ISG Provider Lens®

Digital Sustainability

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



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ERM

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Compliance remains the primary investment driver, but operational value creation is growing in relevance

This ISG Provider Lens® Digital Sustainability 2026 — Global report evaluates the competitive landscape for providers globally. The research covers the following quadrants: Data Transformation Services and Data Management Solutions, assessing providers' capabilities, market positioning and execution across advisory, implementation and managed services within this defined scope of the study.

Market Context

Regulatory recalibration increases architectural pressure

Global sustainability regulations are recalibrating rather than converging. Europe remains the largest center of demand, while U.S. federal retreat, state-level requirements and global exposure create a more fragmented operating environment. Multinational organizations must also accommodate different levels of regulatory and delivery maturity across APAC and other markets. Some respite may be on the horizon with key standards organizations such as the Greenhouse Gas Protocol (GHGP) and the International Standards Organization (ISO) announcing plans for new integrated emission calculation methodologies from late 2028. The current complexity increases the cost of fixed, regulation-specific designs and strengthens the case for reusable data foundations that can support changing taxonomies, disclosures, assurance expectations and product requirements.

The market expansion since 2025 shows that regulatory uncertainties have increased transformation work rather than suspended it. Data transformation services are estimated to have grown by 16 percent since 2025 and are expected to reach an estimated $5 billion in 2026, representing 15 percent of the global digital sustainability market. Data management solutions are estimated to have grown by 11 percent since 2025 and are expected to reach an estimated $7 billion in 2026, representing

The ESG data market is shifting from **static reporting to continuous AI-powered operations.**

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20 percent of the global digital sustainability market. The faster growth of transformation services reflects the need to redesign fragmented data estates to enable platforms, reporting workflows and managed services to operate effectively.

AI changes the data operating model

The second factor contributing to market momentum is the rapid adoption of GenAI, followed by a gradual adoption of agentic AI. In 2025, AI was used mainly to accelerate narrative creation, reconciliation and analysis. In 2026, providers are reporting wide-scale deployment of GenAI, while also developing agents that can acquire, classify, validate and prepare sustainability information across enterprise and value chain systems. This trend increases the potential value of ESG data, but also heightens the importance of provenance, access control, human approval and reproducible calculations.

The two quadrants should, therefore, be read as connected layers rather than isolated markets. Transformation services establish architecture, governance and integration, while management solutions sustain the controlled information flow needed by finance, risk assurance and operations. Market leadership depends on how well these layers interact across regions and ecosystems, not simply on the breadth of a platform or service catalog.

Enterprise Priorities

From reporting repositories to enterprise data products

The priorities visible in the 2025 IPL reports have intensified, and investments continue despite the difficulties in quantifying benefits. Enterprises still need an auditable ESG system of record, and compliance continues to be the primary trigger for a purchase, but the scope has expanded from corporate reporting data to product, component, supplier, asset and financial information. Buyers need sustainability data detailed enough to support compliance and assurance, while concurrently adding to sourcing, product design, capital allocation, risk and operational decisions. Additionally, large enterprises operating in Europe are increasingly reporting all revenue in accordance with the EU Taxonomy for environmentally sustainable activities, requiring an even closer integration between environmental and financial data. These forces are collectively moving ownership closer to operations, finance and procurement, requiring sustainability teams to define business value while technology teams integrate with the existing data estate.

The leading priorities in 2026 are:

- Enterprises are defining a common ESG data architecture, taxonomy and control model that can support multiple regional regulations and voluntary frameworks without duplicating pipelines and calculations.
- Product and value chain teams are extending data to lifecycle assessments, digital product passports (DPPs), financed emissions and supplier traceability, with integration across ERP, workflow, product lifecycle and specialist systems.
- Finance, risk and assurance functions are demanding lineage, reconciliations, evidence workflows, role-based access and repeatable controls that make sustainability information comparable with other governed enterprise data.
- Organizations with a limited number of specialists are adopting managed services or advisory-led operating models for data stewardship, disclosure cycles, regulatory interpretation, quality management and issue resolution.
- Data leaders are introducing GenAI and agents through controlled workflows that preserve source attribution, calculation logic, human approval and a clear record of automated decisions.

Flexibility becomes a buying criterion

Table stakes now include data strategy, target architecture, integration engineering, regulatory knowledge, platform implementation and ongoing governance. Differentiation comes from the ability to work with existing investments, connect internal and external systems, and provide measurable run-state performance.

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Buyers require reference architectures, integration patterns, data quality baselines, control libraries, specific data formats such as eXtensible Business Reporting Language (xBRL), service levels and post-implementation guidance to achieve the business case outcomes. Global consistency also matters: many providers have strong Europe and U.S. references, but not adequate proof that methods, support and regulatory accelerators can be applied across APAC.

Three trade-offs require deliberate governance:

- An integrated suite can simplify accountability, while best-of-breed tools may provide deeper functionality for carbon, product, environment, health and safety (EHS) or supplier use cases.
- Global standardization reduces cost, but excessive centralization can weaken local regulatory and operational fit.
- Agentic automation can reduce recurring efforts, but it can also obscure lineage and introduce control risk.

As enterprises navigate these trade-offs, they should preserve modular interfaces, explicit ownership and exit options so speed does not create platform dependency or architectural debt.

