IDC MarketScape

IDC MarketScape: Worldwide Energy Transition Professional Services 2025 Vendor Assessment

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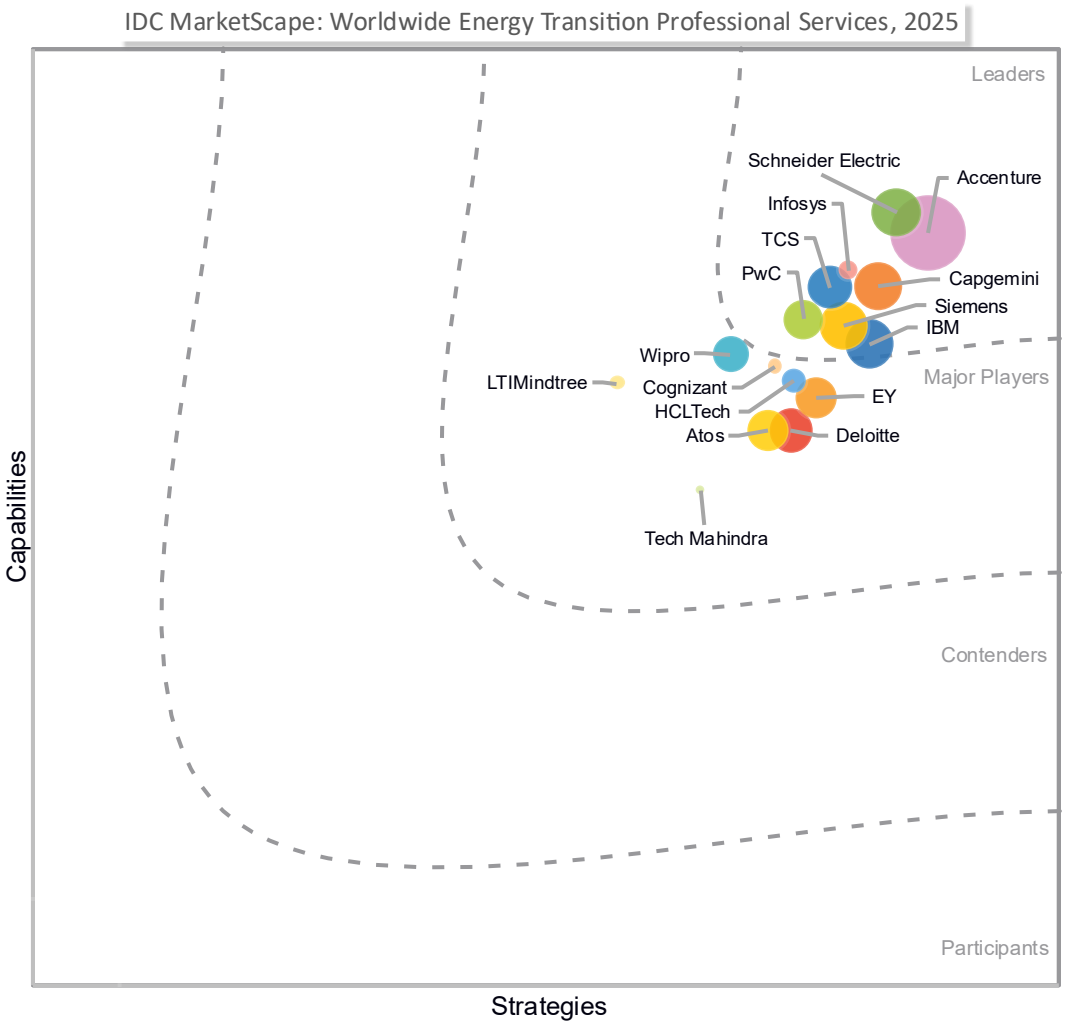
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide Energy Transition Professional Services Vendor Assessment



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Please see the *Appendix* for detailed methodology, market definition, and scoring criteria.

IDC OPINION

Decarbonizing energy-intensive industries is one of the toughest and most urgent challenges in the energy transition. These sectors are vital to the global economy but remain deeply dependent on fossil fuels. Cutting emissions from them is essential to reaching net-zero targets. However, progress has been slow due to legacy infrastructure, high costs, and unclear policy direction. Without strategic guidance and the right technical capabilities, these industries risk falling behind.

At the same time, global energy demand is surging, driven by a combination of industrial expansion in some parts of the world, electrification, and rapid growth in datacenters and AI technologies. According to the International Energy Agency (IEA), electricity demand is expected to grow over 3% annually through 2030, with digital infrastructure — particularly AI and hyperscale datacenters — contributing significantly to this rise. Meeting this demand while staying aligned with net-zero targets will require large-scale increases in clean electricity generation, as low-carbon sources must account for more than 90% of new electricity supply by 2030 to keep climate goals within reach.

Navigating this shift toward clean energy systems brings both complexity and opportunity, but intelligent digital technologies are emerging as essential enablers. Innovations such as artificial intelligence (AI), Internet of Things (IoT), and digital twins are helping to optimize the integration and operation of increasingly diverse and decentralized energy systems. These tools allow for real-time coordination across distributed energy resources, improving efficiency, reliability, and responsiveness throughout the energy value chain.

While geopolitics and national security considerations continue to shape energy policy in some regions, the underlying driver across markets is rapidly shifting toward securing sufficient, sustainable, and smart electricity supply. The challenge is not simply building new capacity, but ensuring every unit of energy is generated, managed, and consumed as efficiently as possible. In this context, digitalization is no longer a supportive feature, but a foundational pillar of the global energy transition.

In response to these shifting demands, strategic professional services partners play a critical role in shaping long-term energy strategies for their industrial customers. Their contribution will help redefine the architecture of their energy future, designing systems that are not only low-carbon, but also more intelligent, efficient, and secure to stay competitive.

This IDC MarketScape study offers energy-intensive organizations a critical assessment of professional services providers' capabilities and strategies in supporting their energy transition. The assessment focuses on digitalization and the

ability to deliver measurable outcomes across IDC's five pillars of decarbonization (see *Appendix* and *Market Definition*).

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

While no minimum market share or revenue threshold is required, vendors should have a strategic focus on energy transition services and demonstrate they can support energy-intensive industries in their decarbonization strategies.

IDC Energy Insights analysts only considered vendors that meet the following minimum criteria:

- Vendors must provide professional services to enterprises in at least three of the following key services: business consulting, IT consulting, systems integration, application development, IT outsourcing, business process outsourcing (including horizontal and industry-specific BPO services and industry-specific managed services), IT deployment support, and IT education and training. Therefore, firms primarily focusing on business consulting will be excluded.
- Vendors must be active in at least three industry sectors, one of which is a high-emissions sector (e.g., cement and concrete, chemicals).
- Vendors must have maintained customer relationships for at least six months.
- Vendors must be delivering services in at least two of the following regions: Asia/Pacific (APAC), Europe, North America, Latin America, and the Middle East and Africa.

ADVICE FOR TECHNOLOGY BUYERS

This IDC MarketScape study examines how professional services providers support industry customers with their energy transition strategies. Tech buyers can leverage these insights to choose the right professional services partners, assess digital maturity, and make more confident investment decisions.

When choosing professional services partners, energy-intensive organizations should pay attention to several important factors:

- **Sector-specific expertise**. Look for service providers with solid experience with the day-to-day realities of energy-intensive sectors. This practical knowledge, beyond general digital skills, helps ensure their solutions meet industry needs.
- **Proven digital solutions**. Choose service providers with experience applying AI, IoT, digital twins, and analytics in similar industries. Real customer examples showing measurable outcomes are key for credibility.

- **Integration capabilities**. Select partners that can connect new digital platforms with legacy systems and physical assets for resilient operations and real-time insights in energy management.
- **Innovation and collaboration**. Choose service providers that invest in R&D, hold relevant patents, and demonstrate measurable improvements in energy performance and decarbonization. Moreover, prioritize those with strong partnerships with tech vendors, research institutions, and industry groups, reflecting a forward-looking approach to energy transition.
- **Life-cycle support**. Prefer partners offering complete services, from initial advisory and road map development to implementation, systems integration, and continuous optimization. A clear strategic vision, combined with strong execution, is essential for long-term impact.
- **Transparency and ROI focus**. Demand clear explanations of business value, cost savings, and decarbonization impact. Ensure these benefits are tracked from the start of the project to finish and are aligned with key stakeholders and investment decisions.
- **Cybersecurity and data governance**. As digitalization grows, protecting energy infrastructure and sensitive data becomes critical. Professional services partners must have a strong record in cybersecurity, data governance, and compliance with evolving standards and regulations.

Areas of Strength and Advanced Capability

Many professional service providers have achieved strong results in digital energy management, and they are using advanced platforms and artificial intelligence to optimize processes and reduce emissions. The adoption of digital twins, predictive analytics, and smart grids brings improvements in efficiency and operational resilience.

