Benchmarking Services (Global)
ISS ESG	Not In	Not In	Not In	Not In	Leader
Jacobs	Contender	Not In	Not In	Not In	Not In
Kearney	Product Challenger	Not In	Not In	Not In	Not In
KPMG	Product Challenger	Leader	Leader	Not In	Not In
Kyndryl	Not In	Contender	Contender	Not In	Not In
LTIMindtree	Leader	Product Challenger	Product Challenger	Leader	Not In
LSEG Data & Analytics	Not In	Not In	Not In	Not In	Leader
McKinsey	Product Challenger	Not In	Not In	Not In	Not In
Measurabl	Not In	Not In	Not In	Contender	Not In
Microsoft	Not In	Not In	Not In	Market Challenger	Not In
MioTech	Not In	Not In	Not In	Not In	Product Challenger
Moody's ESG	Not In	Not In	Not In	Not In	Leader

Provider Positioning

	Strategy and Enablement Services	Technology Solutions and Implementation Services-IT	Technology Solutions and Implementation Services-OT	Data Platforms and Managed Services	Rating and Benchmarking Services (Global)
Mphasis	Not In	Product Challenger	Contender	Not In	Not In
MSCI	Not In	Not In	Not In	Not In	Leader
NTT DATA	Not In	Product Challenger	Product Challenger	Not In	Not In
Oracle	Not In	Market Challenger	Market Challenger	Not In	Not In
OWL ESG	Not In	Not In	Not In	Not In	Contender
Persefoni	Not In	Not In	Not In	Contender	Not In
Protiviti	Contender	Not In	Not In	Not In	Not In
PwC	Leader	Leader	Leader	Not In	Not In
Qualcomm	Not In	Contender	Contender	Not In	Not In
Rackspace Technology	Not In	Market Challenger	Market Challenger	Contender	Not In
RepRisk	Not In	Not In	Not In	Not In	Rising Star ★
S&P Global	Not In	Not In	Not In	Not In	Leader

Provider Positioning

	Strategy and Enablement Services	Technology Solutions and Implementation Services-IT	Technology Solutions and Implementation Services-OT	Data Platforms and Managed Services	Rating and Benchmarking Services (Global)
Salesforce	Not In	Market Challenger	Market Challenger	Market Challenger	Not In
SAP	Not In	Leader	Leader	Leader	Not In
Schneider Electric	Product Challenger	Product Challenger	Rising Star ★	Not In	Not In
SG Analytics	Not In	Not In	Contender	Product Challenger	Not In
Siemens	Not In	Leader	Leader	Not In	Not In
Sphera	Not In	Not In	Not In	Rising Star ★	Not In
Sustainalytics	Not In	Not In	Not In	Not In	Leader
TCS	Leader	Leader	Leader	Leader	Not In
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Thomson Reuters (ASSET4)	Not In	Not In	Not In	Not In	Product Challenger
T-Systems	Not In	Product Challenger	Product Challenger	Not In	Not In
Unisys	Not In	Contender	Contender	Not In	Not In

Provider Positioning

	Strategy and Enablement Services	Technology Solutions and Implementation Services-IT	Technology Solutions and Implementation Services-OT	Data Platforms and Managed Services	Rating and Benchmarking Services (Global)
VelocityEHS	Not In	Not In	Not In	Leader	Not In
Verizon	Not In	Market Challenger	Market Challenger	Not In	Not In
Watershed	Not In	Not In	Not In	Contender	Not In
Wipro	Leader	Leader	Leader	Leader	Not In
Wolters Kluwer	Not In	Not In	Not In	Leader	Not In
WSP	Market Challenger	Not In	Not In	Not In	Not In
Zones	Market Challenger	Market Challenger	Market Challenger	Not In	Not In

Key areas of **sustainability and ESG** that cover strategy, implementation, technologies, data and managed services, including ratings and benchmarking.

Simplified Illustration Source: ISG 2023

Strategy and Enablement Services

Technology Solutions and Implementation Services - IT

Technology Solutions and Implementation Services – OT

Data Platforms and Managed Services

Rating and Benchmarking Services

Definition

Sustainability and ESG concepts have recently gained significant traction, transforming from niche concerns to central pillars of business practices and societal progress.

Increasing awareness of environmental and social issues, evolving regulatory landscapes and changing consumer preferences drive this transition. As the urgency of addressing global challenges intensifies, sustainability and ESG emerge as vital frameworks for driving positive change.

Service providers increasingly recognize the importance of sustainability. They leverage technologies to address environmental and social challenges. From energy providers to transportation companies, providers develop or adopt technology-driven solutions to reduce carbon footprints, optimize resource use and increase diversity and inclusion, demonstrating innovation while showcasing their commitment to green practices and promoting a circular economy.

Service providers are finding ways to transparently communicate their sustainability efforts to gain the trust and loyalty of environmentally conscious consumers. They play a crucial role in advancing sustainable practices and mitigating environmental impacts.

Service providers can win over environmentally conscious consumers, differentiate themselves in the market, avoid regulatory and reputation risks, and potentially justify premium margins by using data and transparently showcasing sustainability efforts while obtaining recognized certifications. As technology advances and enterprise clients seek solutions to become more sustainable, service providers have an unprecedented opportunity to lead the transition toward a greener and more sustainable future.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services/solutions: Strategy and Enablement Services, Technology Solutions and Implementation Services – IT, Technology Solutions and Implementation Services – OT, Data Platforms and Managed Services, and Rating and Benchmarking Services (Global).

This ISG Provider Lens™ study offers IT decision 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 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 45 (exceptionsare 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.

★ **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.

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.

Strategy and Enablement Services

Strategy and Enablement Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. region to identify new market trends and opportunities for digital sustainability strategy and enablement service providers.

In this report, ISG provides insights into the strengths, weaknesses and opportunities of different digital sustainability strategy and enablement service providers.

U.S. companies incorporate sustainability factors into their business strategies. Sustainable investing is rising in the U.S., with investors increasingly demanding ESG information from companies. U.S. companies emphasize diversity and inclusion as part of their sustainability strategies. ESG-linked financing is gaining immense popularity in the U.S., with companies increasingly linking their borrowing costs to their sustainable performance.

Many U.S. companies are setting ambitious net zero targets. Consumers are becoming more aware of the importance of sustainability factors and are increasingly choosing to support companies with strong sustainable performance. Recognizing sustainability as a competitive advantage, U.S. companies are investing in sustainable practices.

The demand for sustainability strategy and enablement services increases, with companies utilizing these services to assess, manage, develop and implement strategies to improve their sustainability performance and reporting. These services can help organizations identify value-creation opportunities, create an integrated sustainability strategy, build execution capabilities, develop communication strategies, and measure sustainability data and performance.

CEOs, CFOs and other C-suite executives should read this report to understand the latest trends in sustainability strategy and enablement services to assist in resource allocation and strategy development.

CSOs and sustainability and ESG professionals, including sustainability managers and ESG analysts, should read this report for updated insights to develop and implement effective ESG strategies.

Strategy professionals should read this report to identify the best sustainability strategy and enablement service providers for companies to help develop and implement a winning ESG strategy.

Consultant professionals should read this report to advise companies on sustainable strategies and performance to stay up-to-date on the latest trends and developments in the industry.

ISG Provider Lens™
Sustainability and ESG
Strategy and Enablement Services

Source: ISG RESEARCH

U.S. 2023

Portfolio Attractiveness (vertical axis, L to H)
Competitive Strength (horizontal axis, L to H)

Product Challenger
Contender
Leader
Market Challenger

Providers plotted:
- Tech Mahindra
- Arup
- Eviden
- KPMG
- Schneider Electric
- Atos
- McKinsey
- Globant
- Arcadis
- Hitachi Digital Services
- BSR
- Anthesis
- Kearney
- GEP
- Cognizant
- HCLTech
- Wipro
- Accenture
- IBM
- BCG
- EY
- Deloitte
- TCS
- Capgemini
- Bain & Company
- ERM
- PwC
- CGI
- LTIMindtree
- Infosys
- WSP
- ICF International
- Zones
- Protiviti
- AECOM
- Jacobs
- 3Degrees
- Conservice ESG

★ Rising Star

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

Iain Fisher

Strategy and Enablement Services

Definition

This quadrant evaluates providers that offer sustainability strategy and enablement services that include implementation capabilities across industries. Delivering sustainability solutions involves various factors. For organizations aiming to help clients navigate the complex landscape of ESG responsibilities, providing strategic capabilities and services across several integrated areas related to enterprise sustainability, sustainable IT, operational technology and technology strategy becomes crucial.

