

Digital Sustainability

IT Solutions

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



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Lenovo



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*Report Authors: Matt Warburton and
Bhuvaneshwari Mohan*

U.S. sustainability demand is becoming discrete, more selective and operationally focused

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

Market Context

Continued growth demonstrates sustainability's value

ISG's research indicates that the global digital sustainability market will reach \$34.3 billion in 2026, up by 12 percent compared with 2025. Although this growth has decelerated from 16 percent in 2024-2025, its persistence despite heightened geopolitical disruption and AI's competing demand for technology investment indicates enterprises recognize the importance of sustainability to long-term competitiveness. The U.S. represents the second-largest regional market, with a 33 percent share.

Fragmentation replaces a single policy signal

The U.S. digital sustainability market remains important, but is developing less uniformly than Europe's and is increasingly shaped by competing policy signals. The federal retreat from climate disclosure and clean energy support identified in 2025 has persisted, reducing national regulatory momentum and public sector demand. At the same time, state requirements, particularly California's climate disclosure laws, and international regimes

U.S. demand favors
**sustainability that
funds itself** and
maintains global
market access.



such as the European Union's (EU) Corporate Sustainability Reporting Directive (CSRD), Carbon Border Adjustment Mechanism (CBAM) and product regulations continue to apply to many large U.S. enterprises.

The result is not deregulation in practice, but a more fragmented compliance environment in which obligations depend on location, sector and global market exposure.

Energy and supply constraints sharpen the economics

Geopolitical disruption has added a second structural force. Conflict in the Middle East has exposed vulnerabilities in manufacturing, retail and consumer goods supply chains, increasing the relevance of resource efficiency, traceability and operational resilience. For energy and utilities, priorities include expanding energy supply and optimizing asset performance, while balancing community and consumer concerns about energy prices and biodiversity impacts.

At the same time, compute demand for AI is colliding with electricity grid interconnection delays, transmission limits and community resistance to new infrastructure. This raises

the economic value of energy-efficient models, workload optimization, improved cooling and better use of existing capacity. The quadrant results should, therefore, be read as evidence of a resilient but uneven market: strong where sustainability solves an immediate operating constraint, weaker where it depends on a standalone mandate or premium budget.

Enterprise Priorities

Sustainability must finance or protect the transformation

The shift from compliance to value described in 2025 has become more disciplined. U.S. boards still support sustainability investment, but buyers are less willing to fund programs on environmental intent alone. They expect a direct connection to energy cost, asset productivity, supply continuity, regulatory access or revenue protection. This favors initiatives that can be embedded within AI, infrastructure, manufacturing, product and sourcing programs, with shared ownership across finance, operations, procurement, engineering, IT and risk.

The leading enterprise priorities for 2026 are as follows:

- Multi-state and multinational enterprises are rationalizing regulatory obligations into a common control model that can support California, federal, EU and product-level requirements without building separate systems for every regime.
- Manufacturers, utilities and asset-intensive firms are scaling AI, IoT and digital twins to improve energy use, maintenance, reliability, renewable integration and methane or flaring performance, with investments gated by verified operating returns.
- Retail, consumer goods and automotive companies are accelerating product traceability, lifecycle assessment, product carbon footprints and digital product passports (DPP) because packaging rules, CBAM and battery requirements can affect market access and supply chain choices.

- CIOs and CTOs are prioritizing AI capacity efficiency through GreenOps, workload placement, model and data optimization, data center power and cooling measures, and architecture choices that reduce both infrastructure cost and environmental impact.

Evidence and adaptability shape selection

Table stakes include regulatory interpretation, greenhouse gas (GHG) emissions and energy baselining, data governance, access to major cloud and industrial ecosystems, and the ability to work across IT and OT. Differentiation comes from U.S. sector evidence, quantified baselines and repeatable mechanisms that move from advice into implementation and managed improvement. Buyers increasingly ask if savings are measurable at the workload, asset or product level; if methodologies are transparent; and if solutions can adapt as state and international requirements change.