Areas for Improvement and Growth

Some professional service providers lack the ability to integrate digital platforms with existing physical infrastructure, while others fall short in offering proactive innovation and strategic guidance. Additionally, only a few can support scalable solutions for low-carbon fuels, carbon capture, or distributed energy systems.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the *Appendix*, the description here provides a summary of each vendor's strengths and opportunities.

Accenture

Accenture is positioned in the Leaders category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

Accenture is a global professional services company with a strong focus on supporting clients across industries in their energy transition strategies. The firm delivers integrated solutions that span strategy, technology, engineering, and operations, helping organizations design and execute decarbonization pathways, optimize energy systems, and accelerate their shift to net zero. Accenture's approach is grounded in industry expertise, digital innovation, leveraging data and AI, and a robust ecosystem of partners.

Quick Facts

- **Domain focus**. Accenture's Net Zero Transitions practice provides end-to-end consulting, engineering, digital, and managed services for clients in energy, utilities, industry, and public sectors, with a focus on decarbonization, electrification, and energy system transformation.
- **Geographic footprint**. Operates in more than 120 countries, serving clients globally with a strong presence in EMEA, the Americas, and Asia/Pacific.
- **Innovation organization**. Leverages proprietary tools (e.g., Carbon Intelligence, Grid Resiliency Index), digital accelerators, and a network of acquired engineering and digital firms to deliver advanced solutions for energy transition.
- **Partner ecosystem**. Maintains strategic alliances with technology hyperscalers (Microsoft, Google Cloud), engineering firms, and emerging solution providers to enable comprehensive energy transition programs.
- **Delivery model.** Offers a modular portfolio that includes strategy, digital architecture, engineering, implementation, and managed services, supported by global delivery centers and specialized energy transition teams.

Innovation Areas

Accenture delivers digital and AI-driven energy management by deploying IoT, advanced analytics, and artificial intelligence to optimize energy use, enable predictive maintenance, and support real-time decision-making in industrial and grid environments. The company's Carbon Intelligence platforms provide real-time carbon measurement, product-level footprint, and support for carbon trading, helping clients develop data-driven decarbonization strategies and comply with evolving regulations.

Tools such as the Grid Resiliency Index analyze climate, asset, and customer data to support capital investment planning and grid hardening, enabling utilities and infrastructure operators to adapt to extreme weather and regulatory demands. Accenture also offers modular services for supply chain decarbonization — including

supplier engagement, emissions measurement, and science-based target setting — to help clients address scope 3 emissions across value chains.

For capital projects and net-zero infrastructure, Accenture provides end-to-end support for greenfield and brownfield projects, integrating digital command centers, engineering, and project controls to accelerate low-carbon capital builds. The company further supports clients with employee engagement for transition through immersive training and change management programs that foster a safety and sustainability culture, ensuring broad adoption of energy transition initiatives across large workforces.

Strengths

- Accenture covers the full energy transition life cycle, from strategy and business case development to engineering, digital enablement, and operational optimization. It has solid experience across all the use cases evaluated in this vendor assessment, with referenceable customers from different markets around the world.
- Accenture has a broad geographic reach and experience across energy, utilities, heavy industry, and public sector, enabling tailored solutions for diverse energy transition challenges.
- Accenture has made significant investments in engineering acquisitions and digital accelerators to enable the delivery of complex capital projects and advanced technology solutions.
- Accenture's proprietary analytics and simulation tools provide clients with actionable insights for system planning, investment prioritization, and performance tracking.

Challenges

- Utilities recognize that Accenture provides great value for money, but with pricing in the upper range, the firm struggles to become a good fit for price-based engagements.
- While Accenture is not historically known for serving small organizations, its investment in as-a-service and cloud-native delivery models has enabled it to scale down its offerings and expand into the SMB segment across multiple industries.

Atos

Atos is positioned in the Major Players category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

Atos is part of Atos Group, with the latter having operations in 68 countries and approximately 72,000 employees. The group operates under two brands — Atos for services and Eviden for products — and is committed to a secure and decarbonized

future offering AI-powered, end-to-end digital solutions tailored to industry-specific needs.

As a major European provider in cybersecurity, cloud, and high-performance computing, Atos offers a comprehensive portfolio that supports every stage of the energy transition life cycle, from strategic consulting and decarbonization road maps to the design, integration, and optimization of sustainable infrastructure.

Quick Facts

- **Domain focus**. Atos supports clients in energy, utilities, manufacturing, and hard-to-abate sectors, delivering digital transformation and decarbonization solutions.
- **Geographic footprint**. Operates globally, with a significant presence in EMEA, North America, and APAC.
- **Innovation organization**. Atos drives the energy transition with advanced computing, AI, IoT, and quantum research. Its patented Direct Liquid Cooling powers some of the world's most energy-efficient supercomputers.
- **Partner ecosystem**. Atos collaborates with a network of technology companies, research institutions, and industry partners to co-develop and deliver advanced solutions for the energy transition. This includes strategic alliances with cloud, AI, cybersecurity, and digital transformation companies.
- **Delivery model**. Offers consulting, digital advisory, and managed services, supported by a modular and scalable delivery infrastructure for mission-critical environments.

Innovation Areas

Atos is driving digital innovation in the energy transition by integrating advanced technologies that deliver measurable impact across industries. Central to its approach is the use of artificial intelligence and machine learning (ML) to optimize energy consumption, predict equipment failures, and enhance grid reliability. Atos' digital twin technology enables clients to simulate and refine energy systems before implementation, supporting the integration of renewables and the design of resilient, efficient infrastructure. These capabilities are complemented by IoT platforms that provide real-time monitoring and control of assets, allowing for dynamic energy management and operational efficiency.

Atos is also advancing the application of blockchain for transparent carbon tracking and secure, verifiable carbon credit trading, helping organizations their meet regulatory and sustainability goals. Atos' high-performance computing solutions, including energy-efficient supercomputers, support complex modeling for decarbonization projects and accelerate the adoption of low-carbon technologies. Through these innovations, Atos supports clients in hard-to-abate sectors to achieve operational excellence, cost savings, and ambitious net-zero targets.

Strengths

- Atos provides end-to-end services, from climate advisory to digital transformation, supporting clients at every stage of their net-zero journeys. Solutions span AI/ML, IoT, digital twins, and data analytics to drive operational efficiency, cost optimization, and energy resilience.
- Atos' focus on AI, quantum computing, and certified cybersecurity ensures clients can accelerate their energy transition while protecting critical infrastructure and meeting regulatory requirements.

Challenges

- Ongoing uncertainty and lack of clear strategic direction following Atos Group's 2022 restructuring and the creation of Atos have created internal misalignment and reduced client confidence in Atos' long-term energy transition capabilities.
- Atos faces challenges integrating its digital and IT solutions across complex energy transition projects due to operational silos and coordination difficulties, resulting in slower delivery and inconsistent client experiences.

Capgemini

Capgemini is positioned in the Leaders category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

Capgemini is a global business and technology transformation services firm with a dedicated Energy Transition & Utilities (ET&U) practice. With over 340,000 professionals supporting clients in more than 50 countries, Capgemini enables organizations across sectors to accelerate their energy transition through integrated strategy, engineering, and digital solutions, addressing the challenges of decarbonization, electrification, and operational transformation.

Capgemini's approach centers on systemic business modeling through Business For Planet Modeling (BFPM), enabling multidisciplinary optimization of capex, total energy cost, and carbon dioxide (CO_2) emissions for multi-asset environments. The firm provides end-to-end transformation support — from strategy and governance to engineering, digital implementation, and operations — tailored to the specific needs of sectors such as manufacturing, utilities, transport, and the public sector.

Quick Facts

- **Domain focus**. Capgemini's ET&U practice delivers end-to-end services spanning smart grids, renewables, hydrogen, batteries, carbon capture, nuclear, and energy efficiency.
- **Geographic footprint**. Operates in over 50 countries, with nearly 341,000 employees representing 160 nationalities. More than 32,000 FTEs are dedicated to ET&U clients worldwide.

- **Innovation organization**. Leverages 90+ research labs, the Capgemini Research Institute, and 22 Applied Innovation Exchanges to drive sector-specific digital and engineering innovation.
- **Partner ecosystem**. Engaged in foundational partnerships such as the Open Hydrogen Initiative and the European Battery Alliance as well as collaborates with technology providers including SAP, Salesforce, Microsoft, AWS, and Google Cloud. In smart grids, Capgemini is a founding member of the vPAC and E4S Alliances.
- **Delivery model**. Utilizes the Rightshore global delivery model, combining onshore, nearshore, and offshore resources with consistent frameworks and certified management for scalability and compliance.

Innovation Areas

Between 2023 and 2026, Capgemini is investing €2 billion in artificial intelligence, developing proprietary accelerators and sector-specific use cases that support the energy transition. These include solutions for grid optimization and predictive maintenance. The company applies digital twins and data platforms across nuclear, renewables, and hydrogen sectors to improve design, operations, and certification. Capgemini also supports the digital transformation of nuclear engineering and gigafactory digitalization.