There is much more to consider when focusing on sustainability, which ranges from ESG to a more traditional corporate social responsibility (CSR). Newer aspects that need to be included as part of sustainability are listed as follows:

- Decarbonizing the supply chain
- Creating a circular business delivery model
- Integrating diversity, equity and inclusion (DEI)

- Eliminating modern slavery
- Complying with key regulations, such as the German Supply Chain Act

Moreover, while some providers can develop strategies, the key to minimizing potential greenwashing issues is to work in the areas of procurement, project management, change, CX and sustainability delivery. Delivering these capabilities across several industries is crucial due to legislations or regulations varying by industry.

Eligibility Criteria

1. Provide sustainability **strategy services for enterprises** across several industries

2. Offer services that deliver **technologies that produce sustainability**-focused benefits for enterprises

3. Demonstrate involvement in decarbonization, net **zero emissions, modeling, circular economy** and other environmental capabilities

4. Implement programs that include procurement, **project management**, change management and outcome measurement

5. Work across **sustainability lifecycle** management

6. Offer experience in policy, **regulation and strategy** implementation

Observations

The extent and volume of sustainable enterprise transformations required over the next decade is enormous. The complexity of net zero transitions can be extreme for some U.S. organizations. Considering this fact, consulting companies and service providers have developed strategy and enablement offerings to address this requirement.

Most providers in this study target their strategy services at the CIO and digital level. However, a subset of Leaders, including Accenture, Bain, BCG, Deloitte, EY, ERM, Wipro and PwC, offer advice to the C-suite on entire business transformations. These Leaders, therefore, are well-positioned to exert greater influence over the operational aspects of sustainability, including investments in operational technology (OT) solutions, which are covered as part of a separate quadrant.

A number of providers also advise at a global policy level. For example, Accenture and Wipro are increasingly involved with the UN and World Economic Forum (WEF). The providers offer playbooks and other resources for the collective benefit and global standardization of policy delivery.

Nonetheless, all Leaders in this quadrant play a significant role in shaping enterprises' sustainability journeys.

This quadrant offers insights into many strategy services that determine technology's role in areas such as reporting and regulatory compliance, decarbonization and net zero transition planning, business model transformation, operational efficiency, risk assessments and change management. Additionally, several Leaders, such as IBM and Capgemini, benefit from their strong research capabilities, adding long-term insights to their offerings.

From the 122 companies assessed for this study, 38 qualified for this quadrant, with 16 being Leaders and one a Rising Star.

accenture

Accenture influences sustainability at regulatory, policy and enterprise levels. With a global presence and industry-specific approach, the company offers wide-ranging sustainability services.

Bain & Company

Bain & Company aids clients in developing sustainability strategies, including net zero emissions and circular product strategies. It has expertise working with Fortune 500 companies, governments and non-profit organizations, offering tailored ESG solutions.

BCG

BCG offers sustainability consulting services, helping clients align strategies with business goals, including climate change mitigation and circular economy. The company caters to all industries and governments, aiming for sustainability transformation.

Capgemini

Capgemini offers a comprehensive framework for clients' net zero journeys, including strategy, sustainable operations and progress monitoring. The company has acquired capabilities by acquiring key players such as 23red and Chappuis Halder & Co.

CGI

CGI's Sustainability & Climate Change Advisory practice uses AI, big data and IoT to help clients implement sustainability technologies. The company partners with the U.K.'s leading academia, the UN and the European Space Agency on sustainability programs.

Strategy and Enablement Services

Cognizant offers tools for ESG integration and provides services such as IT assessment, strategy consulting and cloud migration. It helps clients achieve their net zero targets, design sustainable products and improve supply chain sustainability.

Deloitte invested $1 billion in its Sustainability & Climate practice, offering end-to-end services. It partners with the World Wildlife Fund (WWF) and Global Reporting Initiative (GRI) and has developed the Deloitte Centre for Sustainable Progress (DCSP).

ERM

ERM supports clients across the business lifecycle with sustainability strategies. It specializes in carbon data management, financed emissions management and climate risk analysis.

EY

EY offers extensive ESG expertise, helping clients develop sustainability strategies aligned with their business goals. It also provides advisory services, ESG maturity assessments and sustainability management.

HCLTech

HCLTech is committed to sustainability innovation, developing new tools and services to help clients achieve SDGs. The company has partnered with organizations like WWF and GRI for sustainability expertise.

IBM offers industry-agnostic and technology-focused ESG and sustainability solutions, helping clients develop comprehensive strategies. The IBM Garage methodology fosters innovation and quick outcomes.

Infosys, a carbon-neutral company since 2020, is globally recognized for its sustainability and ESG efforts. It has made several strategic partnerships and delivered quantifiable benefits across industries. The company offers sustainable IT transformation services.

LTIMindtree's sustainability portfolio prioritizes green initiatives, offering energy efficiency, waste management and sustainable growth solutions to foster a carbon-neutral future.

PwC, an audit and consulting firm, leverages its core capabilities to deliver sustainability services. It offers sustainability consulting and climate transition services and is recognized as a global ESG thought leader.

TCS aligns business sustainability with planetary sustainability. It provides tailored sustainability services globally across all ESG elements, leveraging its partner ecosystem for innovation.

Wipro, a global sustainability thought leader, integrates ESG across its services. It uses a matrix approach to strategy and offers integrated taxonomy health checks. Further, it provides sustainability IP to organizations free of charge.

Hitachi Digital

Hitachi Digital Service (Rising Star) offers sustainability consulting through its vast partner network. It provides tailored climate risk assessments and focuses on decarbonization and energy efficiency. The company increasingly invests in R&D for green technologies.

HCLTech

Leader

"Using multiple complementary frameworks based on Act, Pact & Impact principles, HCLTech has a broad, structured and effective set of sustainability strategy offerings."

Iain Fisher

Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 223,400 employees across over 215 delivery centers worldwide. In FY23 the company generated $12.6 billion in revenue, with IT and Business Services as its largest segment. With multiple wins in the last 12 months across the U.S. and Europe, HCLTech uses a platform-first and industry-centric approach to integrate scalability into its ESG capabilities. Its U.S. clients focus on understanding their ESG data, which HCLTech utilizes to form the foundation of its strategy services.

Strengths

Comprehensive advisory: HCLTech's EcoSustain framework offers a comprehensive suite of sustainability services tailored for the U.S. market. It includes sustainable strategy development, business model integration, technology-driven sustainability, supply chain decarbonization, diversity and inclusion integration, regulatory compliance, materiality assessments, auditing, assurance, benchmarking, training and sustainable finance.

Leading partnerships: HCLTech has partnered with WWF, GRI and other prominent sustainability organizations. These collaborations provide HCLTech with access to the most recent sustainability expertise and resources.

Climate assessment: HCLTech offers Climate Risk Assessment and Modeling Services, which provide detailed assessments of climate risks and guidance on managing these risks aligned with the Task Force on Climate-related Financial Disclosures (TCFD) and the Sustainability Accounting Standards Board (SASB) guidelines.

Net zero strategy: SERENE is a specialized framework designed to guide U.S. organizations toward achieving net zero emissions. It includes net zero strategy development, carbon footprint assessment and renewable energy adoption.

Caution

HCLTech's expansion into the U.S. market would likely benefit from a wide range of industry and regional collaborations, complemented by its partnership with Schneider Electric. This multifaceted approach will enhance the company's ability to assess unique positions within the U.S. market.