Executive Summary

Two trade-offs are becoming central. A packaged solution can accelerate compliance and operational insights, but a rigid data model may create costly rework as regulations evolve. Rapid AI expansion can improve forecasting and optimization, yet it can consume the grid capacity and budgets that sustainability programs aim to protect. Enterprises, therefore, need modular architectures, human approval points, workload telemetry and investment governance that evaluates energy, carbon, resilience and financial effects together.

Provider Dynamics

Providers are responding by embedding sustainability to larger transformation budgets and operationalizing repeatable delivery. Leading portfolios connect advisory, engineering, ecosystem platforms and managed services through common baselines and outcome controls. Weaker propositions remain broad but disconnected, or rely on global claims without sufficient U.S. industry evidence and credible financial results.

Strategy and Enablement Services

Provider positions are relatively stable compared with 2025. Established consulting firms continue to benefit from executive trust, regulatory depth and financial expertise, while systems integrators with strong industry consulting are closing the gap by linking strategy directly to implementation. Strong providers use scenario modeling, materiality and risk methods, investment prioritization, operating model design and transformation governance to reconcile state, federal and international exposure. They then connect the roadmap to technology selection, data controls and program delivery.

The decisive proof is confidence backed by execution. Buyers expect advisors to quantify the business case, define owners and controls, and demonstrate that recommendations produced operating outcomes in the relevant sector. Recurring gaps include limited evidence outside major clients, insufficient continuity between advisory and engineering teams, and frameworks that describe regulatory complexity without reducing the cost of managing it.

Asset, Product and Value Chain Solutions

This quadrant continues to mature faster than the overall U.S. market, with more providers achieving production scale penetration than in 2025. Deep industry and engineering expertise remains the strongest differentiator. AI and ML, IoT and digital twins are now common components, but leading providers embed them into maintenance, energy, water, methane, safety, product design and supply chain workflows. Product capabilities increasingly connect lifecycle assessments, footprints, traceability and passports to ERP, product lifecycle management and manufacturing data.

Buyers distinguish maturity through granular evidence: asset baselines, verified energy or maintenance savings, renewable connection decisions, leakage reductions, product-level calculations and traceability from source data to action. Industrial specialists retain an advantage in complex physical environments, while scaled service providers compete by integrating and managing operations.

Common weaknesses include fragmented IT and OT data, pilots that do not transfer into plant operations, and environmental claims that are not reconciled with throughput, reliability or margin.

IT Solutions

Sustainable IT remains the smallest market in scope, and U.S. buyers are particularly reluctant to pay a premium while budgets move toward AI. This constraint is reshaping competition. Providers with established CIO and CTO advisory relationships can influence architecture earlier, while traditional IT providers can integrate improvements into cloud, data center, software, network and workplace services. The strongest propositions make sustainability self-financing through capacity avoidance, energy savings, utilization improvement and longer asset life.

AI is now the organizing issue. Leading delivery combines GreenOps and FinOps data, workload-level energy telemetry, model and data efficiency, workload placement, power and cooling optimization, green software practices and circular device management.



Executive Summary

Mature enterprise-provider relationships can show measurable environmental benefits, but the market still struggles with granular allocation and consistent measurement.

Buyers should challenge assumed savings, boundary choices and the persistence of benefits after deployment. Providers that treat sustainability as a separate reporting layer will lose ground to those that make it a design and run-state discipline for AI and infrastructure.

Outlook

Over the next 12 to 24 months, demand for U.S. digital sustainability will remain resilient but uneven. Growth will concentrate where sustainability protects operating economics or market access: AI and data center efficiency, asset performance, supply chain resilience, methane and resource management, and product traceability. State and international obligations will sustain advisory and control requirements, but will not create a uniform national market. Strategy services will grow by reducing complexity and sequencing investable actions; asset and value chain

solutions will lead by validating operational returns; IT solutions will advance by releasing capacity or lowering the cost of AI.