Capgemini's innovation strategy is further strengthened by its active investment in climate tech start-ups and partnerships with research institutions. Through Capgemini Ventures, supported by an €80 million corporate venture capital fund, the company accelerates the adoption of advanced technologies such as liquid neural networks and predictive analytics platforms, driving sustainable solutions and operational excellence across the energy transition life cycle.

In sustainable supply chains, Capgemini enables battery passports, circular sourcing, and digital supply chain management. This supports the European battery industry and the shift to sustainable mobility. The company further demonstrates thought leadership by publishing the World Energy Markets Observatory and sector-specific research, guiding clients on future trends and risks.

Strengths

- Capgemini combines consulting and digital expertise to deliver customized end-to-end solutions for the energy transition, adapting effectively to diverse sector and regional needs.
- Capgemini leverages a global delivery model and active participation in industry alliances and research ecosystems to accelerate technology adoption and ensure scalable, compliant outcomes.
- Capgemini demonstrates recognized thought leadership and innovation through dedicated investments, proprietary tools, and a strong partner ecosystem supporting sustainable transformation.

Challenges

- Capgemini can be perceived as a premium-priced provider. However, the company demonstrates client commitment and flexibility in pricing arrangements at bid stage and value for money in execution.
- It is critical for Capgemini to ensure consistent, high-level delivery throughout project delivery, avoiding talent turnover that may impact delivery, trust, and perceived value. Ensuring consistency in delivery teams is key to maintaining credibility.

Cognizant

Cognizant is positioned in the Major Players category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment

Cognizant is a global professional services company with over 336,000 employees and operations in more than 35 countries. Its dedicated energy and utilities business — comprising over 1,000 professionals — delivers energy transition services across North America, Europe, and Asia/Pacific. Cognizant's approach is rooted in operational transformation and digital enablement, focusing on tangible outcomes such as infrastructure modernization, emissions reduction, and improved energy performance for clients across industries.

Quick Facts

- **Domain focus**. Cognizant's Energy & Utilities business provides advisory, digital, engineering, and managed services for energy transition, supported by a multidisciplinary team of engineers, PhDs, and consultants with expertise in carbon accounting, renewable integration, and energy systems modeling.
- **Geographic footprint**. Operates in 35+ countries, with significant presence in North America, Europe, and Asia/Pacific as well as delivery hubs in London, Glasgow, Dublin, and major cities globally.
- **Innovation organization**. Maintains a 125,000 sq ft energy and transportation innovation lab with 1,100 physical testbeds and 700 virtual environments; invests in proprietary platforms such as IRENO for grid visibility and the Sustainability Accelerator for ESG data management.
- **Partner ecosystem**. Strategic alliances with hyperscalers (AWS, Microsoft Azure, Google Cloud), engineering firms, and scientific data providers such as TGS, co-developing platforms for carbon storage, wind, and geothermal site selection.
- **Delivery model**. Advisory-led engagements, digital accelerators, and systems integration, supported by a robust partner network and global delivery centers.

Innovation Areas

Cognizant's approach to innovation in energy transition is anchored in the integration of advanced digital technologies, strategic partnerships, and a strong focus on operational transformation. The company invests in proprietary platforms such as the Sustainability Accelerator (which automates environmental, social, and governance or ESG data collection and scenario analysis) and IRENO (a solution for real-time grid visibility and network operations). These tools are designed to address complex challenges, including emissions tracking, infrastructure modernization, and predictive analytics for storm management and carbon capture planning.

Collaboration is central to Cognizant's innovation strategy. The organization maintains a 125,000 sq ft innovation lab equipped with over a thousand physical testbeds and hundreds of virtual environments, supporting experimentation and rapid prototyping. Strategic alliances with technology providers such as AWS, Microsoft Azure, and Google Cloud as well as scientific data partners such as TGS enable the co-development of platforms for carbon storage, wind, and geothermal site selection.

Artificial intelligence and advanced analytics are applied to optimize energy systems, enhance supply chain transparency, and support sustainable IT initiatives. The company's innovation framework also emphasizes sustainable product design, circular economy models, and the integration of digital twins to enable measurable progress in decarbonization and resource efficiency.

Strengths

- Cognizant is recognized by its customers for its high quality of service. Customers also appreciate the work the company has done in developing platforms such as IRENO, MACC curves, and digital twins to enable rapid deployment and measurable outcomes in energy efficiency and decarbonization.
- Strategic alliances with technology, engineering, and scientific data partners enhance Cognizant's ability to deliver complex, cross-industry solutions.

Challenges

- Customers indicate that delivery agility can be impacted by the time required to tailor and validate solutions, highlighting the need for greater responsiveness and readiness in fast-moving environments.
- Cognizant's reliance on third-party partners for solution integration may introduce complexity, underscoring the importance of tighter partner orchestration and transparent coordination across the delivery ecosystem.

Deloitte

Deloitte is positioned in the Major Players category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

IDC notes that this IDC MarketScape and its evaluation is based on IDC's existing knowledge of Deloitte.

Deloitte is a global professional services firm, recognized for its expertise in strategy, operations, digital transformation, and sustainability across the energy and utilities sector. Deloitte is actively shaping the energy transition, helping clients navigate the shift toward a net-zero economy by integrating decarbonization, electrification, digital innovation, and financial transformation into their core business strategies.

Quick Facts

- **Domain focus**. Deloitte's Power, Utilities & Renewables practice delivers end-to-end consulting, digital, and managed services to clients worldwide, with a focus on decarbonization, digitalization, and resilience. Deloitte supports clients across energy, manufacturing, transport, chemicals, heavy industry, and other sectors.
- **Geographic footprint**. Operates in more than 150 countries, with a strong presence in EMEA, the Americas, and Asia/Pacific.
- **Innovation organization.** Combines proprietary research centers, such as the Deloitte Research Center for Energy & Industrials and the Global Hydrogen Center of Excellence, with industry-focused innovation hubs and digital studios.
- **Partner ecosystem**. Maintains strategic alliances with hyperscalers (AWS, Google Cloud, Microsoft Azure, Oracle Cloud), technology vendors, and financial institutions to accelerate energy transition initiatives.
- **Delivery model**. Offers consulting, advisory, digital transformation, cloud, and managed services, leveraging global delivery centers, digital studios, and specialized energy transition teams.

Innovation Areas

Deloitte's innovation areas cover a broad spectrum of services for the energy transition. The firm's cloud engineering practice delivers cloud-native applications and manages large-scale migrations, drawing on the expertise of more than 20,000 cloud practitioners. Deloitte has deep capabilities in platforms such as AWS, Azure, Google Cloud, and Oracle Cloud.

Deloitte is also active in sustainable finance, developing new financing mechanisms and derisking tools. These help clients unlock capital for clean energy projects, making the energy transition more affordable and accessible.

For carbon management, Deloitte offers proprietary tools such as the CarbonNOW accelerator. These solutions support emissions baselining, carbon budgeting, and net-zero planning across both IT and operational environments.

The firm's sustainability consulting includes advisory services for net-zero strategy, regulatory compliance, supply chain decarbonization, and ESG reporting. Deloitte's approach provides practical road maps and real-time insights to help companies meet evolving regulations and sustainability goals.

Strengths

- Deloitte publishes proprietary research and thought leadership, such as the "Pathways to Decarbonization" series, guiding clients on emerging trends, risks, and opportunities in the energy transition for hard-to-abate sectors.
- Facilities such as the Deloitte Greenhouse and Energy Transition Labs simulate real-world industrial environments, enabling clients to test and refine solutions before deployment, grounded in behavioral science and systems thinking.

Challenges

- Deloitte's complex global organizational structure can result in operational inconsistencies and slower decision-making, making it challenging to quickly adapt and deliver unified solutions in the fast-evolving energy transition domain.
- Deloitte's auditor relationships have prevented the company from working with some companies that would otherwise have the desire to do so.

EY

EY is positioned in the Major Players category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

EY is a global professional services organization with sector expertise and a comprehensive portfolio of solutions and services. It has more than 400,000 employees in over 150 countries, with dedicated teams serving the Industrials & Energy sectors. EY supports clients in responding to the shifting dynamics of the global energy landscape. EY's approach integrates strategy, digital innovation, operational transformation, and sector-specific insight to help clients accelerate decarbonization, electrification, and the adoption of new energy models.

Quick Facts

- **Domain focus**. EY brings deep energy industry expertise spanning the Mining & Metals; Oil, Gas & Chemicals; and Power & Utilities sectors, with over 18,000 professionals dedicated to Power & Utilities and 2,500 specialists focusing on renewables.

- **Geographic footprint**. EY operates in 150+ countries, providing global coverage with local market insight and delivery.
- **Innovation organization**. EY maintains a global network of over 50 innovation hubs and invests significantly in technology, talent, and strategic partnerships. This includes platforms such as EY UtilityWave and models such as the Energy and Resources Transition Acceleration (ERTA) framework.
- **Partner ecosystem**. Strategic alliances with Microsoft, SAP, Nvidia, IBM, UiPath, and others enable EY to deliver integrated digital and operational solutions, including AI, cloud, analytics, and cybersecurity capabilities.
- **Delivery model**. EY offers consulting, managed services, assurance, tax, and transaction services, leveraging global delivery centers and sector-focused teams to support clients' energy transition strategies end-to-end.

