ecosystm.

Ecosystm Global Sustainability Barometer Study

FINDINGS FOR THE AMERICAS

2024 Edition

SPONSORED BY:

kyndryl / Microsoft

October 2024

Table of Contents

Study Overview

Study Overview - Demographics

Country

AMERICAS

121	101	60	60	60
Canada	USA	Mexico	Brazil	Argentina

ASIA PACIFIC

102	62	60	60	60	60	60
India	Philippines	Japan	Thailand	Malaysia	Singapore	Australia

EUROPE

63	62	62	62	61	61	60	60
Germany	Spain	Netherlands	Luxembourg	Belgium	France	UK	Italy

Industry

40%	15%	15%	5%	5%	5%	5%	5%	5%
Financial Services	Manufacturing	Retail	Construction & Real Estate	Energy & Utilities	Hospitality	Primary Industries	Media & Telecom	Transport and Logistics

Organization Size (number of employees)

25%
201 - 499

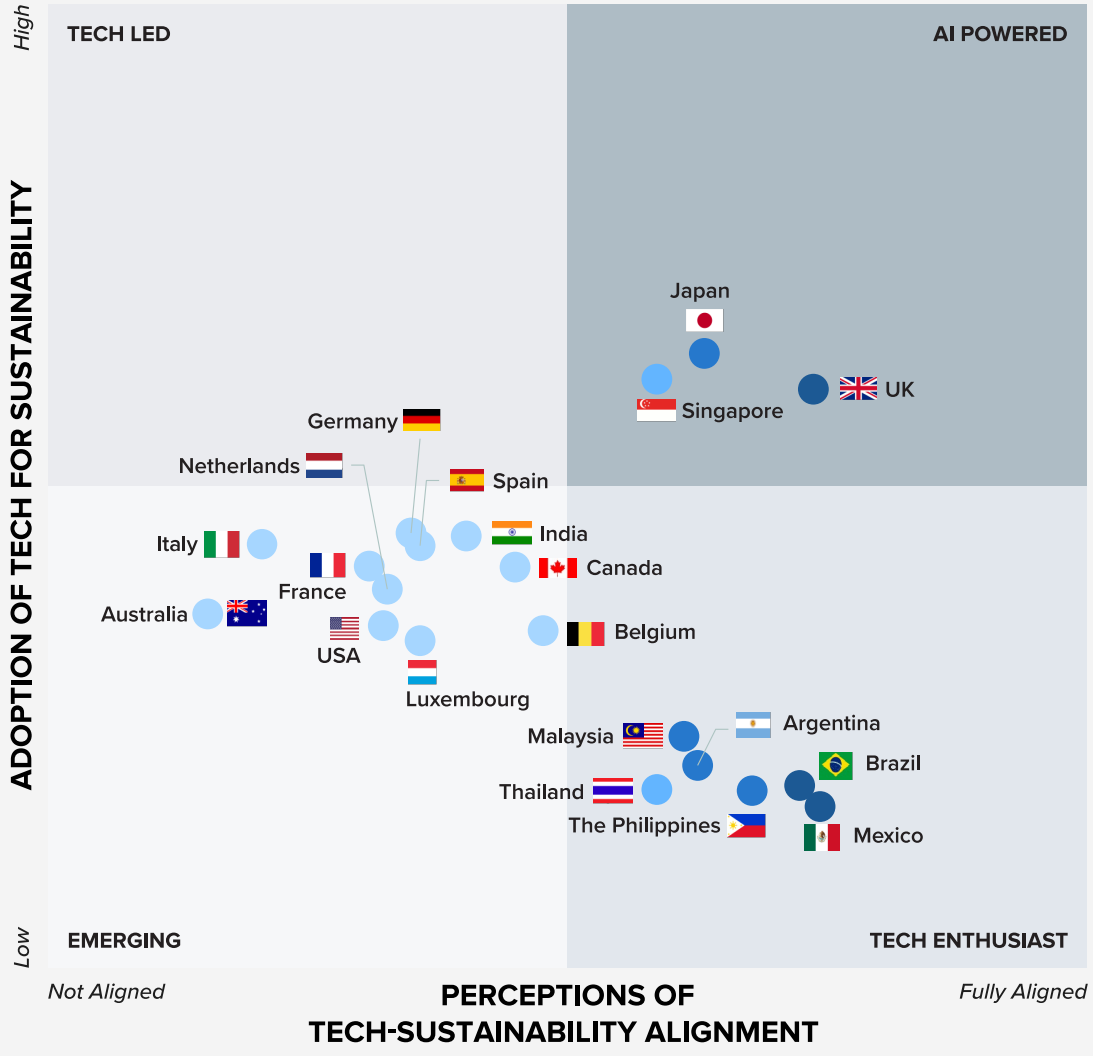
24%
500 - 999

30%
1,000 - 4,999

21%
More than 5,000

N = 1,355

Global Sustainability Landscape – Country Comparison



The Parameters

PERCEPTIONS OF TECH-SUSTAINABILITY ALIGNMENT
How the use of technology for sustainability is viewed (x-axis)

ADOPTION OF TECH FOR SUSTAINABILITY
Real adoption of tech for sustainability (y-axis)

ORGANIZATION'S SUSTAINABILITY STRATEGY
The extent to which organizations focus on sustainability strategy (color of bubble)

AI POWERED. At the forefront of sustainability, using AI to optimize operations, predict future trends, and drive innovation.

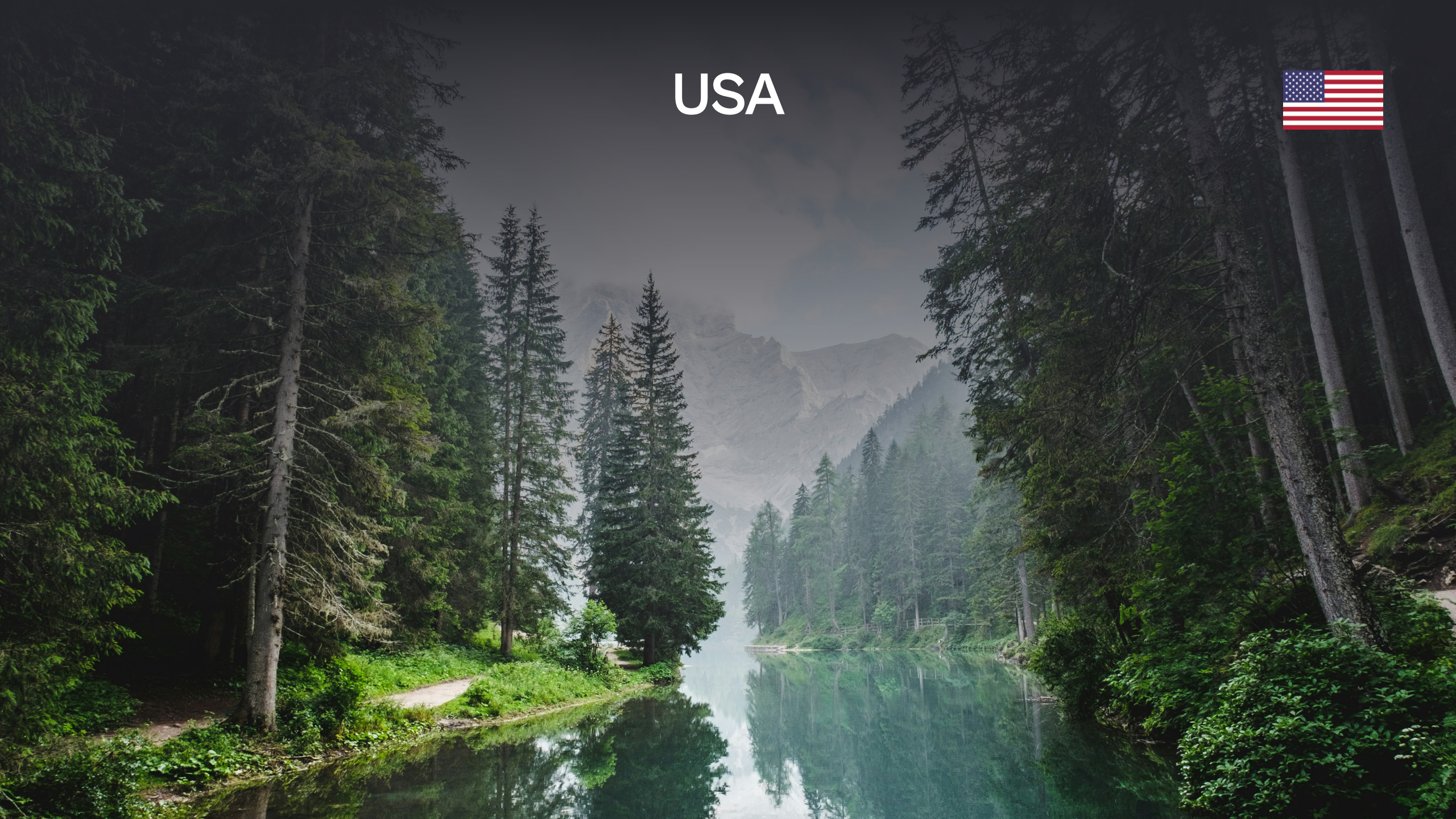
TECH LED. Have adopted a data-centric approach to sustainability, using data analytics to inform decision-making and measure progress.

TECH ENTHUSIAST. Strong desire to leverage technology for sustainability but may have limited resources or expertise.

EMERGING. Beginning their sustainability journey, focusing on basic strategies and limited technology adoption.

Country Findings

USA



Study Demographics

Function

Industry

- **49** Financial Services
- **13** Manufacturing
- **12** Retail
- **9** Transport and Logistics
- **5** Hospitality
- **4** Energy & Utilities
- **4** Construction & Real Estate
- **3** Media & Telecom
- **2** Primary Industries

Organization Size (No. of Emp.)

- **15** 201 - 499
- **34** 500 - 999
- **28** 1,000 - 4,999
- **24** More than 5,000

N = 101

Strategy & Perception

The Importance of Sustainability in the Organization

0%
Not Important
(1-4)

8%
Somewhat Important
(5-6)

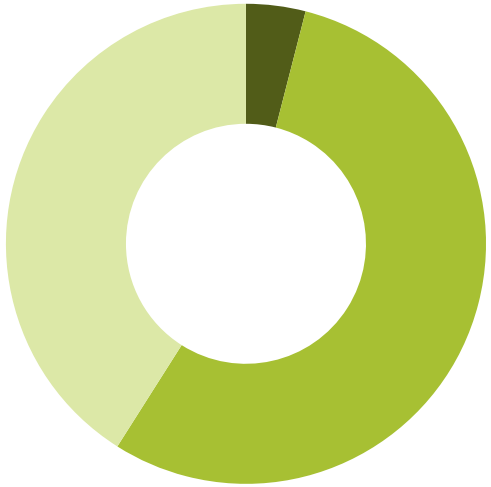
34%
Important
(7-8)

58%
Extremely Important
(9-10)

N = 101
Q: Please RATE the strategic importance of Sustainability in your organization on a scale of 1-10. (1='Least Important' and 10='Most Important')

Pace of Sustainability Efforts

CHANGE FROM LAST YEAR

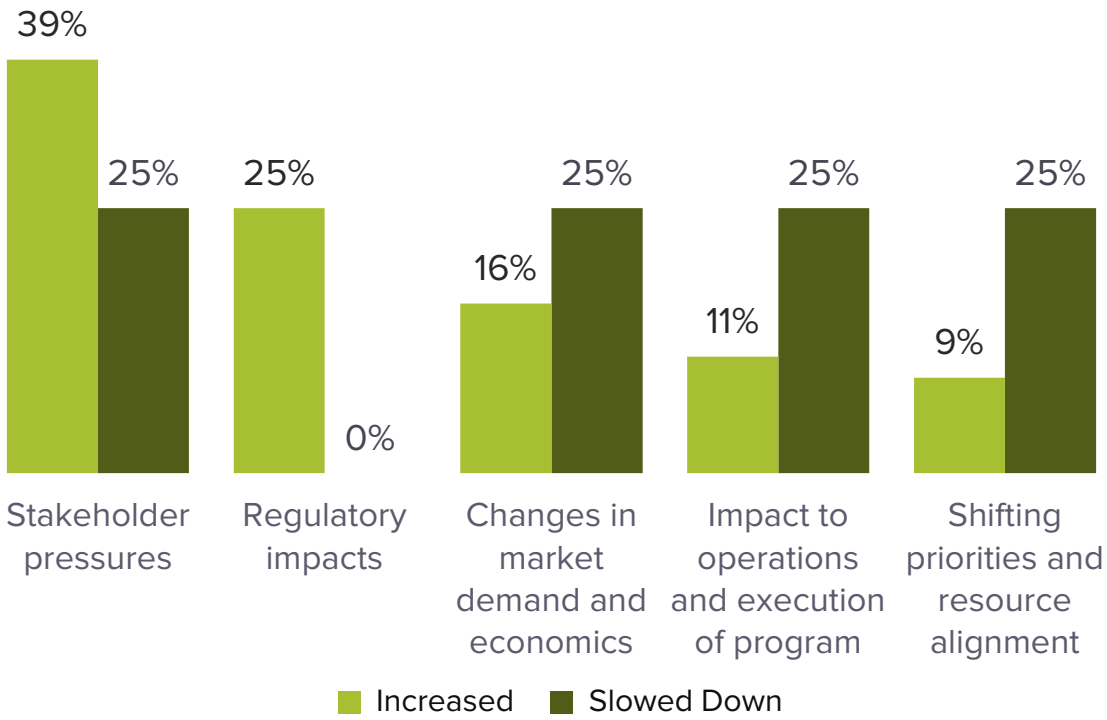


4% Slowed down

55% Increased

41% Remained the same

REASONS FOR CHANGE



N = 101
Q: Have your Sustainability goals and execution slowed down or increased over the last year?

N = 60
Q: What is the main reason for the change in pace of your Sustainability goals and execution?

Maturity of Organizations' Sustainability Strategies

6%

Sustainability is acknowledged but not integrated

Recognized as important but remains peripheral to the core corporate strategy

29%

Sustainability is a strategic aspiration

Included in the transformation strategy, but goals and measures are still not quantified or operationalized

49%

Sustainability is operationally embedded

Goals and initiatives are incorporated into existing operational review and reporting processes, but impact is not fully measured or quantified

9%

Sustainability is data-driven

Strategy and goals are prioritized and built upon real facts and data, providing a solid foundation for decision-making

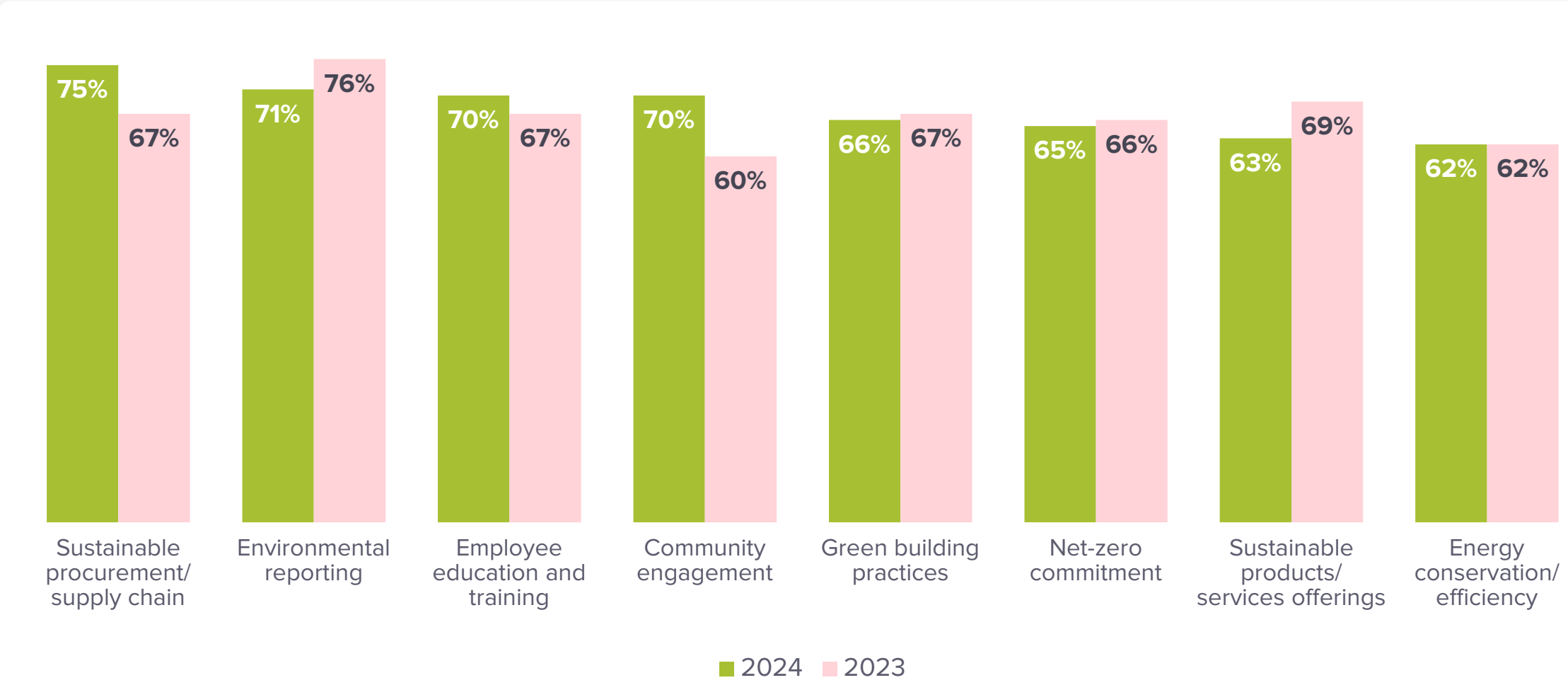
7%

Sustainability is a strategic asse.

Business value of sustainability data is well-understood, and initiatives are fully integrated into strategic planning and decision-making processes

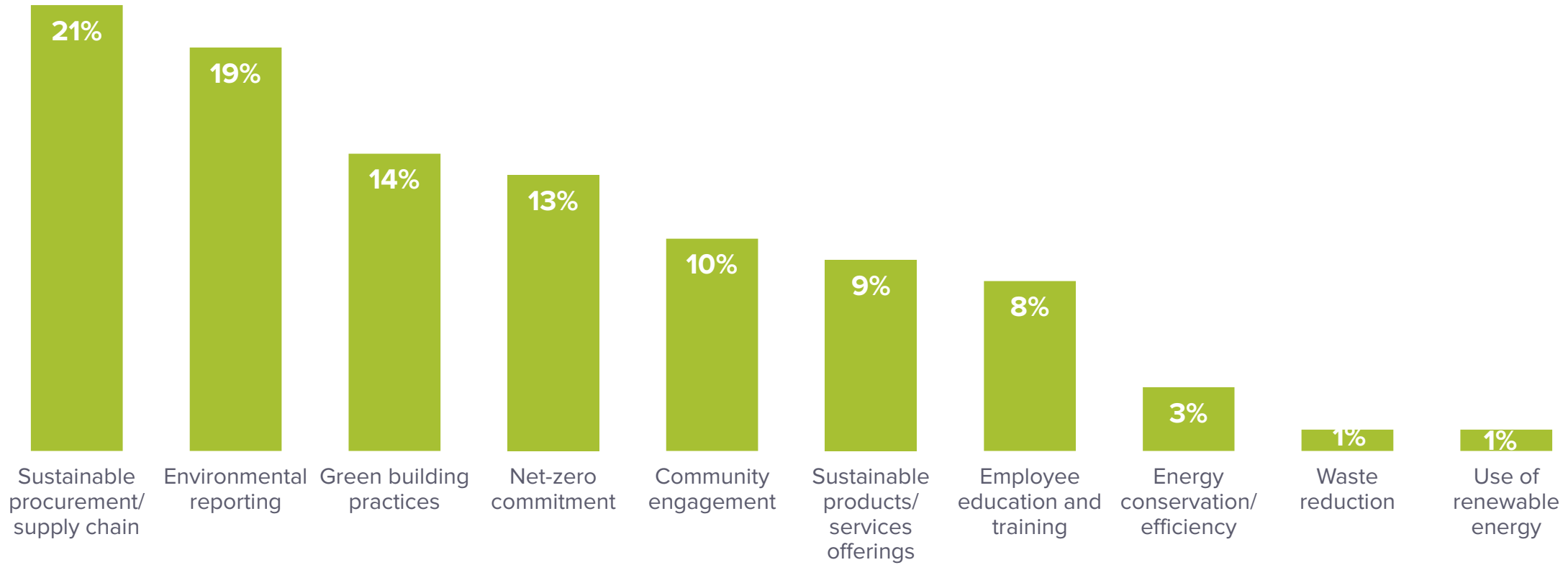
N = 101
Modeled based on responses to multiple questions

Top Environmental Measures Undertaken



N = 101 (2023 N=181)
Q: Which of these Environmental measures has your organization undertaken?

Most Impactful Environmental Measures



N = 101
Q: Which of the initiatives selected above do you consider most impactful?

Top Stakeholders Advocating for Sustainability

59%

Customers

55%

Employees

48%

Investors/ Stakeholders

39%

Supply chain partners

32%

Government/ Regulators

27%

Bank/ Credit providers

23%

Insurers

8%

Rating Agencies

7%

Communities

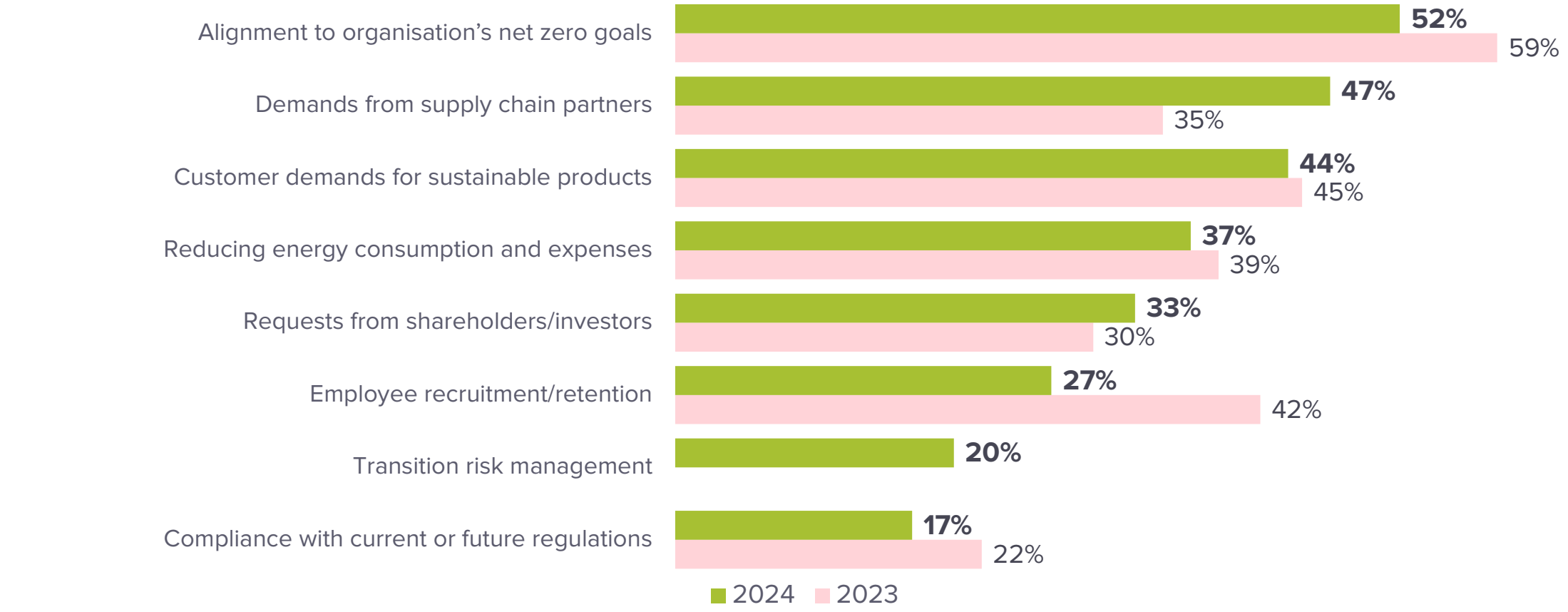
3%

Non-profit organizations

N = 101

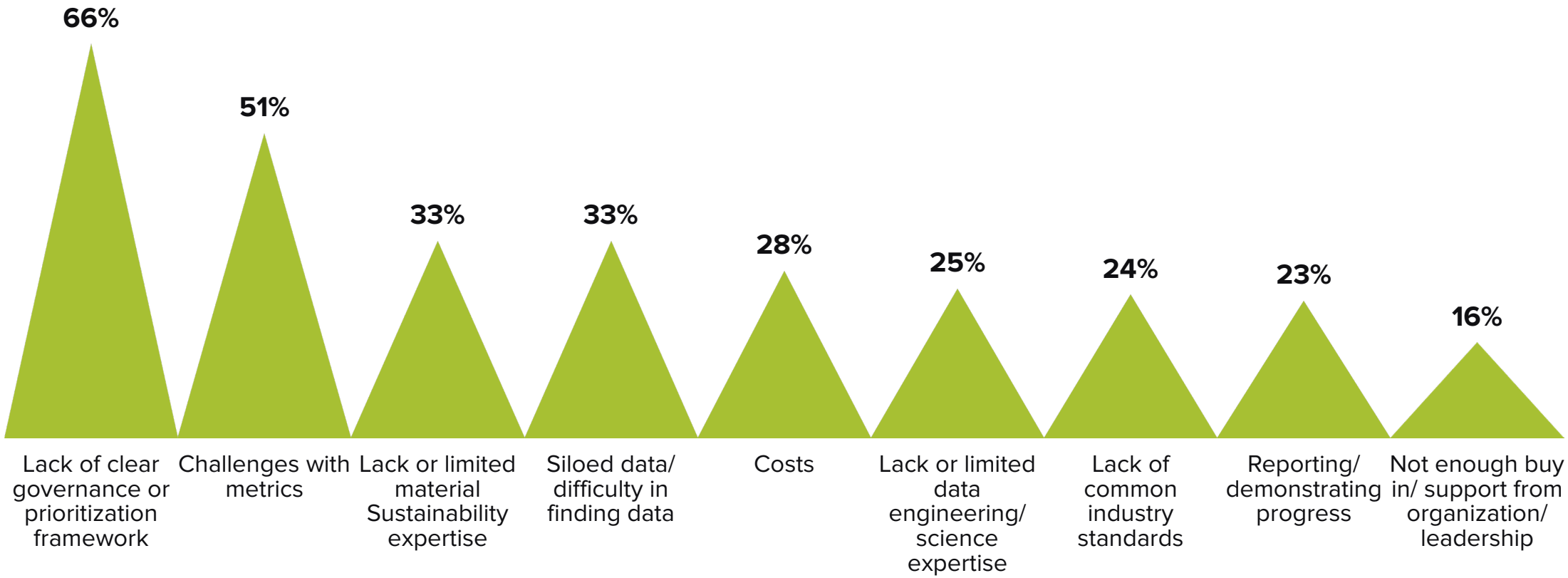
Q: Who are the TOP 3 stakeholders who are most vocal in advocating Sustainability policies and practices in your organization?

Main Drivers of Sustainability



N = 101 (2023 N=181)
Q: What are the 3 main drivers for your organization's Sustainability goals?

Main Challenges of Adopting Sustainability



N = 101
Q: What are the 3 main challenges faced in successfully adopting Sustainability measures?

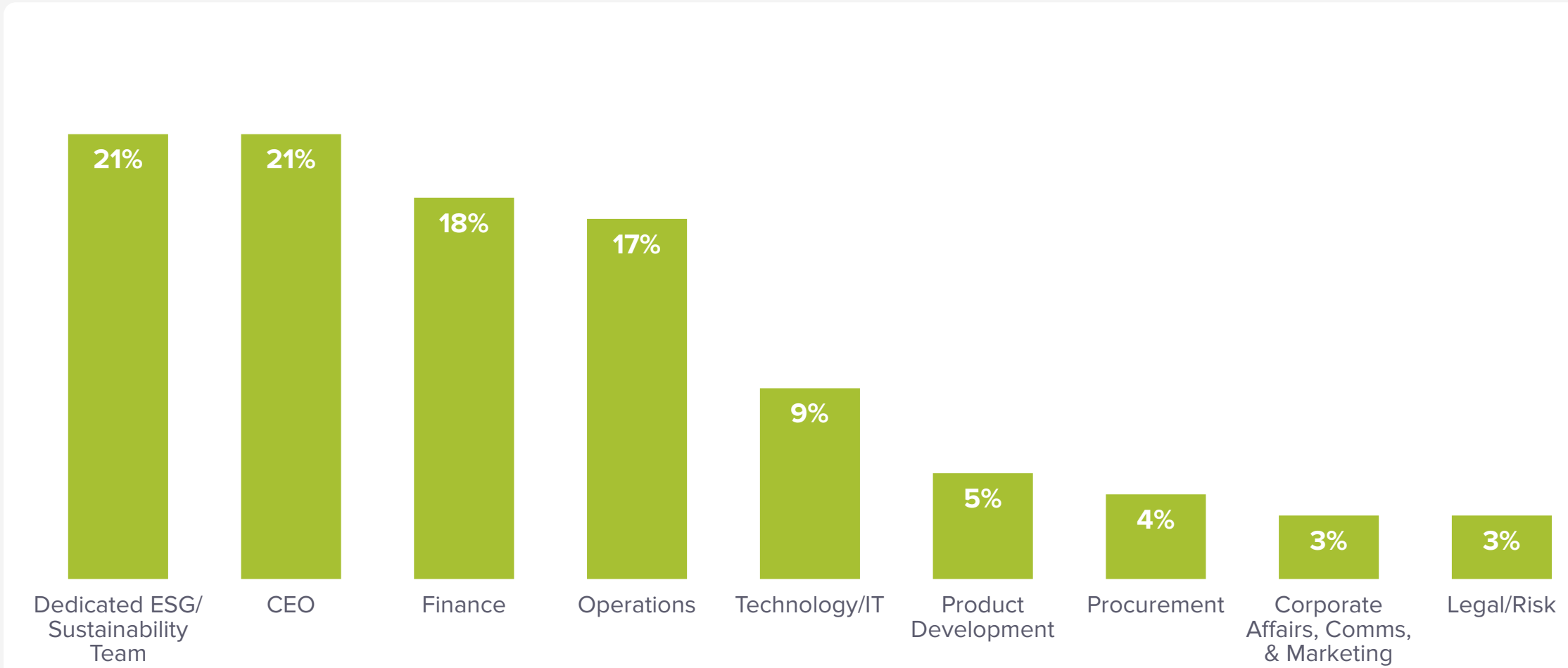
How Governments Can Support Adoption of Sustainability

N = 101
Q: How, according to you, can governments improve the adoption of Sustainability initiatives?

Execution

People, Governance, & Narrative

Sustainability Leadership



N = 101
Q: Which function is primarily responsible for your organization's Sustainability initiative?

Role of Key Stakeholders

Defining The Vision

- 66% CEO
- 50% ESG/Sustainability Team
- 49% Finance

Delivering Sustainability Outcomes

- 60% ESG/Sustainability Team
- 55% Technology/IT
- 50% Finance

Providing the Data

- 77% ESG/Sustainability Team
- 47% Operations
- 31% Technology/IT

Managing the Data

- 62% ESG/Sustainability Team
- 41% Technology/IT
- 36% Finance

Deciding the Metrics

- 66% CEO
- 42% ESG/Sustainability Team
- 39% Technology/IT

Reporting

- 89% ESG/Sustainability Team
- 46% Corporate Affairs, Comms, & Marketing
- 44% Technology/IT

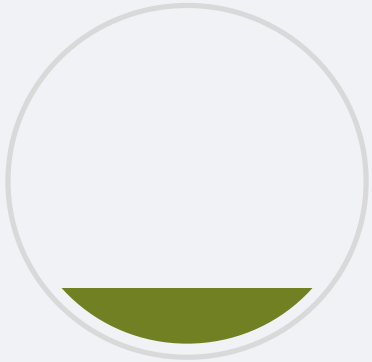
N = 101
Q: Who are the top 3 stakeholders for these activities in your Sustainability program?

Alignment Between Sustainability Team & Finance

11%
Minimal Alignment
(1-4)

31%
Some Alignment
(5-6)

42%
Strong Alignment
(7-8)



16%
Full Alignment
(9-10)

N = 101
Q: Rate the alignment between Finance and the Sustainability Teams on a scale of 1-10

Maturity of Employee Involvement in Sustainability

9%

Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives

23%

Basic Sustainability Awareness

Employees are aware of sustainability goals but may not fully understand their role in achieving them

37%

Emerging Sustainability Engagement

Employees have a basic understanding of sustainability responsibilities and how they relate to their roles

28%

KPI-Driven Sustainability

Sustainability KPIs are set relevant to employee roles, fostering a more focused and targeted approach to sustainability

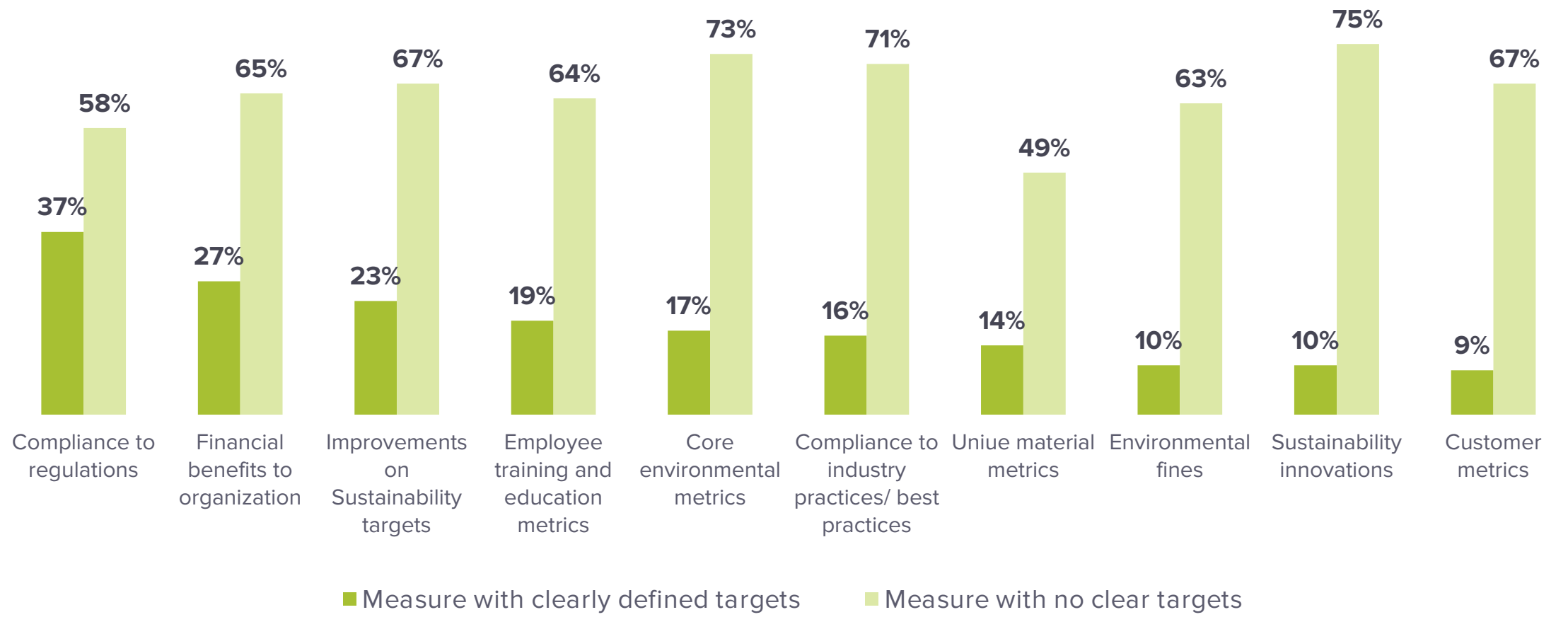
3%

Sustainability as a Strategic Imperative

Sustainability performance is tied to executive and key employee compensation, reinforcing its role as a strategic priority.