Enterprises should monitor the pace of state-rule implementation, changes in international exposure, grid-connection constraints and the effect of geopolitical disruption on energy and materials. Their principal risk is fragmentation: separate compliance tools, asset pilots and AI-efficiency initiatives can produce incompatible data and competing investment logic. Buyers should establish shared baselines, modular controls and outcome measures before sourcing and require suppliers to show how environmental benefits connect to cost, reliability and resilience.

Providers risk offering technically credible capabilities without an economic route to adoption. They should invest in U.S.-specific case evidence, industry engineering, transparent measurement and commercial models that share or fund

efficiency gains. Leadership will depend less on the volume of sustainability features and more on the ability to embed them into AI, infrastructure, product and operational transformation. In a politically divided market, the durable proposition is not advocacy or compliance alone; it is measurable performance that remains valuable across policy cycles.

Federal retreat has not eliminated enterprise demand; it has changed the buying criteria. U.S. clients now favor solutions that can fund themselves through lower energy use, stronger asset performance, supply continuity or reduced regulatory friction. For multinationals, the business case extends to ensuring ongoing access to European and APAC markets. Sustainable and responsible AI represents one of the fastest-growing demand drivers of 2026.





Provider Positioning

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





Provider Positioning

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





Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
DXC Technology	Not In	Contender	Contender
ENGIE	Not In	Contender	Not In
ERM	Leader	Not In	Not In
EY	Leader	Product Challenger	Product Challenger
Fujitsu	Not In	Contender	Product Challenger
GE Vernova	Not In	Market Challenger	Not In
Genpact	Market Challenger	Not In	Not In
GEP	Contender	Not In	Not In
GHD	Contender	Not In	Not In
Globant	Not In	Not In	Contender





Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
HCLTech	Leader	Leader	Leader
Hexaware	Not In	Contender	Contender
Hitachi Digital Services	Product Challenger	Leader	Product Challenger
Honeywell	Not In	Product Challenger	Not In
HPE	Not In	Not In	Contender
IBM	Leader	Leader	Leader
ICF	Product Challenger	Not In	Not In
Infosys	Leader	Leader	Leader
Jacobs	Contender	Not In	Not In
Johnson Controls	Not In	Market Challenger	Not In





Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
Kearney	Product Challenger	Not In	Not In
KPMG	Product Challenger	Product Challenger	Contender
Kyndryl	Not In	Product Challenger	Leader
Lenovo	Not In	Contender	Leader
LTM	Contender	Product Challenger	Product Challenger
LTTS	Not In	Leader	Not In
Marsh McLennan	Contender	Not In	Not In
McKinsey & Company	Leader	Not In	Not In
Mott MacDonald	Contender	Contender	Not In
Mphasis	Not In	Contender	Contender





Provider Positioning

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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
NTT DATA	Rising Star ★	Leader	Leader
PwC	Leader	Leader	Product Challenger
Ramboll	Contender	Not In	Not In
Rockwell Automation	Not In	Product Challenger	Not In
RSM US	Product Challenger	Not In	Not In
Schneider Electric	Product Challenger	Leader	Product Challenger
Siemens	Not In	Rising Star ★	Not In
SLR	Product Challenger	Not In	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger





Provider Positioning

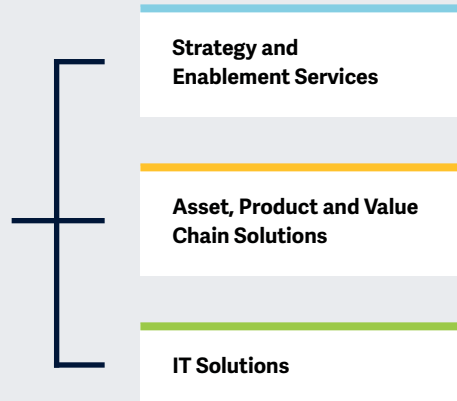
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	Strategy and Enablement Services	Asset, Product & Value Chain Solutions	IT Solutions
ThoughtWorks	Not In	Not In	Product Challenger
Unisys	Not In	Not In	Contender
Verizon	Not In	Not In	Market Challenger
Wipro	Leader	Leader	Leader
WSP	Market Challenger	Market Challenger	Not In
Zones	Not In	Not In	Contender



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.