Innovation Areas

EY focuses on several key areas of innovation to help clients succeed in their energy transition strategies. The firm accelerates digital transformation by integrating advanced technologies, such as artificial intelligence and data analytics, into core business processes. EY supports clients in decarbonizing their operations, reducing emissions across the value chain, and meeting regulatory requirements.

EY also drives the adoption of renewable energy, helping organizations transition to sustainable power sources and optimize their energy mix. In addition, EY enhances customer experience by developing digital solutions that streamline interactions and improve service delivery. The firm invests in cybersecurity to protect critical infrastructure and data, ensuring resilience against emerging threats. These innovation efforts are supported by global partnerships and proprietary platforms, enabling clients to manage complex challenges and seize new opportunities in the energy transition.

Strengths

- EY works with 7,200+ global clients across energy and supports a wide range of energy transition use cases, including ESG reporting, clean energy procurement, and cybersecurity, using tailored tools and advisory to align with client-specific goals
- EY's energy-specific process models assist clients in developing processes, risks and controls, key performance indicators (KPIs), and maturity models, as well as supporting IT systems that address the requirements of the energy sector.
- Proprietary tools such as EY UtilityWave and the ERTA model help clients plan and implement energy transition strategies using data-driven insights.

Challenges

- The lion's share of EY's activities in the energy transition domain is from its work with utilities, oil and gas, and mining companies, thus the company's referenceability from other major energy-intensive industries such as cement, and iron & steel is limited.
- EY's auditor relationships have prevented the company from working with some energy-intensive companies that would otherwise have the desire to do so.

HCLTech

HCLTech is positioned in the Major Players category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

HCLTech is a global technology and engineering services company with operations in over 60 countries and a workforce exceeding 224,000. HCLTech supports a broad industrial base — including utilities, manufacturing, automotive, chemicals, and logistics — in their energy transition journeys. The company's approach integrates operational technology (OT), information technology (IT), and business transformation (BT), enabling clients to align decarbonization goals with operational efficiency and financial performance.

HCLTech's approach to energy transition is characterized by domain expertise, advanced digital platforms, cybersecurity for energy systems and a strong ecosystem of partners, enabling clients across industries to implement practical, scalable, and measurable decarbonization strategies.

Quick Facts

- **Domain focus**. HCLTech delivers end-to-end consulting, digital, and engineering services for both energy supply and energy-consuming sectors, spanning utilities, manufacturing, automotive, and more.
- **Geographic reach**. Operates in over 60 countries, serving clients globally with a network of 500+ sustainability practitioners and a dedicated Energy Transition & Sustainability Center of Excellence.
- **Innovation organization**. Proprietary platforms such as Net Zero Intelligent Operations and Twinalytics provide unified visibility and optimization across devices, buildings, and infrastructure.
- **Partner ecosystem.** Strategic partnerships with SAP, Microsoft, Nvidia, Schneider Electric, and AWS, focusing on joint initiatives in EV charging, smart infrastructure, and AI-powered energy optimization.
- **Delivery model**. Offers a full life cycle from advisory and consulting to implementation, integration, and managed services, leveraging global delivery centers and local market expertise.

Innovation Areas

HCLTech's innovation strategy in energy transition is anchored in the integration of advanced digital technologies and cross-disciplinary expertise. The company applies AI-powered predictive analytics and digital twin platforms to optimize asset performance, forecast demand, and support scenario planning across diverse industrial environments.

Strategic collaborations with partners such as Microsoft, Nvidia, SAP, Schneider Electric, and AWS enable the co-development of solutions in areas such as EV charging, smart infrastructure, and AI-driven energy optimization. HCLTech's proprietary platforms — including Net Zero Intelligent Operations and Twinalytics — provide unified visibility into energy consumption, emissions, and asset health, supporting regulatory compliance and operational alignment.

HCLTech also provides transition finance advisory and analytics for banks and financial institutions, helping them identify and manage green finance opportunities. In the area of cybersecurity, the company implements zero-trust frameworks for OT/IT integration, dynamic threat detection, and infrastructure resilience.

Strengths

- HCLTech has experience delivering energy transition programs across a wide range of sectors — including hard-to-abate industries such as cement, automotive, and chemicals — and it has solid references across geographies and industries.
- HCLTech has developed tools such as Net Zero Intelligent Operations and Twinalytics offering real-time, unified insights into energy use, emissions, and asset health, supporting regulatory compliance and business alignment. Its innovation in the energy transition space secured Gold status from EcoVadis, inclusion in the Dow Jones Sustainability Index, and multiple industry awards for sustainability solutions.

Challenges

- Although HCLTech has engineering expertise and proven solutions across energy transition, sales executives and account managers should bring these strengths more actively into client conversations to better communicate value and industry impact.
- In a competitive market in which many providers offer similar capabilities, HCLTech's differentiation is not always immediately apparent. Without clearer articulation of its unique strengths, including its proprietary platform offerings, there is a risk that its value proposition may be overlooked.

IBM

IBM is positioned in the Leaders category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

IBM is a global business and technology partner, delivering industry-specific solutions to support clients' energy transition strategies. Leveraging expertise in hybrid cloud, AI, and a robust ecosystem of technology and industry partners, IBM helps organizations across sectors accelerate decarbonization, electrification, and operational transformation. Its approach integrates industry knowledge, advanced analytics, and digital innovation to address the demands of the energy transition.

Quick Facts

- **Domain focus**. IBM's Energy & Resources practice spans oil and gas, chemicals, metals, mining, and utilities, providing end-to-end services from strategy to operations, with a strong focus on energy transition and decarbonization.
- **Geographic footprint**. IBM operates globally, with delivery centers, innovation hubs, and industry SMEs across the Americas, EMEA, and Asia/Pacific.
- **Innovation organization**. IBM draws on its consulting, research, and technology divisions, including the Institute for Business Value, and it also collaborates with external partners to drive innovation in energy transition solutions.
- **Partner ecosystem**. Strategic alliances with hyperscalers (AWS, Microsoft Azure), enterprise application vendors (SAP, Oracle, Salesforce, AWS, Microsoft), and industry specialists (Siemens, Worley, AspenTech) underpin IBM's ability to deliver tailored, scalable solutions.
- **Delivery model**. IBM offers consulting, digital transformation, managed services, and systems integration, leveraging its IBM Garage methodology for co-creation and agile delivery, and its AI-powered delivery platform for repeatable outcomes.

Innovation Areas

IBM's approach to energy transition is rooted in the integration of hybrid cloud and artificial intelligence platforms, including watsonx and Red Hat OpenShift. These platforms support data integration and management across diverse cloud infrastructures, facilitating advanced analytics and operational insights.

Artificial intelligence is woven into the fabric of IBM's solutions, powering critical applications such as grid optimization, demand forecasting, asset performance management, and customer engagement.

Collaboration is central to IBM's innovation model. By working alongside partners such as AWS, Worley, and Siemens, IBM co-develops technologies that address challenges in hydrogen production, grid modernization, and expanding access to clean energy. In addition, the IBM Sustainability Accelerator (a separate, pro-bono initiative within IBM's impact program) draws on IBM capabilities, leveraging AI and open-source tools to help policymakers and communities in developing regions plan for sustainable energy futures

Internally, IBM fosters innovation through close collaboration between its consulting, research, and technology divisions. Capabilities such as the Institute for Business Value and Industry Centre of Excellence ensure new solutions are shaped by both industry expertise and the latest technological advancements.

Strengths

- IBM covers the full energy transition life cycle, from strategy and business case development to implementation, operations, and scaling, tailored to sector-specific needs. IBM has enhanced its offerings with strong investment in AI, digital twins, and advanced analytics.
- IBM's global network of consulting professionals, delivery centers, and industry SMEs ensures consistent, high-quality support for complex, multiregion programs.
- IBM emphasizes measurable ROI, cost optimization, and risk reduction in its energy transition engagements, with documented outcomes such as operational savings, improved forecasting, and regulatory compliance.

Challenges

- Over the past several years, IBM has shifted its focus from deep industry-specific expertise to broader, horizontal capabilities in areas such as Big Data, analytics, and AI. As a result, in sectors in which specialized industry knowledge is critical (e.g., utilities and oil and & companies), IBM's mindshare for professional services has dwindled.
- According to some customers, IBM's organizational complexities impact project delivery as chain of command remains longer than average.

Infosys

Infosys is positioned in the Leaders category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

Infosys is a global digital services and consulting company with a robust, decades-long presence supporting energy transition across both the energy sector and energy-intensive industries. Leveraging sectoral expertise, a global partner ecosystem, and advanced digital capabilities, Infosys helps clients accelerate decarbonization by integrating digital orchestration, business model innovation, and co-creation into their energy transition strategies.

Infosys positions itself as a provider that combines digital, AI, and operational expertise to develop practical solutions aimed at supporting decarbonization efforts in the energy sector. Its approach emphasizes co-creation with clients and partners, leveraging proprietary platforms and a dynamic innovation network to accelerate the deployment of new technologies and business models.