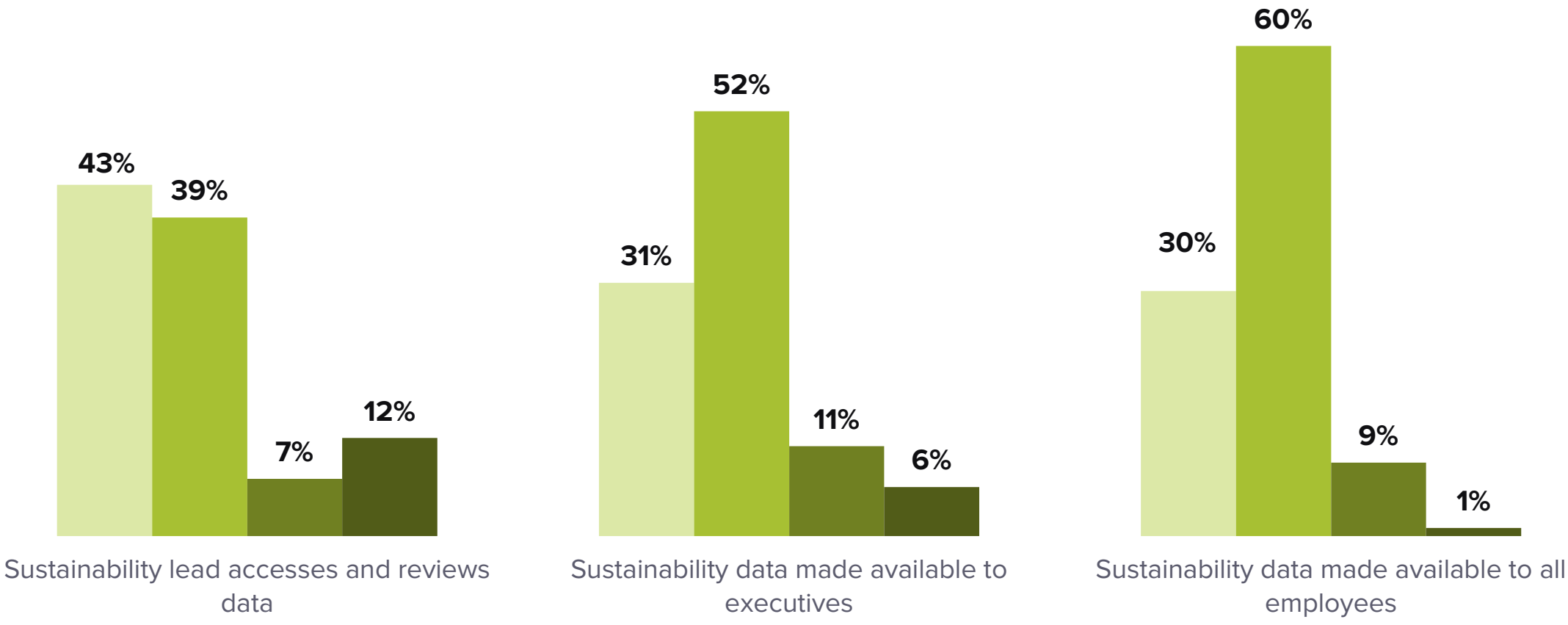
N = 101
Modeled based on responses to multiple questions

Metrics Used to Measure Sustainability



N = 101
Q: Which are the metrics used in your organization to measure Sustainability efforts? (Depicting the metrics adopted with clearly-defined metrics)

Sustainability Data Access and Sharing



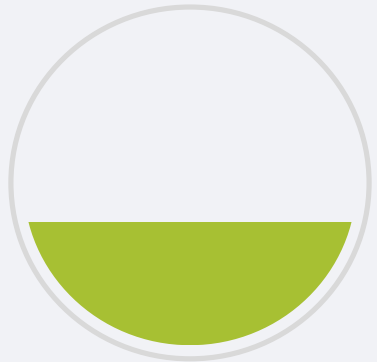
N = 101
Q: How frequently does your organization access/ share data internally on Sustainability progress with key stakeholders?

Technology

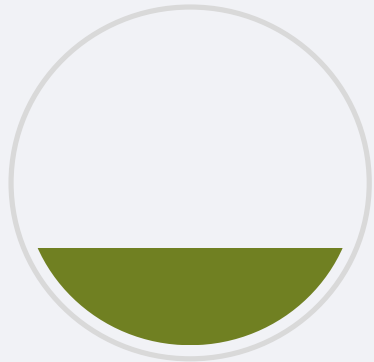
Importance of Technology in Achieving Sustainability Goal

1%
Not Important
(1-4)

32%
Somewhat Important
(5-6)



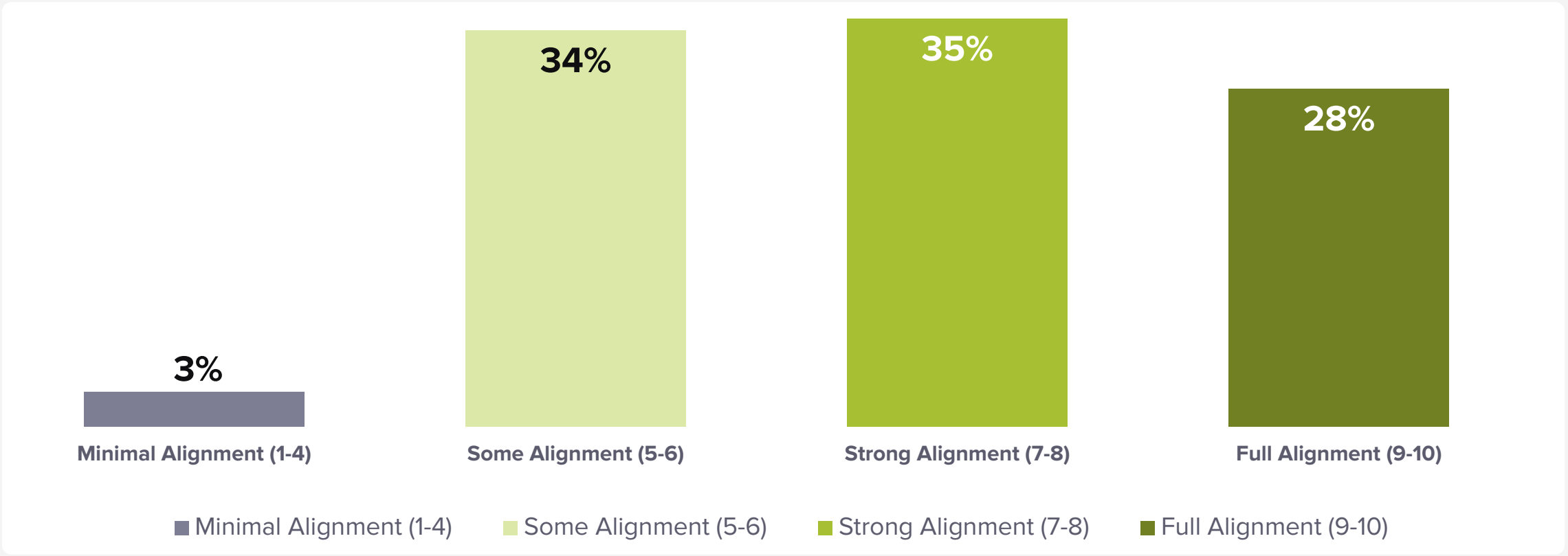
38%
Important
(7-8)



29%
Extremely Important
(9-10)

N = 101
Q: On a scale of 1-10, how would you rate the importance of Technology to achieving Sustainability goals? (Where 1='Not important at all' and 10='Absolutely critical')

Alignment Between Sustainability Teams & Technology



N = 101
Q: Rate the alignment between IT/Technology and Sustainability Teams on a scale of 1-10 (Where 1='Not aligned' and 10='Completely aligned')

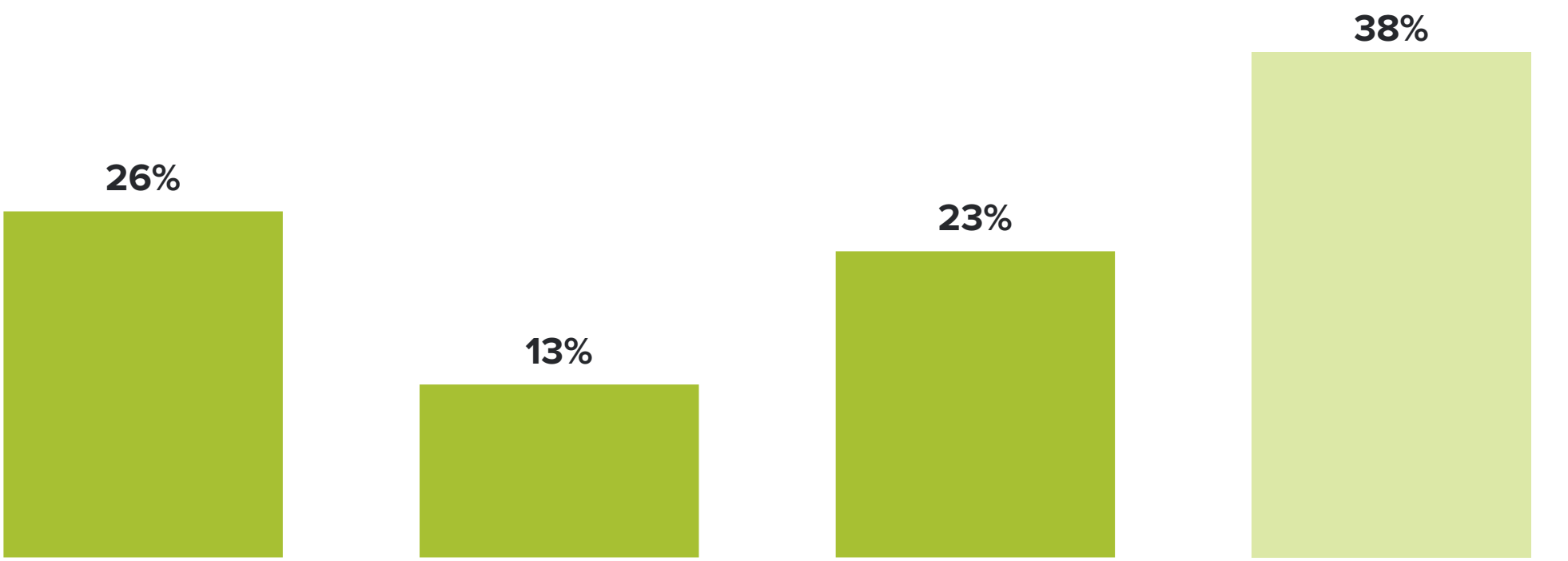
The Extent of Use of IT to Achieve Sustainability Goals

49%
IT is fully leveraged

51%
IT is not fully leveraged

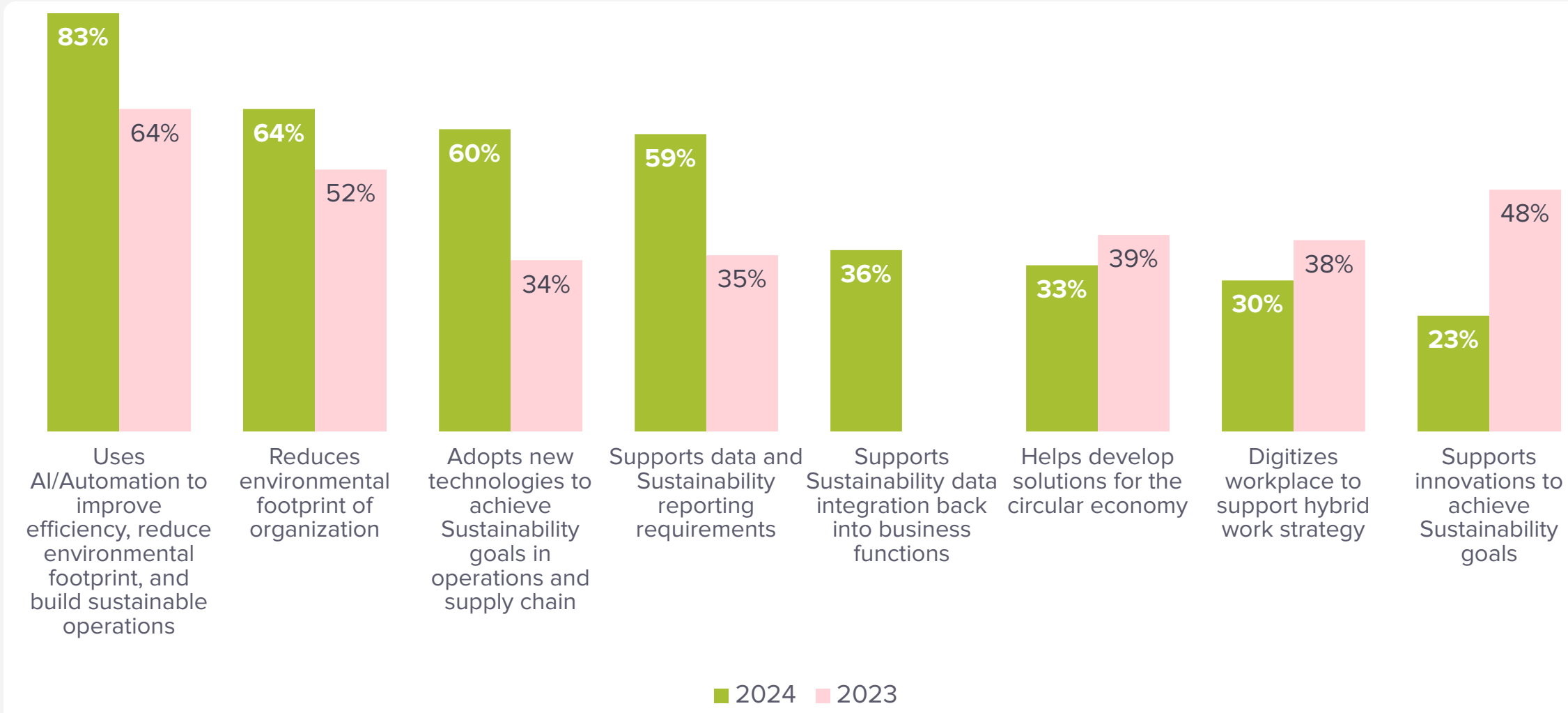
N = 101
Q: Do you feel the organization leverages the full potential of IT/Technology in achieving Sustainability?

IT's Role in Achieving Sustainability Goals



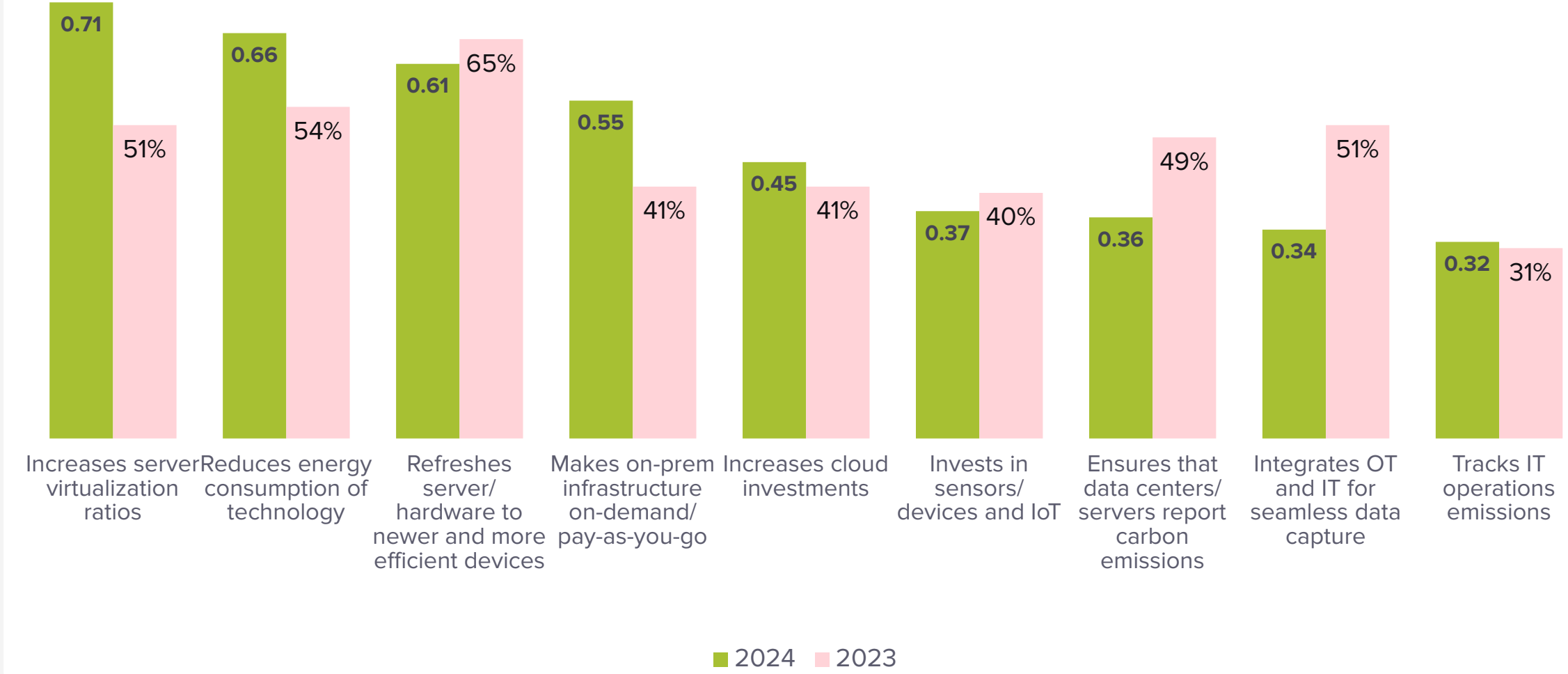
N = 101
Q: What is the extent of the involvement of IT in achieving your organization's Sustainability goals?

Role of Technology in Supporting Sustainability



N = 101 (2023 N=181)
Q: How does the IT/technology team support the organization's Sustainability goals?

Technology Team's Steps to Reduce Carbon Footprint



N = 101 (2023 N=181)
Q: What actions does your IT/technology team take to reduce their carbon footprint?

Data-Driven Sustainability: Leveraging Insights for Impact

0%

We do not use data to track or measure our Sustainability efforts

34%

We collect some data on our Sustainability initiatives, but we don't use it for analysis or decision-making

38%

We use data to track key Sustainability metrics for reporting

15%

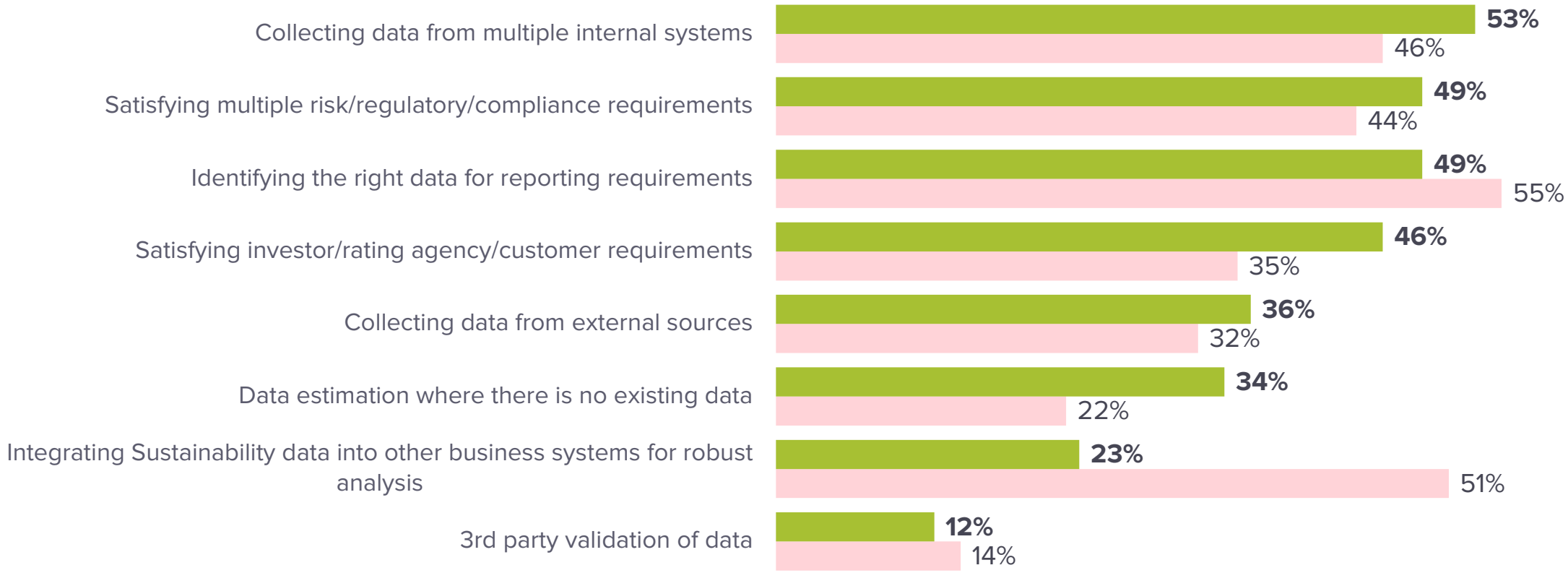
We use data to track, analyze, and optimize our Sustainability performance across business applications

13%

We use data from our Sustainability initiatives to guide the organization's transformation journey

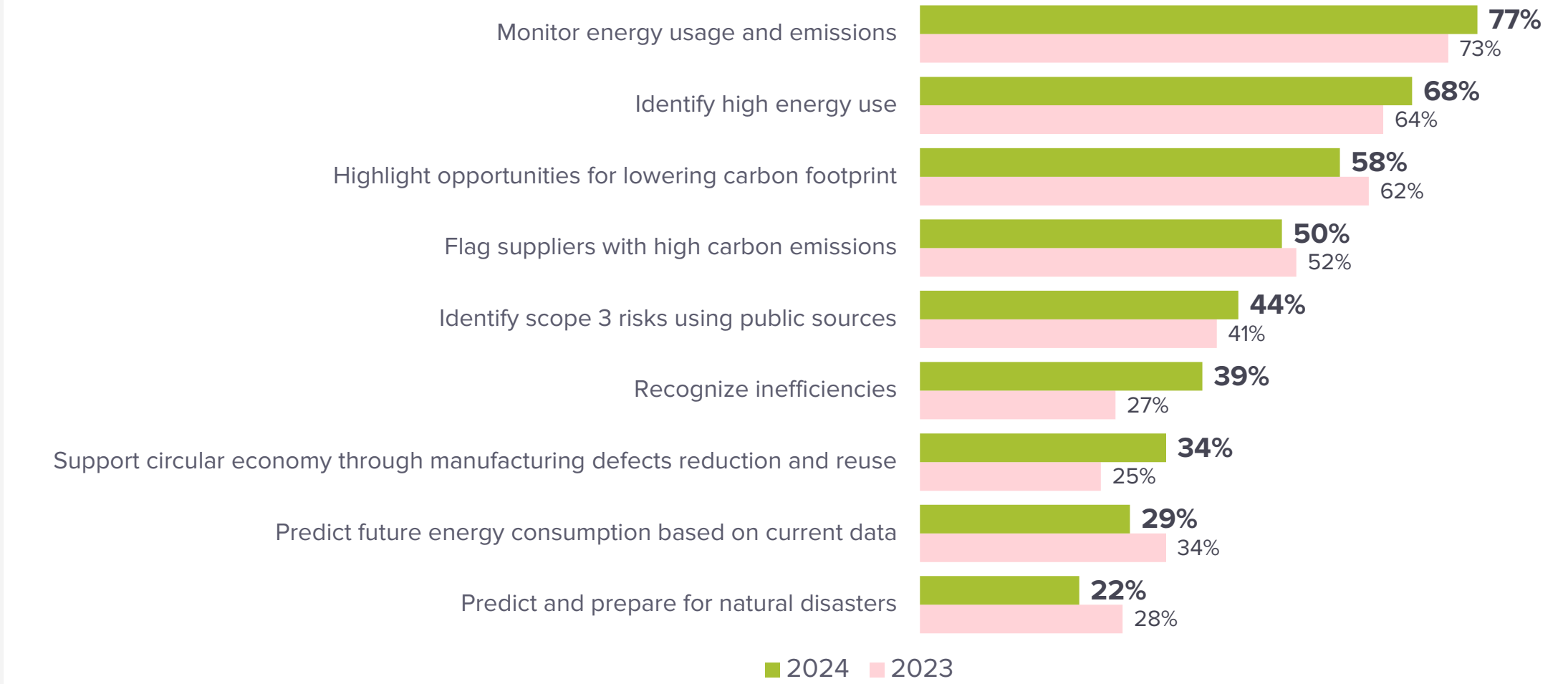
N = 101
Q: To what extent does your organization leverage data to inform and support its Sustainability initiatives?

Challenges of Supporting Sustainability Data Needs



N = 101 (2023 N=181)
Q: What are the top 3 challenges in supporting your organization's Sustainability data needs?

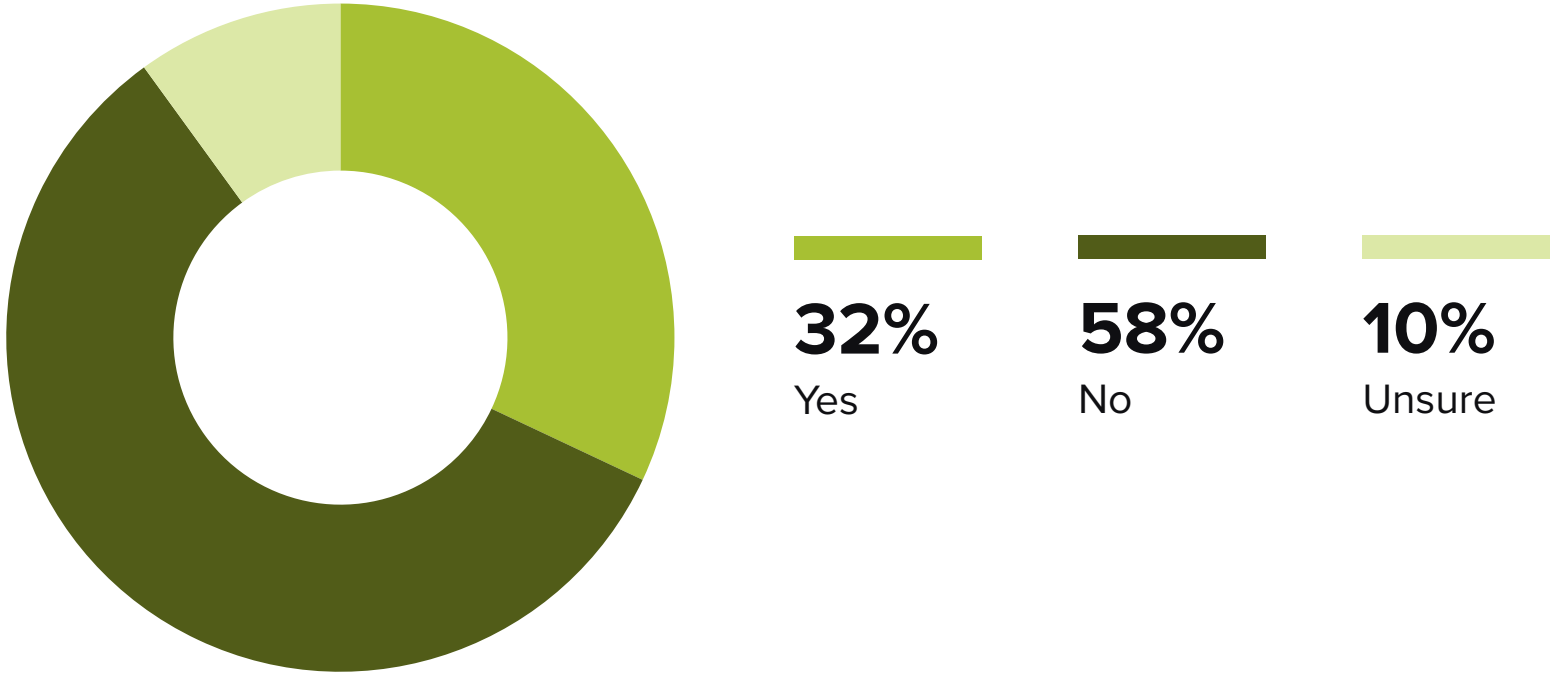
The Use of AI for Environmental Footprint Management



N = 101 (2023 N=181)
Q: How does your organization use data and AI to reduce, manage and report on global environmental footprint?

Environmental Impact of AI

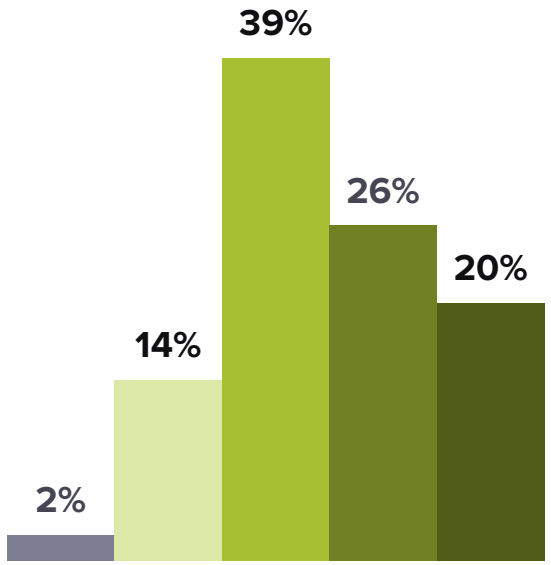
Is Impact Considered?



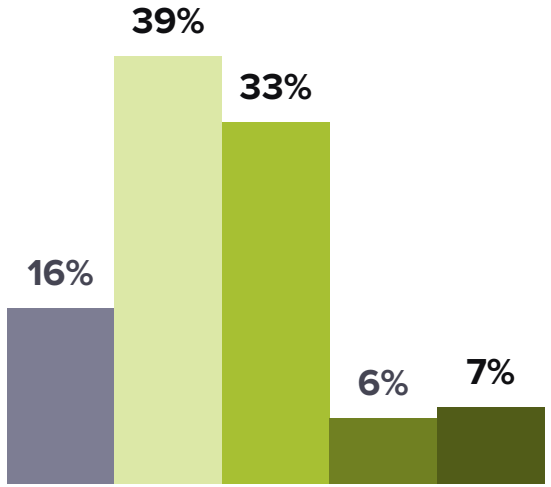
N = 101
Q: Does your organization consider the environmental impact (e.g., energy consumption, carbon footprint) when implementing AI solutions?