Provider Dynamics

Across both quadrants, systems integrators (SIs) are expanding their influence. Their advisory, engineering and AI capabilities allow them to orchestrate enterprise platforms, workflow tools and specialized SaaS products rather than depending on a single application. SaaS vendors remain essential for deep functionality, but are increasingly relying on SIs for access to complex enterprises, implementation and managed operations. This interdependence is creating both large ecosystems and sharp competition for control in the client architecture.

Convergence does not eliminate specialist roles. ERP and workflow platforms provide enterprise anchors, domain-specific SaaS products supply depth, SIs coordinate architecture and change and managed teams sustain controls. Differentiation increasingly rests on the boundaries between them — who owns data defects, regulatory updates, agent errors, integration failures and service performance. Providers that define these responsibilities in operating models and contracts reduce hand-offs and risk, while those that present an ecosystem without accountable orchestration leave buyers to absorb the complexity.

Data transformation services

The leading providers combine ESG advisory with enterprise data engineering and extensive partnerships across ERP, workflow and specialist applications. Their delivery typically progresses from discovery, data and regulatory gap analysis, and operating model design and target architecture into platform selection, integration, governance and adoption. Product-level requirements are increasing the importance of lifecycle assessment, DPPs, supplier data, financed emissions and operational system integration. GenAI and, to a lesser extent so far, agents are being added to data mapping, classification, quality and reporting workflows.

The strongest differentiation is platform-aware but technology-neutral execution. Buyers look for reference architectures, selection criteria, reusable connectors, taxonomies, lineage, control models and quantified improvements in data quality, reporting effort and assurance readiness. Persistent gaps include unclear sequencing across the transformation lifecycle; limited integration evidence for supplier ecosystems, manufacturing, building and asset systems; and uneven proof across APAC. Some propositions also blur the boundary across independent advice, proprietary assets and partner platforms. Leaders will make recommendation rules explicit and demonstrate adoption, change and sustained control effectiveness, not only technical deployment.

Data management solutions

Competition is shifting from data collection toward governed, auditable and scalable information flows. Strong providers bring together systems of record, regulatory content, carbon and EHS functionality, supplier and product data, analytics and recurring support.

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Large, complex enterprises increasingly favor integrated, ERP-based solutions because the capacity of specialists is limited and reporting now sits closer to finance and compliance. Managed services have a compelling value proposition, although evidence of wide-scale adoption is limited. Small organizations still benefit from SaaS-led models if implementation effort and total cost remain proportionate.

The pressure for consolidation is increasing. Regulation-specific platforms face high redevelopment costs as rules change, while SIs are assembling broad management capabilities and proprietary agents. Proof, therefore, depends on run-state service levels, clear operating responsibilities, data quality, lineage, control performance, issue resolution, and renewal or expansion evidence. Market gaps are also becoming more visible; many offerings are strongest in carbon and disclosure but not as much in nature, biodiversity, social, governance and end-to-end value chain data. Unless embedded within an outcome-based managed service, buyers need clarity on which capabilities are native, partner-led or custom and whether the commercial model can scale from an initial reporting use case into a durable global data service.

Outlook

In the next 12-24 months, the data transformation and management markets will converge around an integrated, continuous ESG data operating model. Transformation will not end at platform go-live, and managed services will increasingly include architecture evolution, regulatory interpretation, integration change and AI control. The digital sustainability market will reward providers that deliver trusted and cost-effective expertise across the ESG data lifecycle while taking accountability for data quality, assurance readiness and business use across regions. Enterprises should educate executives on the long-term business case for robust ESG data management and the transformation services required to establish them. A secondary priority is to identify a partner ecosystem that can reliably automate regulation monitoring, anticipate emerging business opportunities and support supply chain engagement and maturity uplift. Their principal risk is unknowingly creating another fragmented layer of technology debt — separate reporting, carbon, product and risk solutions can reproduce the silos that transformation programs intend to remove. Buyers should define the enterprise data model and control ownership first, select modular capabilities against that architecture and contract for measurable service outcomes after implementation.

Providers face two connected risks. SIs can lose trust if proprietary assets compromise platform-neutral advice, while SaaS vendors can be replaced if they cannot demonstrate differentiated functionalities or economical integration. Both should invest in open interfaces, transparent recommendation rules, governed agents, region-specific delivery depth and client engagements that go beyond carbon and disclosure. Market leaders will be providers that can combine transformation speed with durable controls and make ESG information usable in finance, risk, product and operational decisions. The strategic value is not the report or platform; it is the ability to provide trusted and timely sustainability intelligence to decision-makers.

In 2026, ISG's research identified over 200 new case studies for the data transformation and management markets. These supplement 650 existing case studies, mostly attributed to work performed since 2024. Over 44 percent are linked to European buyers and only 17 percent to U.S. buyers, with the common industries being manufacturing (17 percent), retail and CPG (14 percent), power and utilities (13 percent) and banking (10 percent).