Quick Facts

- **Domain focus**. Infosys' Energy Transition practice is built on a 25-year foundation in energy and utilities.
- **Geographic footprint**. Operates globally — with delivery centers and teams across North America, EMEA, Asia/Pacific, and India — supporting projects from California to Singapore, Germany, and the U.K.
- **Innovation organization**. Anchored by the Infosys Innovation Network (IIN), which connects 230+ start-ups, 12+ global innovation hubs, and partnerships with academic institutions such as Stanford and IIT Madras.
- **Partner ecosystem**. Strategic alliances with hyperscalers (AWS, Azure), energy technology platforms (GE Vernova, Schneider Electric), utilities, and innovative start-ups (e.g., VFlow Tech, Bidgely).
- **Delivery model**. End-to-end consulting, digital transformation, managed services, and platform-based offerings, delivered through specialized energy transition teams and global digital studios.

Innovation Areas

Infosys drives the energy transition by integrating proprietary digital platforms, artificial intelligence, and collaborative development with clients and partners. The company's cloud-native solutions such as the Cloud Energy Management Platform (CEMP) optimize generation and storage across renewable microgrids. Artificial intelligence is integrated into asset management, predictive maintenance, and customer experience, with applications ranging from grid optimization to digital assistants for field engineers.

The IIN enables rapid piloting and scaling of new technologies through living labs and digital studios in locations such as London, Houston, and Bangalore. Infosys holds multiple patents in areas such as energy management, building automation, and AI-driven analytics, reflecting a commitment to intellectual property–led development.

In sustainable finance, Infosys collaborates with energy providers on shared-savings models and energy-as-a-service offerings, facilitating technology adoption and aligning incentives for decarbonization.

Strengths

- Infosys supports the entire energy transition journey, from strategy to operations, for both energy companies and energy-intensive sectors. Infosys has been carbon neutral since 2020, and it is taking this experience to help clients become energy efficient and achieve emission reductions.
- With 6,000+ domain specialists globally, Infosys combines sectoral knowledge with advanced digital and AI capabilities to address complex, cross-industry decarbonization challenges. Infosys leverages its global presence and local delivery teams to transfer best practices and innovations across regions, adapting solutions to diverse regulatory, market, and infrastructure contexts.

Challenges

- Infosys has opportunities to strengthen workforce stability as some clients have noted that turnover among junior staff can occasionally affect continuity and efficiency. Additionally, enhancing coordination and knowledge sharing across teams could further improve collaboration and maximize value delivery.
- While Infosys brings strong domain expertise and innovation, it should play a more consistent and proactive role in shaping strategic direction and thought leadership in the energy transition.

LTIMindtree

LTIMindtree is positioned in the Major Players category of this 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

With over 86,000 employees in 2024, LTIMindtree — a global technology consulting and digital solutions company within the Larsen & Toubro (L&T) Group — leverages engineering heritage and digital innovation to help organizations accelerate their energy transition. The firm's approach integrates operational technology, connected assets, and sustainability intelligence to address complex decarbonization challenges across sectors.

Quick Facts

- **Domain focus**. LTIMindtree delivers end-to-end consulting, IT/OT integration, and managed services to clients in energy, manufacturing, utilities, and infrastructure, with a focus on decarbonization, digitalization, and operational excellence.
- **Geographic footprint**. Operates globally across North America, Europe, the Middle East, the U.K., and Asia/Pacific, with a certified team of ESG, greenhouse gas (GHG), and energy transition specialists.

- **Innovation organization**. Maintains over 10 proprietary digital platforms (e.g., Energy NxT, Smart Spaces, ESG NxT, Green Carpet) designed for real-time analytics, automation, and industry-specific energy transition needs.
- **Partner ecosystem**. Collaborates with more than 20 strategic partners, including hyperscalers (AWS, Microsoft, IBM), ESG software providers, and Industry 4.0 platforms to co-develop and scale solutions.
- **Delivery model**. Offers consulting, digital transformation, managed services, and platform-based solutions, with flexible deployment (software as a service or SaaS, hybrid, on-premises) and agile, low-code/no-code methodologies for rapid implementation.

Innovation Areas

LTIMindtree grounds its energy transition strategy in practical solutions and structured execution. The company invests in advanced technologies, always seeking to respond to the real needs of clients facing complex changes in energy and sustainability. Artificial intelligence and advanced analytics are used to predict maintenance needs, forecast demand, and optimize grid operations. These tools help clients improve efficiency and build resilience in their operations. Digital twins and IoT solutions give real-time visibility into assets, supporting both industrial and renewable energy sectors.

Cloud-native platforms from LTIMindtree allow for fast and flexible deployment, making it easier to manage data, support energy trading, and deliver analytics at scale.

LTIMindtree works closely with partners such as AWS, Microsoft, IBM, and several ESG software providers. These collaborations make it possible to co-create and deliver integrated solutions. The company's proprietary platforms — Energy NxT, ESG NxT, Smart Spaces, and Green Carpet — are designed to offer real-time analytics, track emissions, and optimize energy use, always tailored to the specific needs of each industry.

Strengths

- The firm's proprietary platforms — such as Energy NxT, ESG NxT, Smart Spaces, and Green Carpet — enable real-time analytics, emissions tracking, and energy optimization, supporting scalable and agile deployment across diverse industries and geographies.
- LTIMindtree maintains a strong ecosystem of strategic partners, including hyperscalers, ESG software providers, and Industry 4.0 platforms, enhancing its ability to co-develop and deliver integrated energy transition solutions.

Challenges

- Despite its global reach, LTIMindtree's limited customer base in this domain presents selective reference opportunities and underscores future potential for growth as market demand expands.
- LTIMindtree is seen as an effective executor of defined tasks, but according to customers, it sometimes lacks a proactive, strategic mindset, limiting its ability to act as a co-creator or long-term partner in shaping clients' energy transition road maps. As a result, clients frequently drive the direction and planning, with LTIMindtree following rather than directing, which restricts its role to execution rather than strategic partnership.

PwC

PwC is positioned in the Leaders category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

PwC is a global professional services firm with approximately 370,000 employees in 149 countries. PwC's multidisciplinary teams support organizations in navigating the complexities of energy transition, decarbonization, and regulatory change, with a focus on integrated strategy, digital innovation, and operational transformation.

Quick Facts

- **Domain focus**. PwC's Energy, Utilities & Resources (EU&R) network comprises over 27,000 professionals, including more than 11,500 energy transition experts in 65 territories, serving clients in oil & gas, power & utilities, chemicals, mining, and metals. Its team delivers integrated advisory, digital, and assurance services across global markets, supporting complex transformation initiatives.
- **Geographic footprint**. Active in over 65 countries, PwC delivers consistent, scalable energy transition services worldwide, adapting global expertise to local regulatory and market contexts.
- **Innovation organization**. PwC operates centers of excellence focusing on energy transition, digital transformation, and climate strategy, and it regularly convenes global knowledge-sharing events such as the annual EU&R Conference.
- **Partner ecosystem**. Strategic alliances with technology and engineering firms — including SAP, Microsoft, Google, AWS, Oracle, and GE Digital — enhance PwC's ability to deliver data-driven, tech-enabled solutions.
- **Delivery model**. PwC provides end-to-end services from strategy to execution, including advisory, digital transformation, managed services, and assurance, leveraging proprietary tools and accelerators for repeatable, high-quality delivery.

Innovation Areas

PwC drives innovation in the energy transition by integrating advanced digital technologies and sector expertise. The firm applies artificial intelligence, data analytics, and digital twin technologies throughout the energy transition life cycle, from strategic planning to operational execution. AI supports scenario modeling, predictive analytics, and process automation, helping organizations make informed decisions and optimize performance. PwC has developed more than 80 proprietary digital tools, including the Emissions Tracker for real-time greenhouse gas data management, the Net Zero Maturity Assessment, and the Energy Value Assessment Tool for scenario testing and business case optimization.

In sustainable finance, PwC advises on green investment strategies, capital project structuring, and compliance with evolving regulations such as Corporate Sustainability Reporting Directive (CSRD), Task Force on Climate-Related Financial Disclosures (TCFD), and Carbon Border Adjustment Mechanism (CBAM). These services are supported by financial modeling and risk analytics, enabling clients to navigate regulatory complexity and align with global sustainability standards

Strategic alliances with technology and engineering firms — including Microsoft, Google, AWS, SAP, Oracle, and GE Digital — facilitate the delivery of scalable, tech-enabled solutions. Notable initiatives include the "Fueling our Future" campaign (which advances alternative fuels and hydrogen) and the Energy Demand Experience (an AI-powered simulation developed with the World Economic Forum and Microsoft that uses gamification to engage stakeholders and accelerate sustainable practices).

Strengths

- PwC is recognized for supporting clients from initial strategy and feasibility through to large-scale transformation, integration, and ongoing optimization, ensuring measurable and sustained outcomes.
- PwC's deep alliances with technology and engineering partners enable it to deliver integrated, cutting-edge solutions tailored to clients' energy transition needs, while its proprietary digital assets streamline transformation processes and drive measurable outcomes. PwC's collaborative "with you" approach ensures knowledge transfer and capability-building within client organizations, fostering long-term resilience.