Perception on the Impact of AI

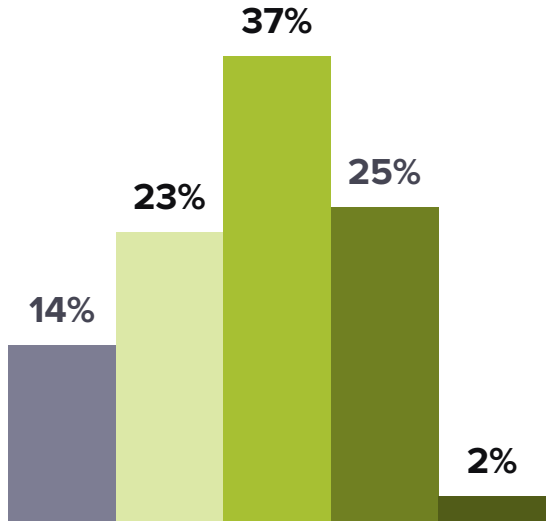
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions



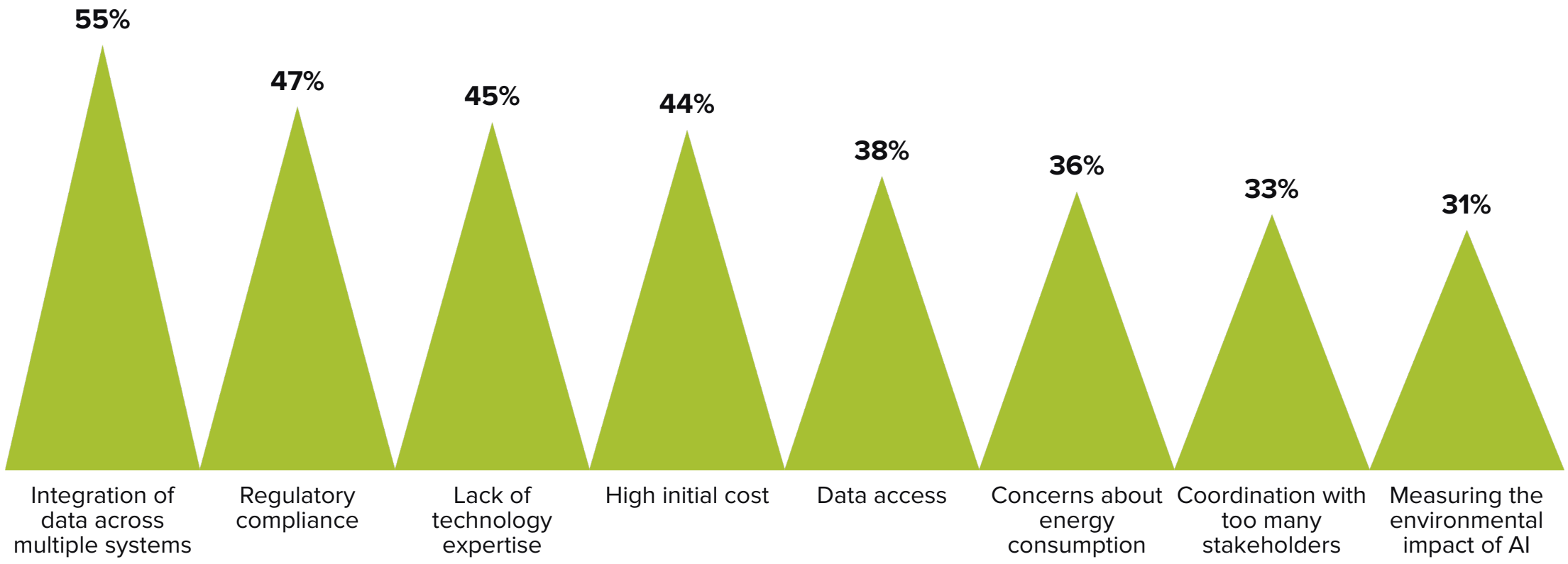
Impact of AI on the cost of Sustainability initiatives



1 (Significant negative impact) 2 (Some negative impact) 3 (Neither positive nor negative) 4 (Some Positive impact) 5 (Significant Positive impact)

N = 101
Q: Please indicate the expected scale of impact of the following.

Key Challenges in Integrating AI for Sustainability Initiatives



N = 101
Q: What are the key challenges of integrating AI for Sustainability initiatives?

Building Sustainability Technology Capabilities

24%

Engage a systems integrator to implement the data project

22%

Engage a consulting company to define roadmap

20%

Use solutions offered by cloud platform provider

14%

Use solutions offered by enterprise system

13%

Innovating on in-house solutions

7%

Buy stand-alone, off-the-shelf solutions

N = 101
Q: How is your organization building Sustainability reporting capabilities?

Canada

Study Demographics - Canada

Function

Industry

53 Financial Services	**15** Primary Industries	**14** Retail	**12** Manufacturing	**9** Construction & Real Estate
7 Energy & Utilities	**5** Hospitality	**4** Media & Telecom	**2** Transport and Logistics	

Organization Size (No. of Emp.)

32 201 - 499	**29** 500 - 999
33 1,000 - 4,999	**27** More than 5,000

N = 121

Strategy & Perception

The Importance of Sustainability in the Organization

0%
Not Important
(1-4)

10%
Somewhat Important
(5-6)

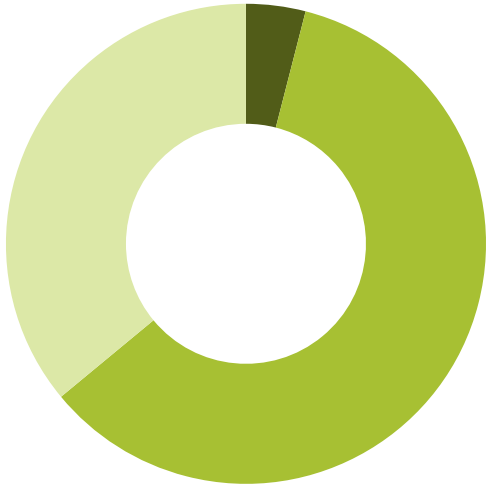
41%
Important
(7-8)

49%
Extremely Important
(9-10)

N = 121
Q: Please RATE the strategic importance of Sustainability in your organization on a scale of 1-10. (1='Least Important' and 10='Most Important')

Pace of Sustainability Efforts

CHANGE FROM LAST YEAR



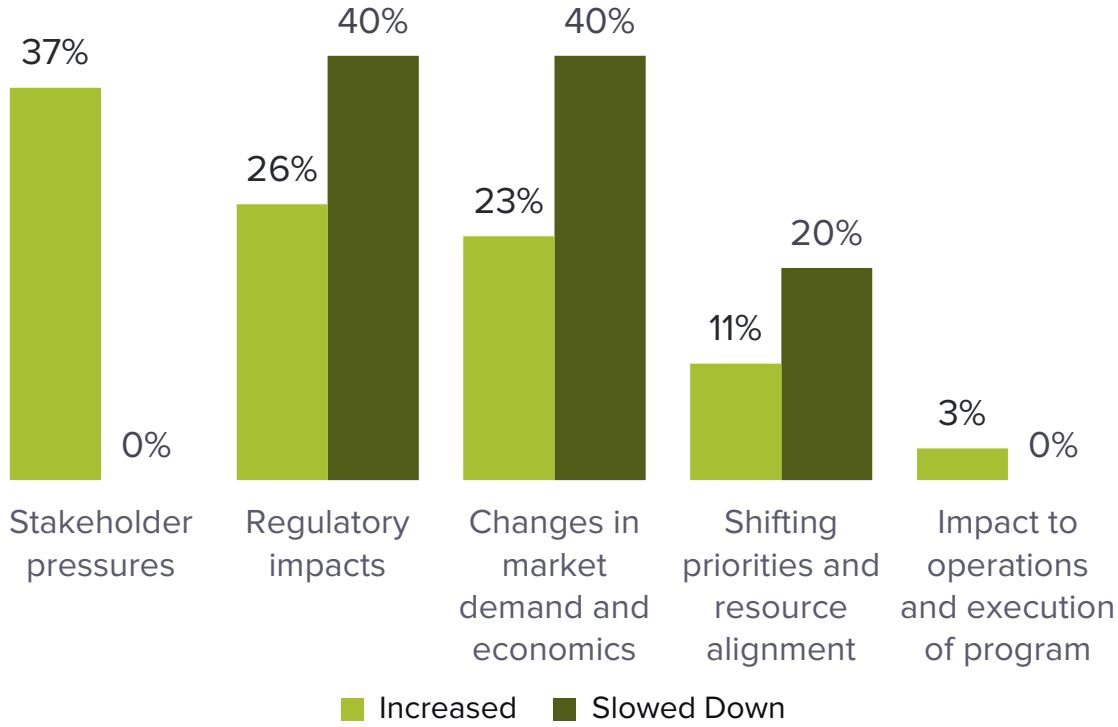
4% Slowed down

60% Increased

36% Remained the same

N = 121
Q: Have your Sustainability goals and execution slowed down or increased over the last year?

REASONS FOR CHANGE



N = 78
Q: What is the main reason for the change in pace of your Sustainability goals and execution?

Maturity of Organizations' Sustainability Strategies

3%

Sustainability is acknowledged but not integrated

Recognized as important but remains peripheral to the core corporate strategy

22%

Sustainability is a strategic aspiration

Included in the transformation strategy, but goals and measures are still not quantified or operationalized

60%

Sustainability is operationally embedded

Goals and initiatives are incorporated into existing operational review and reporting processes, but impact is not fully measured or quantified

9%

Sustainability is data-driven

Strategy and goals are prioritized and built upon real facts and data, providing a solid foundation for decision-making

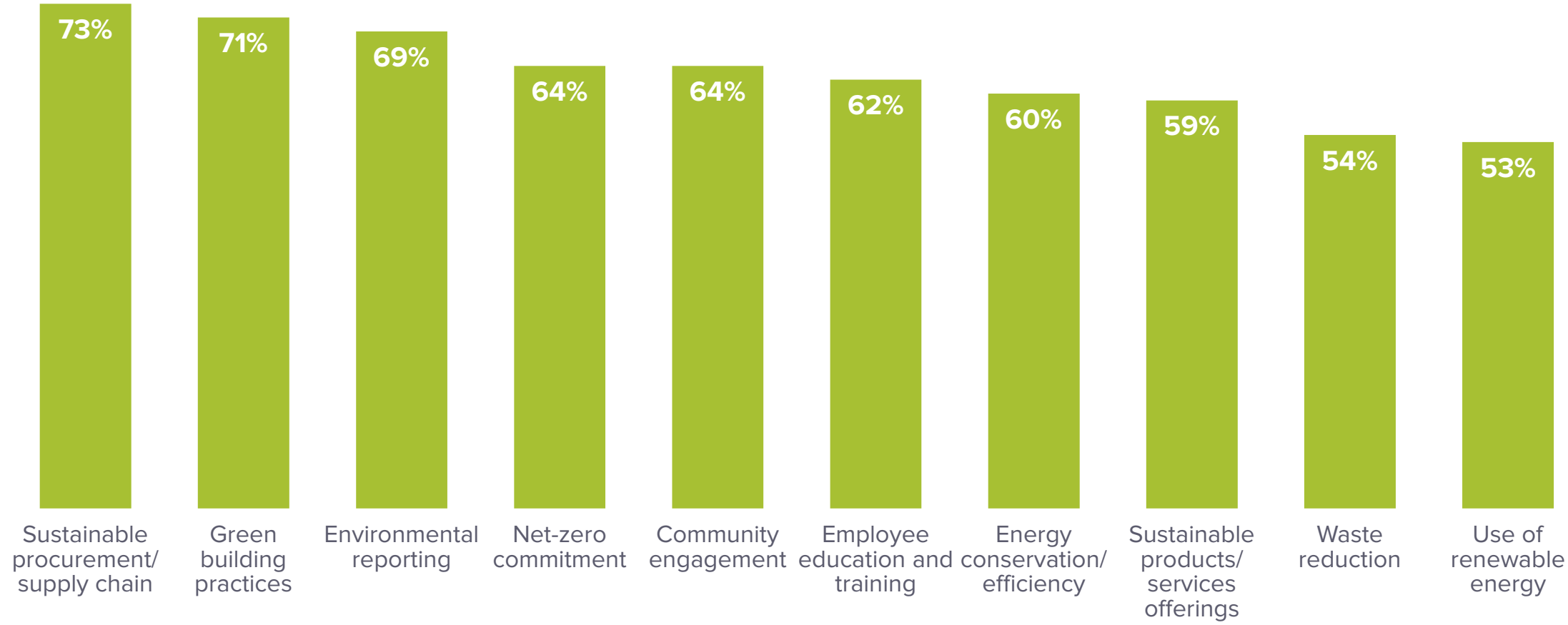
6%

Sustainability is a strategic asse.

Business value of sustainability data is well-understood, and initiatives are fully integrated into strategic planning and decision-making processes

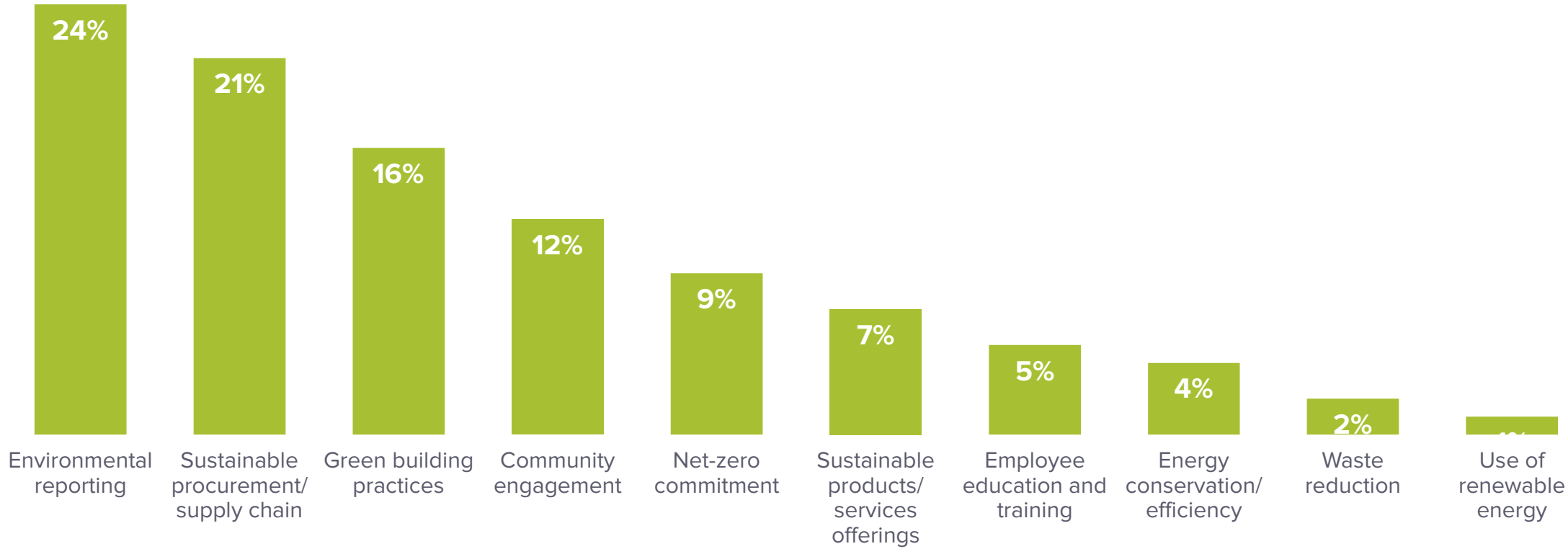
N = 121
Modeled based on responses to multiple questions

Top Environmental Measures Undertaken



N = 121
Q: Which of these Environmental measures has your organization undertaken?

Most Impactful Environmental Measures



N = 121
Q: Which of the initiatives selected above do you consider most impactful?

Top Stakeholders Advocating for Sustainability

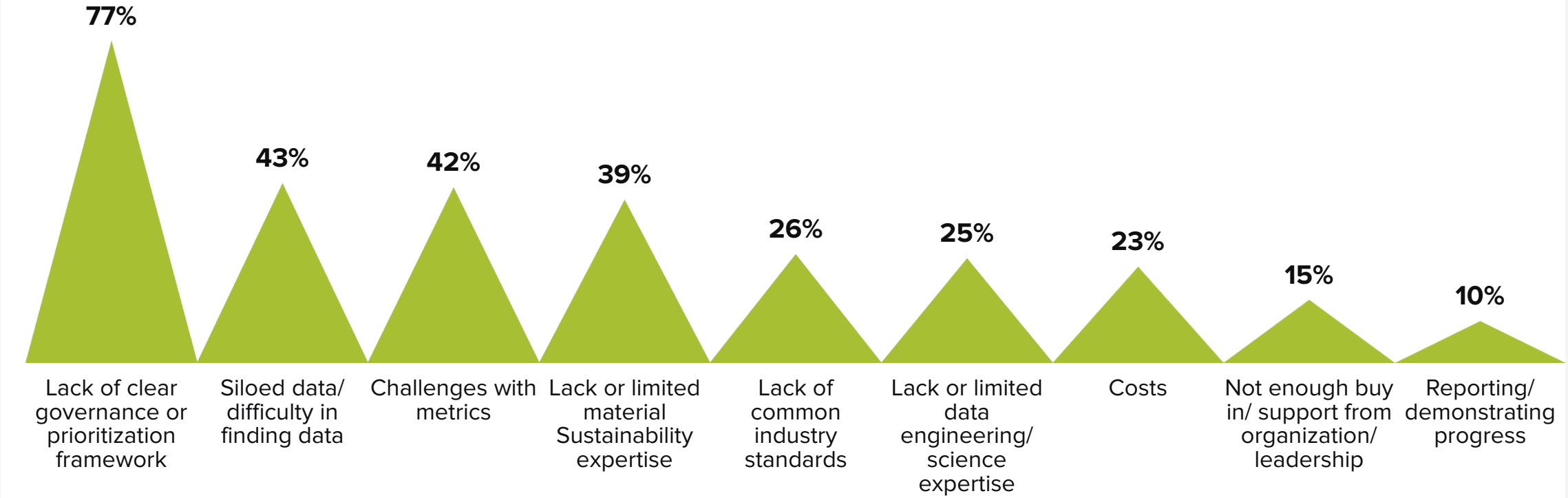
63%	61%	51%	36%	30%
Employees	Customers	Investors/ shareholders	Supply chain partners	Government/ Regulators
21%	20%	10%	4%	3%
Bank/ Credit providers	Insurers	Communities	Rating agencies	Non-profit organizations

N = 121
Q: Who are the TOP 3 stakeholders who are most vocal in advocating Sustainability policies and practices in your organization?

Main Drivers of Sustainability

N = 121
Q: What are the 3 main drivers for your organization's Sustainability goals?

Main Challenges of Adopting Sustainability



N = 121
Q: What are the 3 main challenges faced in successfully adopting Sustainability measures?

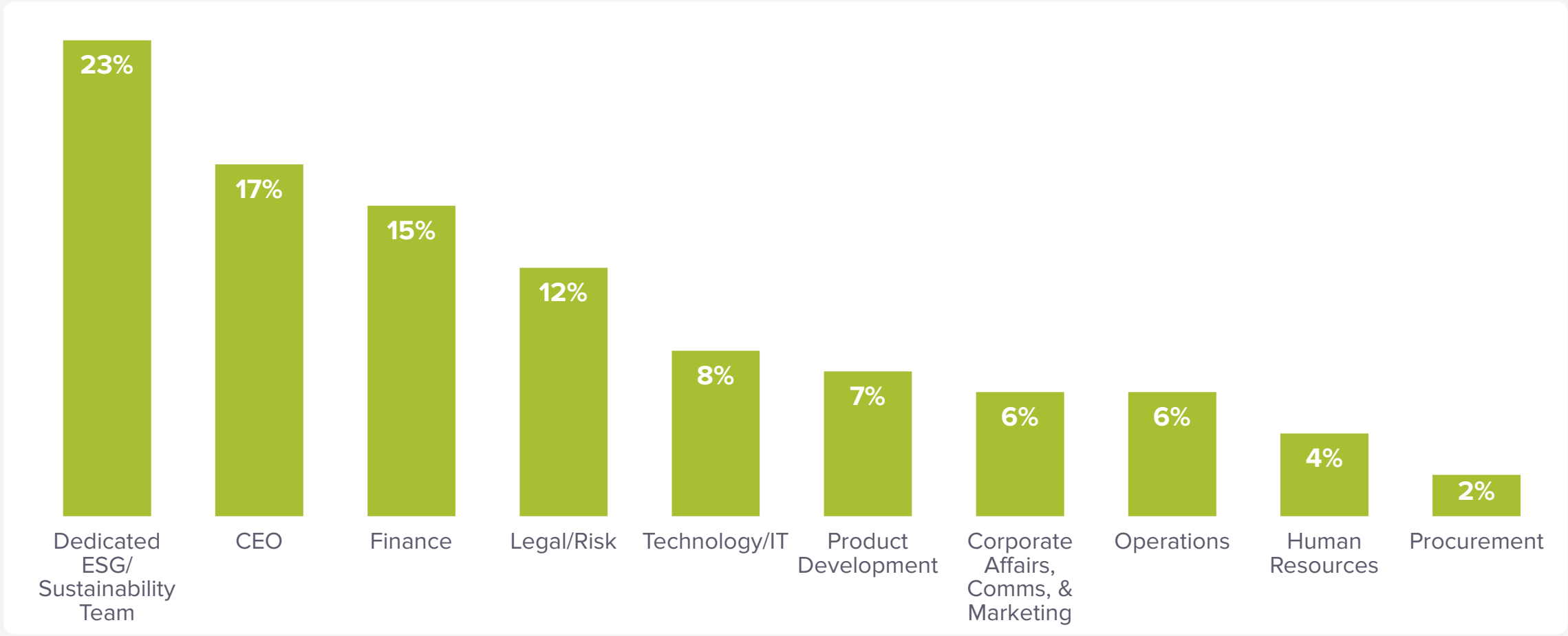
How Governments Can Support Adoption of Sustainability

N = 121
Q: How, according to you, can governments improve the adoption of Sustainability initiatives?

Execution

People, Governance, & Narrative

Sustainability Leadership



N = 121
Q: Which function is primarily responsible for your organization's Sustainability initiative?

Role of Key Stakeholders

Defining The Vision

- 70% ESG/Sustainability Team
- 65% CEO
- 49% Finance

Delivering Sustainability Outcomes

- 62% ESG/Sustainability Team
- 55% Finance
- 55% Technology/IT

Providing the Data

- 74% ESG/Sustainability Team
- 37% Operations
- 36% Finance

Managing the Data

- 73% ESG/Sustainability Team
- 36% Technology/IT
- 33% Legal/Risk

Deciding the Metrics

- 68% CEO
- 44% Finance
- 39% ESG/Sustainability Team

Reporting

- 88% ESG/Sustainability Team
- 57% Corporate Affairs, Comms, & Marketing
- 35% Technology/IT

N = 121
Q: Who are the top 3 stakeholders for these activities in your Sustainability program?

Alignment Between Sustainability Team & Finance

11%
Minimal Alignment
(1-4)

24%
Some Alignment
(5-6)

50%
Strong Alignment
(7-8)

15%
Full Alignment
(9-10)

N = 121
Q: Rate the alignment between Finance and the Sustainability Teams on a scale of 1-10

Maturity of Employee Involvement in Sustainability

7%

Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives

16%

Basic Sustainability Awareness

Employees are aware of sustainability goals but may not fully understand their role in achieving them

50%

Emerging Sustainability Engagement

Employees have a basic understanding of sustainability responsibilities and how they relate to their roles

22%

KPI-Driven Sustainability

Sustainability KPIs are set relevant to employee roles, fostering a more focused and targeted approach to sustainability

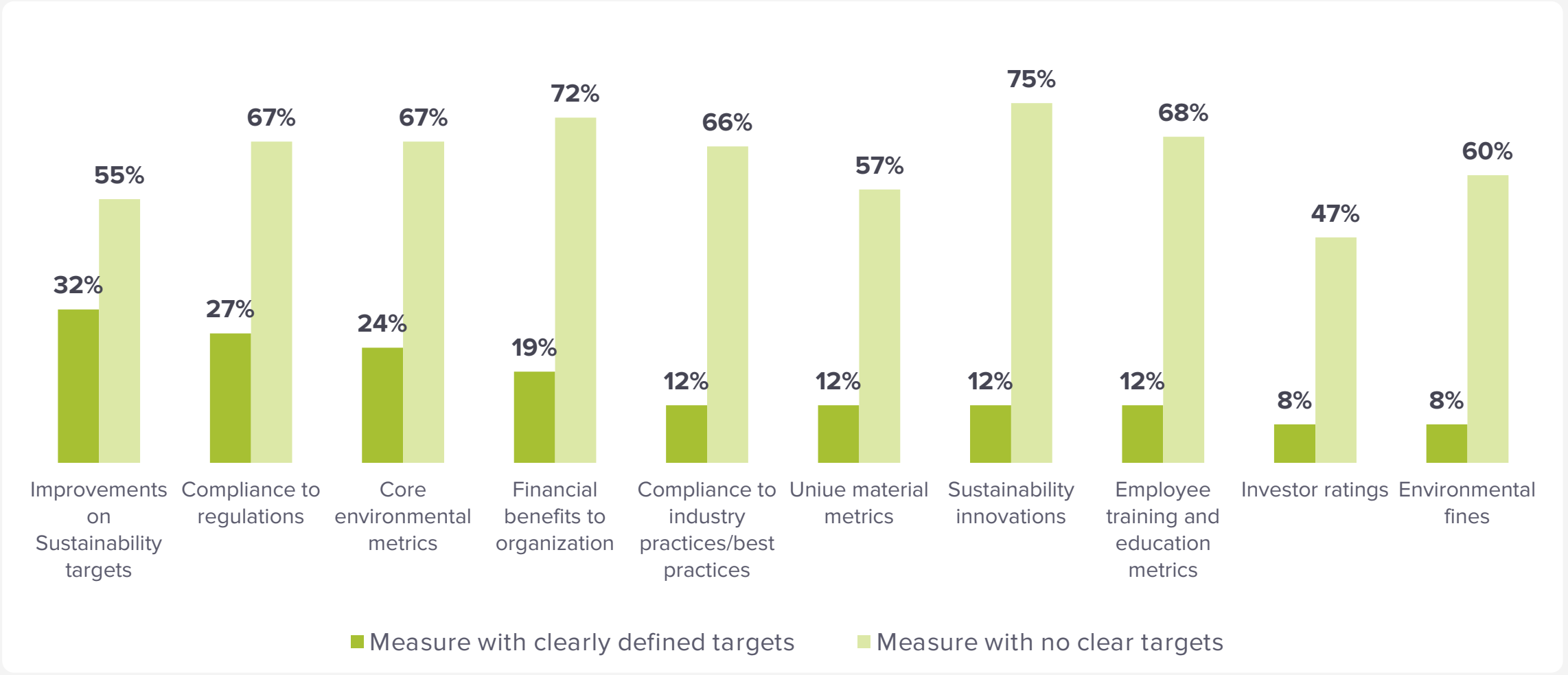
5%

Sustainability as a Strategic Imperative

Sustainability performance is tied to executive and key employee compensation, reinforcing its role as a strategic priority.

N = 121
Modeled based on responses to multiple questions

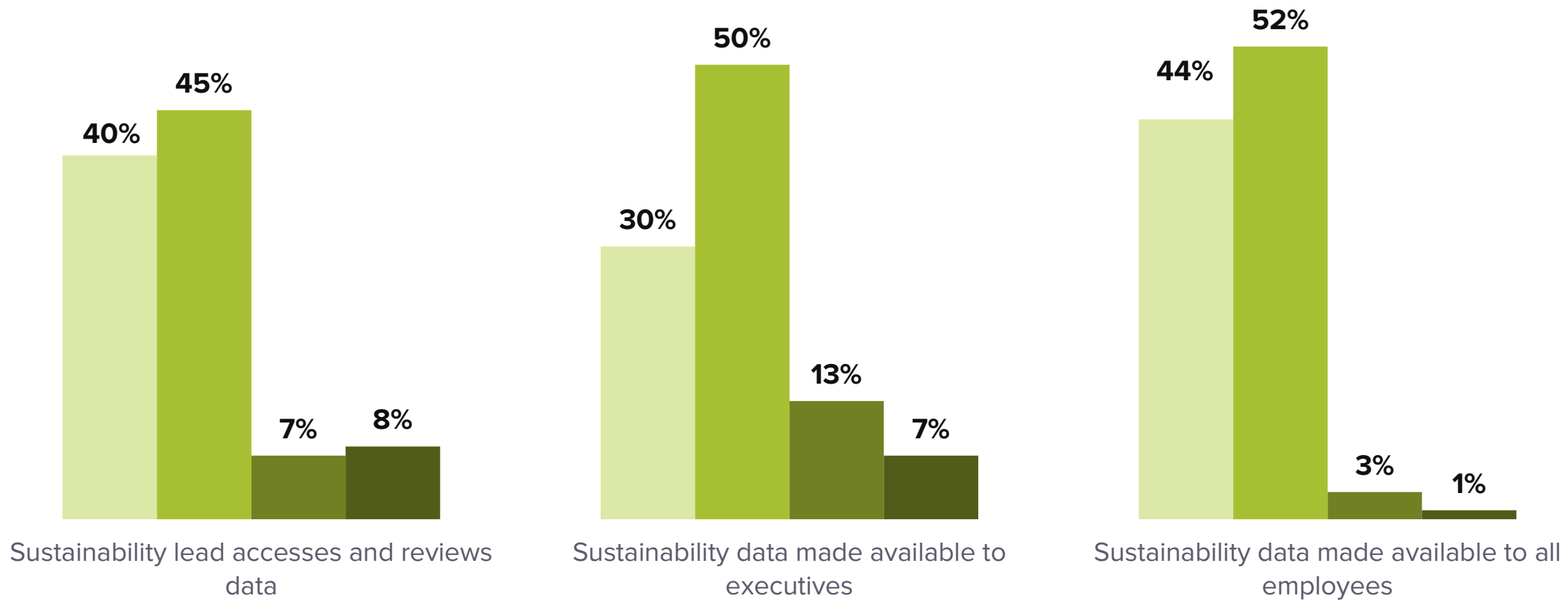
Metrics Used to Measure Sustainability



N = 121

Q: Which are the metrics used in your organization to measure Sustainability efforts? (Depicting the metrics adopted with clearly-defined metrics)

Sustainability Data Access and Sharing



N = 121
Q: How frequently does your organization access/ share data internally on Sustainability progress with key stakeholders?

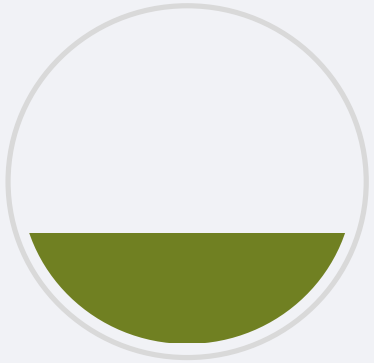
Technology

Importance of Technology in Achieving Sustainability Goals

0%
Not Important
(1-4)

21%
Somewhat Important
(5-6)

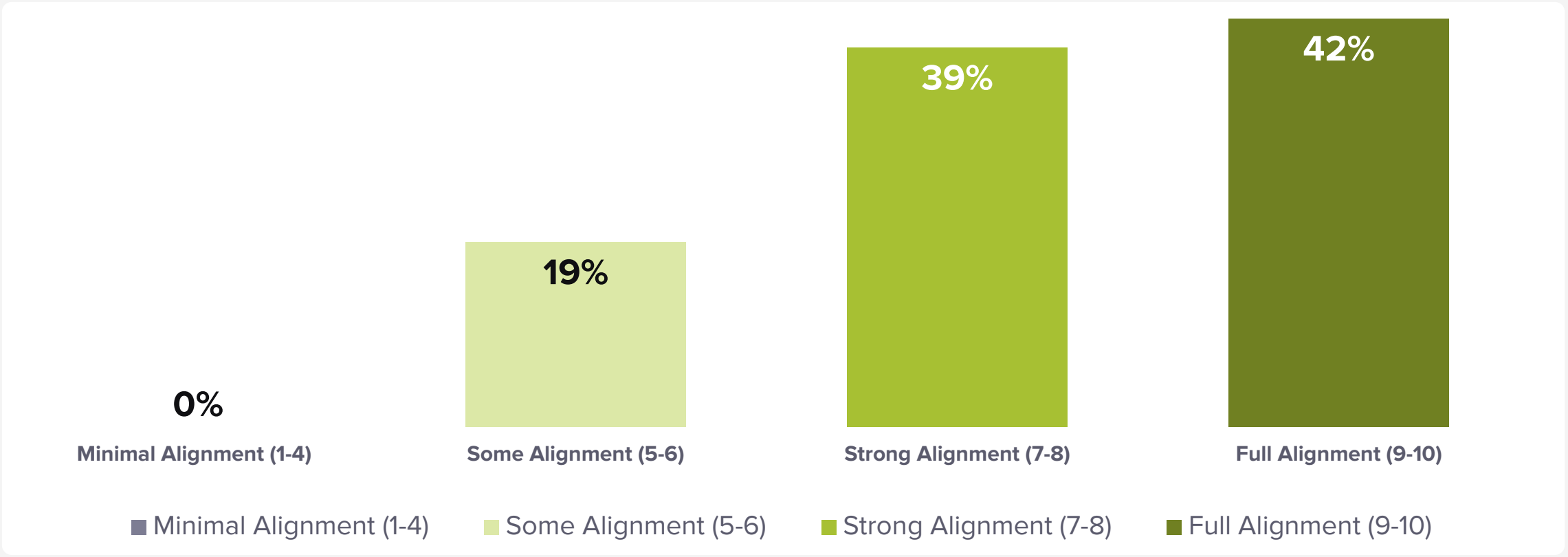
45%
Important
(7-8)



34%
Extremely Important
(9-10)

N = 121
Q: On a scale of 1-10, how would you rate the importance of Technology to achieving Sustainability goals? (Where 1='Not important at all' and 10='Absolutely critical')

Alignment Between Sustainability Teams & Technology



N = 121
Q: Rate the alignment between IT/Technology and Sustainability Teams on a scale of 1-10 (Where 1='Not aligned' and 10='Completely aligned')

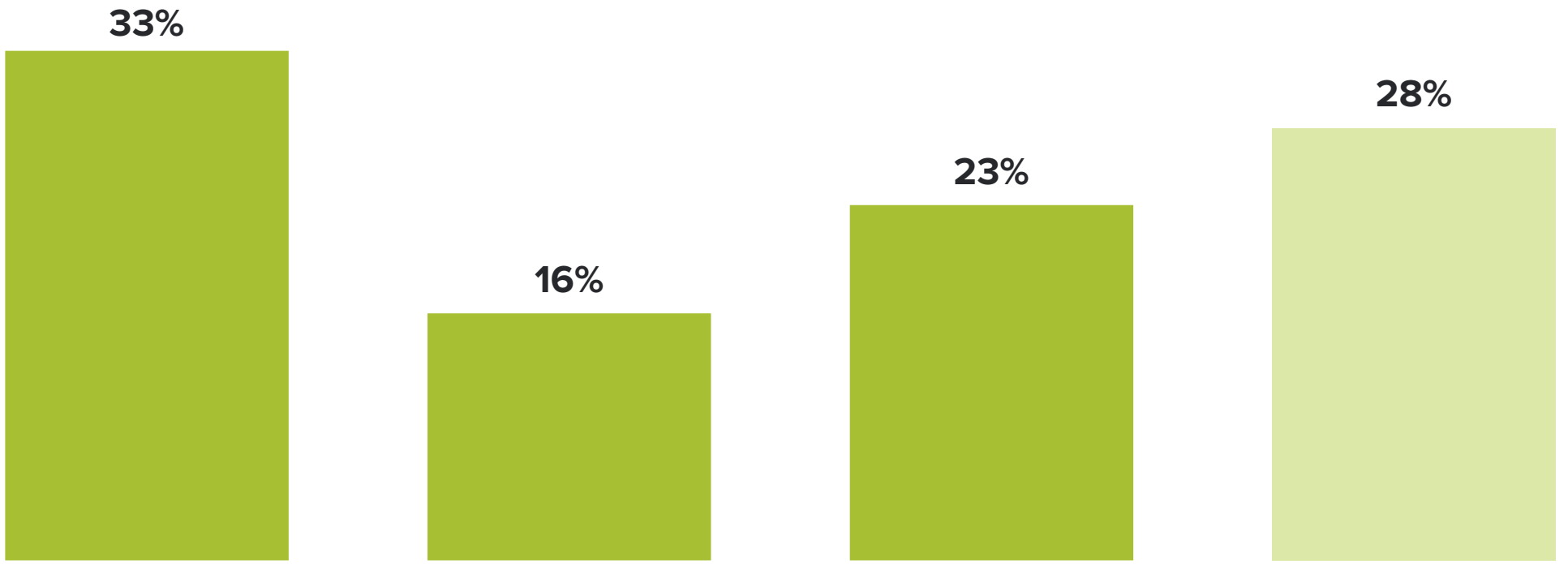
The Extent of Use of IT to Achieve Sustainability Goals

50%
IT is fully leveraged

50%
IT is not fully leveraged

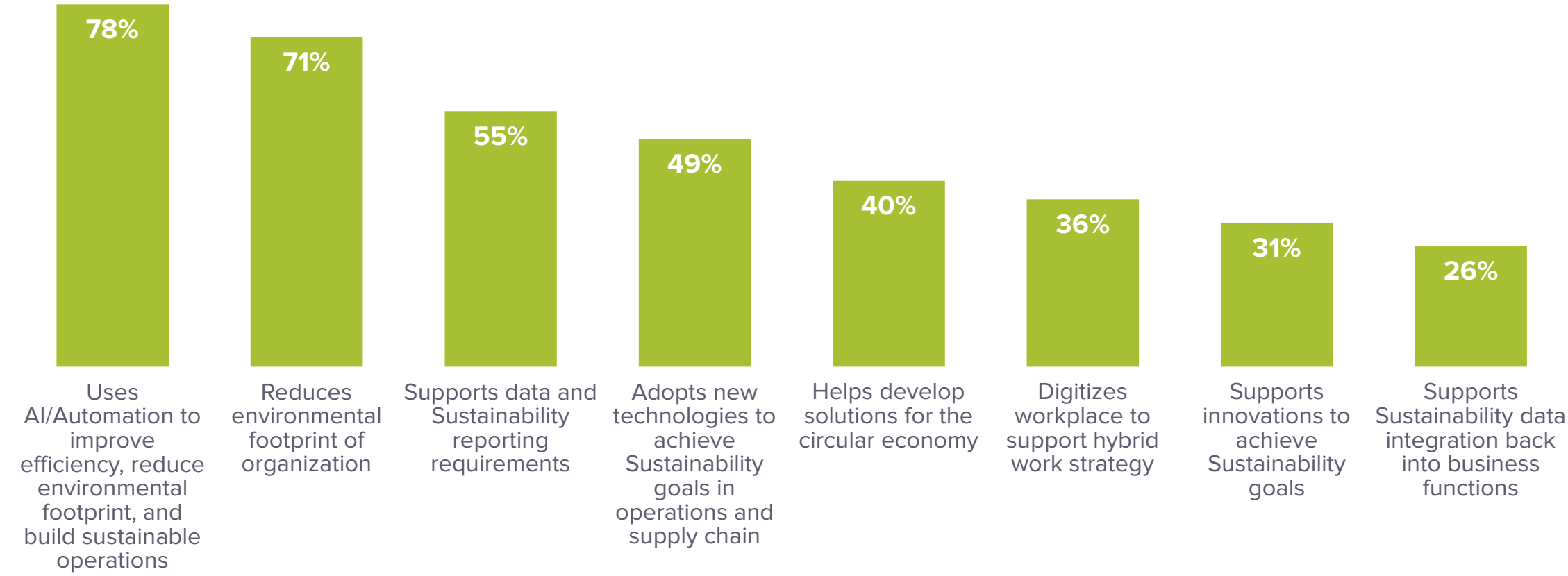
N = 121
Q: Do you feel the organization leverages the full potential of IT/Technology in achieving Sustainability?