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Provider Positioning

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	Data Transformation Services	Data Management Solutions
Accenture	Leader	Leader
AFRY	Contender	Not In
AMCS	Not In	Contender
Anthesis	Product Challenger	Not In
Arvato Systems	Product Challenger	Not In
Atos	Rising Star ★	Contender
AWS	Not In	Market Challenger
BDO	Product Challenger	Not In

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Provider Positioning

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	Data Transformation Services	Data Management Solutions
Benchmark Gensuite	Not In	Contender
Capgemini	Leader	Leader
CGI	Contender	Not In
Cognizant	Leader	Leader
Cority	Market Challenger	Leader
Deloitte	Leader	Not In
Deutsche Telekom / T-Systems	Product Challenger	Product Challenger
DXC Technology	Contender	Not In

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Provider Positioning

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	Data Transformation Services	Data Management Solutions
EcoVadis	Not In	Leader
ERM	Leader	Leader
EY	Leader	Not In
Fujitsu	Contender	Not In
GE Vernova	Contender	Not In
Genpact	Leader	Leader
Globant	Contender	Not In
Google	Not In	Market Challenger

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Provider Positioning

	Data Transformation Services	Data Management Solutions
HCLTech	Leader	Leader
Hexaware	Contender	Not In
Hitachi Digital Services	Product Challenger	Rising Star ★
IBM	Leader	Leader
Infosys	Leader	Leader
Intelex	Not In	Contender
KPMG	Product Challenger	Not In
Kyndryl	Contender	Not In

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Provider Positioning

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	Data Transformation Services	Data Management Solutions
Locus Technologies	Not In	Product Challenger
LTM	Leader	Product Challenger
MESA	Not In	Product Challenger
Microsoft	Not In	Leader
Minsait (Indra Sistemas)	Product Challenger	Not In
Nasdaq	Not In	Product Challenger
NTT DATA	Product Challenger	Product Challenger
OneStream	Not In	Product Challenger

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Provider Positioning

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	Data Transformation Services	Data Management Solutions
Oracle	Not In	Market Challenger
osapiens	Not In	Rising Star ★
Position Green	Not In	Product Challenger
PwC	Leader	Not In
RSM US	Product Challenger	Not In
Salesforce	Not In	Market Challenger
SAP	Not In	Leader
Schneider Electric	Product Challenger	Product Challenger

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Provider Positioning

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	Data Transformation Services	Data Management Solutions
ServiceNow	Not In	Contender
Sphera	Rising Star ★	Leader
Sweep	Not In	Contender
TCS	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger
ThoughtWorks	Product Challenger	Not In
UL Solutions	Not In	Contender
Unisys	Contender	Not In

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Provider Positioning

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	Data Transformation Services	Data Management Solutions
VelocityEHS	Not In	Market Challenger
Watershed	Not In	Product Challenger
Wipro	Leader	Leader
Wolters Kluwer	Market Challenger	Leader
Workday	Not In	Market Challenger
Workiva	Market Challenger	Leader

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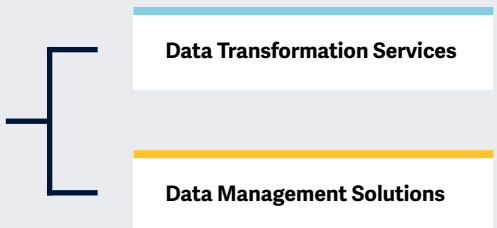
This study evaluates how providers deliver sustainability outcomes through their advisory, AI, data and managed service capabilities.



Simplified Illustration Source: ISG 2026

Definition

The Digital Sustainability 2026 study assesses providers offering digital solutions and services that enable organizations to achieve more sustainable operations, assets, products and value chains. Over the past six years, sustainability, viewed through the combined lens of economic, environmental, social and governance (ESG) factors, has evolved from an optional consideration to a core business objective. Despite a complex and volatile landscape of regulation, stakeholder expectations and geopolitical forces, the market has recalibrated rather than slowed. Growth has moved between regions and shifted from disclosure-led demand to execution and value creation. Organizations remain committed with increased investment planned, although they are more selective and less vocal. The economic fundamentals remain unchanged. Recent conflict in the Middle East has highlighted the scale and speed with which supply chain disruptions can affect countries and organizations. In response, organizations continue to prioritize energy security, operational resilience and cost reduction by optimizing resource consumption, managing climate and sustainability risks, and addressing increasing demand for ethical and transparent practices. The shift toward embedding sustainability into enterprise-wide strategies requires organizations to invest in digital capabilities that reduce cost, emissions and resource use, while ensuring ethical operations.

This study provides the market intelligence needed for:

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

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following two quadrants for services/solutions: Data Transformation Services and Data Management Solutions.

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

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

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

Provider Classifications

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

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

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

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

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Provider Classifications: Quadrant Key

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

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

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

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

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

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

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Data Transformation Services

Who Should Read This Section

This report is valuable for providers offering data transformation services globally to understand their market position and for enterprises looking to evaluate these providers. Multinational enterprises need scalable, automated and auditable ESG data foundations that can support diverse reporting regimes, operating models and value chains. They seek partners that can design and implement ESG data strategies, architectures, governance, taxonomies and integrations while improving data quality and readiness for AI-enabled sustainability decisions.

Sustainability strategists

Sustainability strategists should read this report to understand how providers can design ESG data strategies, roadmaps and operating models that support global sustainability goals. The report highlights capabilities that reduce compliance costs, improve risk management, strengthen reporting readiness and create trusted data foundations for circular business models and value chain transformation.

ESG data architects and engineers

ESG data architects and engineers should read this report to explore how providers design automated and auditable ESG data workflows. The report covers capabilities such as data ingestion, cleansing, categorization, taxonomy alignment, controls, data quality checks and ethical AI frameworks that support consistent insights across global reporting and governance needs.

Enterprise technology leaders

Enterprise technology leaders should read this report to evaluate providers that integrate ESG data from ERP, HCM, supply chain management (SCM), GRC, third-party risk management, CRM, building management, manufacturing execution systems (MES), supervisory control and data acquisition (SCADA) and external partner systems. The report will help them assess which providers can build on existing platforms, improve interoperability and accelerate trusted ESG data transformation on a global scale.