Technology Solutions and Implementation Services - IT

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. region to identify new market trends and opportunities for technology solutions and implementation IT service providers.

In this report, ISG provides insights into the strengths, weaknesses and opportunities of different sustainable technology solutions and implementation IT service providers.

U.S. companies are adopting various technologies and practices to improve their sustainability initiatives. Digital twins are used to simulate and optimize sustainability initiatives, which help reduce the risk of unintended consequences and ensure the success of sustainability initiatives. AI helps automate sustainability processes such as data collection, reporting and decision-making.

These processes help improve the efficiency and accuracy of sustainability programs. Blockchain technology helps enhance the transparency and traceability of supply chains, ensuring ethical sourcing and production practices.

U.S. companies are investing in sustainable technology solutions and implementing new business practices. They are adopting green device lifecycle management practices to reduce the environmental impact of their IT devices. These practices include using energy-efficient devices, extending the lifecycle of devices and recycling devices responsibly. The companies also invest in cybersecurity solutions to protect ESG data and systems from cyberattacks, ensuring the integrity and reliability of ESG data and reporting.

CEOs, CTOs and other executives should read this report to gain valuable insights to make informed decisions about adopting ESG technology solutions and IT services.

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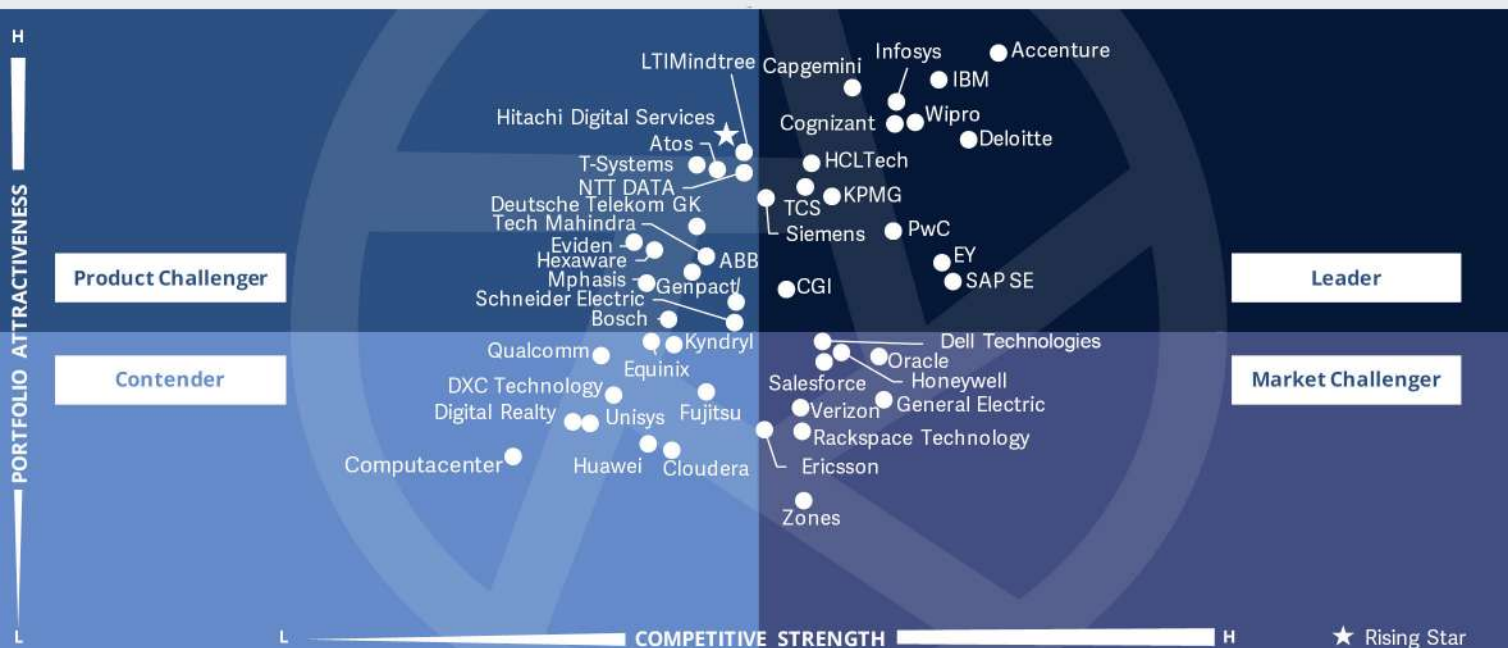
Environmental and sustainability professionals within enterprises should read this report to align their strategies with the adoption of eco-friendly technological solutions.

Government and regulatory bodies can use this report to shape policies that promote sustainable technology practices by highlighting tech adoption trends and their environmental impact.

ISG Provider Lens™

Sustainability and ESG
Technology Solutions and Implementation Services-IT

Source: ISG RESEARCH

U.S. 2023

PORTFOLIO ATTRACTIVENESS

COMPETITIVE STRENGTH

Product Challenger

Contender

Leader

Market Challenger

★ Rising Star

LTIMindtree · Capgemini · Infosys · Accenture
IBM
Hitachi Digital Services · Cognizant · Wipro
Atos · Deloitte
T-Systems · HCLTech
NTT DATA · KPMG
Deutsche Telekom GK · TCS
Tech Mahindra · Siemens · PwC
Eviden
Hexaware · ABB · EY
Mphasis · Genpact · SAP SE
Schneider Electric · CGI
Bosch
Qualcomm · Kyndryl · Dell Technologies
Equinix · Oracle
DXC Technology · Salesforce · Honeywell
Digital Realty · Unisys · Fujitsu · Verizon · General Electric
Computacenter · Huawei · Cloudera · Rackspace Technology
Ericsson
Zones

This quadrant explores solutions for increasing the sustainability of **IT capabilities** typically managed by the CIO and CTO — **the digital backbone of infrastructure, platforms and applications** that offer technology services to the business, independent of industry.

Iain Fisher

Technology Solutions and Implementation Services – IT

Definition

Information technology (IT) and operational technology (OT) are two distinct aspects of any organization, each with its own focus and responsibilities. This quadrant evaluates service providers that offer IT technology solutions for sustainability value chains.

Providers must use various technologies across the sustainability value chain and focus on introducing automation into ESG initiatives.

Technology plays a significant role in making physical assets and resource-intensive processes more efficient. For example, digital twins, IoT, AI, ML and building management systems optimize energy consumption and resource use in buildings and factories.

Within IT, technology enhances ESG practices across various domains. Green data center technology and data center footprint optimization reduce energy consumption and environmental impact.

Green coding, cloud platforms and integrated technologies enable sustainable development and resource-efficient operations, such as the circular economy and sustainability approaches, crucial for reducing carbon emissions and promoting resource efficiency. Incorporating sustainability into end-user device lifecycle management, such as appropriately considering all environmental and social implications for component sourcing, is critical for enterprise clients.

Eligibility Criteria

1. Provide services that use process tools and **technologies to design and implement** more sustainable value chains in one or more areas of ESG outcomes

2. Deliver ESG initiatives by **deploying and integrating** automation

3. Provide or **manage technologies that make physical** assets (such as vehicles, energy or utility plants, buildings, factories and spaces) more sustainable

4. Demonstrate involvement of AI and ML, **digital twins and neuromorphic computing** in delivering opportunities for advanced sustainability solutions

5. Actively participate in the circular economy and **undertake efforts to reduce natural** resources consumption

6. Provide **technology solutions for enterprises** across various industries

Observations

As mentioned in the Executive Summary, ISG has observed significant convergence of different entities in the U.S. digital sustainability and ESG market. The diverse spread of market representation is reflected in this IPL report.