IT's Role in Achieving Sustainability Goals



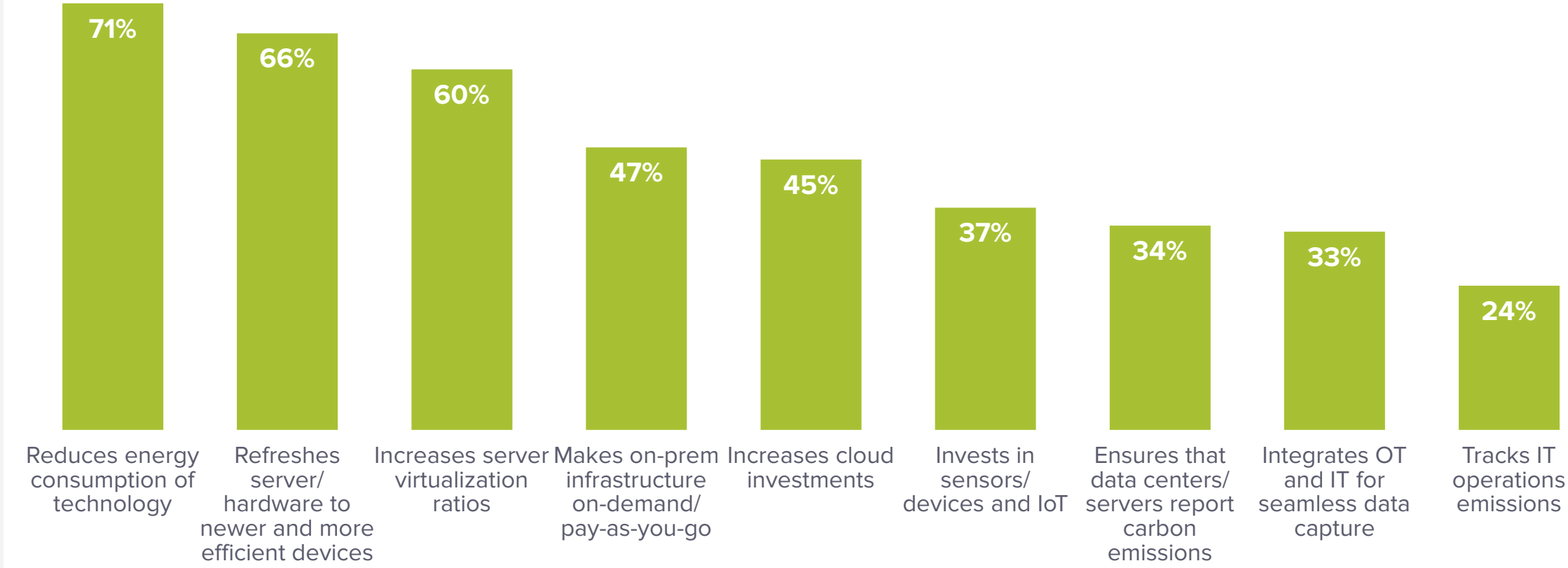
N = 121
Q: What is the extent of the involvement of IT in achieving your organization's Sustainability goals?

Role of Technology in Supporting Sustainability



N = 121
Q: How does the IT/technology team support the organization's Sustainability goals?

Technology Team's Steps to Reduce Carbon Footprint



N = 121
Q: What actions does your IT/technology team take to reduce their carbon footprint?

Data-Driven Sustainability: Leveraging Insights for Impact

1%

We do not use data to track or measure our Sustainability efforts

17%

We collect some data on our Sustainability initiatives, but we don't use it for analysis or decision-making

50%

We use data to track key Sustainability metrics for reporting

19%

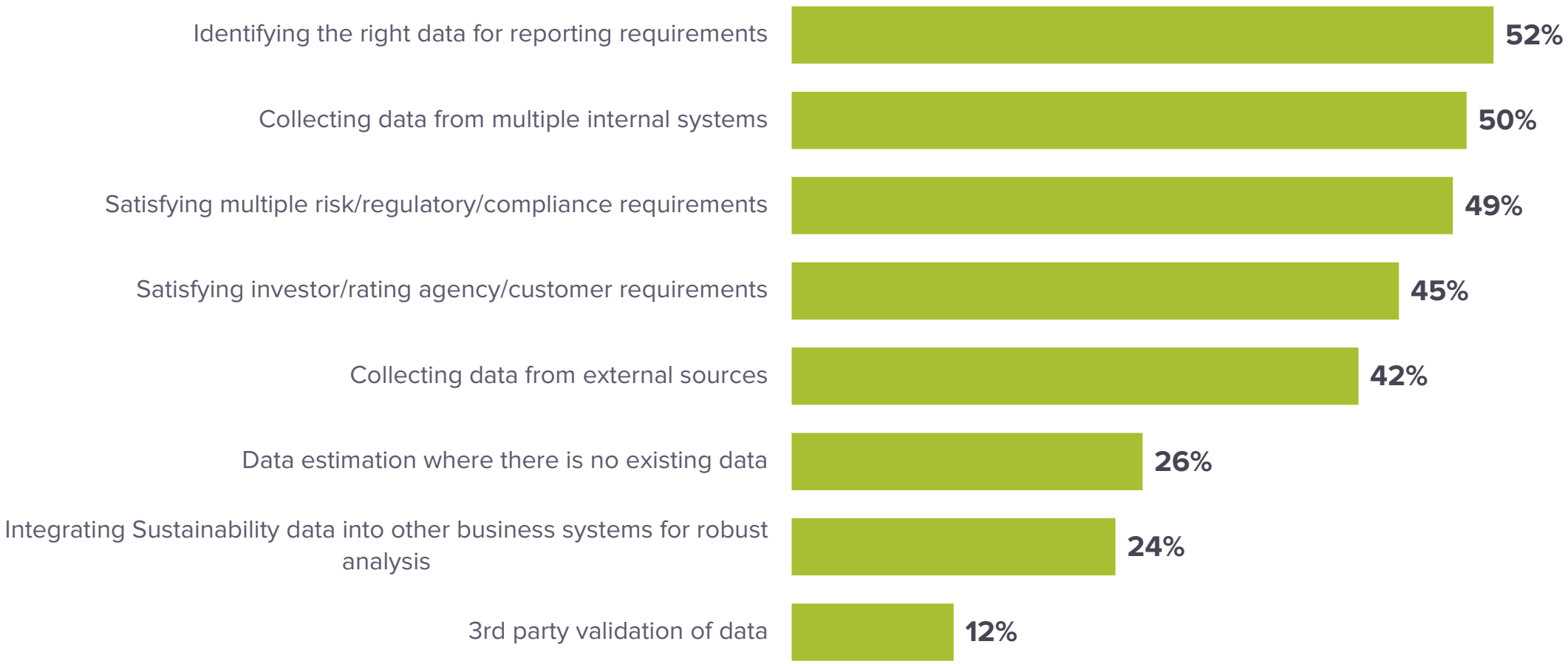
We use data to track, analyze, and optimize our Sustainability performance across business applications

13%

We use data from our Sustainability initiatives to guide the organization's transformation journey

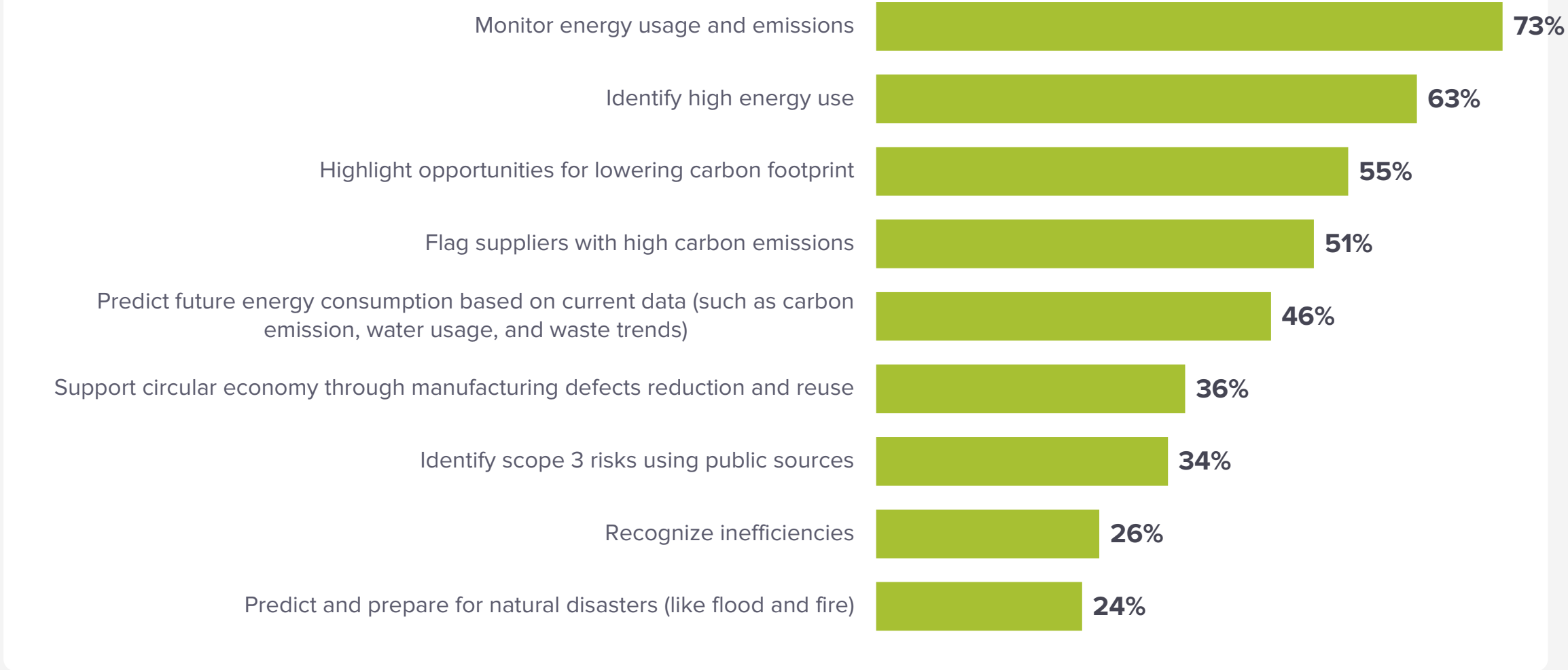
N = 121
Q: To what extent does your organization leverage data to inform and support its Sustainability initiatives?

Challenges of Supporting Sustainability Data Needs



N = 121
Q: What are the top 3 challenges in supporting your organization's Sustainability data needs?

The Use of AI for Environmental Footprint Management



N = 121
Q: How does your organization use data and AI to reduce, manage and report on global environmental footprint?

Environmental Impact of AI

Is Impact Considered?

40% Yes

53% No

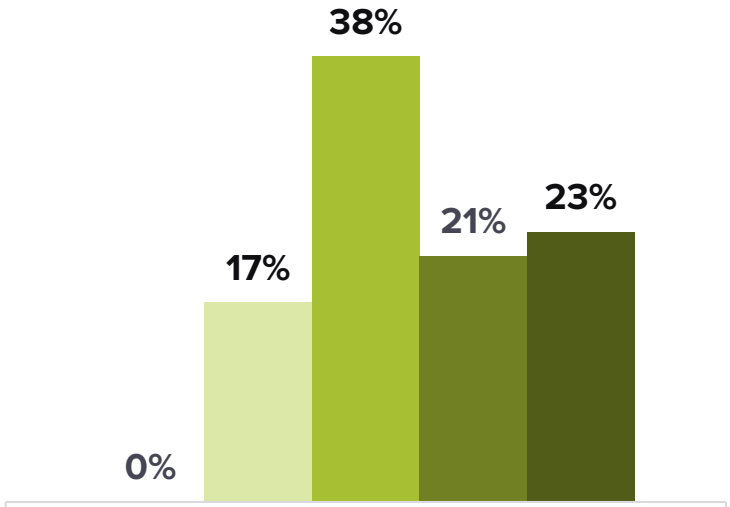
7% Unsure

N = 121

Q: Does your organization consider the environmental impact (e.g., energy consumption, carbon footprint) when implementing AI solutions?

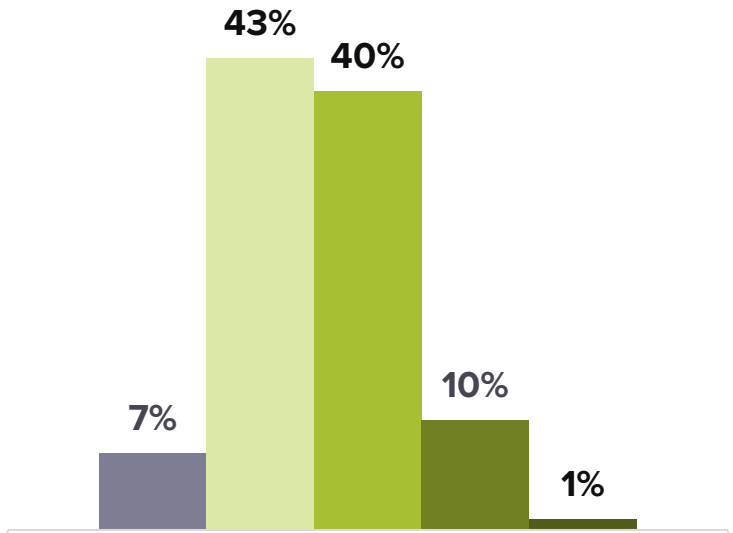
Perception on the Impact of AI

Impact of AI on achieving Sustainability goals



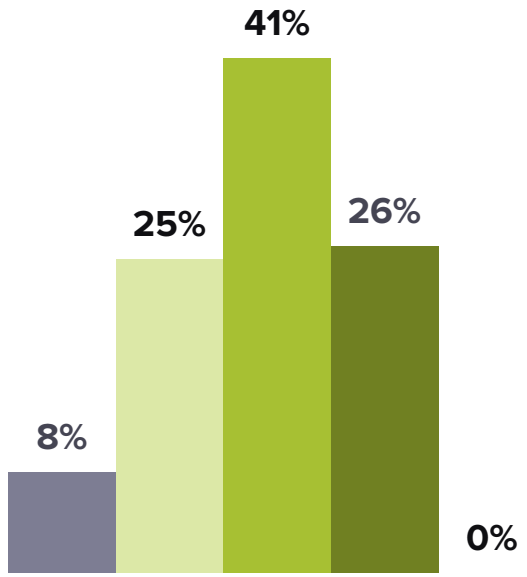
Impact of AI on achieving Sustainability goals

Impact of AI on organization's carbon emissions



Impact of AI on organization's carbon emissions

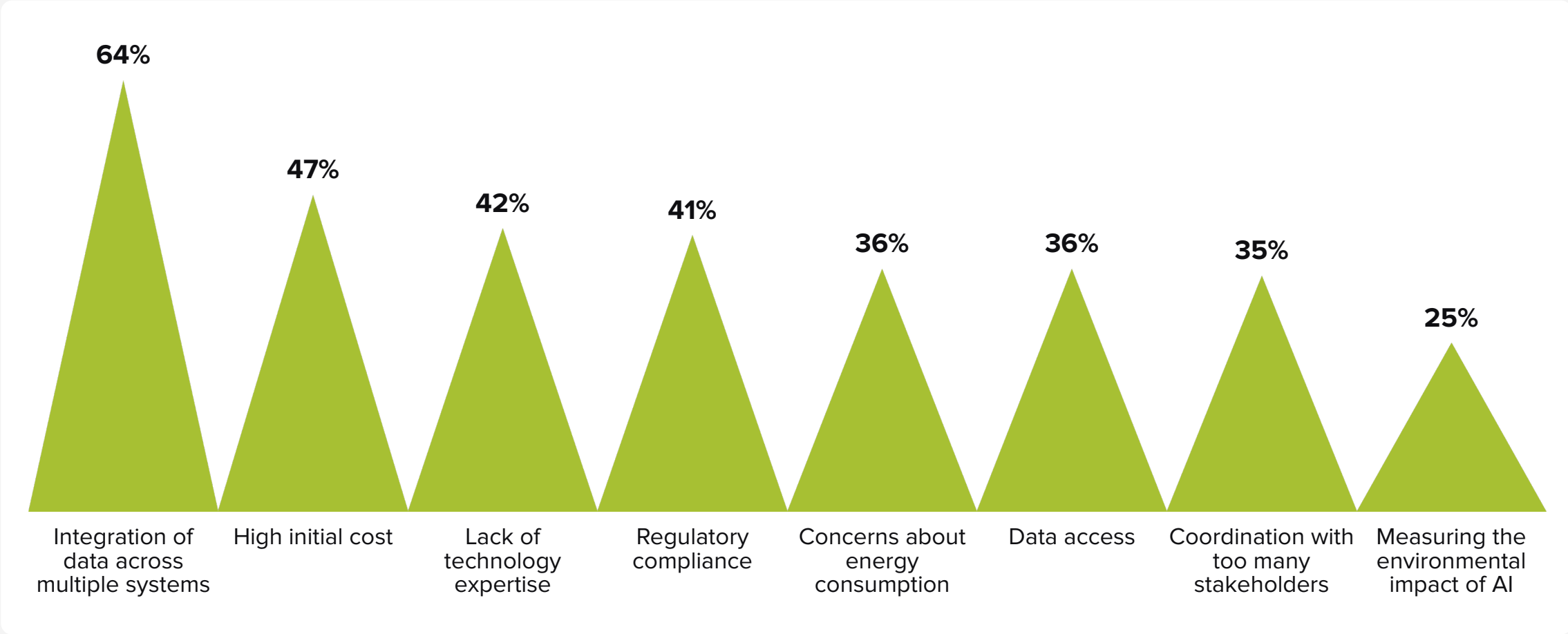
Impact of AI on the cost of Sustainability initiatives



1 (Significant negative impact) 2 (Some negative impact) 3 (Neither positive nor negative) 4 (Some Positive impact) 5 (Significant Positive impact)

N = 121
Q: Please indicate the expected scale of impact of the following.

Key Challenges in Integrating AI for Sustainability Initiatives



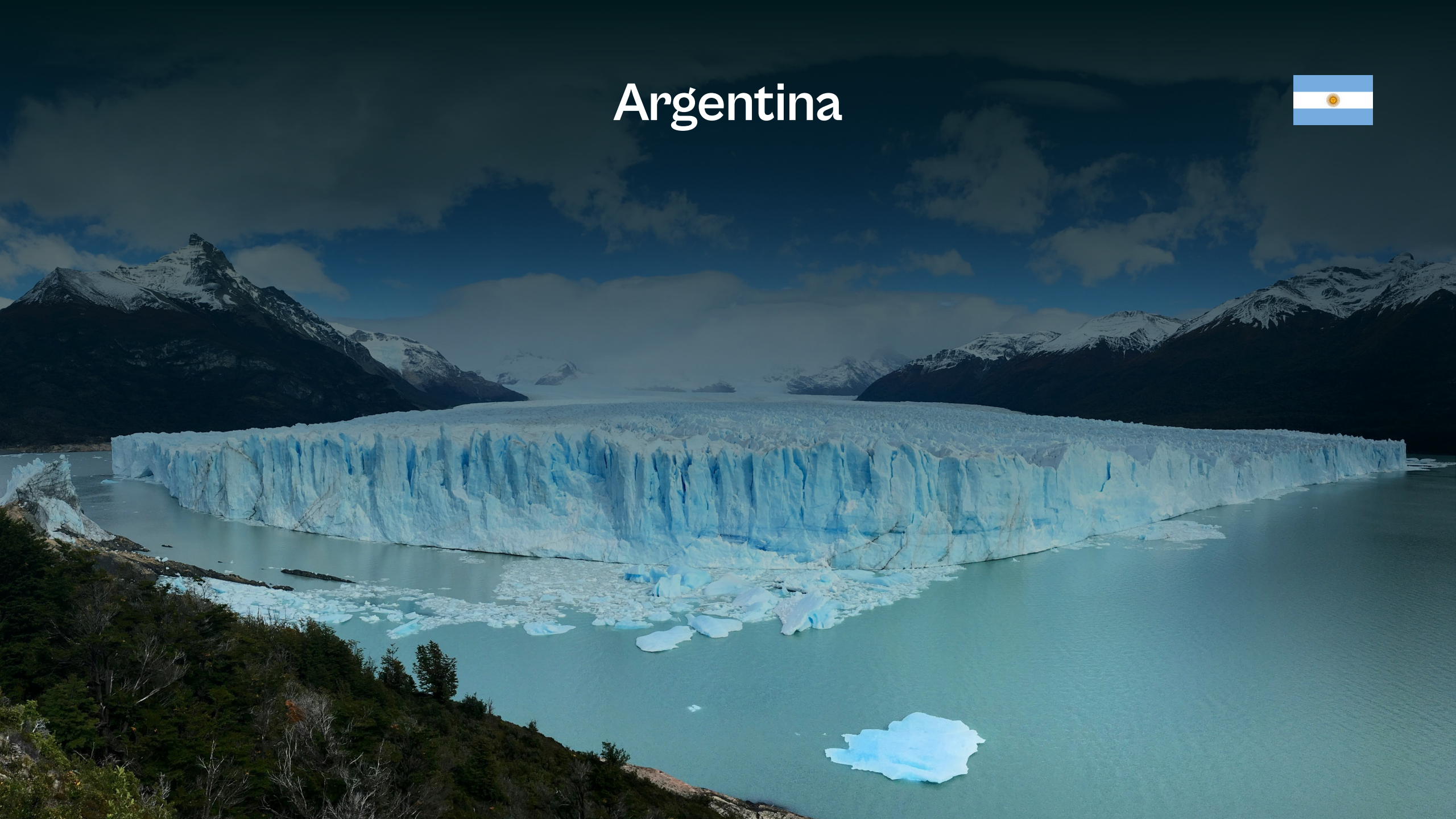
N = 121
Q: What are the key challenges of integrating AI for Sustainability initiatives?

Building Sustainability Technology Capabilities

22%	22%	19%	17%	13%	7%
Engage a consulting company to define roadmap	Engage a systems integrator to implement the data project	Use solutions offered by our enterprise system	Use solutions offered by cloud platform provider	Innovating on in-house solutions	Buy stand-alone, off-the-shelf solutions

N = 121
Q: How is your organization building Sustainability reporting capabilities?

Argentina



Study Demographics - Argentina

Function

Industry

24 Financial Services	**9** Manufacturing	**9** Retail	**3** Transport and Logistics	**3** Hospitality
3 Energy & Utilities	**3** Construction & Real Estate	**3** Media & Telecom	**3** Primary Industries	

Organization Size (No. of Emp.)

- **19** 201 - 499
- **12** 500 - 999
- **16** 1,000 - 4,999
- **13** More than 5,000

N = 60

ecosystm.io

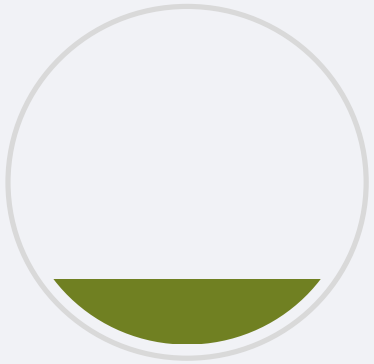
Strategy & Perception

The Importance of Sustainability in the Organization

0%
Not Important
(1-4)

35%
Somewhat Important
(5-6)

45%
Important
(7-8)



20%
Extremely Important
(9-10)

N = 60
Q: Please RATE the strategic importance of Sustainability in your organization on a scale of 1-10. (1='Least Important' and 10='Most Important')

Pace of Sustainability Efforts

CHANGE FROM LAST YEAR

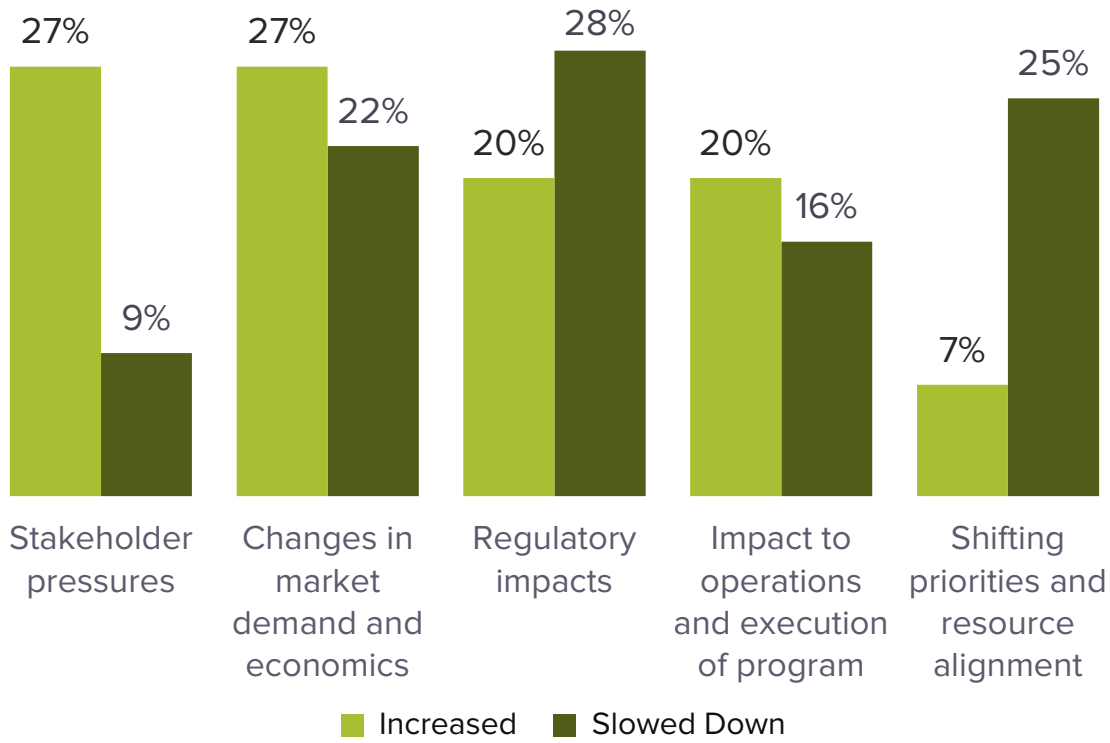
53% Slowed down

25% Increased

22% Remained the same

N = 60
Q: Have your Sustainability goals and execution slowed down or increased over the last year?

REASONS FOR CHANGE



N = 47
Q: What is the main reason for the change in pace of your Sustainability goals and execution?

Maturity of Organizations' Sustainability Strategies

5%

Sustainability is acknowledged but not integrated

Recognized as important but remains peripheral to the core corporate strategy

18%

Sustainability is a strategic aspiration

Included in the transformation strategy, but goals and measures are still not quantified or operationalized

53%

Sustainability is operationally embedded

Goals and initiatives are incorporated into existing operational review and reporting processes, but impact is not fully measured or quantified

18%

Sustainability is data-driven

Strategy and goals are prioritized and built upon real facts and data, providing a solid foundation for decision-making

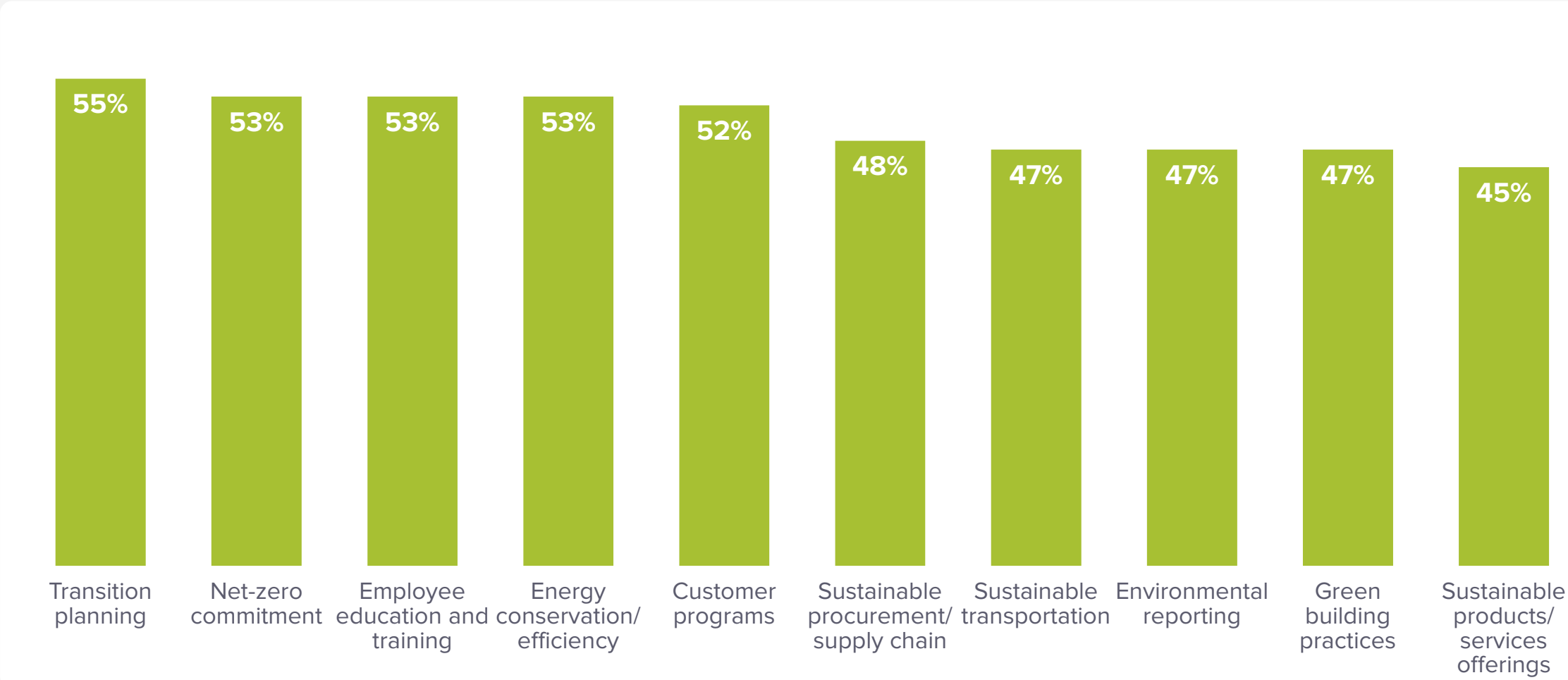
6%

Sustainability is a strategic asse.