GRC professionals

GRC professionals should read this report to understand how ESG data transformation services can improve auditability, close data gaps and support regulatory alignment across regions. The report helps them assess providers with capabilities in controls, assurance readiness, value chain data, ethical AI governance and high-quality disclosure support.

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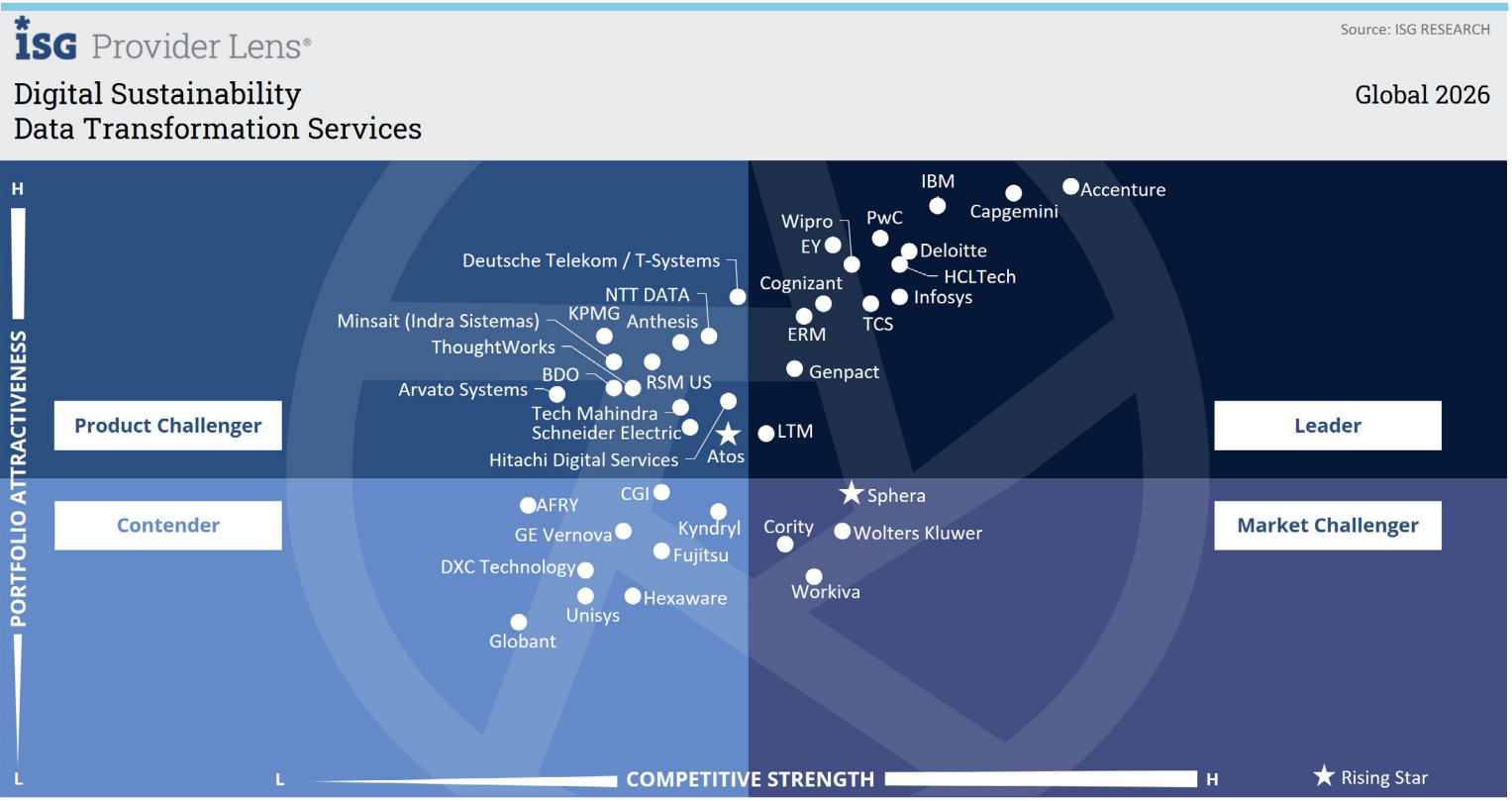

This quadrant assesses providers offering **strategic advisory, integration and engineering services,** delivering scalable, automated and auditable ESG data ecosystems that enable compliance, risk management and sustainable innovation.

Matt Warburton and Bhuvaneshwari Mohan

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Definition

This quadrant assesses providers that offer strategic advisory and engineering services, enabling organizations to plan, design and build the transformation of their ESG data management, operating models and processes.

Providers must deliver scalable, automated and auditable data systems that meet an organization's transformation objectives such as reducing regulatory compliance costs, improving risk management, enhancing business intelligence and unlocking the opportunities of circular business models.

Services assessed for this quadrant include defining the ESG data management strategy; designing and architecting key workflows for ingestion, cleansing, categorization and alignment to relevant reporting taxonomies; and conducting data integrity, quality and gap analyses, with assessments and recommendations.

The quadrant also assesses services and tools that assist organizations in developing frameworks and determining governance for the ethical use of AI and ESG data sets.