Scope of the Report

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

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the U.S. 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).





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.

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.

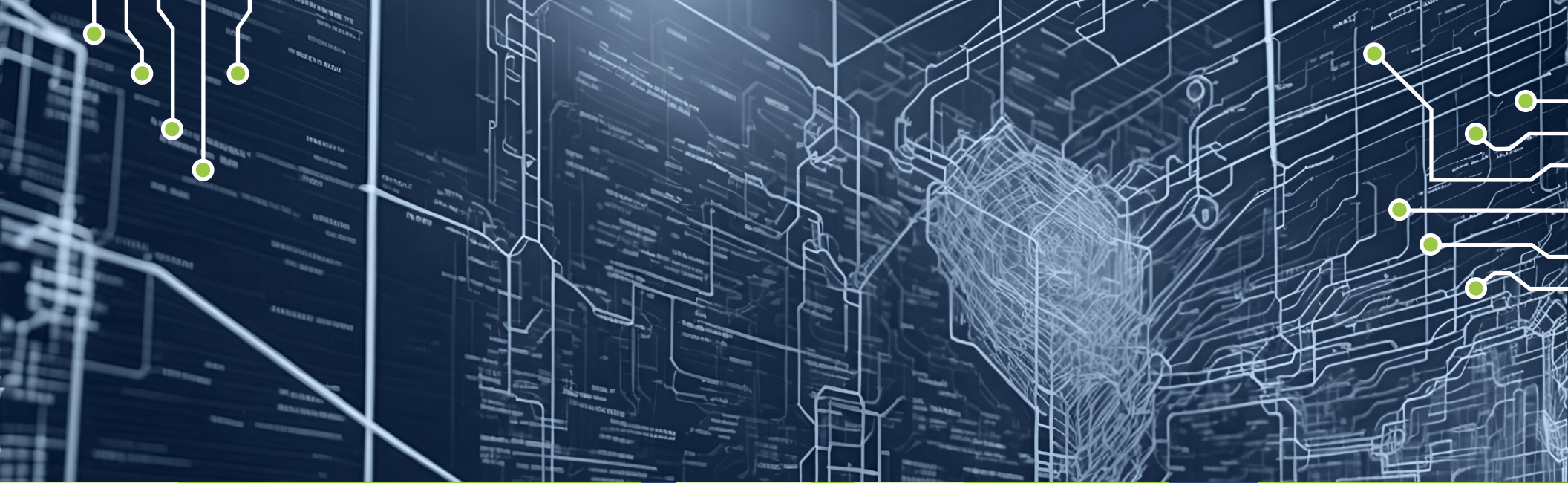
Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength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

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

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

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





IT Solutions

Who Should Read This Section

This report is valuable for providers offering IT solutions and services in the U.S. to understand their market position and for enterprises looking to evaluate these providers. Enterprises are modernizing IT amid rising AI demand, data center energy pressures, varying state-level policies and cost scrutiny. They need partners that can optimize computing, storage, networks, software and devices, reduce outsourced IT impacts, improve accessibility and make AI workloads more sustainable.

CIOs, CTOs and other executives

CIOs, CTOs and other executives should read this report to understand how sustainable IT strategies can reduce costs, manage AI-related energy demand and improve resilience. In the U.S., where cloud growth, data center capacity and stakeholder expectations vary by state and sector, the report helps leaders evaluate providers that can align IT modernization with practical sustainability outcomes.

Technology and IT managers

Technology and IT managers should read this report to explore how providers optimize computing, storage, networking and application environments to reduce energy use and increase utilization. The report highlights approaches to green software, workload placement, infrastructure modernization, sustainable AI engineering, circular device practices and accessibility features that support compliance and operational efficiency.