Business value of sustainability data is well-understood, and initiatives are fully integrated into strategic planning and decision-making processes

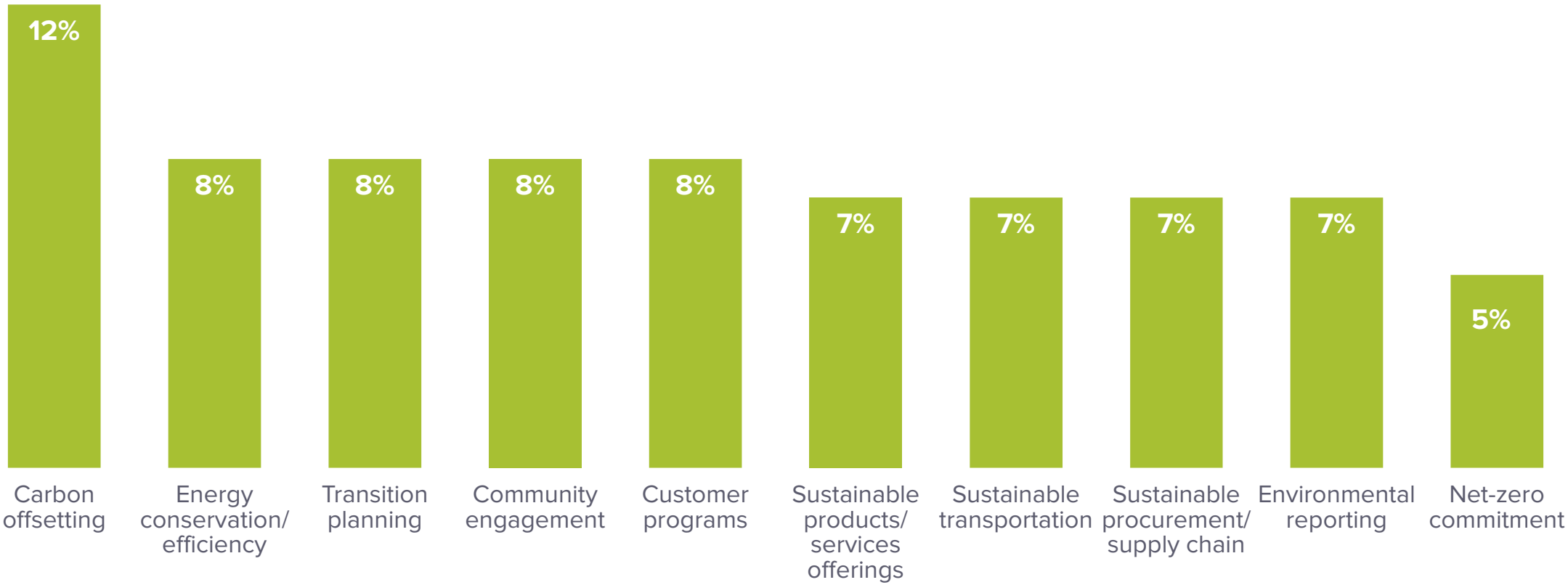
N = 60
Modeled based on responses to multiple questions

Top Environmental Measures Undertaken



N = 60
Q: Which of these Environmental measures has your organization undertaken?

Most Impactful Environmental Measures



N = 60
Q: Which of the initiatives selected above do you consider most impactful?

Top Stakeholders Advocating for Sustainability

47%

Supply chain partners

40%

Investors/ shareholders

35%

Banks/ Credit providers

30%

Customers

30%

Government/ Regulators

30%

Communities

27%

Employees

25%

Insurers

22%

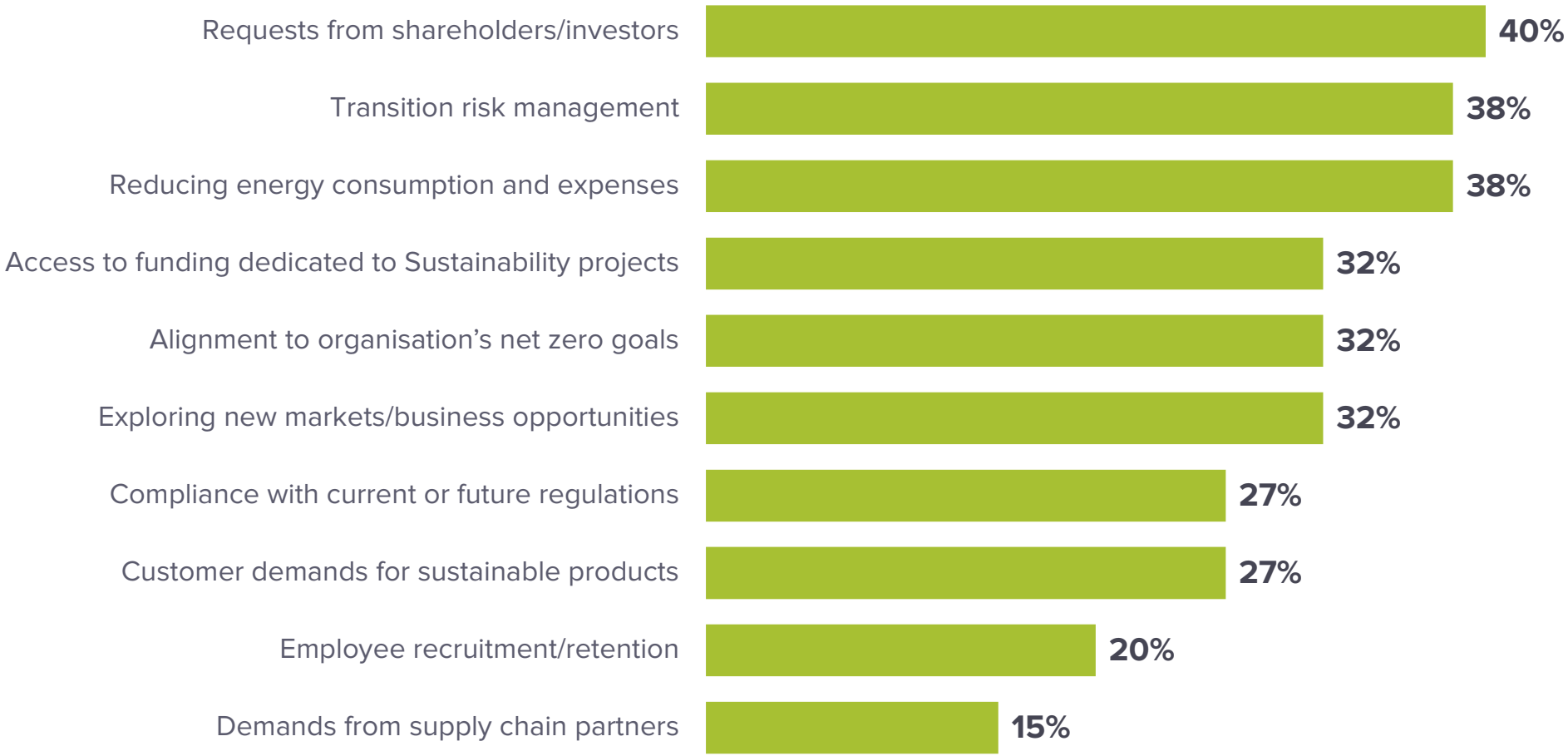
Non-profit organisations

15%

Rating agencies

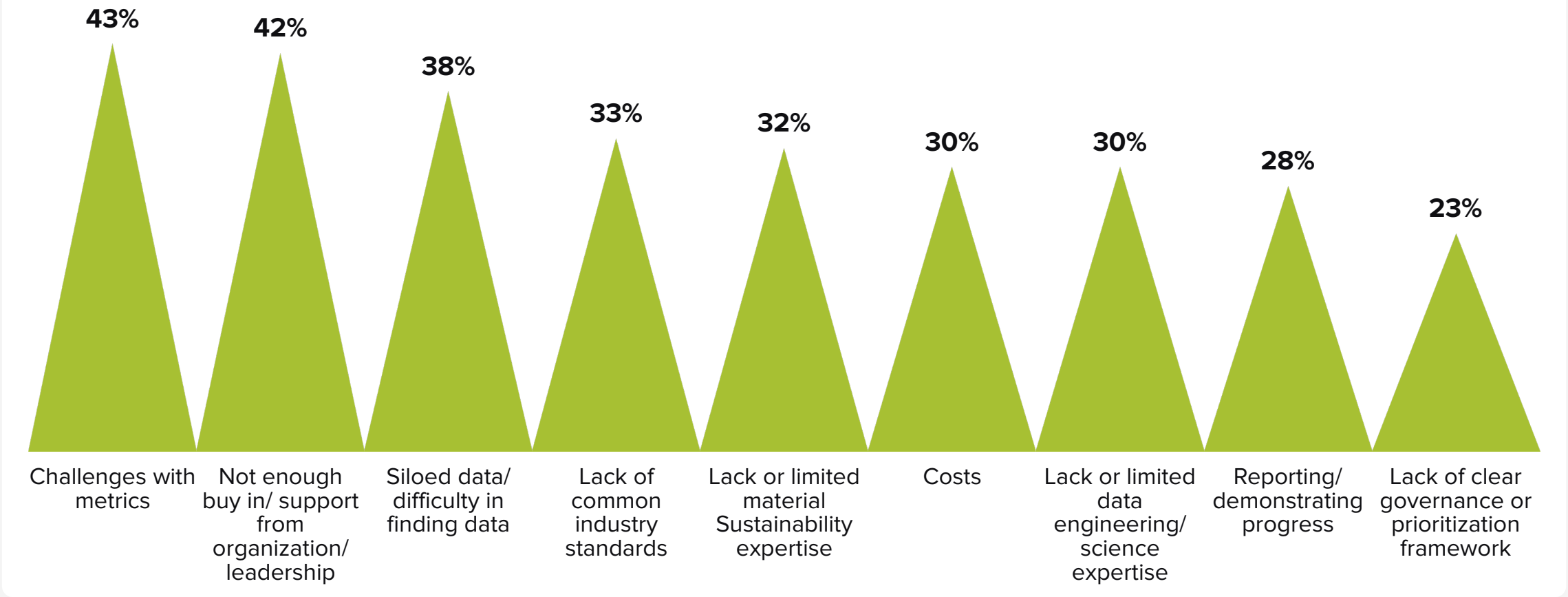
N = 60
Q: Who are the TOP 3 stakeholders who are most vocal in advocating Sustainability policies and practices in your organization?

Main Drivers of Sustainability



N = 60
Q: What are the 3 main drivers for your organization's Sustainability goals?

Main Challenges of Adopting Sustainability



N = 60
Q: What are the 3 main challenges faced in successfully adopting Sustainability measures?

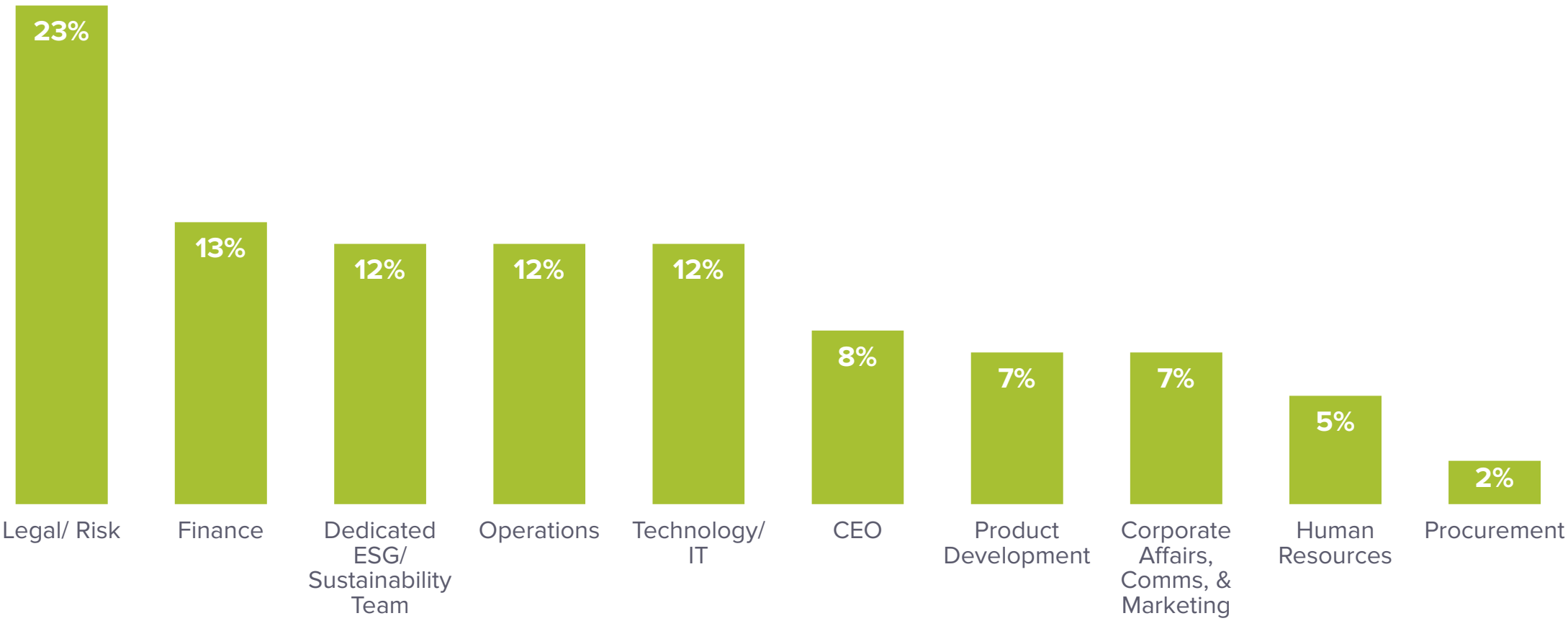
How Governments Can Support Adoption of Sustainability

N = 60
Q: How, according to you, can governments improve the adoption of Sustainability initiatives?

Execution

People, Governance, & Narrative

Sustainability Leadership



N = 60
Q: Which function is primarily responsible for your organization's Sustainability initiative?

Role of Key Stakeholders

Defining The Vision

- 53% Legal/Risk
- 40% Operations
- 37% ESG/Sustainability Team

Delivering Sustainability Outcomes

- 50% ESG/Sustainability Team
- 43% Operations
- 42% Legal/Risk

Providing the Data

- 53% Operations
- 50% Technology/IT
- 45% Procurement

Managing the Data

- 45% Technology/IT
- 42% Legal/Risk
- 38% Procurement

Deciding the Metrics

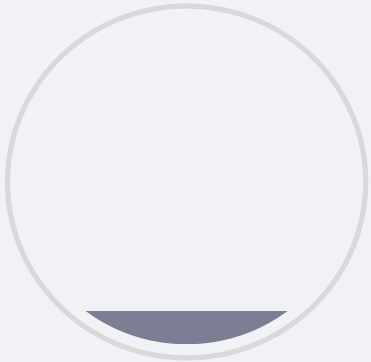
- 57% Finance
- 43% Technology/IT
- 40% Legal/Risk

Reporting

- 58% Corporate Affairs, Comms, & Marketing
- 47% Technology/IT
- 40% CEO

N = 60
Q: Who are the top 3 stakeholders for these activities in your Sustainability program?

Alignment Between Sustainability Team & Finance



10%
Minimal Alignment
(1-4)

15%
Some Alignment
(5-6)

60%
Strong Alignment
(7-8)

15%
Full Alignment
(9-10)

N = 60
Q: Rate the alignment between Finance and the Sustainability Teams on a scale of 1-10

Maturity of Employee Involvement in Sustainability

5%

Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives

17%

Basic Sustainability Awareness

Employees are aware of sustainability goals but may not fully understand their role in achieving them

37%

Emerging Sustainability Engagement

Employees have a basic understanding of sustainability responsibilities and how they relate to their roles

25%

KPI-Driven Sustainability

Sustainability KPIs are set relevant to employee roles, fostering a more focused and targeted approach to sustainability

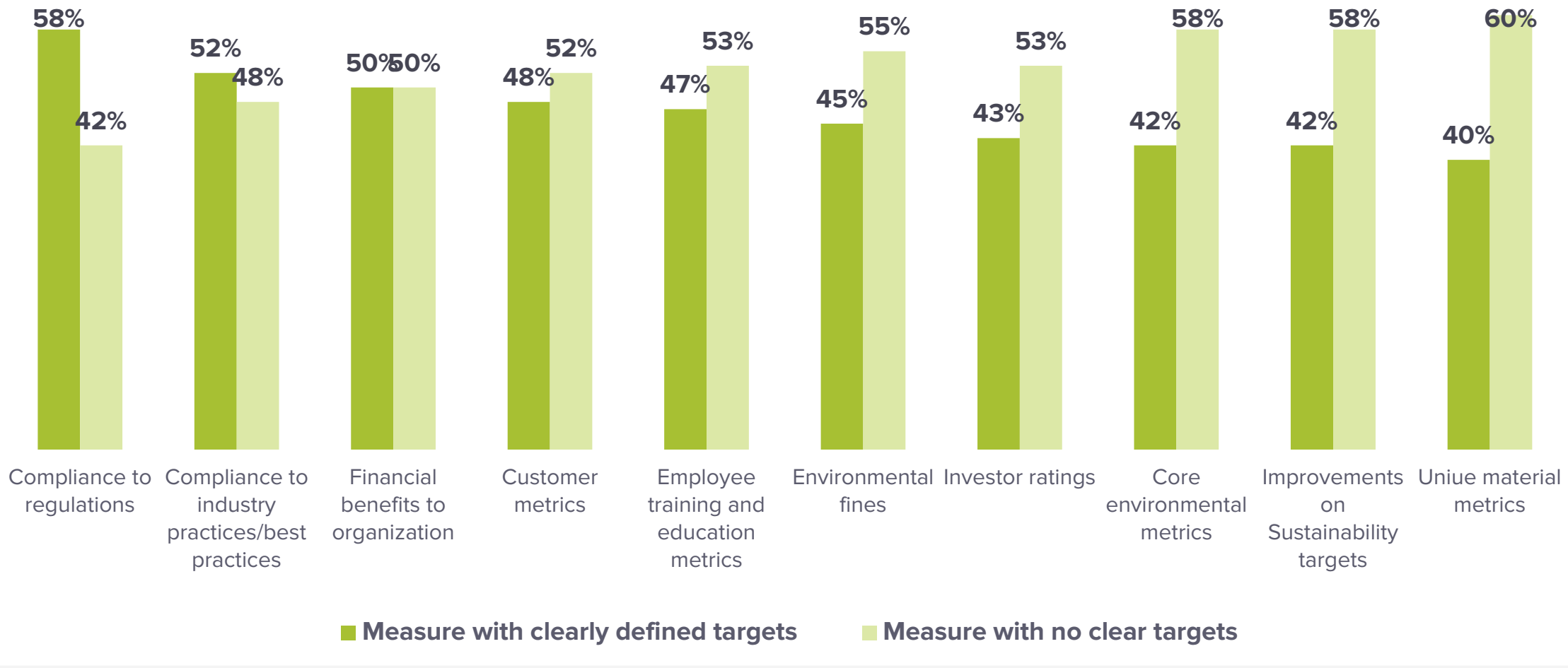
16%

Sustainability as a Strategic Imperative

Sustainability performance is tied to executive and key employee compensation, reinforcing its role as a strategic priority.

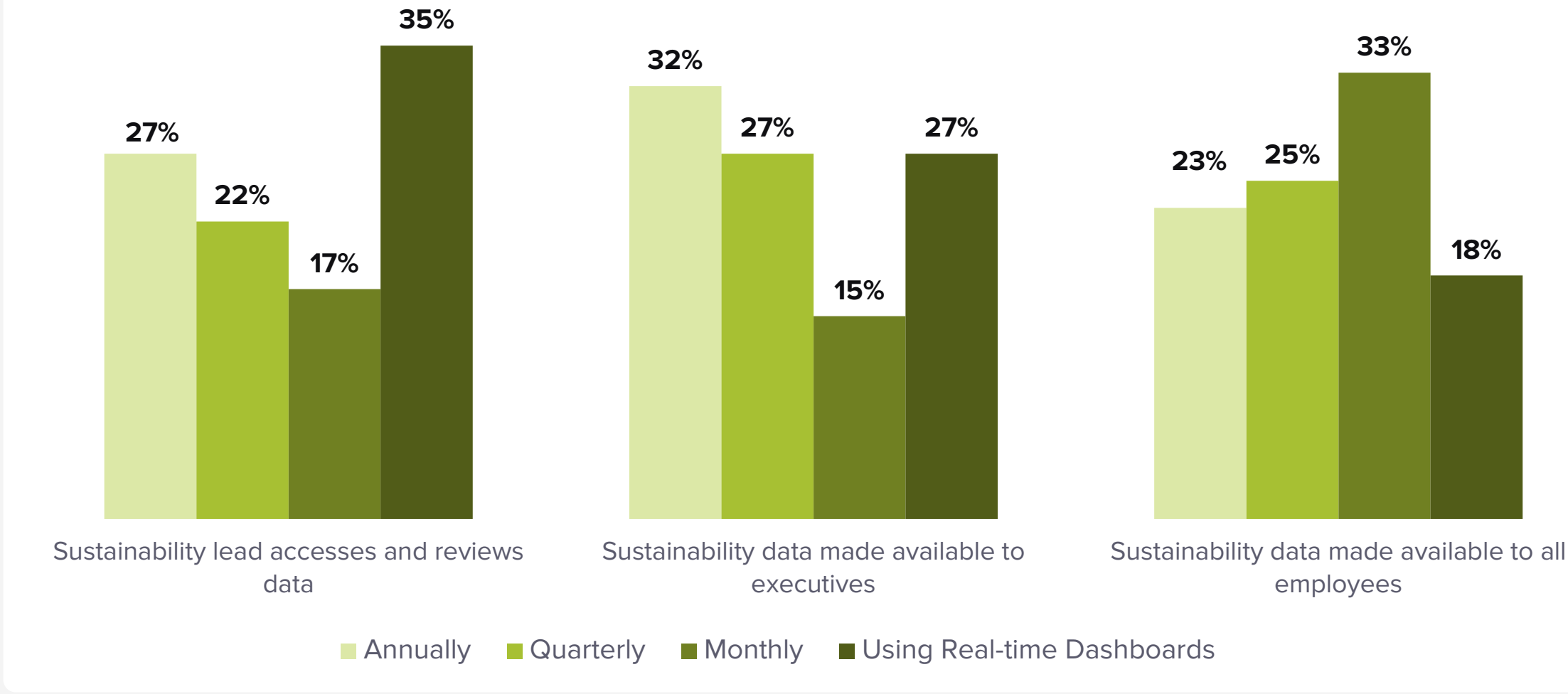
N = 60
Modeled based on responses to multiple questions

Metrics Used to Measure Sustainability



N = 60
Q: Which are the metrics used in your organization to measure Sustainability efforts? (Depicting the metrics adopted with clearly-defined metrics)

Sustainability Data Access and Sharing



N = 60
Q: How frequently does your organization access/ share data internally on Sustainability progress with key stakeholders?

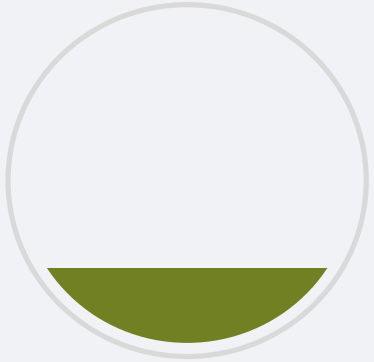
Technology

Importance of Technology in Achieving Sustainability Goals

0%
Not Important
(1-4)

13%
Somewhat Important
(5-6)

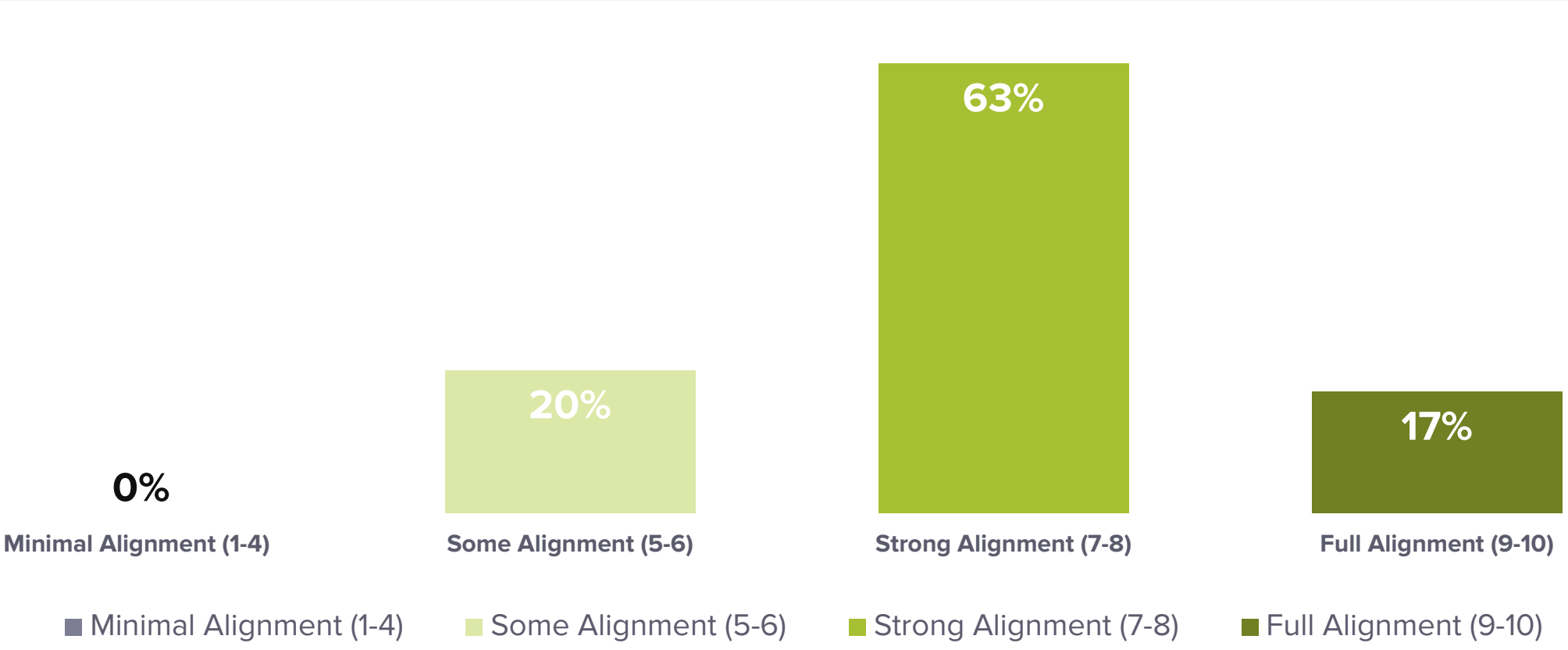
63%
Important
(7-8)



23%
Extremely Important
(9-10)

N = 60
Q: On a scale of 1-10, how would you rate the importance of Technology to achieving Sustainability goals? (Where 1='Not important at all' and 10='Absolutely critical')

Alignment Between Sustainability Teams & Technology



N = 60
Q: Rate the alignment between IT/Technology and Sustainability Teams on a scale of 1-10 (Where 1='Not aligned' and 10='Completely aligned')

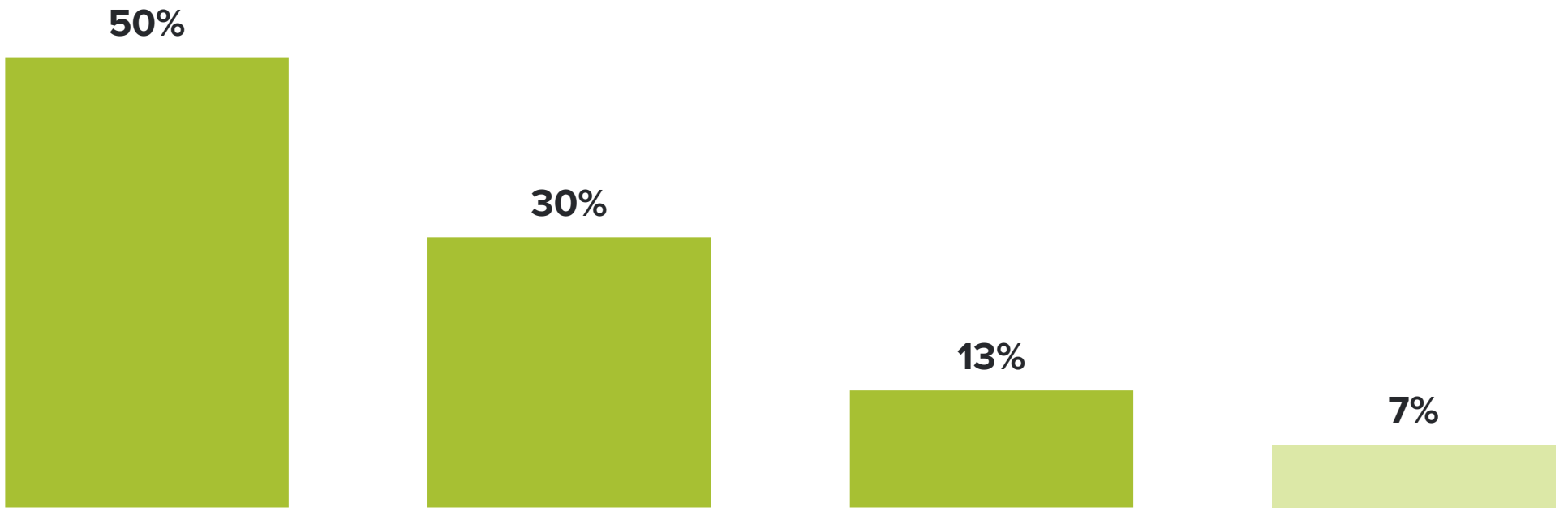
The Extent of Use of IT to Achieve Sustainability Goals

28%
IT is fully leveraged

72%
IT is not fully leveraged

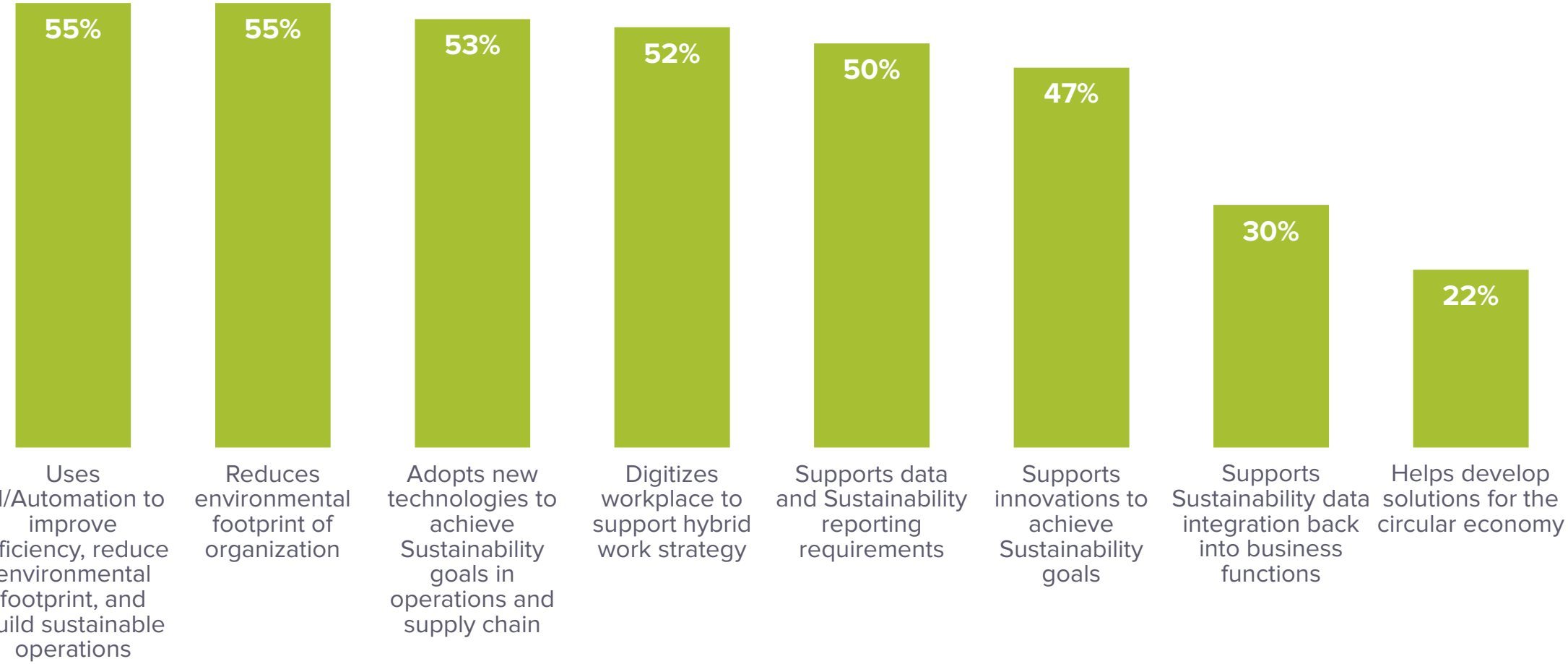
N = 60
Q: Do you feel the organization leverages the full potential of IT/Technology in achieving Sustainability?