Challenges

- In sectors beyond PwC's traditional focus, engagement approaches can sometimes appear more reactive. Enhancing proactive relationship management and increasing visibility into the full breadth of PwC's capabilities could help unlock greater strategic value.
- Customers highlight that PwC's frequent introduction of change orders during project delivery, even when scope flexibility is agreed upfront, can disrupt

momentum and slow down solution delivery, highlighting a need for more agile and outcome-focused commercial models.

Schneider Electric

Schneider Electric is positioned in the Leaders category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

Schneider Electric specializes in energy management and automation, supporting organizations worldwide in their energy transition. In 2024, the company employed approximately 159,000 people across more than 100 countries. Its expertise integrates electrification, digitalization, and decarbonization, underpinned by advanced analytics, artificial intelligence, and a global network of technical specialists.

Quick Facts

- **Domain focus**. Schneider Electric delivers end-to-end services for energy transition, including strategic consulting, process electrification, digital asset management, and operational support. Its portfolio addresses industrial, commercial, public sector, and infrastructure clients worldwide.
- **Geographic footprint**. Operates in 192 countries with a global team of over 3,500 professionals in energy transition and sustainability services and a network of 6,000 in-house electrical experts, supported by certified partners and digital service hubs.
- **Innovation organization**. Allocated €2.2 billion in 2024 to proprietary R&D and partners with SE Ventures, which oversees a €1 billion fund to drive innovation through collaboration with cutting-edge start-ups.
- **Partner ecosystem**. Maintains alliances with technology providers, utilities, and sector specialists to deliver integrated solutions, including digital platforms (EcoStruxure, Zeigo), and collaborates with process technology and automation partners.
- **Delivery model**. Offers consulting, digital, and managed services, leveraging AI-powered software, remote monitoring, and a modular, open architecture to support clients across the asset life cycle.

Innovation Areas

Schneider Electric's innovation strategy focuses on integrating proprietary digital platforms, advanced analytics, and AI to meet the demands of the energy transition. Through internal R&D and SE Ventures — a €1 billion fund — it accelerates technologies in electrification, digitalization, and decarbonization. This enables solutions such as AI-driven maintenance, predictive asset monitoring, and modular software for life-cycle management.

Schneider's EcoStruxure and Zeigo platforms incorporate proprietary IP to deliver real-time data, enable scenario modeling, and support the monitoring of critical

assets by over 150 Connected Services Hub agents for asset performance and risk management. A global network of more than 6,000 experts in electrical distribution, cooling, and industrial automation drives innovation in circularity, retrofits, and digital upgrades, extending asset life and reducing environmental impact

Innovation is further advanced through collaborations with early-stage technology companies and the application of AI hubs, which house more than 300 in-house data scientists, and support sectors such as grid integration, process electrification, and energy management.

Strengths

- Schneider Electric brings end-to-end expertise across the energy transition life cycle, from strategy and business-case development to engineering, digital transformation, and operations. Its strong track record spans all key use cases, with a diverse portfolio of global, referenceable clients.
- Schneider Electric's proprietary platforms such as EcoStruxure and Zeigo integrate AI, analytics, and scenario modeling to support data-driven decision-making and operational resilience.
- Schneider Electric's life cycle–based approach emphasizes modernization and circularity, helping clients extend asset life and reduce environmental impact without requiring full system replacement.
- Schneider Electric's global delivery model — supported by over 6,000 in-house electrical, cooling, and industrial automation experts and a network of certified partners — enables consistent execution across diverse geographies and regulatory environments.

Challenges

- While customers appreciate Schneider Electric's strong executive engagement, alignment often weakens at the middle management level, slowing down decision-making and causing friction during execution. This inconsistency can hinder delivery and underscores the need for a unified understanding of client goals across the organization.
- Schneider Electric's use of large, specialist teams can create coordination challenges that affect project efficiency and consistency. Strong project management is essential to maintain quality, highlighting the need for streamlined team structures and better internal coordination to improve delivery.

Siemens

Siemens is positioned in the Leaders category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

Siemens is a global technology company specializing in electrification, automation, and digitalization across multiple industries, employing approximately 327,000 people worldwide in 2024.

Siemens provides a comprehensive suite of digital, engineering, and advisory services to address the challenges of decarbonization, electrification, and energy system resilience. Its approach integrates operational technology and information technology, enabling organizations to plan, implement, and optimize their transition to low-carbon operations. The company's portfolio includes digital platforms, scenario modeling tools, and life-cycle services designed to support long-term energy transition strategies.

Quick Facts

- **Domain focus**. Siemens supports energy transition across power, utilities, manufacturing, process industries, and commercial real estate. The company leverages digitalization, analytics, and expertise to deliver decarbonization, grid modernization, and resilient infrastructure.
- **Geographic footprint**. Operates in over 190 countries, with major projects and customer engagements in EMEA, the Americas, and Asia/Pacific.
- **Innovation organization**. Siemens invests in digital platforms such as Building X and the Energy System Twin, and it maintains research and engineering centers dedicated to energy transition technologies and solutions. Its portfolio also includes Gridscale X and Electrification X, which support grid management and electrification planning.
- **Partner ecosystem**. Siemens drives energy transition by investing in advanced digital platforms (including Building X and the Energy System Twin) and it operates a global network of research and engineering centers that focus on developing next-generation technologies and solutions.
- **Delivery model**. Offers end-to-end services including advisory, feasibility studies, technical design, integration, and ongoing optimization, supported by a global network of experts and digital tools.

Innovation Areas

Siemens advances the energy transition through targeted, practical innovation. The company invests in digital platforms such as Building X and the Energy System Twin, which enable organizations to model energy scenarios, optimize asset performance, and support decarbonization strategies.

Siemens has developed executable digital twins for real-time simulation and management of energy infrastructure, as demonstrated in projects such as the digital twin deployment for Italian Trieste's energy grid and the Building X Lifecycle Twin for continuous building optimization.

In green hydrogen, Siemens is scaling up modular PEM electrolyzer production, including a new gigawatt plant in Berlin, and it has partnered with Air Liquide to industrialize renewable hydrogen solutions.

Artificial intelligence is embedded in platforms such as Building X, providing actionable insights for energy savings and emissions reduction. Siemens also collaborates in ecosystem initiatives such as the ENSURE project, working with government, academia, and industry to develop intelligent solutions for future energy systems.

The Siemens Xcelerator marketplace further connects customers with a global network of technology partners, accelerating the adoption of innovative solutions.

Strengths

- Siemens combines engineering expertise with digital innovation to support complex energy transitions across sectors and geographies.
- Siemens' integrated IT/OT approach enables scenario planning, system optimization, and life-cycle support through platforms such as Building X and Energy System Twin.
- Siemens applies industrial AI and software-defined automation to enhance flexibility, efficiency, and resilience, enabling real-time optimization and predictive maintenance.

Challenges

- Customers indicated that in some cases, Siemens could improve agility by accelerating product development and reducing turnaround times for solution customization and delivery.
- While customers value Siemens' innovation, some believe broader access to its global R&D ecosystem — especially for public and educational institutions — could further enhance value by enabling deeper collaboration and accelerating co-innovation.

TCS

Tata Consultancy Services (TCS) is positioned in the Leaders category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

TCS is a global technology and consulting company with over 613,000 employees in 2024. TCS brings together digital, engineering, and industry expertise to address the challenges of energy transition. The company works closely with organizations as they move toward decarbonization, electrification, and modernization of energy systems. Its strategy centers on technology innovation and collaboration, partnering with cloud providers, technology firms, and research institutions to deliver practical solutions for net zero ambitions.

Quick Facts

- **Domain focus**. TCS assists clients across various industries — including utilities, energy resources, manufacturing, and automotive — in managing energy sustainably to achieve their net-zero targets. Its energy transition services support the shift from carbon-intensive energy sources to renewables, offering solutions such as decarbonization strategy, transition advisory, clean energy integration, and energy storage.
- **Geographic footprint**. With over 613,000 employees and operations in 55 countries, TCS serves clients globally, including major projects in North America, Europe, Asia/Pacific, and the Middle East.
- **Innovation organization**. TCS invests in proprietary platforms (e.g., Clever Energy, Intelligent Power Plant, Energy Internet Platform) and maintains innovation hubs such as TCS Pace Ports and partnerships with leading universities and research bodies, including the Industrial Decarbonization Research and Innovation Centre (IDRIC).
- **Partner ecosystem**. Strategic alliances include hyperscalers (AWS, Microsoft Azure, Google Cloud), technology vendors (Siemens, Honeywell, IBM, Schneider Electric), and collaborations with niche carbon management firms and industry bodies to accelerate cross-industry adoption of energy transition solutions.
- **Delivery model**. TCS offers consulting, digital transformation, managed services, and outcome-based engagements, underpinned by global delivery centers and a flexible commercial model (including gain-share and risk-reward pricing).