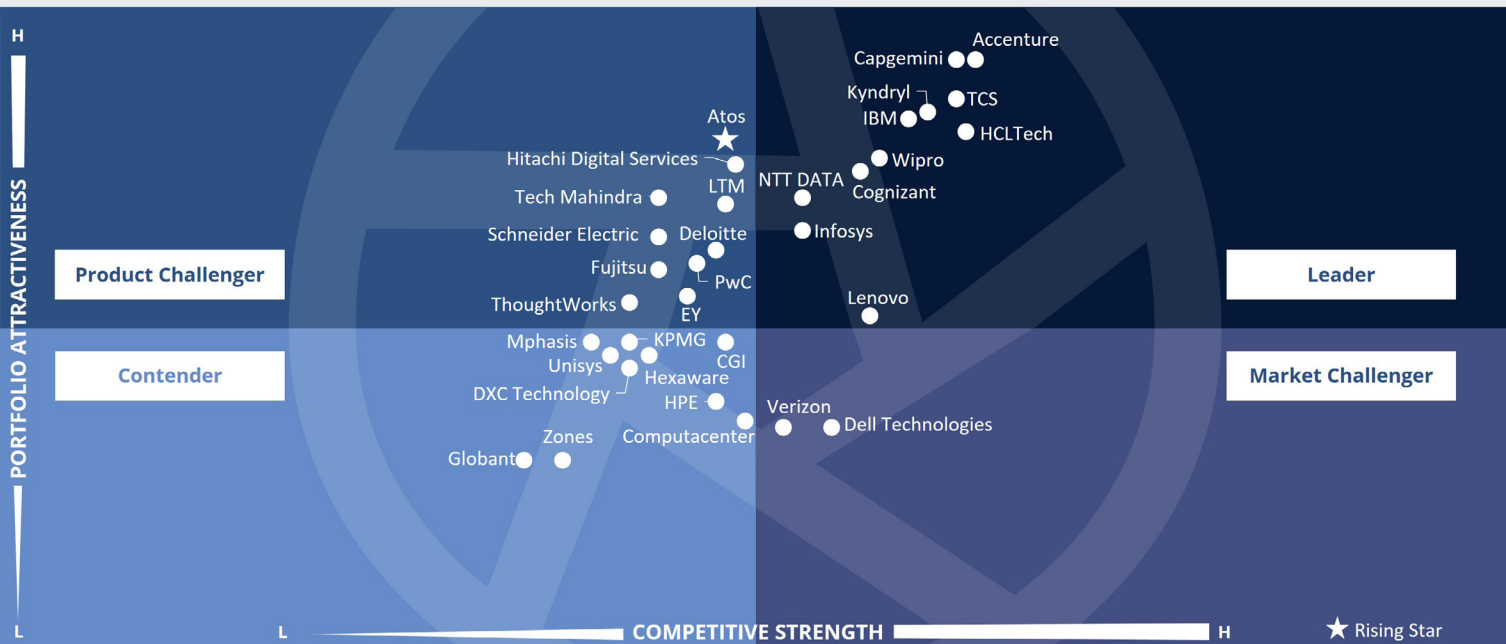
Environmental and sustainability professionals

Environmental and sustainability professionals should read this report to understand how IT functions can support enterprise carbon, circularity and accessibility goals. In the U.S., where IT footprints are shaped by cloud consumption, AI growth, device refresh cycles and outsourcing models, the report helps connect sustainability targets with practical technology decisions.

Government and regulatory bodies

Government and regulatory bodies should read this report to understand how enterprises and providers are addressing the sustainability impacts of IT in the U.S., including data centers, AI workloads, software design, device sourcing, e-waste and accessibility. The findings can inform policies that encourage efficient, inclusive and accountable digital infrastructure.