IT's Role in Achieving Sustainability Goals



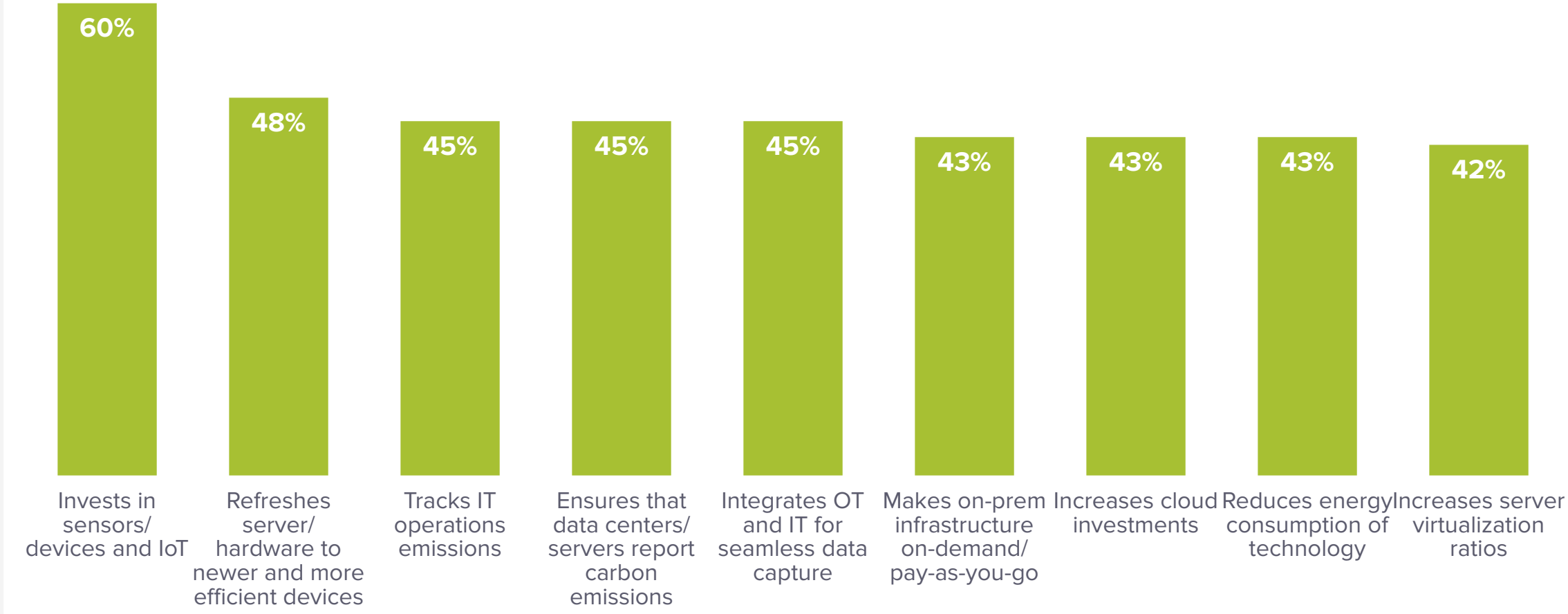
N = 60
Q: What is the extent of the involvement of IT in achieving your organization's Sustainability goals?

Role of Technology in Supporting Sustainability



N = 60
Q: How does the IT/technology team support the organization's Sustainability goals?

Technology Team's Steps to Reduce Carbon Footprint



N = 60
Q: What actions does your IT/technology team take to reduce their carbon footprint?

Data-Driven Sustainability: Leveraging Insights for Impact

20%

We do not use data to track or measure our Sustainability efforts

17%

We collect some data on our Sustainability initiatives, but we don't use it for analysis or decision-making

15%

We use data to track key Sustainability metrics for reporting

28%

We use data to track, analyze, and optimize our Sustainability performance across business applications

20%

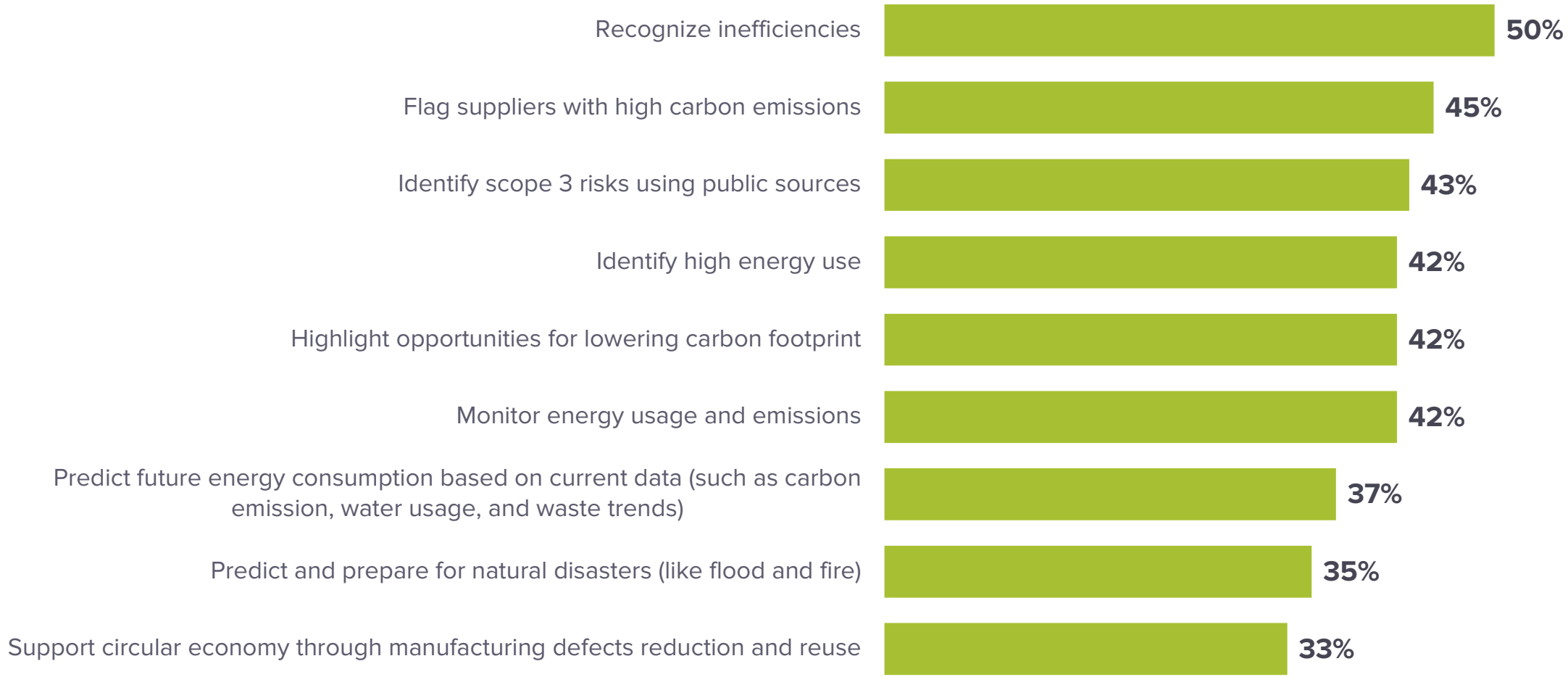
We use data from our Sustainability initiatives to guide the organization's transformation journey

N = 60
Q: To what extent does your organization leverage data to inform and support its Sustainability initiatives?

Challenges of Supporting Sustainability Data Needs

N = 60
Q: What are the top 3 challenges in supporting your organization's Sustainability data needs?

The Use of AI for Environmental Footprint Management



N = 60
Q: How does your organization use data and AI to reduce, manage and report on global environmental footprint?

Environmental Impact of AI

Is Impact Considered?

10%
Yes

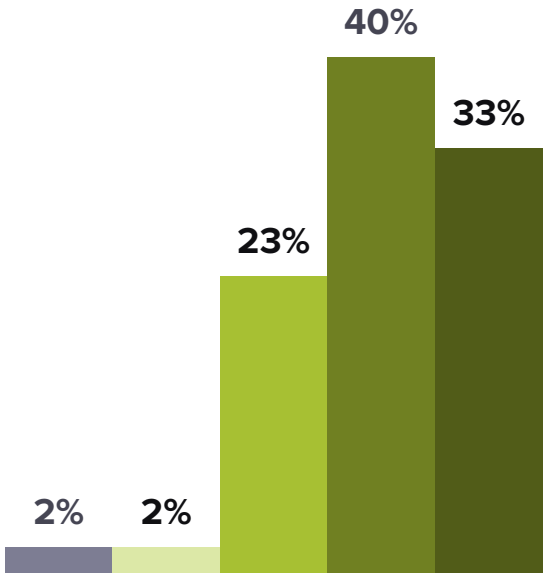
73%
No

17%
Unsure

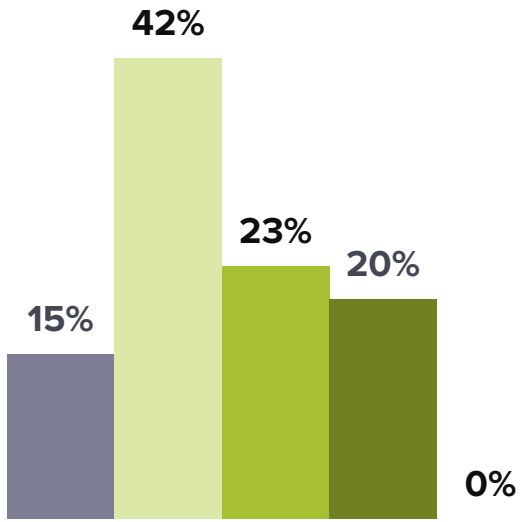
N = 60
Q: Does your organization consider the environmental impact (e.g., energy consumption, carbon footprint) when implementing AI solutions?

Perception on the Impact of AI

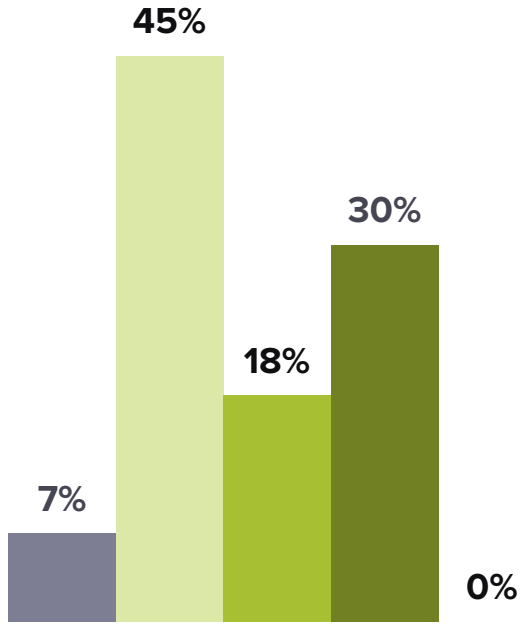
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions



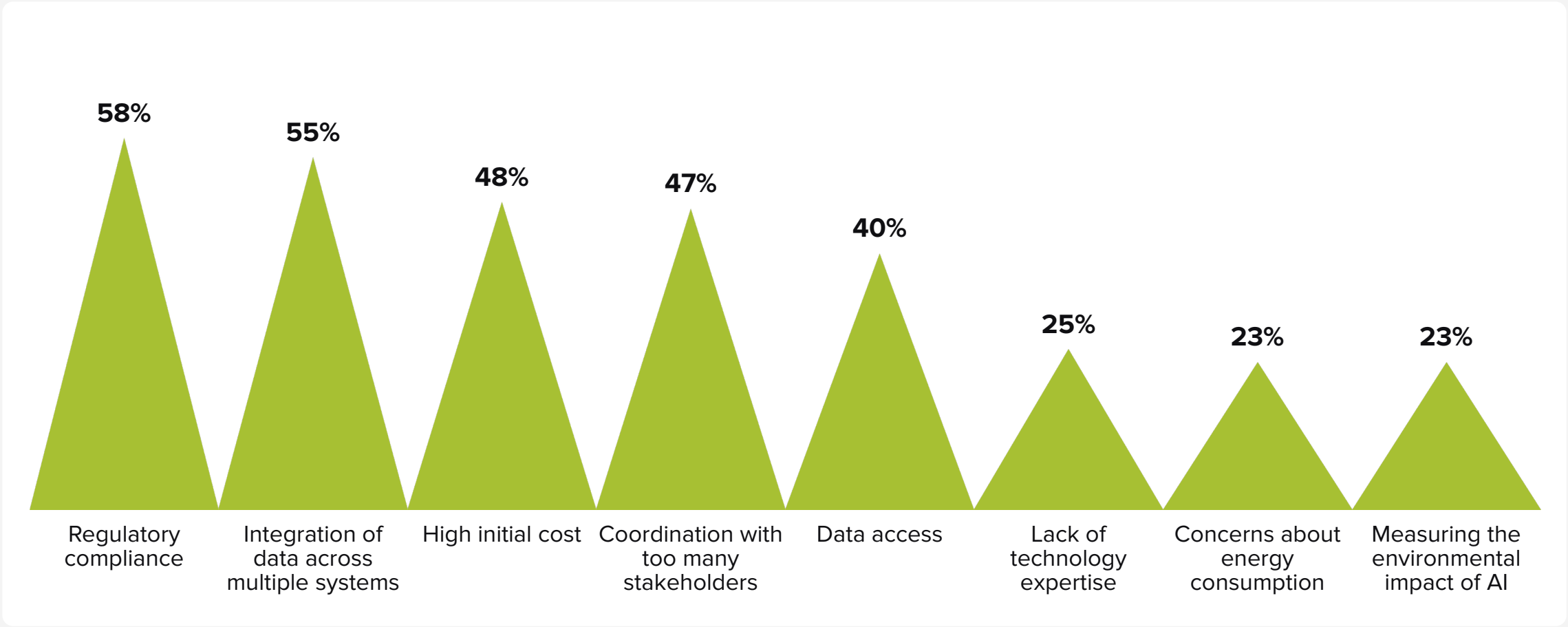
Impact of AI on the cost of Sustainability initiatives



1 (Significant negative impact) 2 (Some negative impact) 3 (Neither positive nor negative) 4 (Some Positive impact) 5 (Significant Positive impact)

N = 60
Q: Please indicate the expected scale of impact of the following.

Key Challenges in Integrating AI for Sustainability Initiatives



N = 60
Q: What are the key challenges of integrating AI for Sustainability initiatives?

Building Sustainability Technology Capabilities

27%

Using solutions offered by our enterprise system

18%

Buying stand-alone, off-the-shelf solutions

18%

Using solutions offered by our cloud platform provider

15%

Innovating on in-house solutions

12%

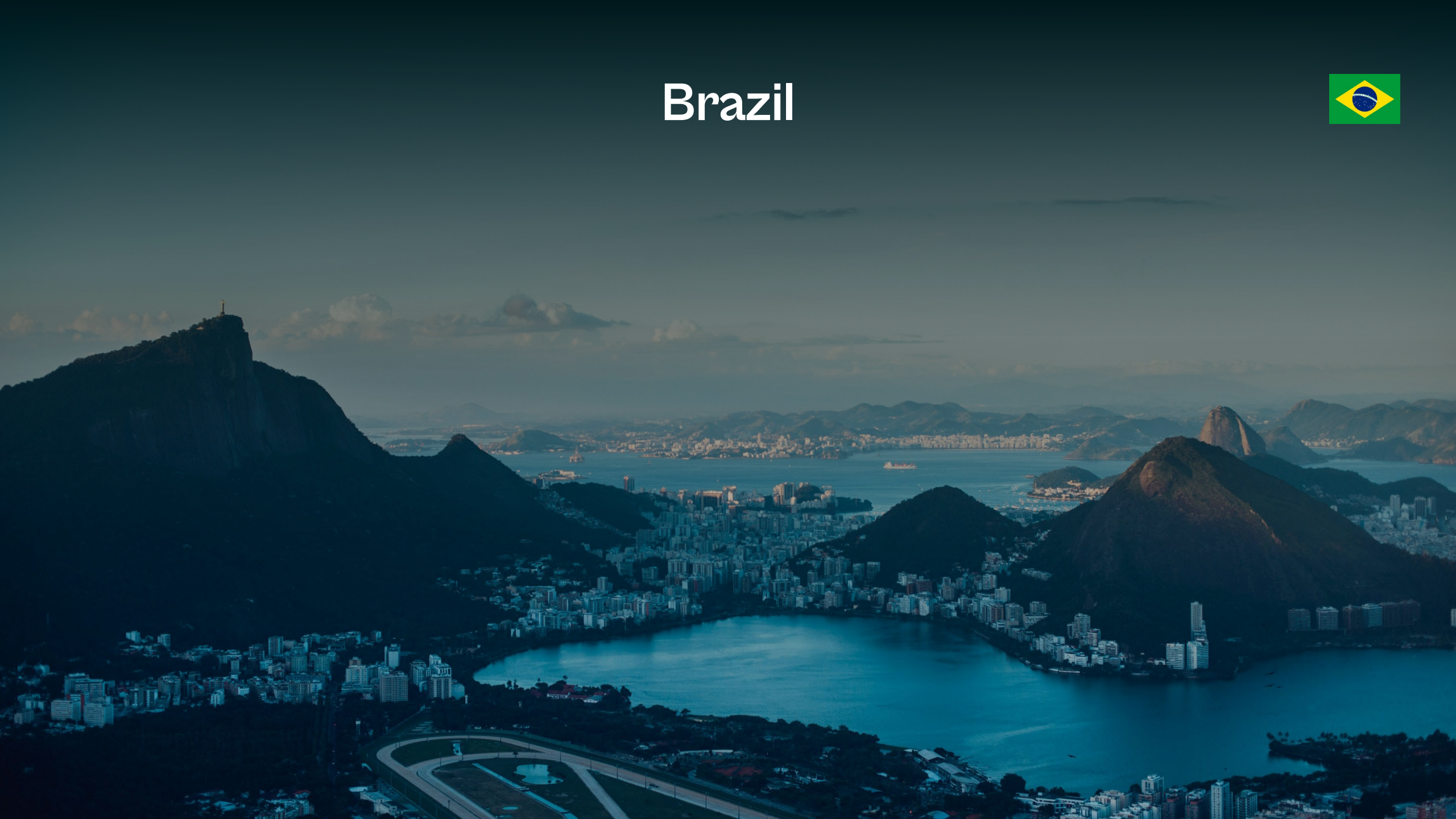
Engaging a systems integrator

10%

Engaging a consulting company to define our roadmap

N = 60
Q: How is your organization building Sustainability reporting capabilities?

Brazil



Study Demographics - Brazil

Function

Industry

24 Financial Services	**9** Primary Industries	**9** Retail	**3** Manufacturing	**3** Construction & Real Estate
3 Energy & Utilities	**3** Hospitality	**3** Media & Telecom	**3** Transport and Logistics	

Organization Size (No. of Emp.)

- **16** 201 - 499
- **13** 500 - 999
- **20** 1,000 - 4,999
- **11** More than 5,000

N = 60

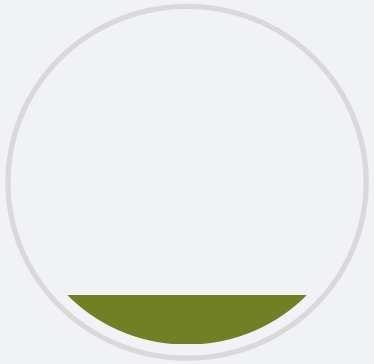
Strategy & Perception

The Importance of Sustainability in the Organization

0%
Not Important
(1-4)

37%
Somewhat Important
(5-6)

48%
Important
(7-8)



15%
Extremely Important
(9-10)

N = 60
Q: Please RATE the strategic importance of Sustainability in your organization on a scale of 1-10. (1='Least Important' and 10='Most Important')

Pace of Sustainability Efforts

CHANGE FROM LAST YEAR

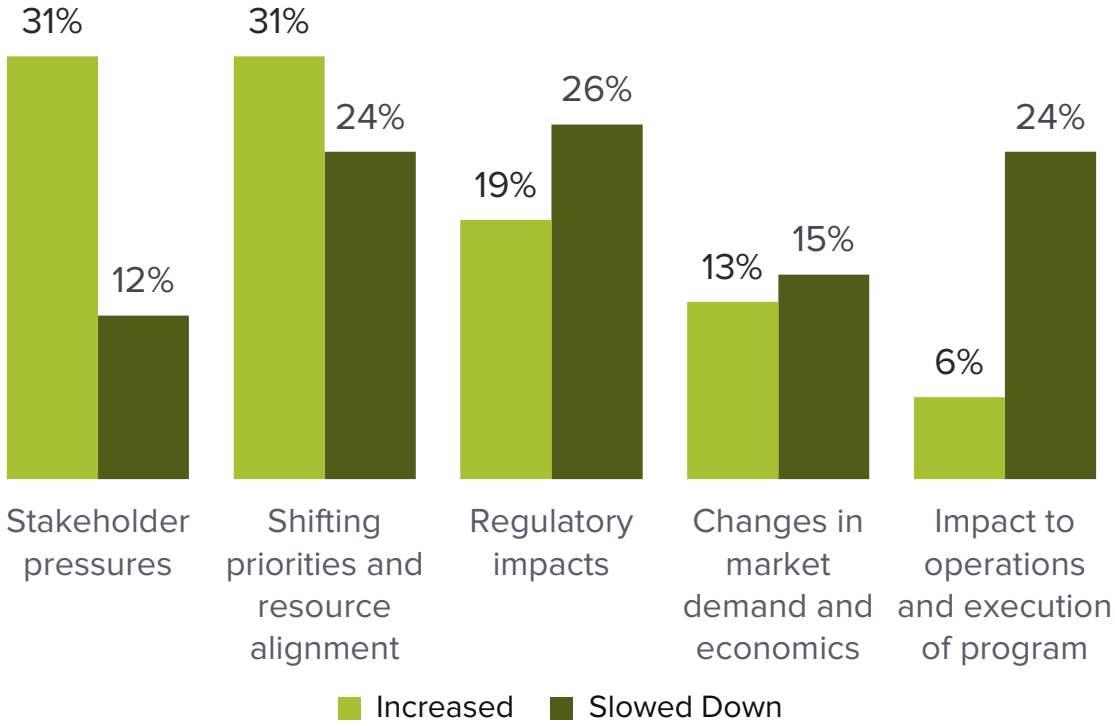
56% Slowed down

27% Increased

17% Remained the same

N = 60
Q: Have your Sustainability goals and execution slowed down or increased over the last year?

REASONS FOR CHANGE



N = 50
Q: What is the main reason for the change in pace of your Sustainability goals and execution?

Maturity of Organizations' Sustainability Strategies

2%

Sustainability is acknowledged but not integrated

Recognized as important but remains peripheral to the core corporate strategy

27%

Sustainability is a strategic aspiration

Included in the transformation strategy, but goals and measures are still not quantified or operationalized

58%

Sustainability is operationally embedded

Goals and initiatives are incorporated into existing operational review and reporting processes, but impact is not fully measured or quantified

8%

Sustainability is data-driven

Strategy and goals are prioritized and built upon real facts and data, providing a solid foundation for decision-making

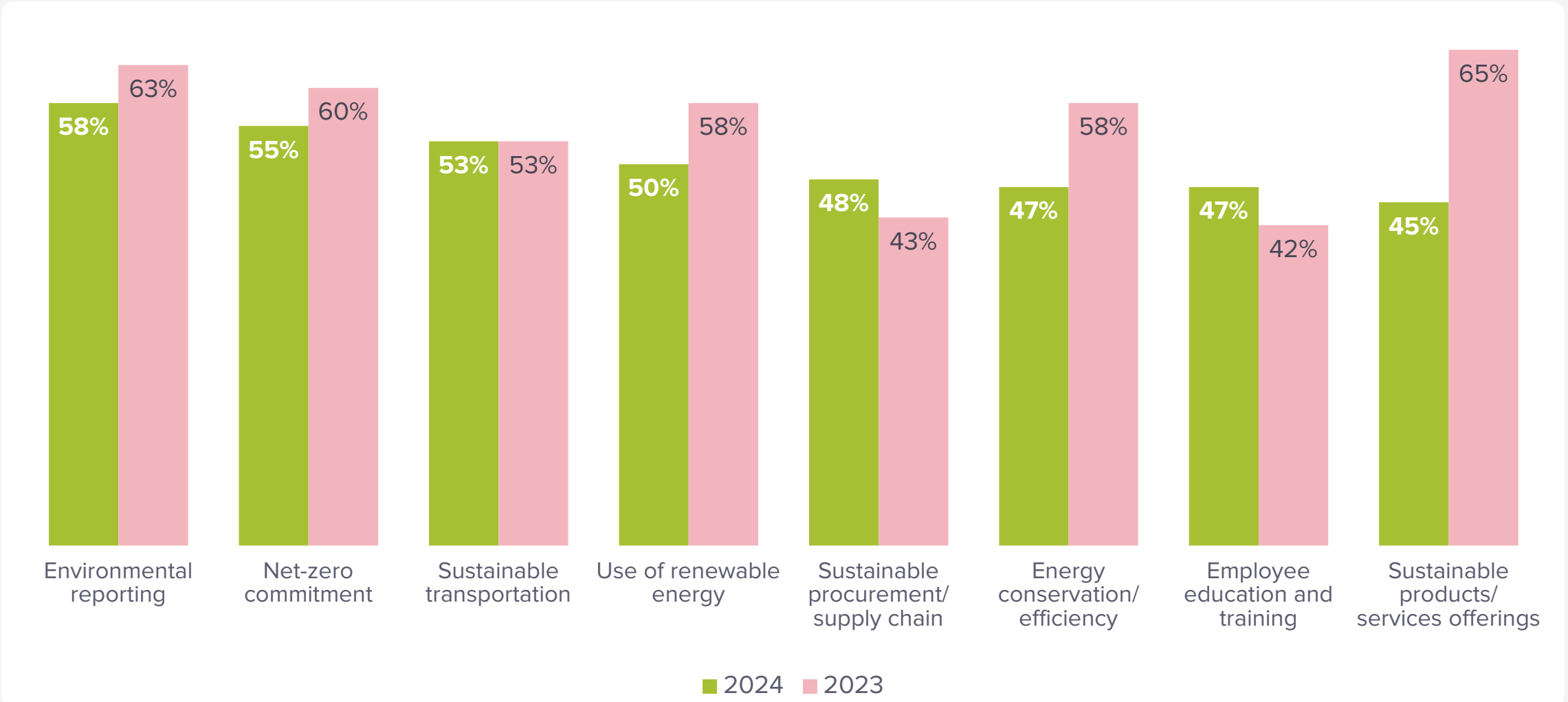
5%

Sustainability is a strategic asse.

Business value of sustainability data is well-understood, and initiatives are fully integrated into strategic planning and decision-making processes

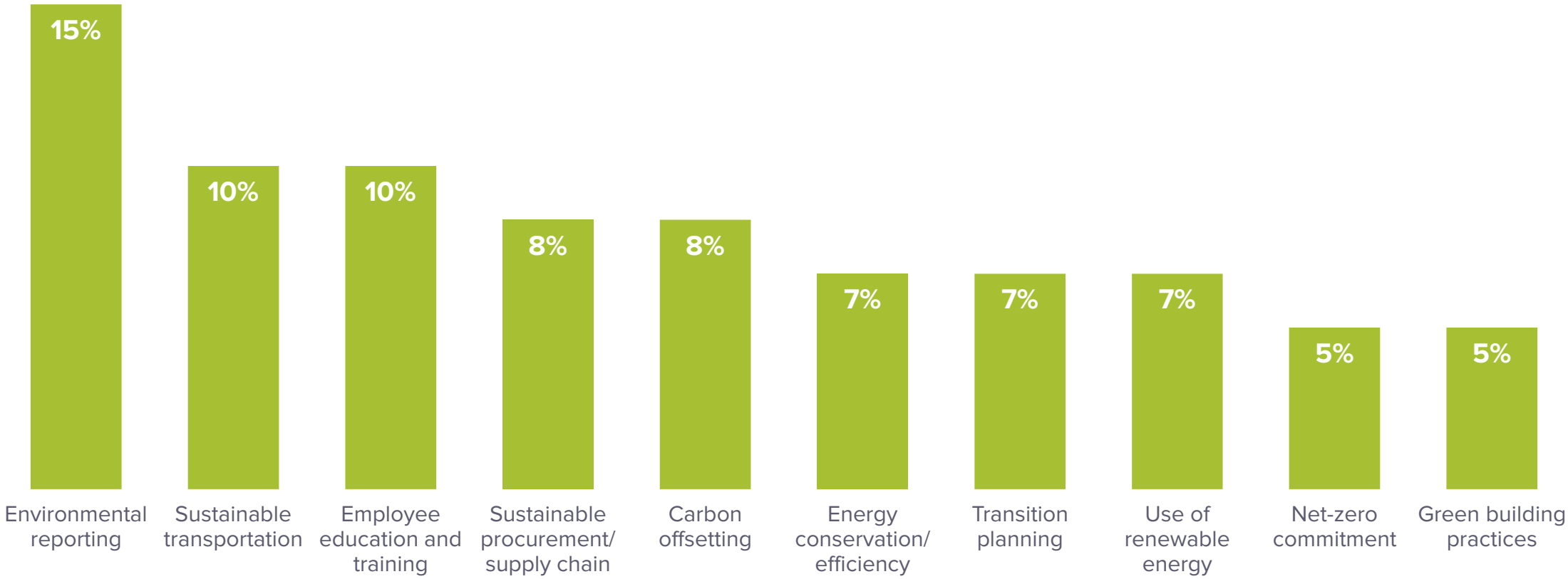
N = 60
Modeled based on responses to multiple questions

Top Environmental Measures Undertaken



N = 60 (2023 N=60)
Q: Which of these Environmental measures has your organization undertaken?

Most Impactful Environmental Measures



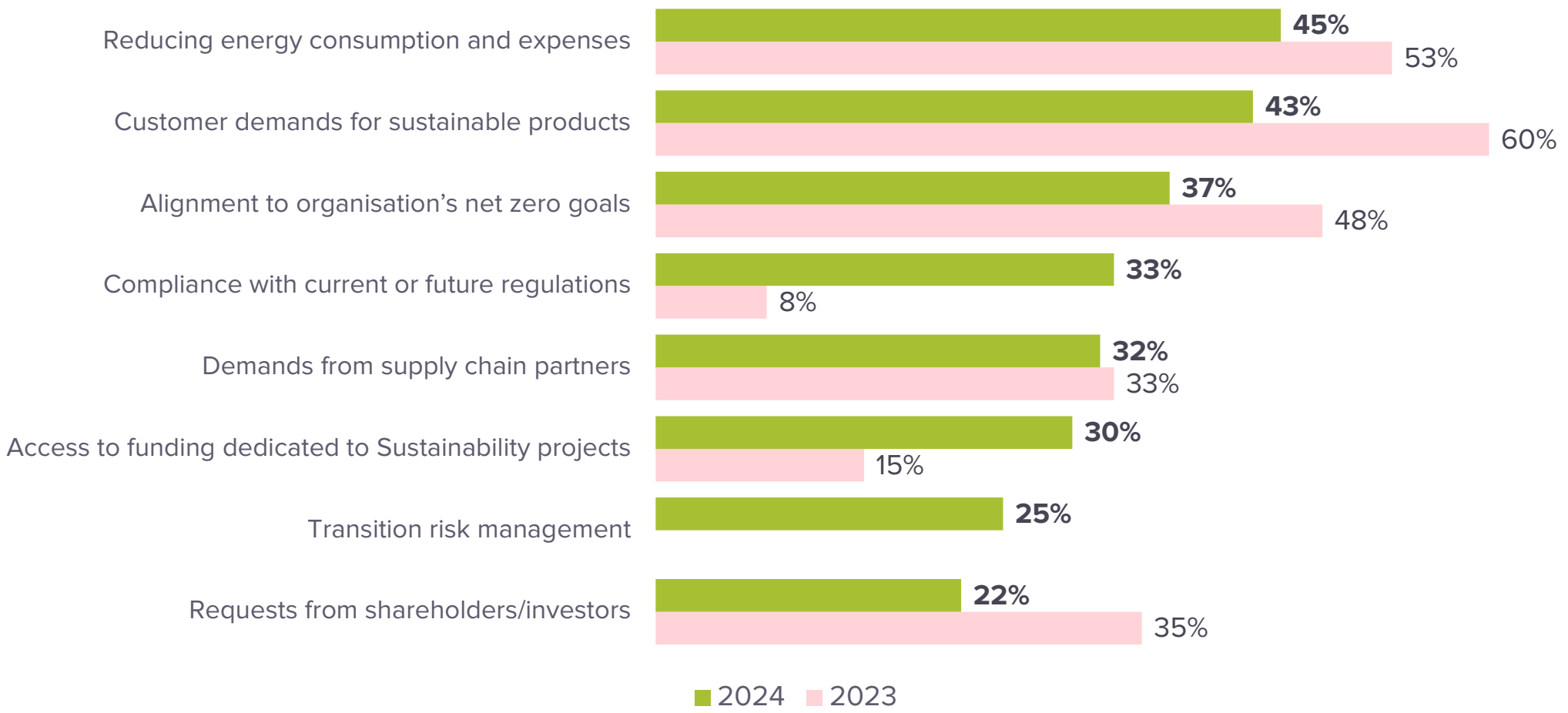
N = 60
Q: Which of the initiatives selected above do you consider most impactful?

Top Stakeholders Advocating for Sustainability

42%	38%	33%	32%	30%
Governments/ Regulators	Supply chain partners	Investors/ shareholders	Customers	Banks/ Credit providers
30%	28%	27%	22%	18%
Employees	Insurers	Communities	Non-profit organizations	Rating agencies

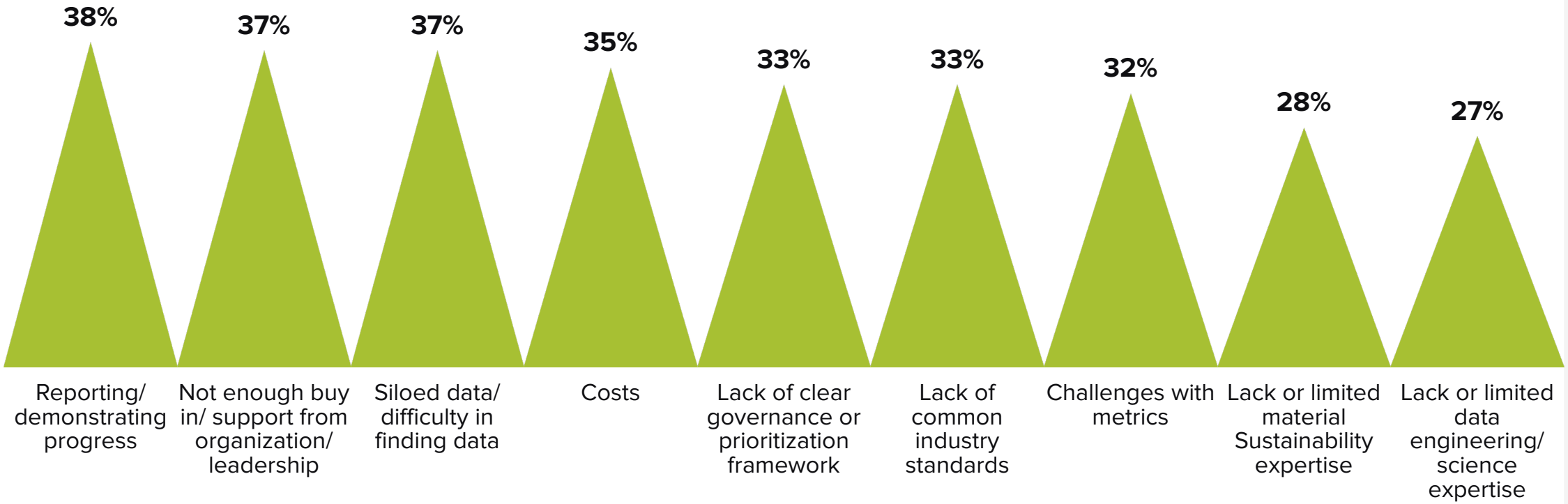
N = 60
Q: Who are the TOP 3 stakeholders who are most vocal in advocating Sustainability policies and practices in your organization?