Eligibility Criteria

1. Develop and deliver ESG **data management strategies, roadmaps and operating models** that enable organizations to achieve their overall sustainability objectives
2. Design ESG data **architectures, governance models, taxonomies, controls and data foundations** that support scalable, auditable and trusted data management
3. Offer **solution evaluation and selection services** to determine the optimal data platforms and technologies that meet organizations' ongoing ESG data management needs
4. **Integrate data from internal systems of record,** including:
   - ERP
   - HCM
   - supply chain management (SCM)
   - GRC
   - third-party risk management (TPRM)
   - customer relationship management (CRM)
   - building management (BM) systems and other physical assets systems, such as manufacturing execution systems (MES), supervisory control and data acquisition (SCADA)
5. Provide integration services to aggregate and utilize **external ESG data** effectively, including from **suppliers and ecosystem partners**
6. Establish **frameworks for the ethical and inclusive use of ESG datasets,** including those used for **AI model training and deployment**

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Observations

ISG's analysis indicates that the global digital sustainability data transformation services market has grown by 16 percent since 2025, owing largely to the recalibrations and complexities of region-specific and global regulations. In 2026, the market value for these services is estimated at $5 billion, or 15 percent of the total digital sustainability market. Additionally, these services accounted for 10 percent of the case studies featured in ISG's digital sustainability database.

Global organizations continue to shift toward a more comprehensive approach to collecting, analyzing and reporting ESG and financial data to mitigate risks and optimize sustainability value. The rising demand for product- and component-level ESG data has widened the scope of enterprise requirements.

The Leaders in this quadrant, therefore, possess notable advisory skills, built on decades of experience in integrating various types of data, together with market-leading AI capabilities. These Leaders tend to be the largest SIs with extensive partnerships across ERPs, workflow platforms and specialized SaaS solutions offering top-tier functionality for areas such as DPPs, Life Cycle Assessments (LCAs) and financed emissions across industries.

These SIs remain vital partners for SaaS platforms. However, as they increasingly develop their own agentic AI and GenAI capabilities, their dependence on SaaS platforms to meet client needs diminishes. Meanwhile, SaaS platforms depend heavily on these players to introduce and implement their systems for large enterprise clients.

From the 62 companies assessed for this study, 40 qualified for this quadrant, with 14 being Leaders and two Rising Stars.

accenture

Accenture combines ESG data advisory, engineering and platform integration to design scalable architectures, governance and operating models, and data flows for global enterprises.

Capgemini

Capgemini combines global data engineering, sustainability and industry expertise to design ESG data strategies, architectures and operating models for enterprise transformations.

cognizant

Cognizant is a global technology and professional services company that combines ESG data advisory, architecture, platform selection and engineering to build governed sustainability data foundations.

Deloitte.

Deloitte helps global enterprises modernize ESG data foundations through advisory, architecture, integration, governance and platform-enabled reporting transformation.

ERM

ERM combines sustainability and EHS expertise with data strategy, engineering, systems integration and AI services to transform fragmented ESG data into scalable, auditable foundations.

EY

EY is a global ESG data advisory firm, integrating sustainability into enterprise data strategies and governance frameworks across the U.S., Europe and APAC.

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genpact

Genpact is a global digital transformation firm with deep ESG data advisory and integration capabilities, leveraging proprietary frameworks and AI accelerators to deliver scalable, auditable ESG data systems across complex enterprise environments.

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 combines sustainability consulting, co-creation, data engineering and responsible AI governance to undertake scalable, auditable ESG data transformations.

Infosys

Infosys is a global technology and consulting provider that designs ESG data strategies, operating models, architectures and integrations for auditable sustainability transformation.

LTM

LTM provides ESG data strategy, architecture and integration services that combine proprietary platforms, cloud data foundations and operational data sources to create scalable, auditable reporting and decision-support environments.

pwc

PwC, an audit and consulting firm, leverages its financial and tax advisory expertise to deliver sustainability consulting and climate transition services. It is a recognized global ESG thought leader.

TCS TATA CONSULTANCY SERVICES

TCS combines ESG data strategy, operating model design, architecture, platform selection, integration and responsible AI to build decision-grade sustainability data foundations.

wipro

Wipro combines ESG data strategy, architecture, platform selection, integration, AI engineering and change services for global data transformation programs.

Atos

Atos (Rising Star) combines consulting, data engineering, AI and platform integration to design governed ESG data foundations that support reporting, assurance and sustainability decision intelligence.

Sphera

Sphera's (Rising Star) data transformation services bring together sustainability advisory, ESG data strategy, operating model and architecture design, platform evaluation, implementation, integration and change management.

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Leader

"ERM transforms complex sustainability and EHS data at the source, pairing environmental expertise and domain-led architecture with applied AI, modern engineering and platform-neutral delivery."

Matt Warburton and Bhuvaneshwari Mohan

ERM

Overview

ERM, headquartered in London, U.K., is a global sustainability, environmental, health, safety and social risk consulting firm. It has around 8,000 employees across 140 offices in more than 40 countries, including 2,000 in the U.S. Its data transformation services use a One Data Strategy to connect ESG data strategy, governance, architecture and engineering. It integrates enterprise and operational sources such as ERP, IoT and supervisory control and data acquisition (SCADA) into data lakes, warehouses and pipelines, with built-in lineage and auditability. Microsoft, Salesforce, Sphera, Workiva and Enablon extend ERM's platform-neutral delivery ecosystem.

Strengths

Domain-led data architecture: ERM embeds ESG and EHS expertise into data models, KPI frameworks and governance structures during the design phase. Its One Data Strategy creates a single source of truth with standardized taxonomies, calculation methods and cross-framework mapping for scalable, audit-ready enterprise data.