Innovation Areas

TCS approaches innovation in energy transition through a structured, technology-led strategy that integrates digital platforms, AI, and ecosystem collaboration. Its innovation model is anchored in proprietary platforms such as Clever Energy, Intelligent Power Plant, and the Energy Internet Platform, which support real-time energy optimization, predictive analytics, and dynamic grid management.

The company's innovation strategy emphasizes three core levers: data-driven decision-making, prosumer-centric models, and electrification. AI and IoT are used to unify IT and OT systems, enabling predictive maintenance, energy forecasting, and emissions tracking. These capabilities are deployed across sectors, from utilities to manufacturing, through scalable platforms and modular solutions.

TCS also invests in future-ready infrastructure through its global network of Pace Ports and partnerships with academic and research institutions, including Macquarie University and Imperial College. These hubs facilitate rapid prototyping and cross-industry experimentation.

Innovation is further supported by flexible commercial models, such as gain-share and outcome-based contracts, which align incentives and accelerate adoption. This approach enables clients to pilot and scale new energy solutions while managing risk and ensuring measurable progress toward sustainability goals.

Strengths

- TCS combines industry knowledge with digital and engineering capabilities to support energy transition across sectors, from utilities to manufacturing.
- Its ecosystem-led approach leverages strategic partnerships and proprietary platforms to enable decarbonization, operational transformation, and innovative business models across industries.
- TCS maintains a global delivery footprint and innovation hubs that support scalable, regionally adaptable solutions.

Challenges

- TCS could enhance consistency in project delivery by strengthening standardization across roles and improving project management practices.
- TCS customers indicate that the company could be more proactive in articulating the value and ROI of its solutions. This gap in communication can make it challenging for stakeholders to fully align project outcomes with their broader strategic objectives, highlighting the need for TCS to adopt a more consultative and benefit-driven engagement approach.

Tech Mahindra

Tech Mahindra is positioned in the Major Players category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

Tech Mahindra, a global IT services and consulting firm within the Mahindra Group, is increasingly recognized for its strategic support of energy transition initiatives across sectors. With 150,000 employees in over 90 countries, the company leverages advanced digital technologies and industry knowledge to help clients decarbonize operations, enhance energy efficiency, and comply with evolving ESG requirements. Tech Mahindra positions energy transition as both an environmental imperative and a driver of operational resilience.

Quick Facts

- **Domain focus**. Tech Mahindra supports energy transition across manufacturing; telecom; automotive; utilities; banking, financial services, and insurance (BFSI); retail; and the public sector. Its services use IoT, AI and digital twins to deliver decarbonization, ESG compliance, energy optimization, and sustainable infrastructure.

- **Geographic footprint**. Tech Mahindra maintains a global network of 175 offices across more than 90 countries, with its largest operational hubs and client engagements concentrated in India, North America, and Europe.
- **Innovation organization**. Tech Mahindra invests in proprietary digital platforms such as Green Code Refiner, Riskman, and GreenFinance, and it leverages live testbed campuses and R&D partnerships to advance energy transition technologies and solutions.
- **Partner ecosystem**. Collaborates with global technology and sustainability companies including Microsoft, AWS, ERM, AXA Climate, and EkkoSense to co-create scalable, sector-specific solutions and accelerate client decarbonization journeys.
- **Delivery model**. Offers end-to-end services, strategy, implementation, and monitoring, supported by advanced digital, IoT, and AI/ML capabilities, and a global network of domain specialists and technology partners.

Innovation Areas

Tech Mahindra's innovation strategy is rooted in the integration of advanced digital technologies with sustainability-focused solutions, tailored to the evolving needs of energy transition. The company combines proprietary platforms — such as Green Code Refiner (developed with Microsoft) and i.sustain.NXT — with AI, IoT, and blockchain to enable real-time optimization, predictive analytics, and ESG data automation across IT estates, datacenters, and supply chains.

Tech Mahindra's campuses serve as live testbeds for energy efficiency and digital twin applications, reinforcing a culture of continuous improvement. Strategic collaborations with AWS, ERM, AXA Climate, and EkkoSense further enhance its ability to co-create scalable, sector-specific solutions.

In sustainable finance, the company is developing tools to assess ESG scores for green loans, while in supply chain decarbonization, it leverages blockchain for traceability and compliance with emerging regulations such as CBAM and European Union Deforestation Regulation (EUDR). This multidimensional innovation approach enables clients to embed sustainability into core operations while navigating regulatory complexity with agility.

Strengths

- Tech Mahindra combines digital engineering, IT modernization, and sustainability expertise to support energy transition across complex operational environments.
- Its modular platforms and global delivery model enable tailored, scalable solutions across sectors and geographies.
- The firm collaborates with a broad ecosystem of technology and sustainability partners to co-develop solutions aligned with emerging regulatory and ESG requirements.

Challenges

- Tech Mahindra is better known for its background in IT services, which remains a core part of its identity. While the company is expanding into energy transition and sustainability, its footprint in the evaluated domain is limited.
- While Tech Mahindra demonstrates appropriate technical competence, some clients have noted limitations in its industry-specific expertise. This lack of extensive sector knowledge can hinder the company's ability to tailor solutions effectively, highlighting the need to strengthen industry specialization to better address client needs and deliver more impactful outcomes.

Wipro

Wipro is positioned in the Major Players category in the 2025 IDC MarketScape for Worldwide Energy Transition Professional Services vendor assessment.

Wipro is a global technology services and consulting company with over 230,000 employees across 65 countries. Wipro's experience in sustainability spans more than two decades, during which it has developed energy transition strategies for a broad spectrum of sectors. Drawing on advanced digital engineering and an innovation ecosystem, Wipro supports organizations as they decarbonize operations and adapt to evolving regulatory and market requirements.

Quick Facts

- **Domain focus**. Wipro provides energy transition solutions across sectors such as energy, utilities, manufacturing, chemicals, transportation, and heavy industry. Its services encompass digital transformation, sustainability consulting, and advanced analytics.
- **Geographic footprint**. Operates in over 65 countries, with projects delivered in more than 20 nations and a global workforce exceeding 230,000 employees.
- **Innovation organization**. Wipro invests in proprietary digital platforms such as Energy Reach, STO360, AI360, and Cognitive Energy Intelligence, and it maintains three innovation centers, 30+ workspaces, and 20+ digital pods dedicated to energy transition technologies and solutions
- **Partner ecosystem**. Wipro accelerates energy transition by collaborating with academic institutions, industry alliances (e.g., Sustainable Markets Initiative, Transform to Net Zero), and technology partners and by investing through its $500 million Wipro Ventures fund in start-ups aligned with energy transition priorities.

- **Delivery model**. Offers end-to-end services including advisory, feasibility studies, technical design, integration, and ongoing optimization, supported by a global network of domain experts and digital tools

Innovation Areas

Wipro's innovation strategy in energy transition is anchored in applied digital engineering, co-innovation, and a robust ecosystem of partners, start-ups, and academia. Its proprietary platforms — such as AI360, Holmes, and Asset Radar — enable predictive maintenance, asset health monitoring, and digital twins, supporting operational efficiency and decarbonization across sectors.

The company's $500 million Wipro Ventures fund has backed over 35 start-ups, accelerating the integration of emerging technologies such as AI, IoT, and blockchain into client solutions. These investments have been deployed across more than 250 customer engagements globally.

Wipro also contributes to open standards, notably through its work on The Open Group's Open Footprint platform, in which it developed data models and GHG calculation engines for environmental reporting. Its innovation infrastructure includes three global centers, 30+ workspaces, and 20+ digital pods.

Strategically, Wipro emphasizes co-investment with clients and partners, open innovation, and value creation beyond traditional models. This includes initiatives in hydrogen blending, SAF enablement, and carbon capture, utilization, and storage (CCUS), in which Wipro has designed reference architectures and digital backbones to support emerging low-carbon value chains.

Strengths

- Wipro combines domain expertise, digital engineering, and proprietary platforms to support clients across the energy transition life cycle, from strategy to execution.
- Wipro offers flexible pricing models, including outcome-based and subscription approaches, tailored to project scope and client priorities. Its use of data-driven value assessments helps quantify impact and align costs with measurable result.
- Wipro's global innovation network and co-investment approach help scale solutions for emerging energy business models.

Challenges

- Wipro is sometimes still seen more as a delivery partner than a strategic co-creator. Expanding its role earlier in the energy transition journey through proactive opportunity framing and innovation-led advisory can help shift this perception and unlock more value.

- With the ongoing talent crunch, some customers have expressed concerns regarding Wipro's employee attrition, which can affect the depth and consistency of specialized expertise available for complex energy transition projects.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is with customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

In lieu of market share, IDC Energy Insights measures vendor footprint within the specific market segment as represented by the relative bubble sizes in the chart.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores — and ultimately, vendor positions on the IDC MarketScape — on detailed surveys and interviews with vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capabilities.

Market Definition

For the purpose of this IDC MarketScape, IDC Energy Insights defines energy transition as the shift toward a net-zero economy, balancing sustainability, availability of clean energy and economic factors for a broad cross-industry adoption.