This section covers the U.S. IT solutions market that witnessed exponential growth in solutions and services for measuring and reducing greenhouse gas (GHG) emissions, waste and water use in all aspects of the CIO's domain. The largest concentration of services was in monitoring emissions from data center and cloud environments — increasingly referred to as GreenOps — although recent trends show strong growth in green coding and architecture. The area with the lowest evidence was in the sustainable management of workplace devices such as laptops, tablets and mobile phones. Given the significant emissions, water and e-waste they generate, it is an area many providers should elevate.

A noteworthy trend is the growth of decarbonization level agreements, or DLAs, which represent a commitment to reduce emissions resulting from IT managed services delivery.

While CIOs and CTOs have ample competing priorities, the volume and strength of sustainable or green IT case studies — with the best quality coming from those that include accurate and verified emission reductions — indicates enterprise demand for this market is maturing. Leaders in this quadrant have demonstrated their capabilities in enabling IT's contribution to corporate-level sustainability and ESG goals. CIOs are advised to set demanding goals for their providers to deliver.

From the 122 companies assessed for this study, 47 qualified for this quadrant, with 15 being Leaders and one a Rising Star.

accenture

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

Capgemini

Capgemini offers carbon emission data analysis and applies life cycle assessment methodologies for decarbonization. It focuses on workforce engagement for sustainable change, among other areas.

CGI

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

cognizant

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

Deloitte.

Deloitte offers a comprehensive approach to sustainability, focusing on environmental, social and economic aspects. It provides training for sustainable IT, helps build business cases for tech investments and implements sustainability technologies.

EY

EY's sustainable IT portfolio emphasizes green tech and analytics, offering solutions for carbon reduction, energy efficiency and compliance with environmental regulations, fostering a sustainable future.

HCLTech

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

IBM

IBM's longstanding 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.

KPMG

KPMG's sustainable IT portfolio helps organizations reduce their environmental impact, improve social performance and enhance IT governance. It includes services such as IT decarbonization, sustainable IT strategy and IT for social good.

pwc

PwC's Net Zero Pathway uses data for operational decision-making and decarbonization. The company has developed toolkits using blockchain for sustainability across industries. PwC partners with SAP and Sphera for ESG reporting and sustainability solutions.

SAP

SAP's sustainable IT portfolio helps businesses reduce their environmental impact, improve circularity and achieve ESG goals. It offers solutions for climate action, circular economy and social responsibility.

SIEMENS
Ingenuity for life

Siemens uses AI in its energy management systems for energy optimization. It has an IoT platform, MindSphere, for data analytics. Siemens has partnered with SAP, Atos, IBM, Deutsche Bahn and Uniper to develop various sustainability solutions.

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.

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.

Hitachi Digital Services

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

HCLTech

Leader

"HCLTech stands out for its comprehensive range of sustainable IT capabilities, integrating sustainability considerations into architecture, application engineering and infrastructure management, supported by its sustainability SLAs."

Iain Fisher

Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 223,400 employees across over 215 delivery centers worldwide. In FY23 the company generated $12.6 billion in revenue, with IT and Business Services as its largest segment. With multiple wins in the last 12 months across the U.S. and Europe, HCLTech uses a platform-first and industry-centric approach to integrate scalability into its ESG capabilities. Its U.S. clients are increasingly focused on understanding their ESG data, which HCLTech leverages to form the foundation of its strategy services.

Strengths

Efficient architecture: HCLTech offers established architecture, transition and operational services that assist customers in transitioning to the cloud. It also offers services that modernize applications and related infrastructure platforms, utilizing serverless architecture, PaaS and containers wherever possible. Further, the company prioritizes design with minimal network dependency to reduce emissions from wide area networks and decrease the carbon footprint of their IT systems.

Broad sustainability literacy: HCLTech is upskilling more than 222,000 employees globally on sustainability through a dedicated curriculum, enabling them to remain updated with the key concepts and knowledge on applying client solutions.

Green DC operations: HCLTech's intelligent Facility Management System (iFMS) is a sustainable operations framework that facilitates the transition from conventional to smart facilities. Its centralized Building Management Operation Center (BMOC) and Twinalytics digital twin solutions visualize key data to support more informed decisions.

Sustainability SLAs: HCLTech offers SLAs associated with key sustainability metrics, such as emissions generated while providing services intended to reduce carbon emissions.

Caution

HCLTech should build more reference clients in the U.S. by leveraging their existing successful project delivery case studies and incorporating relevant sustainability metrics to improve confidence.

Technology Solutions and Implementation Services - OT

Technology Solutions and Implementation Services – OT

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. region to identify new market trends and opportunities for technology solutions and implementation OT service providers.

In this report, ISG provides insights into the strengths, weaknesses and opportunities of different ESG technology solutions and implementation OT service providers.

U.S. companies are utilizing technologies to automate carbon accounting and reporting processes, which, in turn, help track their emissions and progress toward sustainability goals. Organizations are also using IoT devices such as smart thermostats, energy monitoring systems and building automation systems to improve energy efficiency in their operations. They further use AI to improve sustainability performance in areas such as energy management, waste reduction and product design.

Energy, utilities, manufacturing and transportation industries face mounting pressure to reduce their environmental impact and improve their sustainability performance.

U.S. companies are investing in smart electric vehicle (EV) charging stations and EV fleet monitoring solutions to reduce transportation emissions. Investments in these solutions help the organizations achieve their net zero targets and meet customer demand for sustainable transportation options. U.S. companies are also implementing sustainability-integrated digital transformation programs to transform their businesses and make their operations more sustainable.

Strategy professionals should read this report to understand the sustainable technology solutions that can help them achieve their sustainability goals.

Vendors and partners of OT service providers should read this report to understand the competitive landscape and identify opportunities to collaborate with OT service providers.
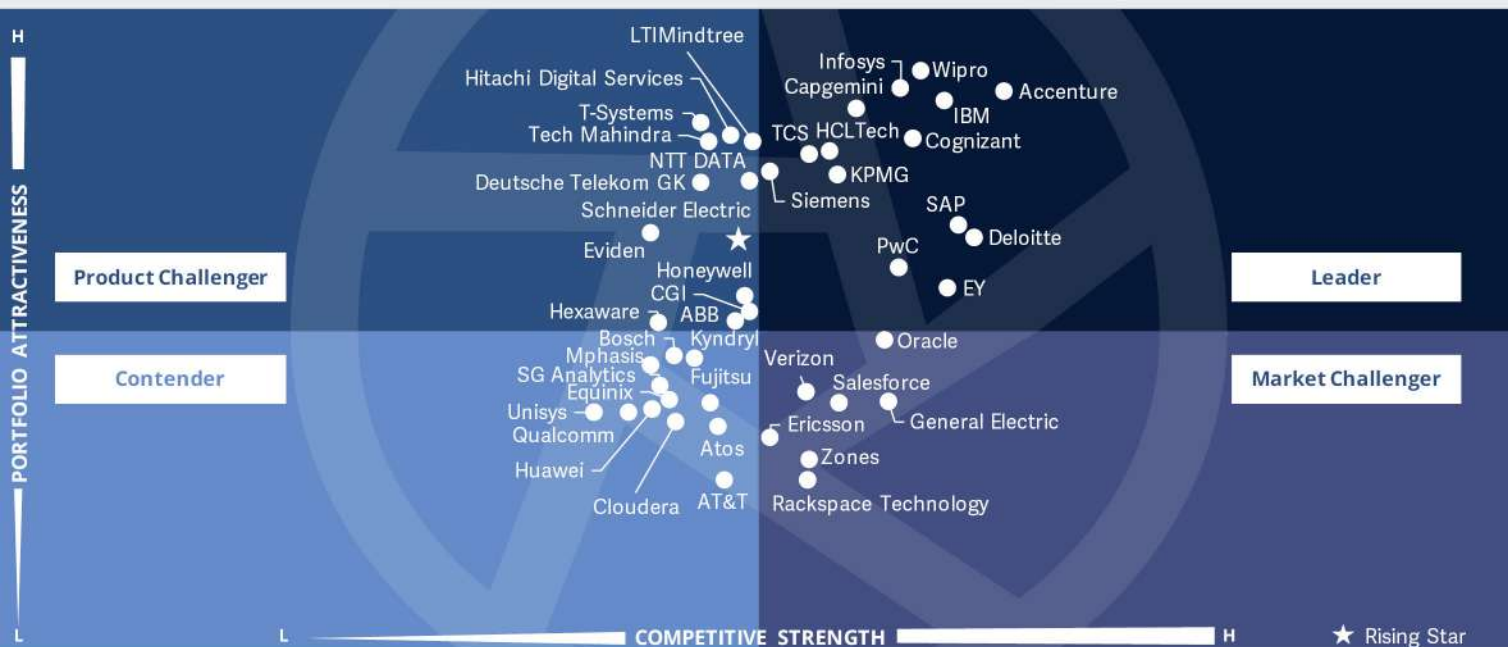
Sustainability consultants and advisors should read this report to help them identify the best service providers that would assist clients in achieving their sustainability goals.