Main Drivers of Sustainability



N = 60 (2023 N=60)
Q: What are the 3 main drivers for your organization's Sustainability goals?

Main Challenges of Adopting Sustainability



N = 60
Q: What are the 3 main challenges faced in successfully adopting Sustainability measures?

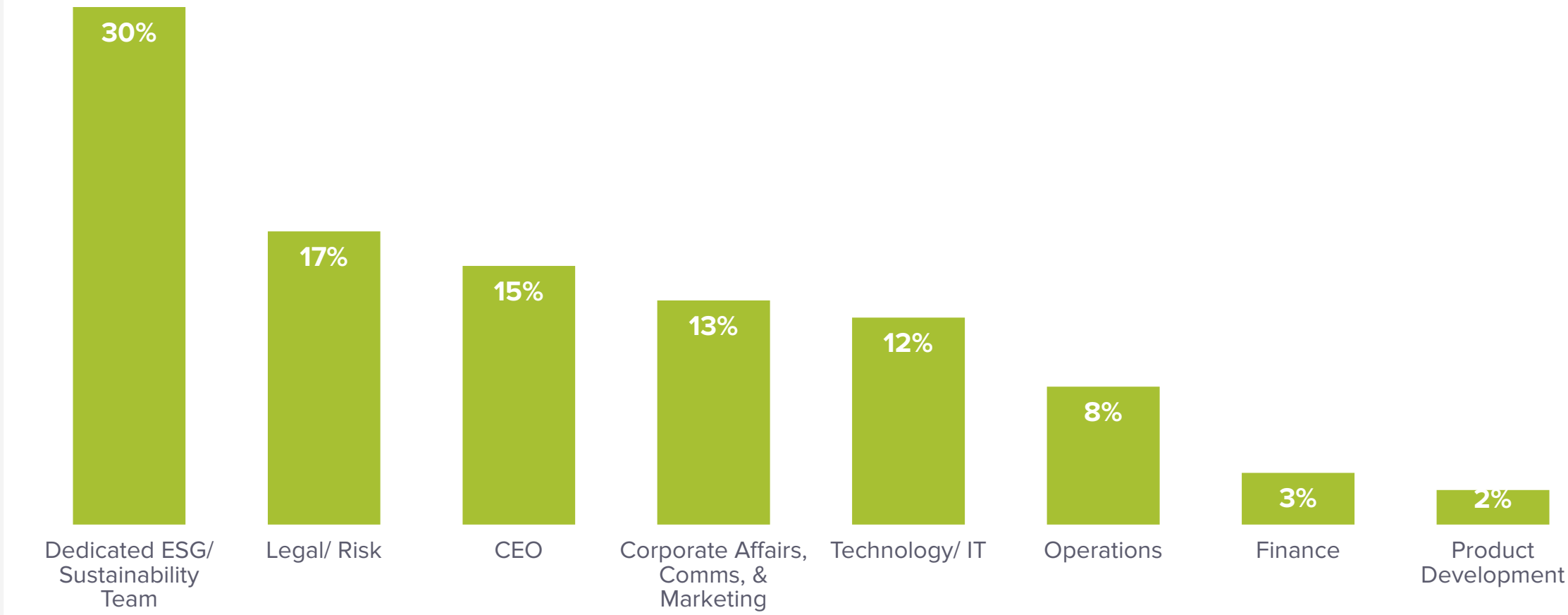
How Governments Can Support Adoption of Sustainability

N = 60
Q: How, according to you, can governments improve the adoption of Sustainability initiatives?

Execution

People, Governance, & Narrative

Sustainability Leadership



N = 60
Q: Which function is primarily responsible for your organization's Sustainability initiative?

Role of Key Stakeholders

Defining The Vision

- 53% Legal/Risk
- 40% ESG/ Sustainability Team
- 35% Procurement

Delivering Sustainability Outcomes

- 55% Technology/ IT
- 45% Operations
- 38% Legal/ Risk

Providing the Data

- 53% Technology/ IT
- 48% Operations
- 35% Procurement

Managing the Data

- 52% Operations
- 47% Technology/ IT
- 43% ESG/ Sustainability Team

Deciding the Metrics

- 67% Finance
- 38% Legal/ Risk
- 32% Procurement

Reporting

- 53% Corporate Affairs, Comms, & Marketing
- 50% CEO
- 47% Technology/ IT

N = 60
Q: Who are the top 3 stakeholders for these activities in your Sustainability program?

Alignment Between Sustainability Team & Finance

27%
Minimal Alignment
(1-4)

22%
Some Alignment
(5-6)

40%
Strong Alignment
(7-8)

12%
Full Alignment
(9-10)

N = 60
Q: Rate the alignment between Finance and the Sustainability Teams on a scale of 1-10

Maturity of Employee Involvement in Sustainability

5%

Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives

5%

Basic Sustainability Awareness

Employees are aware of sustainability goals but may not fully understand their role in achieving them

48%

Emerging Sustainability Engagement

Employees have a basic understanding of sustainability responsibilities and how they relate to their roles

30%

KPI-Driven Sustainability

Sustainability KPIs are set relevant to employee roles, fostering a more focused and targeted approach to sustainability

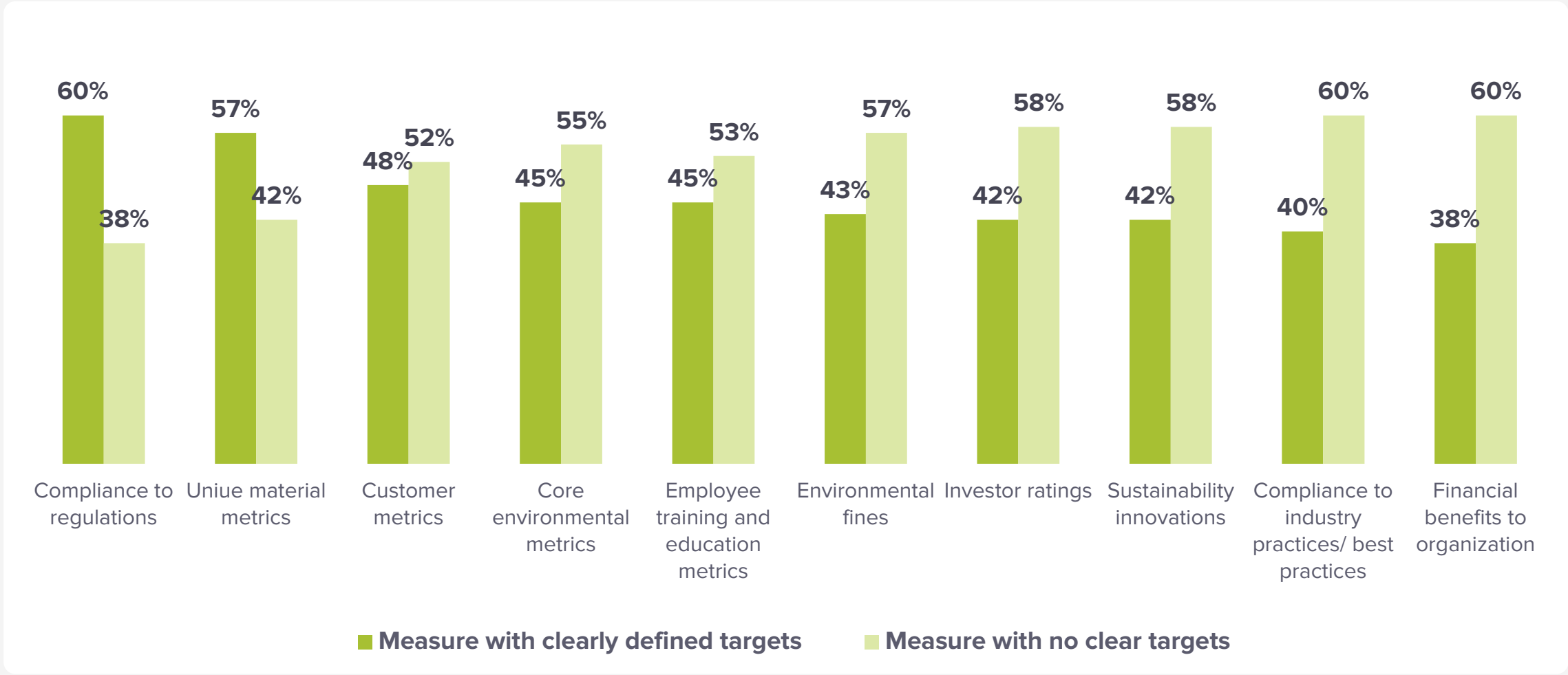
12%

Sustainability as a Strategic Imperative

Sustainability performance is tied to executive and key employee compensation, reinforcing its role as a strategic priority.

N = 60
Modeled based on responses to multiple questions

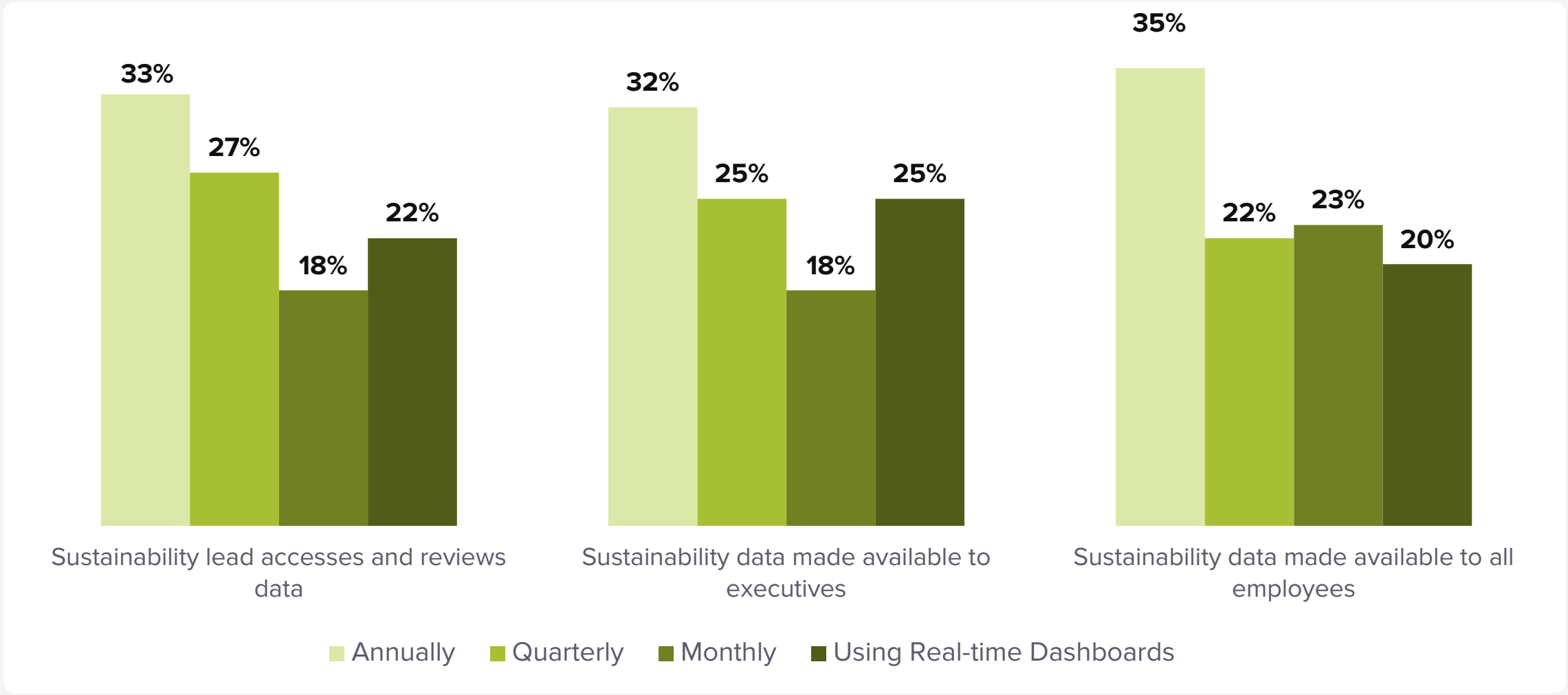
Metrics Used to Measure Sustainability



N = 60

Q: Which are the metrics used in your organization to measure Sustainability efforts? (Depicting the metrics adopted with clearly-defined metrics)

Sustainability Data Access and Sharing



N = 60
Q: How frequently does your organization access/ share data internally on Sustainability progress with key stakeholders?

Technology

Importance of Technology in Achieving Sustainability Goals

0%
Not Important
(1-4)

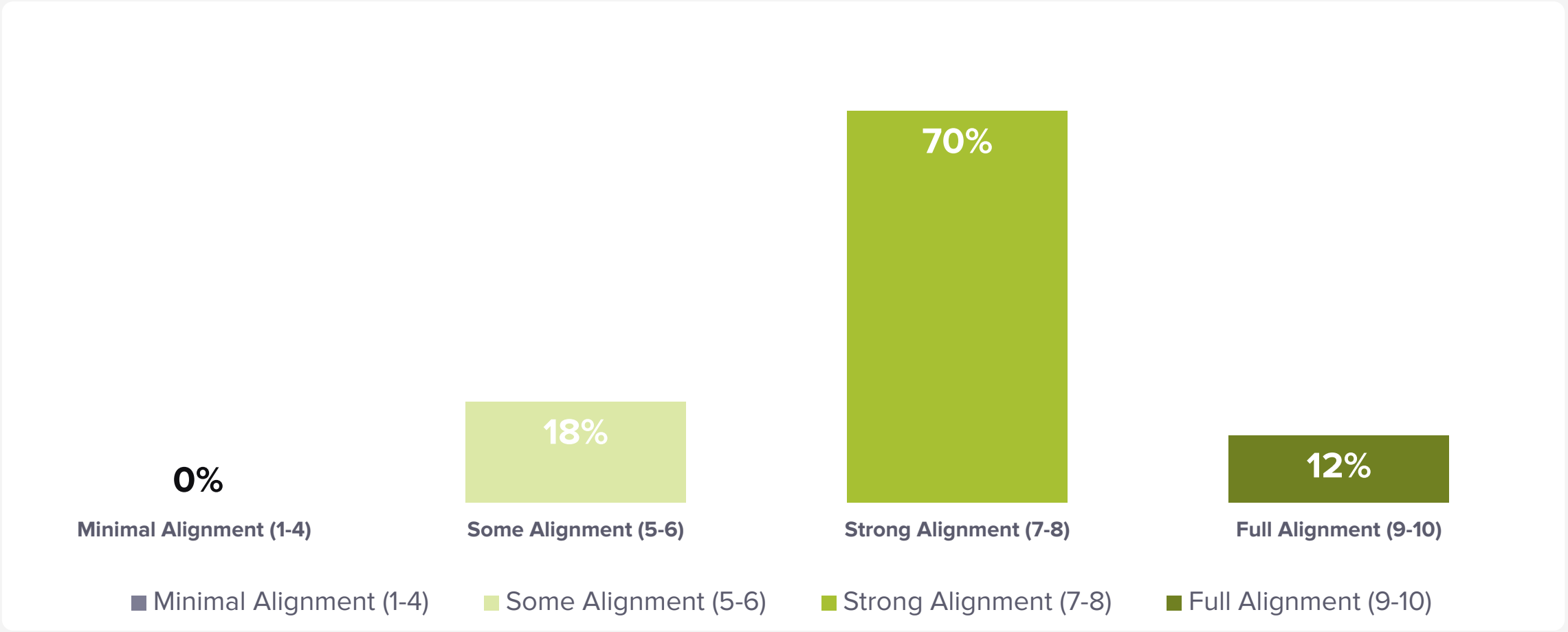
17%
Somewhat Important
(5-6)

63%
Important
(7-8)

20%
Extremely Important
(9-10)

N = 60
Q: On a scale of 1-10, how would you rate the importance of Technology to achieving Sustainability goals? (Where 1='Not important at all' and 10='Absolutely critical')

Alignment Between Sustainability Teams & Technology



N = 60
Q: Rate the alignment between IT/Technology and Sustainability Teams on a scale of 1-10 (Where 1='Not aligned' and 10='Completely aligned')

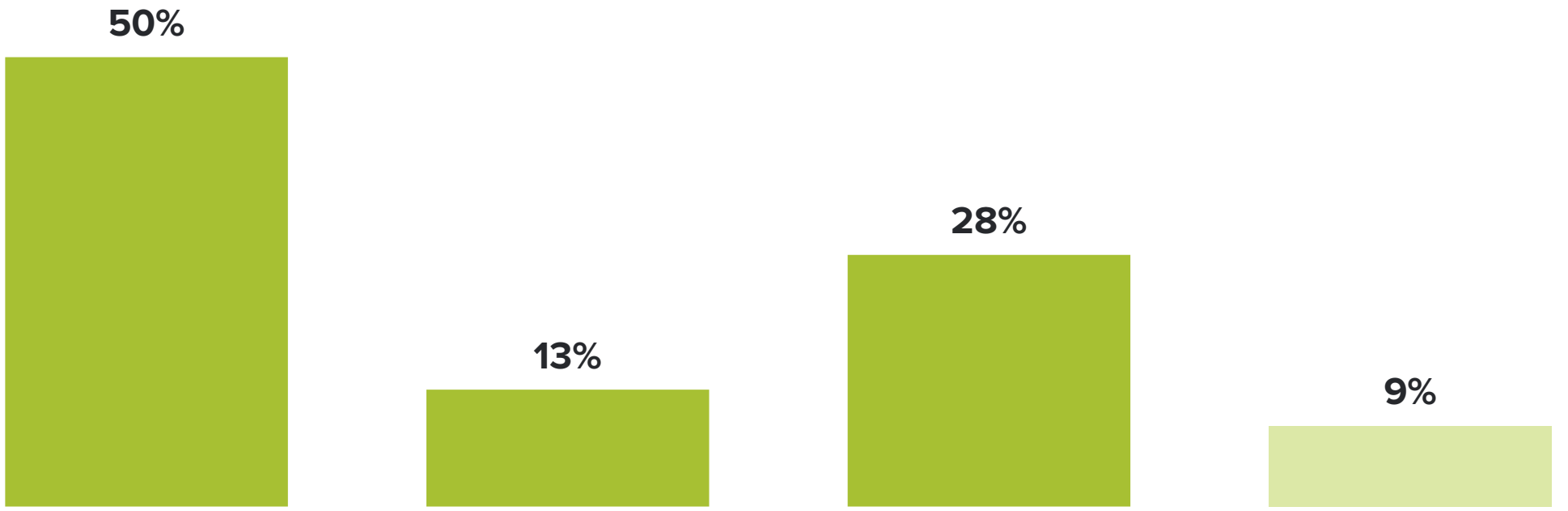
The Extent of Use of IT to Achieve Sustainability Goals

28%
IT is fully leveraged

72%
IT is not fully leveraged

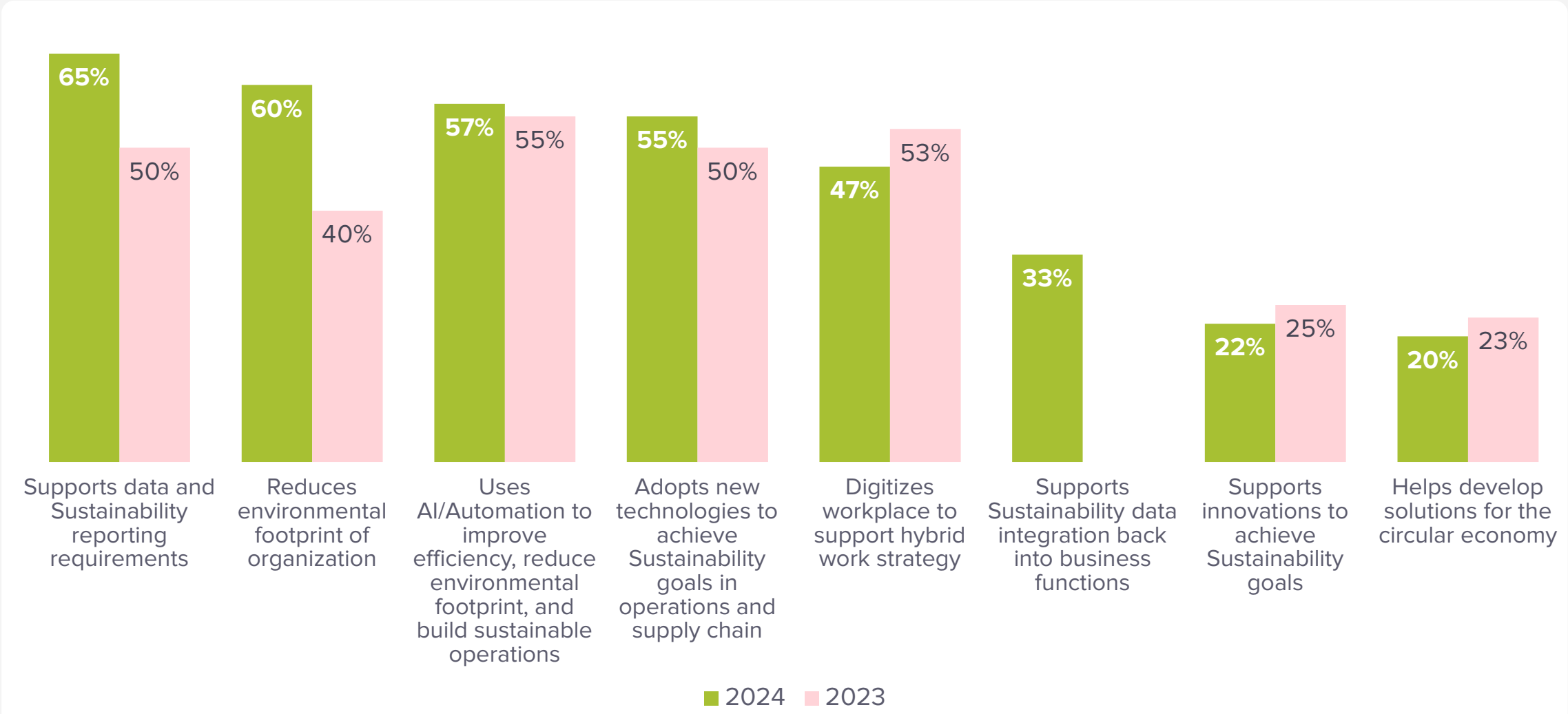
N = 60
Q: Do you feel the organization leverages the full potential of IT/Technology in achieving Sustainability?

IT's Role in Achieving Sustainability Goals



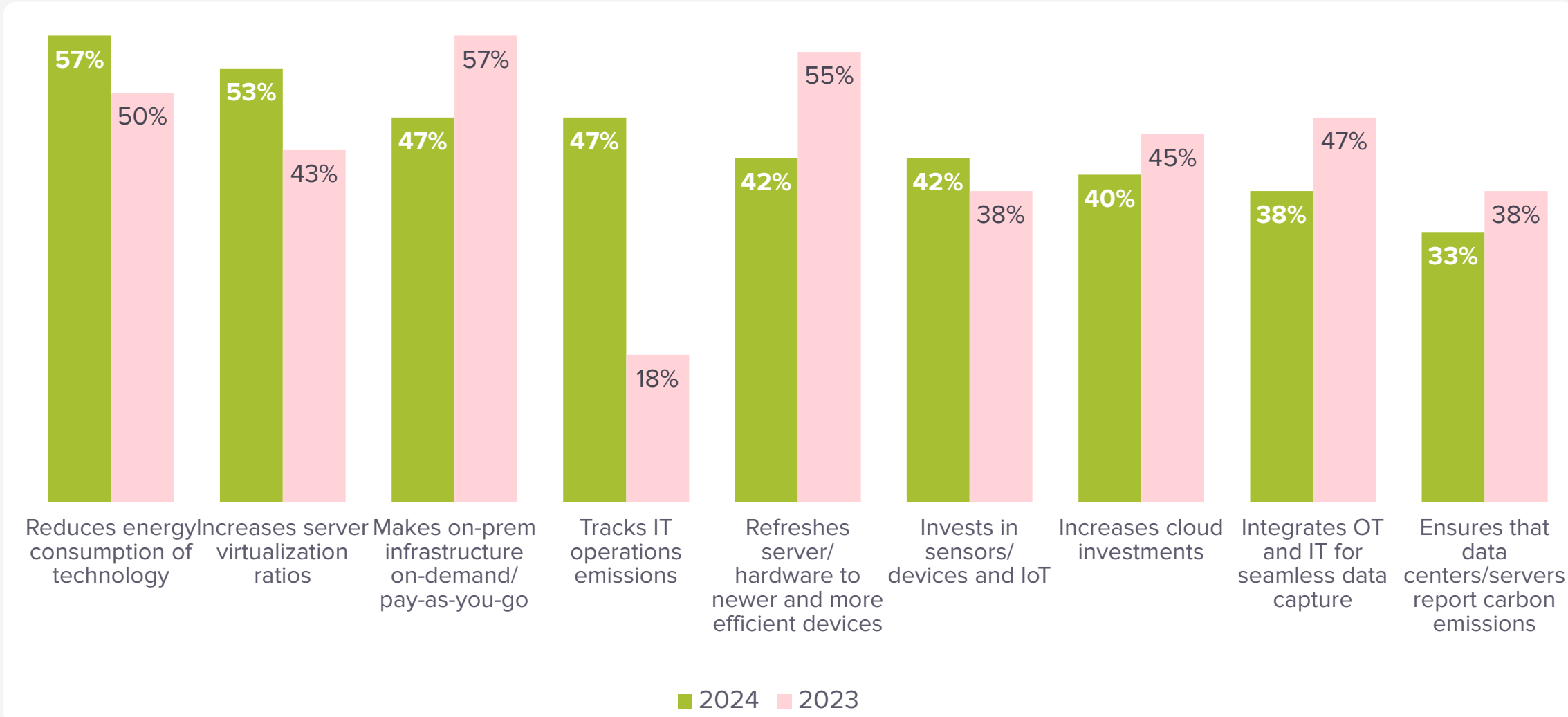
N = 60
Q: What is the extent of the involvement of IT in achieving your organization's Sustainability goals?

Role of Technology in Supporting Sustainability



N = 60 (2023 N=60)
Q: How does the IT/technology team support the organization's Sustainability goals?

Technology Team's Steps to Reduce Carbon Footprint



N = 60 (2023 N=60)
Q: What actions does your IT/technology team take to reduce their carbon footprint?

Data-Driven Sustainability: Leveraging Insights for Impact

10%

We do not use data to track or measure our Sustainability efforts

23%

We collect some data on our Sustainability initiatives, but we don't use it for analysis or decision-making

35%

We use data to track key Sustainability metrics for reporting

17%

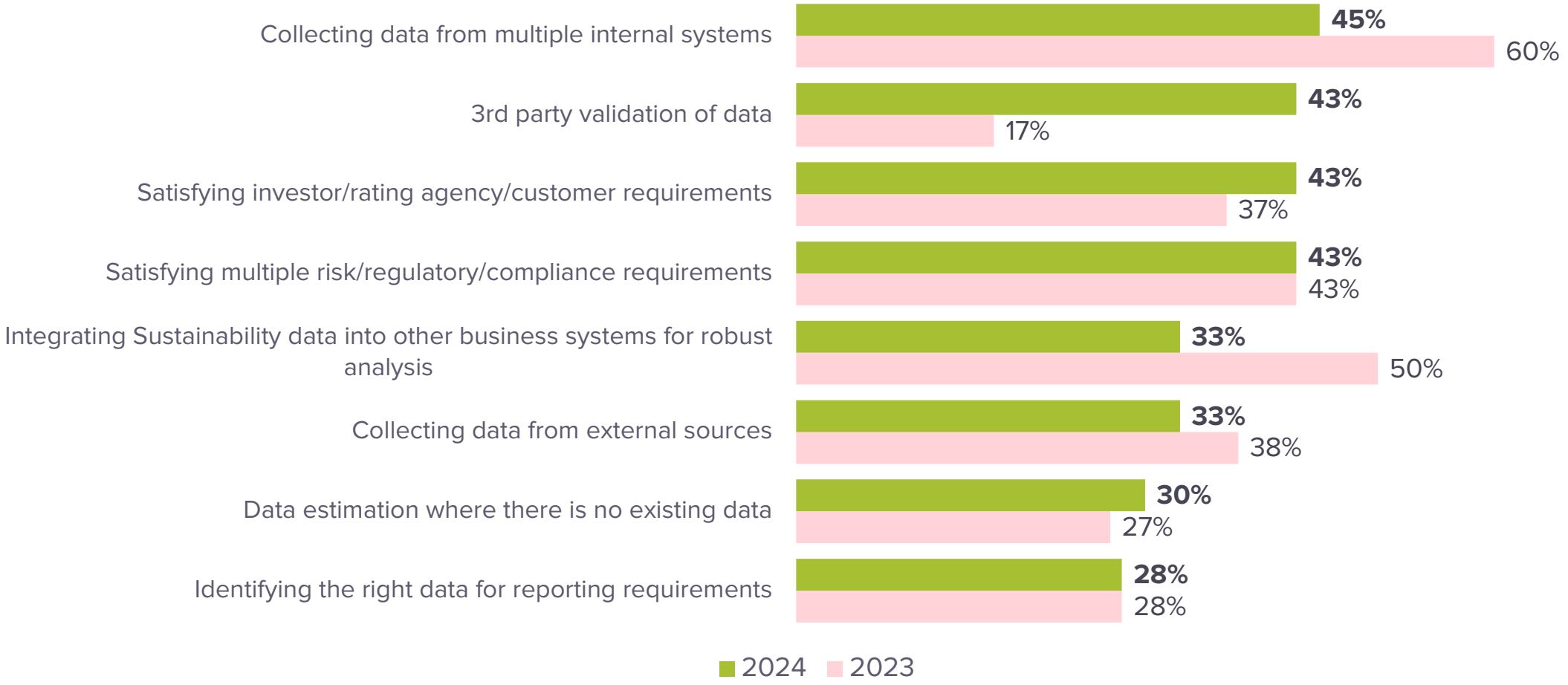
We use data to track, analyze, and optimize our Sustainability performance across business applications

15%

We use data from our Sustainability initiatives to guide the organization's transformation journey

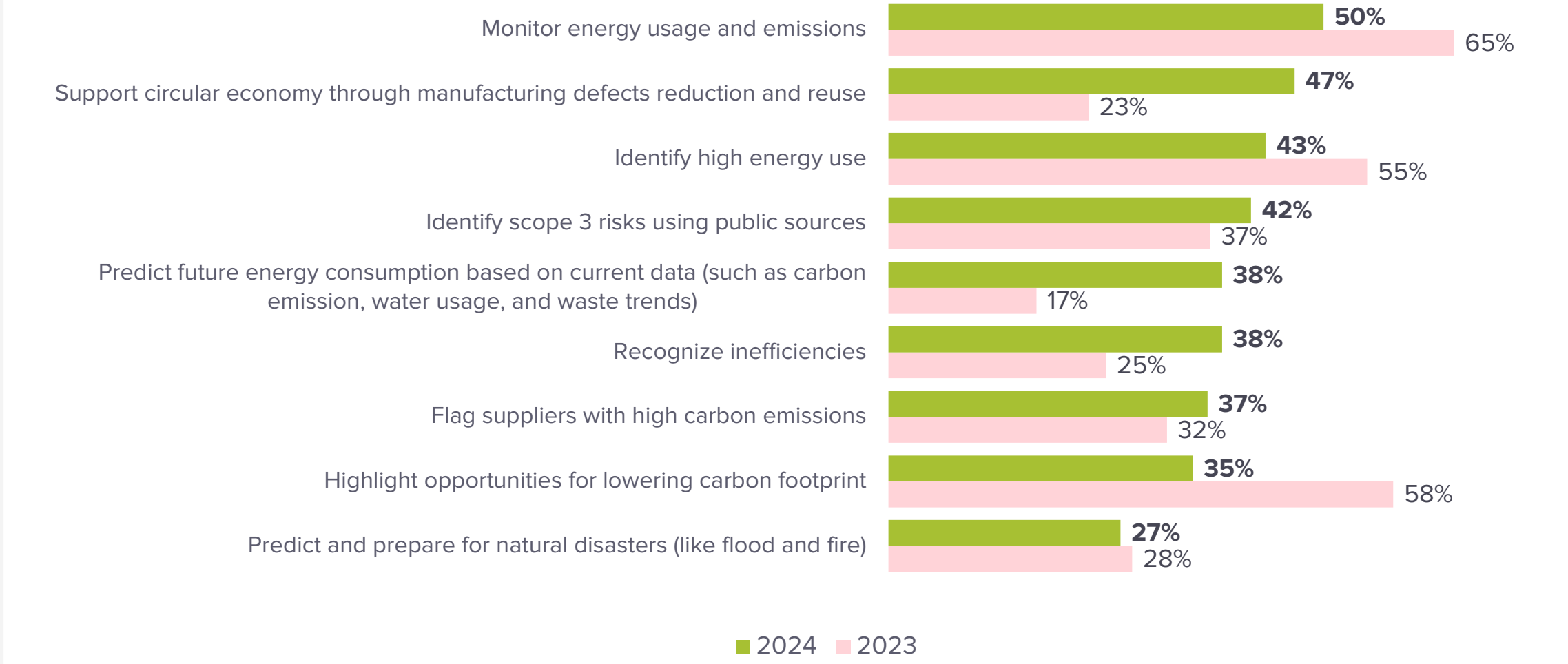
N = 60
Q: To what extent does your organization leverage data to inform and support its Sustainability initiatives?