This quadrant evaluates providers that offer solutions to enhance the **sustainability of IT**, focusing on the core digital infrastructure such as platforms, applications, AI/ML and devices that support business operations.

Matt Warburton and Bhuvaneshwari Mohan



Definition

This quadrant assesses providers that offer sustainability solutions and services for foundational IT capabilities used in all industries, often referred to as the sustainability of IT or Green IT. Providers in this space offer consulting, engineering, IT and managed services.

The solutions and services considered for this quadrant aim to improve the environmental and social sustainability of IT functions such as compute, storage and network infrastructure, end-user devices, software and AI.

The sustainability of AI is the most consequential driver in this quadrant. As a result, one of the highest priorities for many firms is to understand and optimize GenAI and agentic AI workloads and the resulting infrastructure energy consumption, while reducing associated environmental impacts.

This quadrant also evaluates the social considerations of IT use, such as enhancing IT accessibility for users with disabilities and neurodiverse requirements.

Eligibility Criteria

1. Provide horizontal and foundational IT capabilities, including industry-agnostic platforms that **enable organizations to use technologies more sustainably**
2. Assess, design or govern more sustainable:
 - IT strategies
 - architectures
 - sourcing models
 - operating policies
3. **Rationalize and re-architect application portfolios** to optimize utilization and **reengineer applications, AI and ML algorithms and data platforms** for energy efficiency and bias prevention
4. Enable organizations to re-architect, optimize and manage the consumption of:
 - compute
 - storage
 - network
5. Manufacture and supply end-user devices or offer end-of-life services for end-user devices that **maximize circular resource flows and enable inclusivity**
6. Provide services to assess and **optimize the aggregated and individual utilization of end-user devices**, including guidance on adapting policies and sourcing criteria to prolong device usage and lifespan
7. Offer **IT outsourcing services with integrated sustainability commitments** such as reducing emissions generated by the service over time



Observations

The global market for solutions that improve the sustainability of IT remains the smallest among the three quadrants in this report, valued at \$1.5 billion or three percent of the total digital sustainability market. U.S. buyers account for about 34 percent of this value and 16 percent of sustainable IT case studies in ISG's digital sustainability database.

The U.S. sustainable IT market shows the highest demand for strategy services so far in 2026, reflecting a heightened awareness among CIOs and CTOs of the opportunity to reduce costs by taking measures that simultaneously improve the bottom line and environmental outcomes.

Traditional IT providers are well placed to address these requirements, although those with established consulting capabilities can influence buyer journeys earlier by designing sustainable IT strategies with CIOs and CTOs.

ISG's research shows that more mature enterprise-provider relationships have achieved direct measurable environmental benefits, including significant reductions in energy efficiency of data center infrastructure. This is especially critical in the U.S. as the compute capacity struggles to keep pace with AI demand due to electricity grid connection delays and community resistance.

However, U.S. buyers are reluctant to pay more for sustainable IT services, with IT budgets increasingly shifting to AI initiatives. Therefore, providers that integrate sustainability with AI programs and engineer self-financing business cases are demonstrating the greatest growth.

From the 66 companies assessed for this study, 33 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture provides sustainable IT consulting and engineering for U.S. cloud, data center, software, device and AI estates, combining end-to-end lifecycle management with partnerships with hyperscalers.

Capgemini

Capgemini helps U.S. enterprises reduce the cost, energy, water and material demands of IT by combining Sustainable AI, Green IT, software engineering, cloud optimization and managed services.

cognizant

Cognizant is a global technology services company that combines IT carbon baselining, engineering, cloud optimization and managed delivery to help U.S. enterprises decarbonize complex technology estates.

HCLTech

HCLTech provides U.S. enterprises with sustainable IT consulting, engineering and managed services across cloud, infrastructure, workplace devices, software and AI.

IBM

IBM combines asset management, environmental intelligence, AI and consulting to help U.S. manufacturers, utilities and infrastructure operators improve reliability, energy performance, safety and value chain sustainability.