Intelligent document processing: ERM applies NLP, GenAI and retrieval-augmented generation (RAG) to extract and structure data from disclosures, permits, regulatory records and other unstructured sources. In a client example, ERM processed utility invoices across seven suppliers with a Sphera integration and a RAG database that indexes environmental compliance documents for a rapid review.

ESG data governance: ERM defines ownership, accountability, standardized methodologies, controls and end-to-end lineage as a part of its transformation architecture. AI-enabled validation, anomaly detection and classification improve data quality, while evidence trails and harmonized KPIs support multi-framework reporting.

Caution

ERM's ESG data transformation advantage rests on its sustainability and EHS expertise, when compared with large SIs that can offer broad engineering capacity. For business growth in this market, ERM must convince CIOs and CTOs that it can achieve deployment speed and quality at scale and on par with these competitors.

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Data Management Solutions

Who Should Read This Section

This report is valuable for providers offering data management solutions globally to understand their market position and for enterprises looking to evaluate these providers. Enterprises need trusted ESG systems of record that continuously capture, govern, calculate and analyze data across global value chains. They seek platforms and managed services that improve data quality, auditability, reporting, issues, risks and objectives (IRO) insights and AI readiness while supporting diverse regulatory, voluntary and performance management needs.

Sustainability professionals

Sustainability professionals should read this report to understand how data management solutions can centralize ESG data, automate recurring collection and improve reporting accuracy. The report highlights platforms and managed services that support decarbonization, compliance, performance tracking and value chain visibility, enabling teams to focus on analysis and action.

ESG consultants and analysts

ESG consultants and analysts should read this report to assess the evolving market for ESG data platforms, managed services, AI-enabled preparation and benchmark insights. The report will help them identify providers that can support auditable reporting, data quality improvement, emissions calculations, IRO analysis and integration with enterprise and external data sources.

ESG controllers and data professionals

ESG controllers and data professionals should read this report to understand how their roles are evolving around data quality, controls, lineage, evidence collection and user access management. The report highlights solutions that help monitor risks, manage calculations, automate workflows and produce reliable quantitative and qualitative sustainability disclosures.

Product and operations leaders

Product and operations leaders should read this report to understand how ESG data platforms and managed services can connect operational, supplier, asset and resource data with sustainability performance management. The report will help them improve visibility into carbon, water, waste, nature, environmental, health and safety (EHS) and value chain impacts while supporting decisions that reduce risk and improve efficiency.

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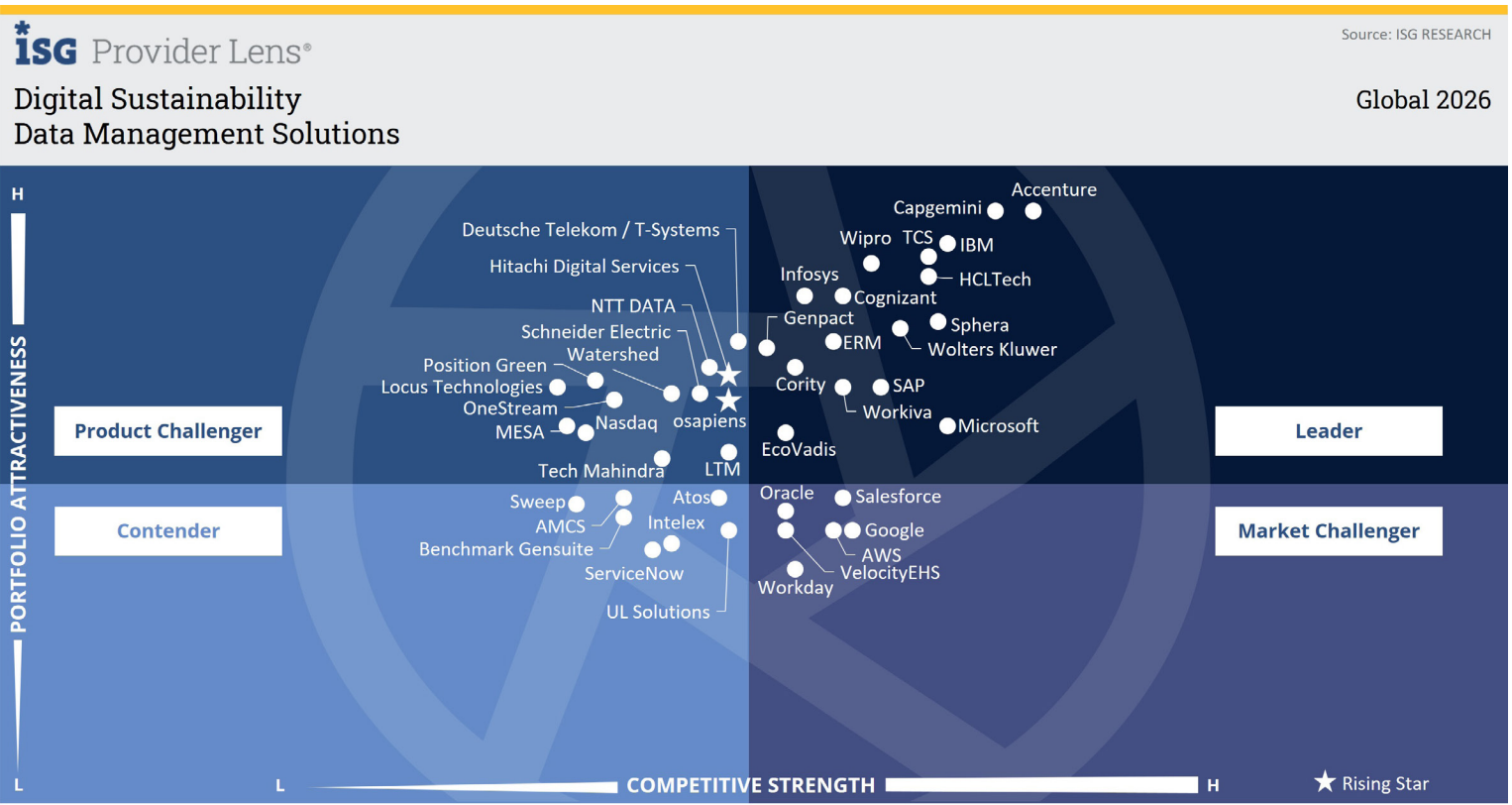