ISG Provider Lens™
Sustainability and ESG
Technology Solutions and Implementation Services-OT

Source: ISG RESEARCH

U.S. 2023

H

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

LTIMindtree
Hitachi Digital Services
T-Systems
Tech Mahindra
NTT DATA
Deutsche Telekom GK
Schneider Electric
Eviden
Honeywell
CGI
Hexaware   ABB
Bosch   Kyndryl
Mphasis
SG Analytics
Equinix   Fujitsu
Unisys
Qualcomm
Huawei
Cloudera   AT&T   Atos

Infosys   Wipro
Capgemini   Accenture
IBM
TCS HCLTech
Cognizant
KPMG
Siemens
SAP
Deloitte
PwC
EY
Oracle
Verizon
Salesforce
Ericsson   General Electric
Zones
Rackspace Technology

Leader

Market Challenger

L

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant focuses on the **operational technology (OT)** that exists specifically to address the **sustainability of business processes and operations** and is heavily tailored to specific industries and regions.

Iain Fisher

Technology Solutions and Implementation Services – OT

Definition

Information technology (IT) and operational technology (OT) are two distinct aspects of any organization, each with its own focus and responsibilities. This quadrant evaluates service providers that offer OT solutions for sustainability value chains.

OT is for connecting, monitoring, managing and securing an organization's industrial operations and is used in physical production industries, such as electricity, water, wastewater, oil and gas and manufacturing. IT systems can help reduce paper waste and improve energy efficiency through smarter systems reducing carbon emissions OT; they can also improve the efficiency in industrial processes, reducing waste and energy use. By integrating IT and OT, organizations can leverage the strengths of both to create more sustainable and efficient operations. Providers must use various technologies across the sustainability value chain and focus on introducing automation into ESG initiatives.

Providers must offer cross-industry and value chain solutions, including waste management, decommissioning and redevelopment services to address environmental concerns and promote circular economy practices. Chemicals and materials management, pollution management and hazardous materials management solutions reduce negative environmental impact and support regulatory compliance.

The market is moving toward how providers can support a more circular economy, where waste is minimized and resources are reused or recycled. Providers will achieve this through platforms that facilitate the sharing or recycling of goods or through technologies that can transform waste into new products.

Eligibility Criteria

1. Provide services that use process tools and **technologies to design and implement** more sustainable value chains in one or more areas of ESG outcomes

2. Deliver ESG initiatives by **deploying and integrating** automation

3. Provide or **manage technologies that make physical** assets (such as vehicles, energy or utility plants, buildings, factories and spaces) more sustainable

4. Demonstrate involvement of AI and ML, **digital twins and neuromorphic computing** in delivering opportunities for advanced sustainability solutions

5. Actively participate in the circular economy and **undertake efforts to reduce natural** resources consumption

6. Provide **technology solutions for enterprises** across various industries

Observations

The U.S. market for applying operational technology (OT) to sustainability goals is less mature than that for IT. However, this scenario is quickly changing with the number of experienced providers increasingly investing in sustainable IT.

The convergence of IT and OT markets is most evident in this quadrant. The market comprises providers from traditional IT, industrial engineering, consulting and software platforms, contributing to market-leading functionalities. Many of the Leaders are difficult to distinguish in terms of their portfolio breadth, with most differentiation seen in the size and volume of deals secured, quality of case studies and scale of investment evidenced.

Some of the IT providers are part of large multi-industry conglomerates — bringing digital sustainability to other enterprises in these industries offers these providers the opportunity to share the expertise of their group companies. TCS and HCLTech are the most notable ones in this quadrant.

Interestingly, many traditional IT providers appear to put more emphasis on their OT solutions than their IT solutions, reflecting that the OT market is significantly larger and growing faster than the IT market in the U.S. However, a growing belief exists among providers in their right to win as they increasingly engage outside the CIO domain directly with business stakeholders. It also reflects the availability of budgets from U.S. enterprises for sustainability business transformations, partially funded by tax credits from the Inflation Reduction Act.

From the 122 companies assessed for this study, 45 qualified for this quadrant, with 14 being Leaders and one a Rising Star.

accenture

Accenture employs a holistic approach to business transformation, embedding sustainability into its business models. Utilizing industry expertise and key energy efficiency assets, the company offers services for renewable strategy, design, construction and operations.

Capgemini

Capgemini's Designed for Earth framework optimizes product lifecycle stages. Its World Emission platform maps global emissions using satellite data, and the Energy Command Center uses IoT for energy asset management and sustainability initiatives.

cognizant

Cognizant partners with various industries to develop OT solutions. Its new business group, Cognizant® Ocean, applies digital technologies to the blue economy. It tracks renewable energy for electric vehicle (EV) charging and uses AI for real-time carbon optimization.

Deloitte.

Deloitte focuses on financial sustainability and ESG solutions, with a potential for expansion. It utilizes digital twin technology, IoT and blockchain to increase efficiency and lower emissions. It offers customized digital solutions for decarbonization strategies.

EY

EY's sustainable operational tech portfolio, including EY OpsChain, focuses on resource efficiency, emission reduction and environmental compliance, facilitating greener industrial operations.

HCLTech

HCLTech focuses on the finance, agriculture and manufacturing industries, offering tailored OT solutions. It partners with Schneider Electric for holistic digital solutions. Its offerings include asset monitoring with Twinalytics and Smart Water solutions.

IBM

IBM has a broad ecosystem of partnerships and in-house research for industry use cases. It specializes in decarbonizing resource-intensive sectors with solutions such as IBM Maximo. Its research teams innovate with AI and quantum computing.

Infosys

Infosys offers industry-specific solutions, including for finance, buildings and transportation. It manages renewables and natural resources with IoT-based command centers. Its Quantum Center of Excellence provides advanced computing for carbon capture and sequestration.

KPMG

KPMG's sustainable operational technology portfolio, featuring KPMG Climate Accounting Infrastructure, promotes efficient resource use, emission reduction and compliance with environmental standards, advancing eco-friendly operations.

pwc

PwC uses technology-driven insights for ESG data flow and risk mapping. Its solutions focus on strategic, financial and data-oriented use cases. It utilizes smart factory dashboards for environmental data mapping and offers a wide industry portfolio.

SAP

SAP offers asset optimization via software solutions such as digital twin tech for sustainable resource use. It collaborates with major firms for digital sustainability solutions and aids in minimizing waste with its SAP Responsible Design and Production solution.

SIEMENS
Ingenuity for life

Siemens invests in sustainability research and has launched the Tech for Sustainability Initiative. It provides digital infrastructure solutions and follows its DEGREE strategic framework to meet ESG targets.

tcs TATA CONSULTANCY SERVICES

TCS offers comprehensive proprietary solutions such as TCS Envirozone™ and TCS Clever Energy™ for environmental goals and promotes circularity in products and services.

wipro

Wipro integrates ESG across its service portfolio, using solution centers for its Impact Intelligence program. The company engineers sustainability into its offerings, with experience across multiple industries.

Schneider Electric

Schneider Electric's (Rising Star) EcoStruxure is a sophisticated IoT platform for optimizing efficiency and sustainability. Its Energy & Sustainability Services team assists with strategic energy sourcing and efficiency.