Infosys

Infosys is a global IT services provider that combines Green IT governance, carbon-aware engineering, cloud optimization, responsible AI and accessible digital workplace services.



kyndryl

Kyndryl is a global IT infrastructure services provider that combines managed operations, cloud and application modernization, FinOps and AI-enabled optimization to improve the sustainability of U.S. technology estates.

Lenovo

Lenovo combines circular device economics, AI-ready infrastructure, lifecycle services and carbon intelligence to improve the sustainability of U.S. IT estates.

NTT DATA

NTT DATA combines sustainable AI, full-stack measurement, circularity, GreenOps, and data center and network optimization for U.S. IT estates.



TCS combines cloud, infrastructure, application, workplace and AI optimization with governance services that help U.S. enterprises reduce IT cost and environmental impact.



Wipro combines sustainable technology consulting, cloud and data center engineering, AI efficiency and managed services to improve the efficiency and sustainability of U.S. IT estates.

Atos

Atos (Rising Star) combines sustainable cloud, software, workplace and AI services with Eviden's cybersecurity and mission-critical systems, offering U.S. buyers an end-to-end route to manage IT cost, energy, carbon and risks.



Lenovo



"Lenovo offers U.S. CIOs and CPOs a compelling path to cut costs and carbon emissions by combining OEM-backed circular devices with AI-ready data center efficiency and lifecycle data that informs procurement decisions."

Matt Warburton and Bhuvaneshwari Mohan

Overview

Lenovo is headquartered in Beijing, China, and North Carolina, U.S. It has more than 73,500 employees across over 60 countries. In FY26, the company generated \$83.1 billion in revenue. Lenovo's sustainable IT proposition is led by advisory and delivery of business value from circular device economics, AI-ready infrastructure and managed lifecycle services. Lenovo TruScale® Device as a Service (DaaS) for Sustainability combines device delivery, certified refurbished options and recovery services, while Lenovo's xIQ Sustainability Platform links AI-enabled advisory with carbon data. Its infrastructure portfolio addresses the power, cooling and space pressures associated with growing AI workloads.

Strengths

Compute infrastructure efficiency:

Lenovo combines Neptune® liquid cooling, high-density compute, power and cooling optimization, Lenovo xClarity management and telemetry to improve data-center efficiency as AI workloads grow. The portfolio considers cooling power, floor space and power availability alongside compute demand. In a media production engagement, it achieved 100 times more compute power per square foot and a 33 percent reduction in cooling power consumption.

Data-backed procurement choices:

Lenovo combines advisory services with its Carbon Impact Portal, providing customers with access to device-level sustainability attributes, carbon footprint data, packaging information, energy ratings and reporting

outputs. Lenovo xIQ Sustainability Platform unifies this data with AI-led advisory and scenario modeling to compare procurement and lifecycle choices, enabling CIOs and CPOs to consider sustainability as a business decision linked to spending, operational efficiency and Scope 3 reduction.

Circular economics at scale:

Lenovo positions TruScale®-certified refurbished devices and asset recovery services as complementary capabilities to help customers optimize infrastructure spending associated with refresh cycles. The case studies demonstrate these services can reduce waste while continuing to meet business needs.

Caution

To strengthen the reputation of Lenovo's AI efficiency and sustainability services, it should publish more client references that quantify the relationship between workload performance, power demand and carbon impact. Examples could demonstrate Lenovo's expertise in model selection and algorithm design.





Appendix

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

Study Sponsor:

Iain Fisher

Lead Authors:

Matt Warburton and Bhuvaneshwari Mohan

Editors:

Dona George, Sajina B, Shaurya Vineet & Upasana Hembram

Research Analyst:

Bhuvaneshwari Mohan

Data Analyst:

Lakshmikavya Bandaru

Consultant Advisor:

Kathy Rudy

Project Manager:

Padma Mohapatra

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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



Author and Editor Biographies

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.



Author and Editor Biographies

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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