Professional services for energy transition leverage advanced technologies (e.g., AI/ML, IoT, digital twins, blockchain, and data analytics) to help industries — particularly hard-to-abate sectors — achieve business goals such as operational efficiency, cost optimization, and energy resilience, while advancing decarbonization and sustainability goals.

IDC identifies five pillars of decarbonization strategies in industries:

- **Energy efficiency**. Reducing energy use in industrial processes.
- **Electrification**. Shifting from fossil fuels to electricity, particularly from renewable sources.
- **Low-carbon fuels and feedstocks**. Incorporating sustainable materials such as biofuels and hydrogen.
- **Carbon capture, utilization, and storage**. Mitigating emissions from existing infrastructure.
- **Distributed energy ecosystems**. Leveraging distributed energy resources (DERs), smart grids, and related technologies to enhance efficiency and integrate renewables

Professional services for energy transition span the full life cycle from advisory and strategy development, including the creation of energy transition road maps, to solution design, integration, operation, and scaling, delivering capabilities such as renewable energy integration, emissions optimization, carbon capture, and autonomous energy systems. This report will look at the following professional services:

- Business services, including business consulting, which defines the vision, goals, business architecture, security, organizational model, talent, and other business process-related dimensions; process services that involve the transfer of management and execution of activities or single-business processes to an external service provider; and BPO services.
- IT services, including IT systems and network implementations, data integration, application development and maintenance, IT deployment and support, and education and training that are used to support net-zero programs and portfolio transformation.

Strategies and Capabilities Criteria

Tables 1 and 2 list the capabilities and strategies criteria, respectively, used in this evaluation as well as the relative weight of each criterion.

TABLE 1

Key Capability Measures for Success: Worldwide Energy Transition Professional Services

Criteria Categories	Definitions	Weights (%)
Functionality/ offering	The vendor's service offerings are well-aligned with current transformational needs of industry clients' operations and the spectrum of the services evaluated in this IDC MarketScape. The vendor leverages advanced technologies (e.g., AI, IoT, digital twins, blockchain, and data analytics) to help industry clients achieve business goals such as operational efficiency, cost optimization, and energy resilience, while advancing decarbonization and sustainability goals. The vendor's value-based offerings align within customers' transformational road map to ensure benefits are delivered. The vendor needs to prove to industry clients their capabilities in decarbonization strategies in both mature and developing economies. The vendor will be evaluated on the number of industry clients' operations use cases, supported with noteworthy references.	35.0%
Range of services	The vendor offers a wide range of services to support industry clients' operations, ranging from business services (including business consulting, BPO, and process services) and IT services.	5.0%
Customer service delivery	The vendor's delivery model meets current customer requirements and allows for the adoption of new delivery models without prohibitive cost implications; execution methodology mitigates risks to deployment schedule. The appropriate delivery model must include an effective engagement with the client team and meet client-developed project timelines or service-level agreements. The vendor should have business process blueprints and data models as well as traditional and innovative methodologies to support project execution. An agile approach are highly considered in this IDC MarketScape. The vendor leverages methodologies and platforms to drive efficiency and innovation in software delivery and energy transition services.	5.0%
Market adoption	The vendor has client references across regions and industries. It demonstrates possibility to leverage services across different industry clients markets and regulations. The pervasiveness of a vendor's presence in the market is analyzed in this IDC MarketScape in terms of number of customers and average deal size.	15.0%
Customer satisfaction	The vendor is assessed by its customer satisfaction. The vendor is recognized by customers for delivering strong value for money, and for its ability to align customers' net-zero investments with financial and operational priorities. The vendor is evaluated on service quality and the strength of their working relationship.	40.0%

TABLE 1

Key Capability Measures for Success: Worldwide Energy Transition Professional Services

Criteria Categories	Definitions	Weights (%)
	The vendor's customer support is assessed for its online capabilities, including trouble ticketing, administrative web portals, and provisioning. The vendor's support organization is assessed for providing clear and effective account management. The vendor is evaluated for supporting operations across multiple geographies, which is considered important by customers.	
Total		100%

Source: IDC, 2025

TABLE 2

Key Strategy Measures for Success: Worldwide Energy Transition Professional Services

Criteria Categories	Definitions	Weights (%)
Functionality or offering road map	Future plans for offerings are well-aligned with industry clients' needs and future transformation. New offering development should include innovative service areas related to the domain and use cases analyzed by this IDC MarketScape. This assessment determines if the vendor proactively leads and anticipates customer needs or simply reacts to requirements without strategic, forward-looking engagement.	20.0%
Functionality or offering strategy	The vendor complements its offering with a strong ecosystem of partners relevant for the domain analyzed by this IDC MarketScape. Partners range from software companies, technology and operational technologies companies, and start-ups. The vendor's strategy focuses on helping clients generate new revenue, reduce costs, and achieve measurable benefits. By providing decarbonization solutions that go beyond net-zero goals, the vendor demonstrates the value of digital investments, quantifying ROI through cost savings, efficiency gains, and long-term growth. A clear methodology ensures the identification, tracking, and realization of these benefits.	30.0%
Delivery	The vendor can scale delivery internationally with the right mix of global and local resources and delivery centers.	10.0%

TABLE 2

Key Strategy Measures for Success: Worldwide Energy Transition Professional Services

Criteria Categories	Definitions	Weights (%)
Growth	The vendor has strategic plans for both organic and inorganic growth, and its plans are well-aligned with/anticipate industry trends for the next two to three years. Plans include potential for geographic expansion, as well as services portfolio and strategic partnership strategies.	5.0%
Customer assessment	The vendor is acknowledged by its customers as having deep industry expertise and its ability to support their energy transition road maps. Customers believe in the vendor's ability to support their future goals because it understands their industry and its transformation.	10.0%
Innovation	Vendor's investment in innovation is valuable and well-perceived by customers.	10.0%
R&D pace/ productivity	Vendor has a defined approach and plans for R&D projects, invests in R&D, and has center/s of excellence.	5.0%
Employee strategy	The vendor demonstrates a clear commitment to invest in programs to develop and retain advanced talent, while providing for a diverse range of career tracks. Emerging market expansion requires increased focus on local capabilities and the capability to deliver services from specialized delivery centers to provide rewarding opportunities and high client value. The vendor is investing in industry domains and training for its employees. Particular weight is given to vendors that can demonstrate continuous commitment to industry clients through dedicated head count and a named industry client practice. Training in design thinking and agile is highly considered.	5.0%
Financial/funding	The vendor's financial performance is positive. The company's strategy for generating, attracting, and managing capital maximizes its potential for creating market value. The vendor has been able to access external funds or internal resources for acquisitions	5.0%
Total		100%

Source: IDC, 2025

LEARN MORE

Related Research

- *2024 Energy Transition Survey: Findings and Implications for Discrete Manufacturing* (IDC #US53608825, June 2025)

- *Energy Transition in the APAC Region. Country Analysis: Australia, China, India, Japan, Singapore, and South Korea* (IDC #EUR153403125, June 2025)
- *The Hype and Reality of Green Hydrogen* (IDC #EUR153272325, March 2025)
- *The European Clean Industry Deal: Striking a Balance Between Being Green and Being Profitable* (IDC #EUR153258925, March 2025)
- *IDC MarketScape: Worldwide Service Providers for Power Generation and Storage 2025 Vendor Assessment* (IDC #US52038625, March 2025)
- *The Journey to Decarbonizing Global Aviation by 2050* (IDC #EUR153189825, February 2025)
- *IDC's Worldwide Energy Transition Strategies Survey: Key Investments and Enablers Across Regions* (IDC #EUR153126625, February 2025)
- *Datacenters Driving the Energy Transition in the Digital Economy: Top Trends in 2025* (IDC #EUR152735725, February 2025)
- *Market Insights Presentation: Worldwide Energy Transition Strategies, 2025* (IDC #EUR153070025, January 2025)
- *IDC MarketScape: Worldwide Consulting and Digital Services Providers for the Downstream Oil and Gas Industry 2024 Vendor Assessment* (IDC #US51004223, June 2024)
- *IDC MarketScape: Worldwide Consulting and Digital Services Providers for the Upstream Oil and Gas Industry 2024 Vendor Assessment* (IDC #US51004123, May 2024)

Synopsis

This IDC MarketScape study evaluates professional service providers that support energy-intensive industries in their energy transition. It reviews their capabilities, digital strategies, and ability to deliver measurable results. The analysis explores how technologies such as AI, IoT, and advanced analytics reshape operations to improve energy efficiency and reliability as well as manage risk. This study highlights strengths and challenges, including integrating digital solutions with physical assets and ensuring decarbonization investments deliver tangible business value.

"Decarbonizing heavy industries is not only about climate — it's also about staying competitive in a fast-changing, electrified world shaped by digital technologies," said Angela Salmeron, research director, IDC Energy Insights. "As energy systems become more complex, digital innovation becomes a key advantage. Strong partnerships with professional services providers are essential to strategically build intelligent operations that are ready to lead in the future."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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