HCLTech

Leader

"HCLTech excels in its approach to the U.S. OT market, strongly emphasizing customer satisfaction, targeting specific industries and offering differentiated solutions."

Iain Fisher

Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 223,400 employees across over 215 delivery centers worldwide. In FY23 the company generated $12.6 billion in revenue, with IT and Business Services as its largest segment. The company's leadership in the sustainability field is evident through its huge dedicated employee base, driving technology sustainability initiatives across diverse sectors.

Strengths

Intelligent operations: HCLTech's Net Zero Intelligent Operations (NIO) system, powered by IoT WoRKSTM, employs digital twins and AI to reduce energy usage and greenhouse gas (GHG) emissions. It aids businesses in boosting sustainability and progressing toward net zero goals. Twinalytics, an IoT-powered digital twin, integrated with Building Information Modeling, enhances energy efficiency in digital factory spaces and human-centric buildings.

Strong customer journey focus: HCLTech's approach to understanding clients' specific decarbonization challenges and their current stage enables it to provide highly tailored solutions. This approach helps define optimal OT solutions and prioritize and sequence them to maximize ROI.

Regional focus: HCLTech tailors its focus depending on regional demand. In the U.S., the demand for specific services the company offers is low. Missing focus areas include financed emissions and portfolio decarbonization, sustainable application portfolios, circular economy and a more demanding attitude to sustainable culture.

SME offering: HCLTech's three-layered approach, specifically targeting the SME sector, addresses the decarbonization strategy and offers solutions that reduce, optimize and offset carbon emissions. This approach makes HCLTech an intriguing option for organizations in the underserved sector of the U.S. market.

Caution

HCLTech possesses some unique capabilities that are not yet fully embedded on a global scale, particularly in the U.S. It has an opportunity to get ahead of the curve and go to market with these capabilities to lead the conversation.

Data Platforms and
Managed Services

Data Platforms and Managed Services

Who Should Read This Section

This report helps businesses across various sectors and regions to identify emerging trends and opportunities in the ESG data platforms and managed services market.

In this report, ISG evaluates different service providers based on their strengths, weaknesses and opportunities. It also provides in-depth insights into the ESG data solutions landscape.

The U.S. government is enforcing more regulations that require businesses to disclose their ESG performance. Investors and consumers are also demanding ESG transparency from the companies they support. Such policies drive businesses to invest in ESG data and analytics to improve their ESG performance and align with the expectations of socially responsible stakeholders.

Cloud-based ESG data platforms and managed services are becoming popular in the U.S. owing to their scalability, affordability and user-friendliness. These services help businesses enhance their ESG efforts efficiently. AI and ML are also used to automate tasks such as data collection, analysis and reporting, improving the efficiency and accuracy of ESG programs.

A growing need for data platforms and managed services exists in the market. These services can help businesses monitor and manage suppliers' ESG performance and maintain the integrity of ESG commitments throughout the supply chain.

Business professionals should read this report to improve their ESG performance and transparency and align with the expectations of socially responsible investors, consumers and regulators.
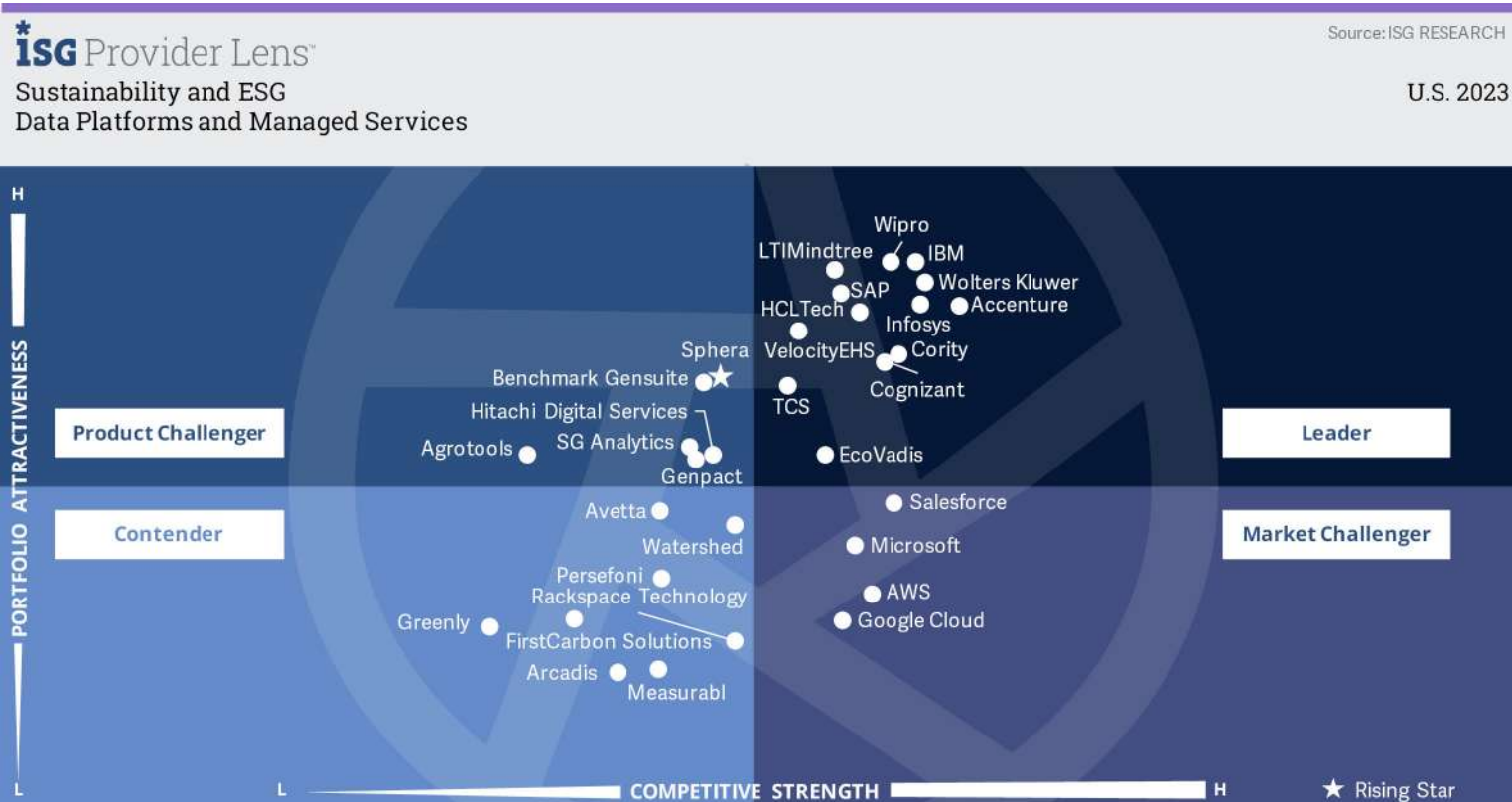
ESG consultants and analysts should read this report to gain insights into the ESG data solutions landscape and provide guidance and recommendations to their clients.

Sustainability professionals should read this report to gain valuable information on how businesses invest in ESG data and analytics to improve their sustainability performance.

ISG Provider Lens™
Sustainability and ESG
Data Platforms and Managed Services

Source: ISG RESEARCH

U.S. 2023

Product Challenger

Contender

Leader

Market Challenger

PORTFOLIO ATTRACTIVENESS

COMPETITIVE STRENGTH

★ Rising Star

Wipro
LTIMindtree   IBM
SAP   Wolters Kluwer
HCLTech   Accenture
Infosys
Sphera   VelocityEHS   Cority
Benchmark Gensuite ●★
Hitachi Digital Services   Cognizant
Agrotools   SG Analytics   TCS
Genpact
EcoVadis
Avetta   Salesforce
Watershed   Microsoft
Persefoni
Rackspace Technology   AWS
Greenly   Google Cloud
FirstCarbon Solutions
Arcadis   Measurabl

This quadrant assesses the data platforms and services that aggregate, categorize, summarize and **enable reporting of ESG data** for internal and external purposes. These solutions **help enterprises address regulation efficiently at scale**.