This quadrant assesses **data platforms and managed service providers** that help clients understand and **report ESG data** for internal and external purposes. These solutions enable **regulatory compliance and sustainability-orientated growth.**

Matt Warburton and Bhuvaneshwari Mohan

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Definition

This quadrant assesses data solutions and managed service providers that equip organizations with the ongoing capabilities to monitor, analyze and utilize ESG data across their value chain. The primary purpose of these offerings is to operate as the organizations' ESG system of record, making ESG data available in the right context for other sustainability initiatives.

Achieving sustainability objectives requires ESG data from every part of the value chain. However, much of this data lacks granularity or accuracy, cannot be easily adapted to sustainability frameworks and use cases, exists in isolated spreadsheets or is missing.

With considerable uncertainties in corporate sustainability reporting requirements, organizations must invest in dynamic, scalable data foundations that allow GenAI and agentic AI to analyze and prepare data while retaining transparency and auditability.

Providers assessed for this quadrant also offer data solutions, platforms and/or managed services.

Eligibility Criteria

1. **Continuously capture, organize, govern, calculate, control** and make ESG data available as a trusted and auditable system of record across different industry value chains
2. **Operate as the ESG system of record,** providing:
   - **sustainability data lakes/hubs**
   - **taxonomies**
   - **calculation engines**
   - **emissions factor management**
   - **data quality**
   - **lineage and controls**
   - **evidence collection workflows**
   - **user access controls and auditability**
3. **Accommodate all ESG data types,** including, but not limited to:
   - **carbon**
   - **water**
   - **waste**
   - **nature and biodiversity**
   - **environmental health and safety (EHS)**
   - **third party and supplier**
   - **social and community**
   - **corporate governance and risk**
4. **Manage and monitor ESG data from internal and external sources** such as ERPs, HCMs, SCMs, GRCs, TPRMs, CRMs, BMs, MES or SCADA systems
5. Enable and accelerate recurring **regulatory and voluntary reporting,** disclosures, analytics, dashboards and impact, risk and opportunity insights
6. Provide **sustainability performance management; impact, risk and opportunity (IRO) insights;** optimization analysis; benchmark insights; data quality and reporting; and monitoring and alerts
7. Deliver **recurring enablement, operational support or managed services**

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Observations

ISG's analysis shows that the global sustainability data management solutions market expanded by around 11 percent since 2025. In 2026, it was valued at $7 billion and represented 17 percent of case studies in ISG's digital sustainability database. Europe represents the largest region by spend, at approximately 45 percent.

The Data Management Solutions quadrant continues to be driven by compliance requirements. Client demand is dominated by ESG reporting, disclosure and regulatory alignment, with carbon accounting, supply chain data and traceability forming important adjacent needs. The focus has shifted from collecting sustainability data toward creating governed, auditable and scalable information flows that can support finance, risk, assurance and external reporting.

Buyers are seeking flexible models: integrated platforms that internal teams can operate effectively, and managed or advisory-led services when specialist capacity is constrained. As sustainability reporting moves closer to finance and compliance functions, the value proposition is shifting toward ongoing support that combines implementation, governance, regulatory interpretation and operational delivery.

Platforms face market consolidation as SIs expand their capabilities, and regulation-specific platforms face high redevelopment costs and ROI risks. Demand is strongest among large, complex organizations seeking integrated, scalable solutions and managed services over in-house operations. SaaS tools remain vital for smaller firms but struggle to match demand for expertise and implementation.

From the 62 companies assessed for this study, 43 qualified for this quadrant, with 17 being Leaders and two Rising Stars.

accenture

Accenture integrates and operates ESG data platforms and managed services that create auditable systems of record for reporting, carbon, EHS, supplier risk and performance worldwide.

Capgemini

Capgemini provides global ESG data foundations, analytics and managed operations that make sustainability information auditable, reusable and accessible across enterprise systems.

cognizant

Cognizant is a global technology services company that combines ESG data platforms, partner applications, AI and managed operations to create auditable sustainability systems of record.

Cority

Cority is a prominent provider of EHS and quality software that specializes in calculating carbon emissions data. The company has grown by acquiring significant firms such as Reporting 21 and Greenstone, which have enhanced its ESG performance capabilities.

ecovadis

EcoVadis provides sustainability evaluations for over 3 million organizations, utilizing specialized frameworks and in-depth supply chain knowledge. Its platform features practical scorecards, carbon-reduction tools and assistance for sustainable practices.

ERM

ERM combines proprietary sustainability software, managed data operations and partner platforms to capture, govern, analyze and operationalize ESG and EHS data worldwide.