Iain Fisher

Data Platforms and Managed Services

Definition

This quadrant assesses service providers that offer platforms covering sustainability data services, risk monitoring across business operations and the supply chain, and compliance with legislation and regulations.

Data services support ESG initiatives by providing valuable insights and facilitating informed decision-making. Platforms for collecting, measuring, monitoring, reporting and optimizing ESG data enable organizations to track and assess their ESG performance. Such evaluation enables them to perform end-to-end reporting and showcase the results to the market and customers in many areas, which include

- ISSB
- CSRD
- German Supply Chain Act
- SEC

ESG reporting and assurance/auditing services ensure accurate and transparent reporting of sustainability efforts. Carbon accounting software and services assist organizations in

measuring and managing emissions. Supplier data/managed services are essential for ESG practices throughout the supply chain.

Supplier risk monitoring and partner support help organizations identify and address sustainability risks within their supply chains, promoting responsible sourcing practices. Sustainability risk monitoring enables organizations to assess and manage environmental and social risks associated with their suppliers. Ethical data use, including AI, supports responsible and ethical data practices and promotes transparency and fairness in decision-making processes.

Data services for procurement and supply chains are critical to promote sustainability. Procurement services for sustainability help organizations make sustainable and ethical purchasing decisions that consider environmental and social factors.

Environmental health and safety (EHS) managed services are vital for organizations to maintain a safe and environmentally responsible workplace. EHS performance

Eligibility Criteria

1. Provide services that capture, **monitor, report and track sustainability** efforts across enterprises

2. Offer platforms with **sustainability monitoring, optimization, aggregation, carbon accounting** and other ESG services

3. Provide supplier or **third-party risk monitoring** services

4. Offer managed **services for ESG data feeds** and ethical AI

5. Deliver **ESG-focused procurement services**

6. Deploy **EHS performance management**, reporting and monitoring solutions

Observations

The ESG data platforms market is intensively competitive, with IT service providers targeting it comprehensively. U.S. enterprises are preparing for more ESG corporate reporting, domestically and globally. The market's appeal lies in the challenge of managing a new, extensive enterprise-wide dataset related to ESG data, with European regulations affecting U.S.-based firms operating in the region, indicating a sustained aggressive trend. This market collaborates traditional IT service providers and several software and platform providers that have historically operated in broader industrial and business operations contexts, for example, EHS operations.

U.S. firms invest in data platforms that can provide supply chain visibility. While the SEC's proposed regulations — and California's SB 253 and SB 261 laws that have already passed — have yet to take effect, the Uyghur Forced Labor Prevention Act (UFLPA) that was enacted in the U.S. came into effect in June 2022. This law requires U.S. firms to prove to U.S. Customs and Border Protection that goods produced in the Chinese region of Xinjiang have not been manufactured using forced labor of the Uyghur minorities. Data platforms, such as those covered in this quadrant, are critical enablers of complying with this law.

Mergers and acquisitions are surging in the digital sustainability market. Leaders have expanded their capabilities, leading to significant market consolidation. Providers are actively updating integration points and product roadmaps, while buyers are assessing the long-term value of their existing solutions.

From the 122 companies assessed for this study, 33 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

accenture

Accenture's ESG 360˚ Value Reporting offers a comprehensive data model with over 400 factors, strategic partnerships for solution development, tools for legislative reporting and diversified experience through acquisitions.

cognizant

Cognizant's Sustainability Accelerator integrates IT/OT for efficient ESG data management. It enables circularity, provides deep insights into ESG reporting and uses the Cognizant Neuro AI-enhanced tool for automated data collection.

Cority

Cority, a leading environment, health, safety and quality (EHSQ) software provider, excels in carbon emission data calculations. It continually expands by acquiring key players, such as Reporting 21 and Greenstone, enhancing its ESG performance capabilities.

EcoVadis

EcoVadis provides comprehensive sustainability assessments for more than 1.6 million companies and has industry-specific frameworks and supply chain expertise. Its platform offers actionable scorecards, carbon action tools and ongoing support for sustainable operations.

HCLTech

HCLTech's platform-first approach includes over 20 proprietary platforms for sustainable operations across industries. It leverages partner solutions, offers in-house ESG analytics, provides EHS risk reporting and manages supply chain sustainability risks.

IBM

IBM's ESG platform, built from Envizi, automates ESG data collection and reporting. It integrates with IBM's management tools, Watson AI for insights and blockchain for secure, tamper-proof supply chain records.

Infosys

Infosys offers comprehensive ESG data assets, including Sustainability, Intelligence Cloud and EcoWatch platforms. The company provides provenance tracking, net-zero expertise and region-specific solutions for standards such as Germany's SCDDA.

iSG Provider Lens™   SUSTAINABILITY AND ESG (ENVIRONMENTAL, SOCIAL, GOVERNANCE) QUADRANT REPORT | DECEMBER 2023   **44**

Data Platforms and Managed Services

LTIMindtree

LTIMindtree's ESG NxT platform offers automated ESG reporting and emission management. Its Green Carpet platform tracks business travel emissions, and Worker NxT benchmarks EHS performance. The company also employs a team of carbon specialists.

SAP

SAP provides sustainability solutions for ESG reporting and climate action, including the SAP Sustainability Data Exchange for greenhouse gas management. It leverages an extensive partner ecosystem and AI-powered solutions for bespoke sustainability reports.

TCS

TCS offers comprehensive sustainability solutions, including the Intelligent Urban Exchange platform, materiality assessment tools, a regulatory compliance platform, a supply chain sustainability platform and connected sustainability solutions that leverage IoT and AI.

VelocityEHS

VelocityEHS is a trusted brand offering a software platform and managed services for EHS and ESG, with strong carbon data management capabilities. It continually invests in new technologies, provides ongoing support and partners with firms such as WSP.

wipro

Wipro partners with Concerto for carbon value modeling and GIST Impact for capital impact analysis. It focuses on responsible finance data modeling and is a global expert in responsible procurement, teaching sustainability overlays for procurement modules.

Wolters Kluwer

The Enablon platform by **Wolters Kluwer** offers comprehensive ESG solutions with integrated EHS capabilities and regulatory expertise. It provides benchmarking tools and ongoing support from ESG experts and serves large enterprises for scalable reporting.

Sphera

Sphera's (Rising Star) SpheraCloud and Essential Suite enhance safety, compliance and sustainability for various industries with data analytics support, enhancing decision-making and reducing risks.

HCLTech

"HCLTech uses a platform-first approach with over 20 proprietary platforms for sustainable operations. It utilizes its partner solutions and dedicated EHS center of excellence and offers supply chain risk management services."

Iain Fisher

Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 223,400 employees across over 215 delivery centers worldwide. In FY23 the company generated $12.6 billion in revenue, with IT and Business Services as its largest segment. The company is at the forefront of delivering sustainability solutions for data and managed services. Its ESG data specialists are predominantly based in the U.S. and cater to a number of industries to deliver data managed services and platform solutions, either independently or through partnerships.

Strengths

Dedicated EHS CoE: HCLTech has a dedicated EHS center of excellence within its sustainability practice. With EHS being a regulated domain, HCLTech's solution automates workflow, assessments and product configurations. Its ability to provide support and enhancements for platforms, such as those from Enablon, Intelex and Cority, helps expedite EHS risk reporting and incident root cause analysis by extracting automated data, monitoring and regulatory reporting.

Supply chain data managed services: HCLTech provides third-party risk management services through an automated managed services platform designed to deliver end-to-end supply chain risk assessments across key domains, such as ESG and cybersecurity. The platform is focused on assessing, managing and monitoring supply chain sustainability risk posture and resilience.