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Genpact is a global digital transformation firm with deep ESG data advisory and integration capabilities, leveraging proprietary frameworks and AI accelerators to deliver scalable, auditable ESG data systems across complex enterprise environments.

HCLTech

HCLTech's platform-first strategy encompasses more than 20 proprietary systems designed to support sustainable operations across various industries. It utilizes partner solutions, delivers internal ESG analytics and oversees sustainability risks within the supply chain.

IBM's Envizi® platform and managed capabilities provide a global, auditable system of record for ESG data, reporting, emissions, supply chain intelligence and performance planning.

Infosys is a global technology provider offering ESG data platforms, integrations and managed services for auditable records, reporting, analytics and value chain insights.

Microsoft

Microsoft's Sustainability Manager suite automates ESG data collection, tracking and reporting. The platform integrates with Fabric and Azure and utilizes AI insights for actionable analytics.

SAP

SAP is a global enterprise software provider delivering an ERP-centric sustainability portfolio that unifies ESG, carbon and compliance data across finance, supply chain and operations for multinational organizations.

Sphera

Sphera's data management solutions use its SpheraCloud platform to operate a governed ESG system of record spanning corporate, environmental, operational, product and supplier data, controls, reporting and analytics.

TCS offers ESG systems of record, reporting, analytics, carbon and resource accounting, EHS data and supplier risk operations through IUX, accelerators and managed services.

Wipro combines its Impact Intelligence solution, partner platforms, AI and managed services to operate auditable ESG data foundations and reporting workflows globally.

Wolters Kluwer

Wolters Kluwer combines CCH Tagetik's finance-led sustainability performance management with its Enablon-branded ESG, EHS and risk platforms, providing global enterprises with a governed data foundation for disclosure, carbon accounting and operational insight.

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Workiva

Workiva is a U.S.-based cloud software provider whose governed ESG data and reporting platform connects ESG, financial, risk and control data, as well as carbon accounting and disclosure workflows, for multinational organizations.

HITACHI
Inspire the Next

Hitachi Digital Services (Rising Star) is an engineering service provider and SI specializing in energy-intensive industries. Its data management proposition is built on the RitaONE platform, which was created by the Hitachi Group's rail division.

osapiens

osapiens (Rising Star) is a Mannheim-based software provider that delivers a configurable ESG data and workflow platform for reporting, carbon, supply chain compliance and product data, supported by a modular SaaS model and offices across Europe and the U.S.

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Leader

"ERM combines expert environmental and EHS data knowledge, specialized SaaS platforms and managed services to deliver a flexible global delivery model."

Matt Warburton and Bhuvaneshwari Mohan

ERM

Overview

ERM is a global leader in sustainability, environmental, health, safety and social risk consulting. Majority-owned by KKR and headquartered in London, ERM has about 8,000 employees across more than 140 offices in over 40 countries. Its 6,000 sustainability experts and 500 digital experts support clients globally through delivery hubs, while regional regulatory specialists and digital hubs, including in India, support local interpretation, language-specific documentation and global programs. Its One Data Strategy provides a single governed foundation that facilitates data collection and reporting across many workflows.

Strengths

ESG data foundation controls: ERM integrates ESG, EHS and operational information into a governed single source of truth. Standard data models, KPI libraries, controls, data ownership and data lineage support audit-grade reporting and real-time performance monitoring across jurisdictions.

Sector-specific SaaS solutions: ERM's Mine Assure solution consolidates more than 27 mining EHS and ESG standards into one assessment protocol, reducing duplicate conformance work. Another solution, emissions.AI, applies emissions and energy analytics to complex facilities, while ERM Assess supports simultaneous data capture and real-time visibility across audits and risk reviews.

Broad engineering toolkit: ERM's toolkit includes Microsoft and Salesforce assets, including Azure Data Factory, Synapse, Fabric, Azure SQL, Python, R, Foundry, Power Platform and Power BI. Its technology-agnostic approach supports business applications, low-code automation, core AI and data engineering within existing client environments.

Operational regulatory intelligence: ERM Libryo uses AI, LLMs and retrieval-augmented generation (RAG) to monitor regulatory change, interpret obligations and map applicable laws to specific operations and locations. Real-time alerts and actionable tasks help distributed teams understand compliance status and respond proactively to changing EHS and supply chain requirements.

Caution

ERM's digital capabilities remain relatively unknown to procurement and technology buyers. A targeted marketing campaign, including events for these stakeholders, as well as more published case studies demonstrating supply chain and third-party risk management outcomes, could address this.

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Appendix

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

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of October 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

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

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Lead Author

Matt Warburton

Principal Consultant and Sustainability Lead

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

Warburton focuses on accelerating sustainable outcomes and works closely with organizations to maximize the positive impact of technology. He has led engagements for large clients in technology, aviation, financial services, healthcare, mining and retail. These range from providing strategic and practical advice on the digital sustainability capabilities organizations need and how to get them, to designing and delivering ESG risk assessments on hundreds of suppliers.

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



Lead Analyst and Co-Author

Bhuvaneshwari Mohan

Lead Analyst

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

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

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Study Sponsor



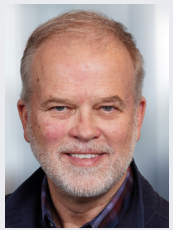
Iain Fisher

Executive Director, Research

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

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

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®/ISG Research

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry.

Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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ISG Provider Lens®

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

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

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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ISG Provider Lens®

OCTOBER, 2026

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