Cloud-based ESG platform: HCLTech's Simplified ESG Analytics (SESGA) Platform provides reporting and advanced analytics. It integrates external data with an enterprise's internal data to provide industry-specific insights. SESGA offers scenario analysis, interactive dashboards and ESG performance reporting to a wide range of stakeholders. It helps organizations integrate ESG principles into their operations, enhance transparency and drive sustainable practices across their value chains.

Caution

HCLTech needs to carve out dedicated strategy to offer its sustainability services to mid-market clients that are early in their journey. With its advantageous list of partners, accreditations and ecosystem members, HCLTech can make it clear to prospective clients with an impressive ecosystem that can help.

Rating and Benchmarking Services

Rating and Benchmarking Services

Who Should Read This Section

This report helps businesses in different sectors and regions to discover new market trends and opportunities in the ESG rating and benchmarking services market.

In this report, ISG compares and analyzes different ESG rating and benchmarking service providers based on their strengths, weaknesses and opportunities. It also provides in-depth insights into the ESG data solution landscape.

The ESG rating and benchmarking services market is rapidly evolving and expanding. Regulatory bodies worldwide are increasingly mandating companies to disclose and report their ESG performance. Companies are integrating ESG considerations into their overall business strategies.

ESG data is often fragmented and difficult to compare. ESG rating and benchmarking services help standardize and aggregate ESG data, making it more useful for companies and investors. Traditional ESG ratings have typically focused on environmental factors. However, a growing focus on social and governance factors, such as human rights, labor practices and board diversity, is driving the development of new ESG rating methodologies that prioritize these factors. AI and ML are used to develop new ESG rating and benchmarking methodologies that are more accurate and efficient than their earlier counterparts.

ESG professionals should read this report to oversee and coordinate organizations' ESG activities and initiatives and ensure compliance with ESG standards and regulations.

CSOs and other sustainability professionals should read this report to identify the best ESG rating and benchmarking service providers to help them track companies' progress and measure the ESG impact.

Marketing and sales professionals should read this report to identify the best ESG rating and benchmarking service providers and gain insights on developing and marketing sustainable products and services.

ISG Provider Lens™
Sustainability and ESG
Rating and Benchmarking Services

Source: ISG RESEARCH

Global 2023

PORTFOLIO ATTRACTIVENESS

COMPETITIVE STRENGTH

Product Challenger

Contender

Leader

Market Challenger

Bloomberg
EcoVadis
MSCI
S&P Global
ISS ESG
RepRisk ★
Sustainalytics
Thomson Reuters (ASSET4)
Moody's ESG
FactSet
MioTech
CDP
ESG Book
Ethos ESG
LSEG Data & Analytics
FTSE Russell (LSEG)
ESG Analytics
GRESB
OWL ESG
EthiFinance ESG Ratings

★ Rising Star

This quadrant assesses companies that provide **global sustainability** rating and benchmarking services. Used by organizations globally to accredit, **rate and benchmark their capabilities**, this quadrant serves as an increasingly important list of providers and capabilities.

Iain Fisher

Rating and Benchmarking Services

Definition

This quadrant assesses organizations that provide industry-agnostic ESG ratings, benchmarking services and credentials.

Ratings and benchmarking services play a vital role in driving ESG initiatives by providing standardized assessments and comparing organizations' environmental, social and governance performance.

Standardized ESG ratings across industries enable organizations to gauge their sustainability performance relative to their peers. By benchmarking against industry standards, companies can identify improvement areas and establish sustainability targets.

ESG rating services ensure the inclusion of environmental, sustainability and governance requirements. For environment, agencies measure and rate organizations based on their emissions footprint.

They help companies comprehend Scope 1, 2 and 3 emissions, which encompass direct emissions, indirect emissions from purchased energy and emissions from the entire value chain, respectively. Further assessment across ESG factors, such as energy efficiency, waste management, labor practices, diversity and inclusion, board diversity, executive compensation and ethical business practices, are standard.

These services incorporate supply chain tracking and measurement. This implies that organizations are evaluated not only on their internal practices but also on suppliers' sustainability performance. Assessing the entire supply chain helps identify potential risks, such as unethical labor practices or environmental violations, encourage organizations to engage with suppliers and improve sustainability practices.

Eligibility Criteria

1. Provision of standard **ESG rating services**

2. Ability to **benchmark organizations** and services across industries

3. Rating of organizations based on their **emissions footprint** into Scope 1, 2 and 3

4. Inclusion of **environmental, social and governance** requirements

5. Accreditation services to peer **review organizations**

Observations

The ESG benchmarking and rating services sector is rapidly transforming due to rising interest from both investors and regulatory bodies. ESG benchmarking and rating providers are enhancing their assessment techniques to evaluate companies' ESG performance more comprehensively. This involves incorporating a broader spectrum of ESG factors, utilizing more detailed data and creating more refined evaluations of companies' ESG risks and opportunities.

Companies are facing mounting pressure to increase transparency about their ESG performance. This heightened scrutiny is fueling the demand for ESG benchmarking and rating services that enable companies to measure and disclose their ESG performance in a credible and consistent manner.

Investors are increasingly integrating ESG data and analytics into their investment and risk management strategies. They have a growing appreciation for the significance of social and governance factors in assessing a company's long-term sustainability. As a result, there is a

growing need for ESG benchmarking and rating services that can offer investors the data and insights necessary for making informed ESG investment decisions.

To meet the expanding requirements of their clientele, ESG benchmarking and rating providers are refining their methodologies and diversifying their product offerings.

From the 122 companies assessed for this study, 20 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

Bloomberg

Bloomberg's ESG Ratings are based on company-reported ESG data, supplemented by its proprietary research and analytics. Its ESG Benchmarks track the performance of companies with strong ESG ratings.

CDP

CDP focuses on environmental data disclosure, aiding sustainability efforts. Its ESG ratings are based on company responses to the CDP's annual climate change, water security and forests questionnaires.

EcoVadis

EcoVadis provides supplier-focused ESG ratings to promote responsible sourcing and assesses sustainability performance to evaluate supply chain sustainability.

ESG Book

ESG Book Offers ESG data, analytics and reporting services. The company also offers ESG ratings and customizable ESG benchmarking solutions tailored to specific needs.

FactSet

FactSet provides ESG data for financial professionals to integrate ESG factors into investment decisions.

ISS ESG

ISS ESG offers ESG ratings and research, guiding responsible investment.

Moody's ESG

Moody's ESG offers ESG assessments with financial risk insights. The company provides various ESG data, research and analytics services to help investors and companies make informed decisions about ESG risks and opportunities.

MSCI

MSCI is known for ESG ratings and indices to support sustainable investing.

Rating and Benchmarking Services

LSEG Data & Analytics provides ESG data and analytics for better decision-making.

S&P Global

S&P Global offers comprehensive ESG benchmarking and ratings. The company provides a variety of ESG data, research and analytics services to help investors and companies make informed decisions about ESG risks and opportunities.

Sustainalytics

Sustainalytics specializes in ESG research and ratings for sustainable practices. The company offers ESG benchmarks that track the performance of companies with strong ESG risk ratings.

RepRisk

RepRisk (Rising Star) utilizes ESG data science to systematically identify and assess ESG risks.

Appendix

The ISG Provider Lens™ 2023 – Sustainability and ESG (Environmental, Social, Governance) study analyzes the relevant software vendors/ service providers in the U.S., Europe, Brazil and the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of October 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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 (Environmental, Social, Governance) 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

Author & Editor Biographies

Lead Author

Iain Fisher
Director Research

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.

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Monica K is the senior research analyst for the sustainability, digital business transformation and cyber security studies as part of the ISG Provider Lens™ program. She also has experience in researching technologies such as robotic process automation, blockchain and artificial intelligence. Monica has been working with ISG for the past one and a half years and takes part in analyzing service provider information through primary and secondary research.

Additionally, she engages in delivering ad-hoc requests from providers and advisors.

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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.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 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, 2023

REPORT: SUSTAINABILITY AND ESG (ENVIRONMENTAL, SOCIAL, GOVERNANCE)