Challenges of Supporting Sustainability Data Needs



N = 60 (2023 N=60)
Q: What are the top 3 challenges in supporting your organization's Sustainability data needs?

The Use of AI for Environmental Footprint Management



N = 60 (2023 N=60)
Q: How does your organization use data and AI to reduce, manage and report on global environmental footprint?

Environmental Impact of AI

Is Impact Considered?

8%
Yes

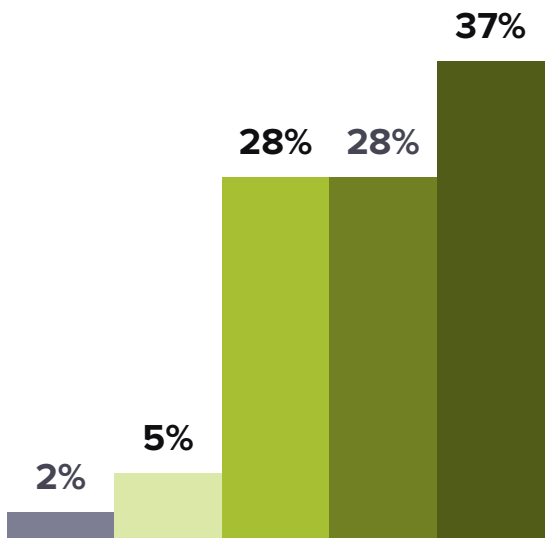
72%
No

20%
Unsure

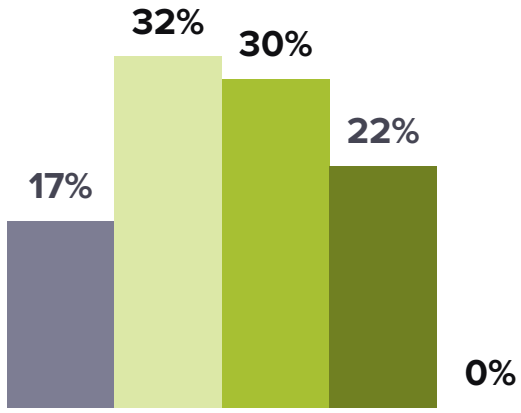
N = 60
Q: Does your organization consider the environmental impact (e.g., energy consumption, carbon footprint) when implementing AI solutions?

Perception on the Impact of AI

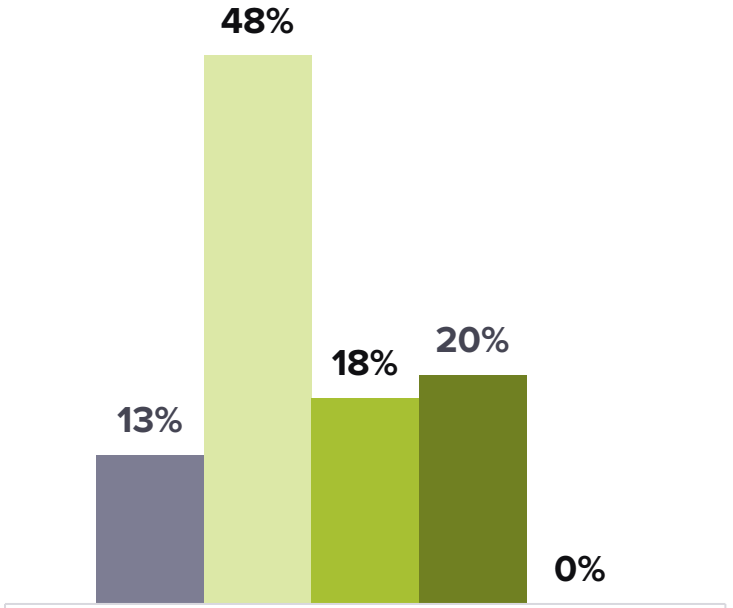
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions



Impact of AI on the cost of Sustainability initiatives

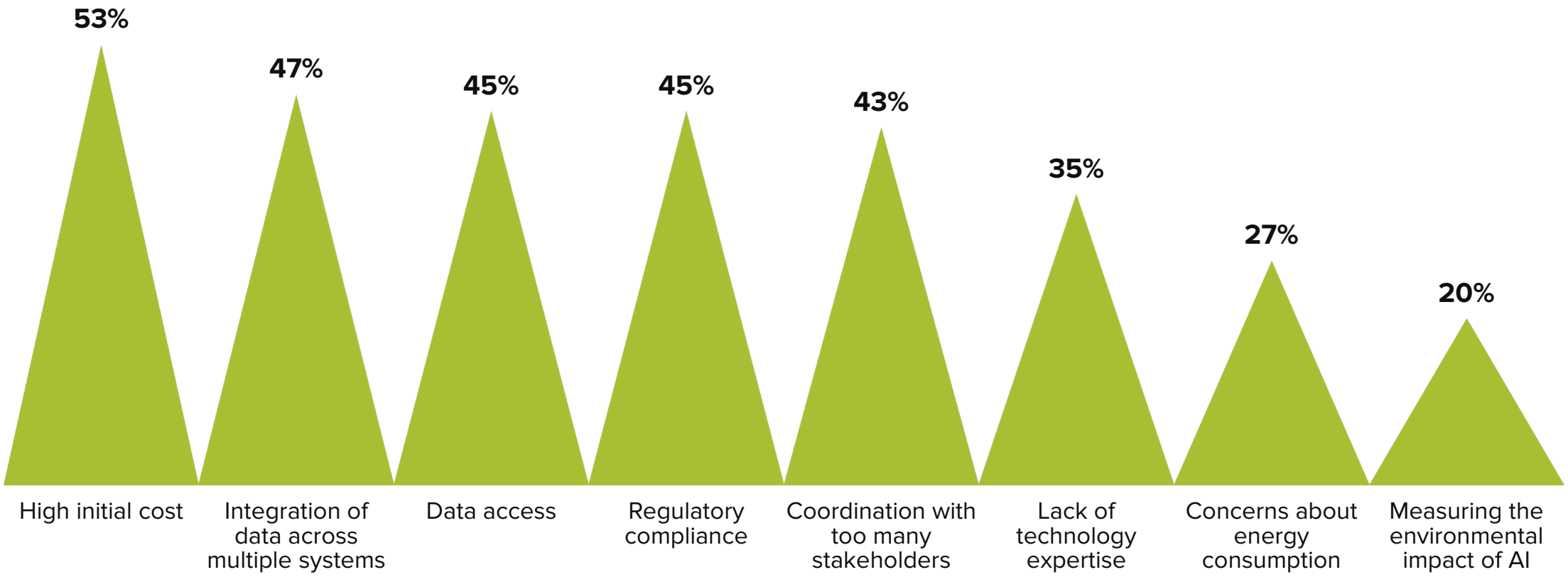


Impact of AI on the cost of Sustainability initiatives

1 (Significant negative impact) 2 (Some negative impact) 3 (Neither positive nor negative) 4 (Some Positive impact) 5 (Significant Positive impact)

N = 60
Q: Please indicate the expected scale of impact of the following.

Key Challenges in Integrating AI for Sustainability Initiatives



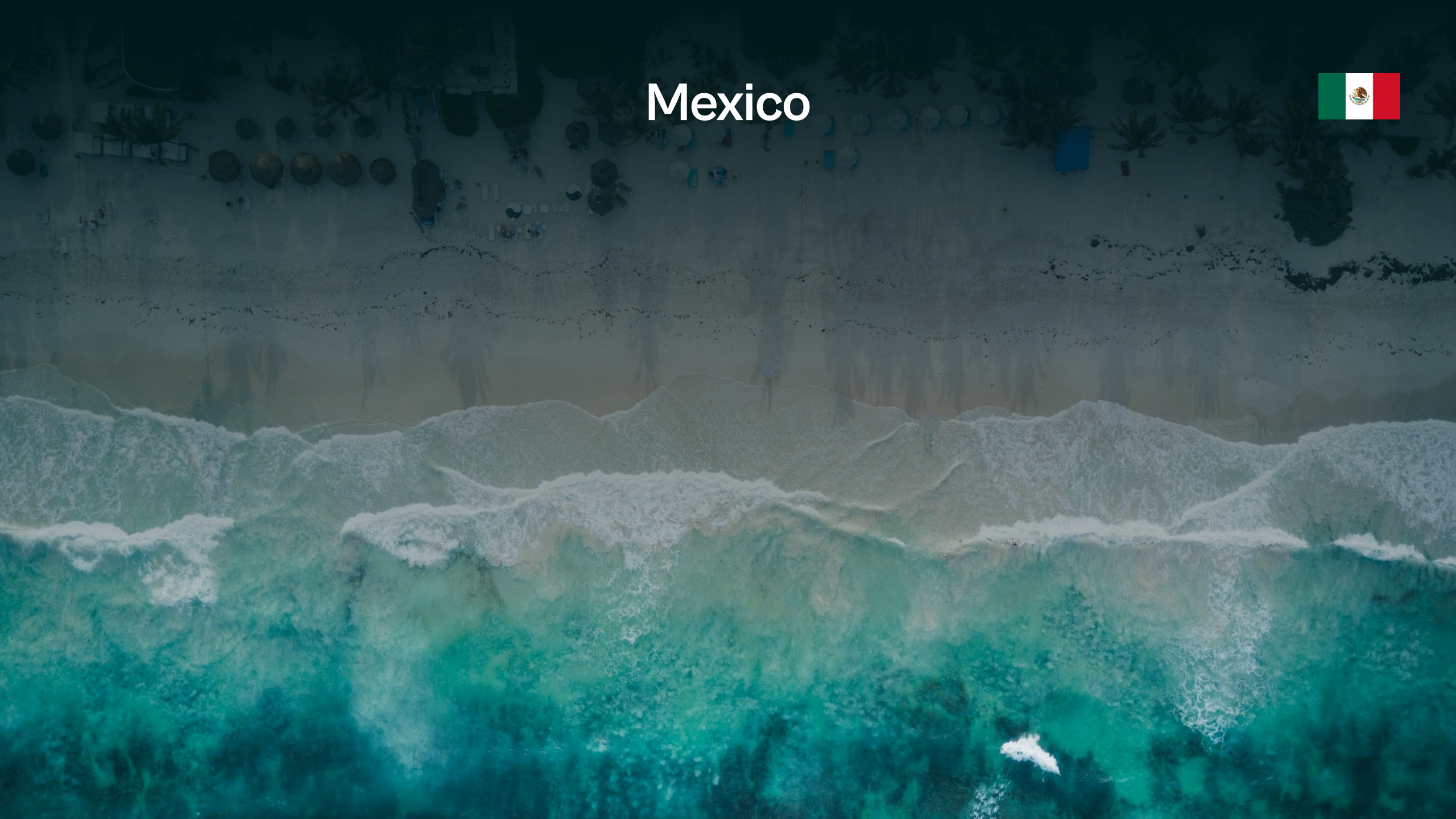
N = 60
Q: What are the key challenges of integrating AI for Sustainability initiatives?

Building Sustainability Technology Capabilities

23%	22%	18%	15%	13%	9%
Innovating on in-house solutions	Buy stand-alone, off-the-shelf solutions	Engage a consulting company to define roadmap	Engage a systems integrator to implement the data project	Use solutions offered by cloud platform provider	Use solutions offered by our enterprise system

N = 60
Q: How is your organization building Sustainability reporting capabilities?

Mexico



Study Demographics - Mexico

Function

Industry

24 Financial Services	**9** Retail	**9** Manufacturing	**3** Energy & Utilities	**3** Media & Telecom
3 Hospitality	**3** Construction & Real Estate	**3** Transport and Logistics	**3** Primary Industries	

Organization Size (No. of Emp.)

- **17** 201 - 499
- **10** 500 - 999
- **20** 1,000 - 4,999
- **13** More than 5,000

N = 60

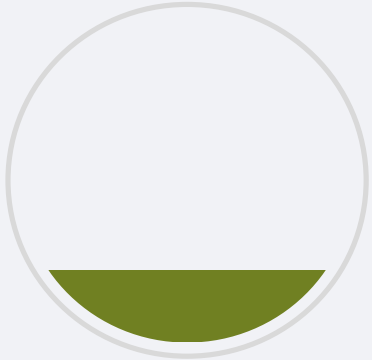
Strategy & Perception

The Importance of Sustainability in the Organization

0%
Not Important
(1-4)

27%
Somewhat Important
(5-6)

52%
Important
(7-8)



21%
Extremely Important
(9-10)

N = 60
Q: Please RATE the strategic importance of Sustainability in your organization on a scale of 1-10. (1='Least Important' and 10='Most Important')

Pace of Sustainability Efforts

CHANGE FROM LAST YEAR

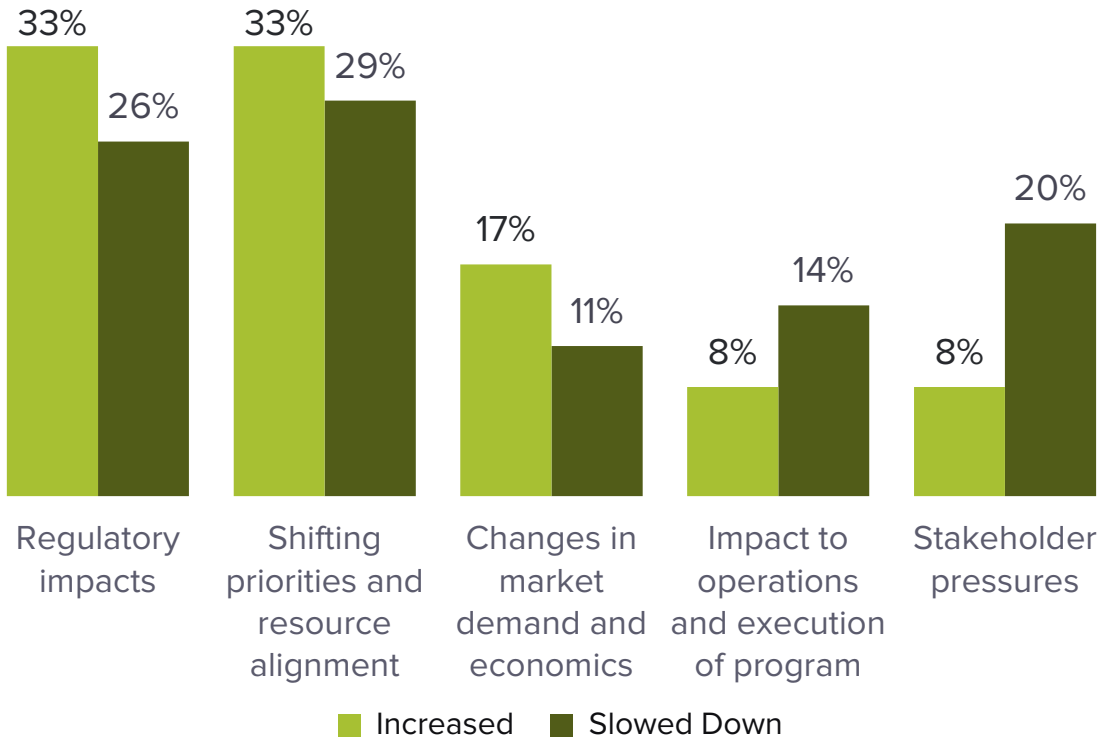
58% Slowed down

20% Increased

22% Remained the same

N = 60
Q: Have your Sustainability goals and execution slowed down or increased over the last year?

REASONS FOR CHANGE



N = 47
Q: What is the main reason for the change in pace of your Sustainability goals and execution?

Maturity of Organizations' Sustainability Strategies

5%

Sustainability is acknowledged but not integrated

Recognized as important but remains peripheral to the core corporate strategy

18%

Sustainability is a strategic aspiration

Included in the transformation strategy, but goals and measures are still not quantified or operationalized

55%

Sustainability is operationally embedded

Goals and initiatives are incorporated into existing operational review and reporting processes, but impact is not fully measured or quantified

15%

Sustainability is data-driven

Strategy and goals are prioritized and built upon real facts and data, providing a solid foundation for decision-making

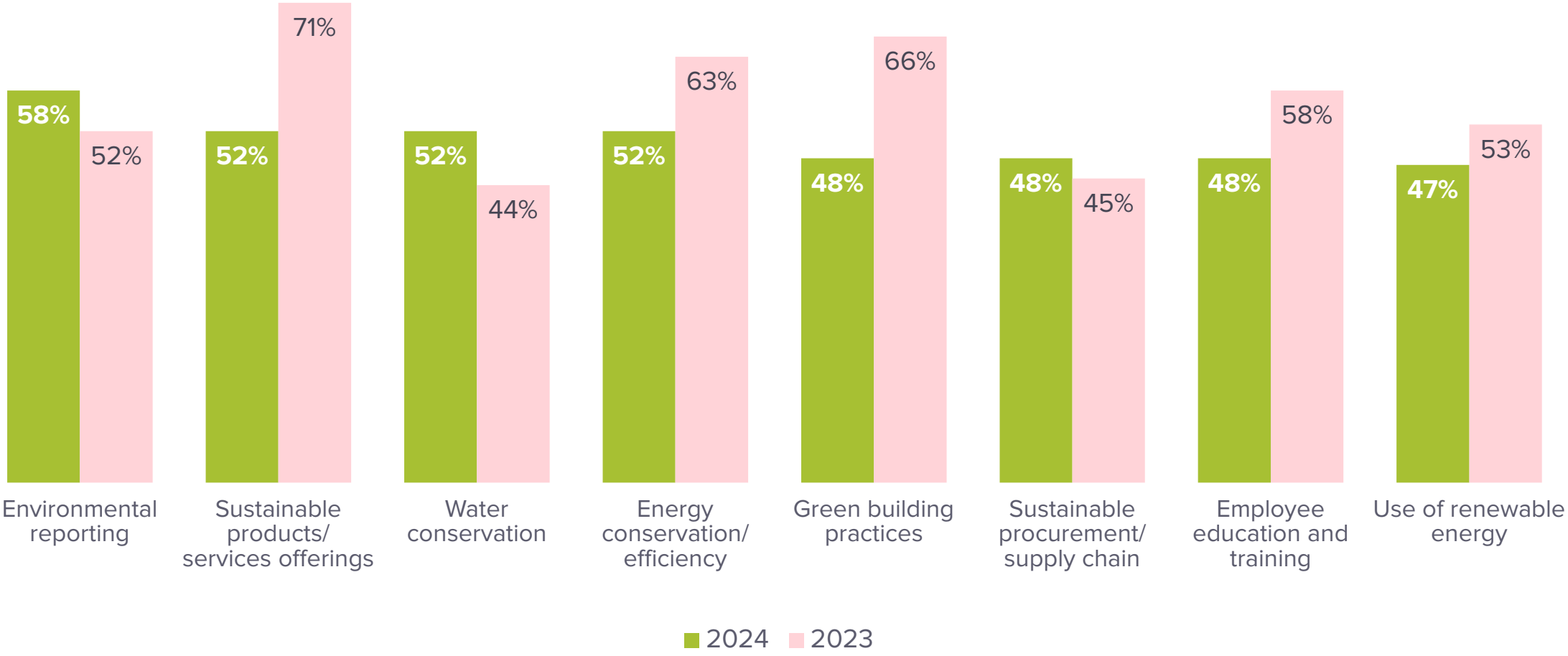
7%

Sustainability is a strategic asse.

Business value of sustainability data is well-understood, and initiatives are fully integrated into strategic planning and decision-making processes

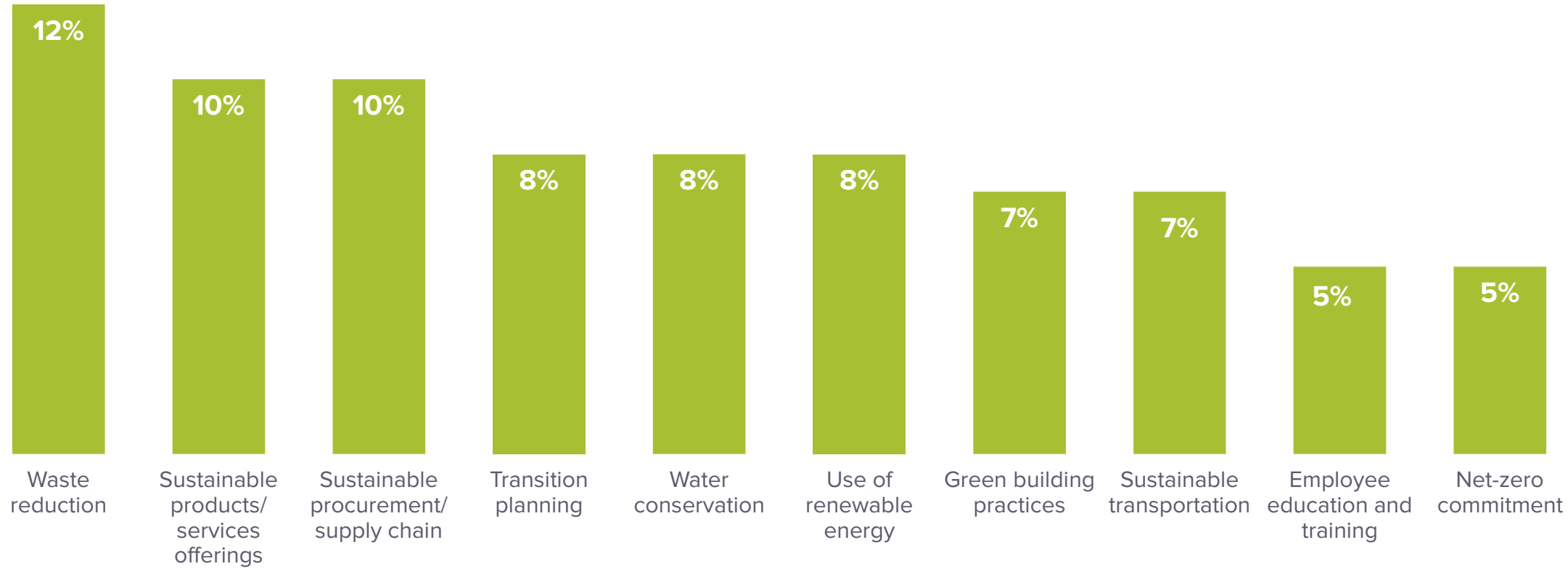
N = 60
Modeled based on responses to multiple questions

Top Environmental Measures Undertaken



N = 60 (2024 N=62)
Q: Which of these Environmental measures has your organization undertaken?

Most Impactful Environmental Measures



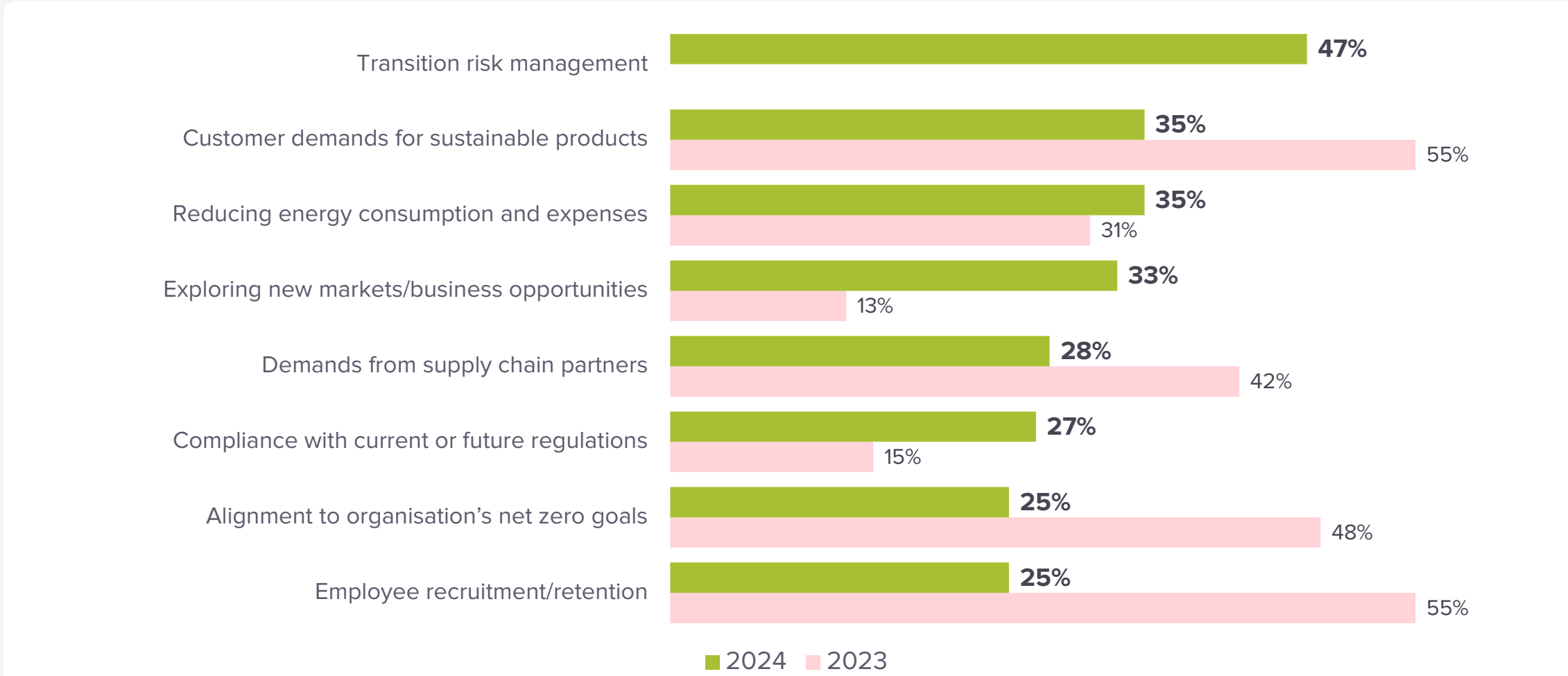
N = 60
Q: Which of the initiatives selected above do you consider most impactful?

Top Stakeholders Advocating for Sustainability

42%	38%	38%	37%	32%
Government/ Regulators	Investors/ shareholders	Bank/ Credit providers	Customers	Supply chain partners
27%	27%	25%	18%	17%
Employees	Communities	Rating agencies	Insurers	Non-profit organizations

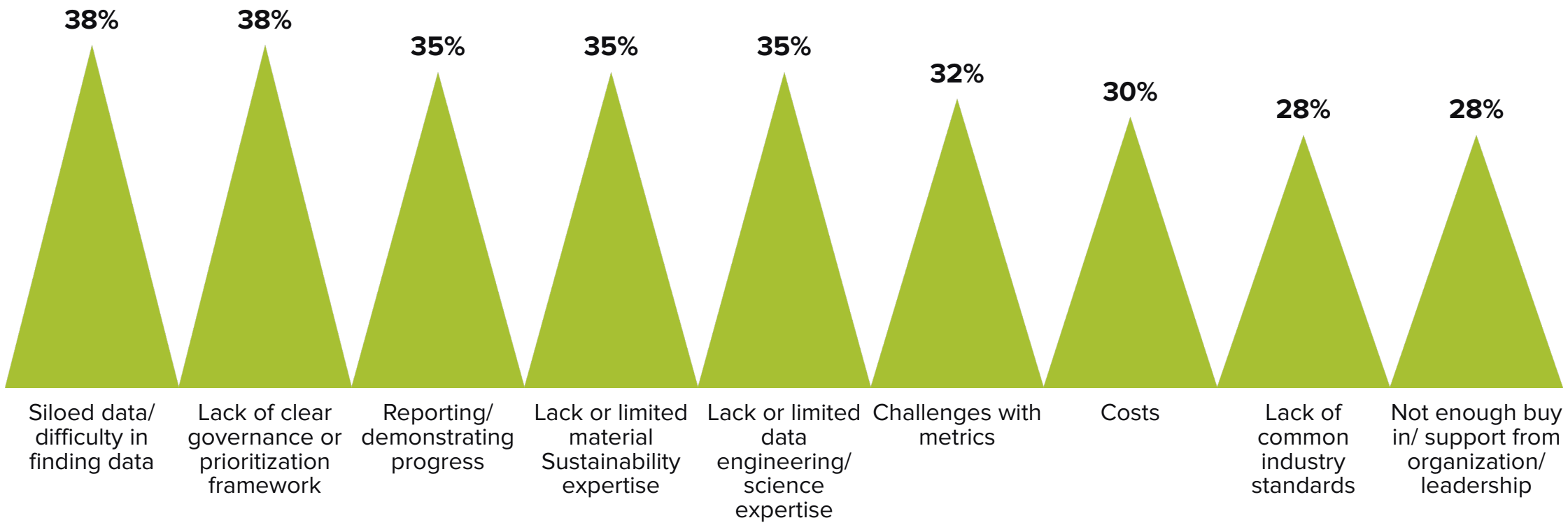
N = 60
Q: Who are the TOP 3 stakeholders who are most vocal in advocating Sustainability policies and practices in your organization?

Main Drivers of Sustainability



N = 60 (2023 N=62)
Q: What are the 3 main drivers for your organization's Sustainability goals?

Main Challenges of Adopting Sustainability



N = 60
Q: What are the 3 main challenges faced in successfully adopting Sustainability measures?

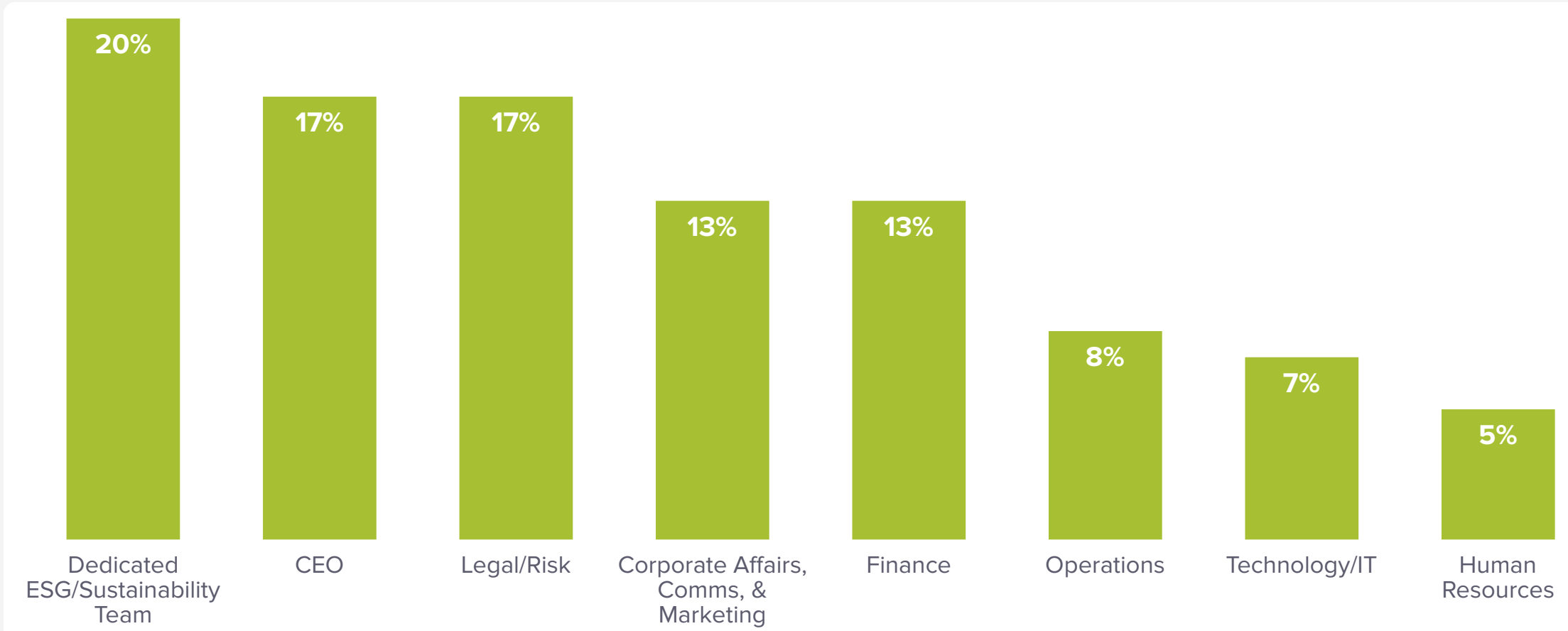
How Governments Can Support Adoption of Sustainability

N = 60
Q: How, according to you, can governments improve the adoption of Sustainability initiatives?

Execution

People, Governance, & Narrative

Sustainability Leadership



N = 60
Q: Which function is primarily responsible for your organization's Sustainability initiative?

Role of Key Stakeholders

Defining The Vision

- 58% Legal/Risk
- 47% ESG/Sustainability Team
- 32% Operations

Delivering Sustainability Outcomes

- 57% ESG/Sustainability Team
- 48% Technology/IT
- 47% Operations

Providing the Data

- 57% Technology/IT
- 52% Operations
- 43% Procurement

Managing the Data

- 50% Technology/IT
- 47% Legal/Risk
- 42% Procurement

Deciding the Metrics

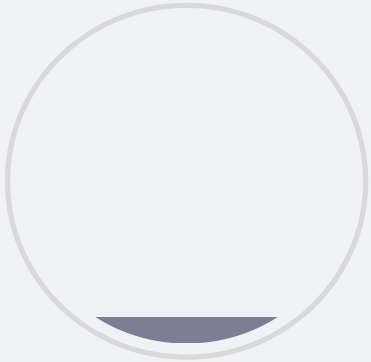
- 52% CEO
- 50% Finance
- 37% Legal/Risk

Reporting

- 55% Corporate Affairs, Comms, & Marketing
- 48% Technology/IT
- 43% CEO

N = 60
Q: Who are the top 3 stakeholders for these activities in your Sustainability program?

Alignment Between Sustainability Team & Finance



8%
Minimal Alignment
(1-4)

22%
Some Alignment
(5-6)

55%
Strong Alignment
(7-8)

15%
Full Alignment
(9-10)

N = 60
Q: Rate the alignment between Finance and the Sustainability Teams on a scale of 1-10

Maturity of Employee Involvement in Sustainability

7%

Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives

5%

Basic Sustainability Awareness

Employees are aware of sustainability goals but may not fully understand their role in achieving them

38%

Emerging Sustainability Engagement

Employees have a basic understanding of sustainability responsibilities and how they relate to their roles

32%

KPI-Driven Sustainability

Sustainability KPIs are set relevant to employee roles, fostering a more focused and targeted approach to sustainability

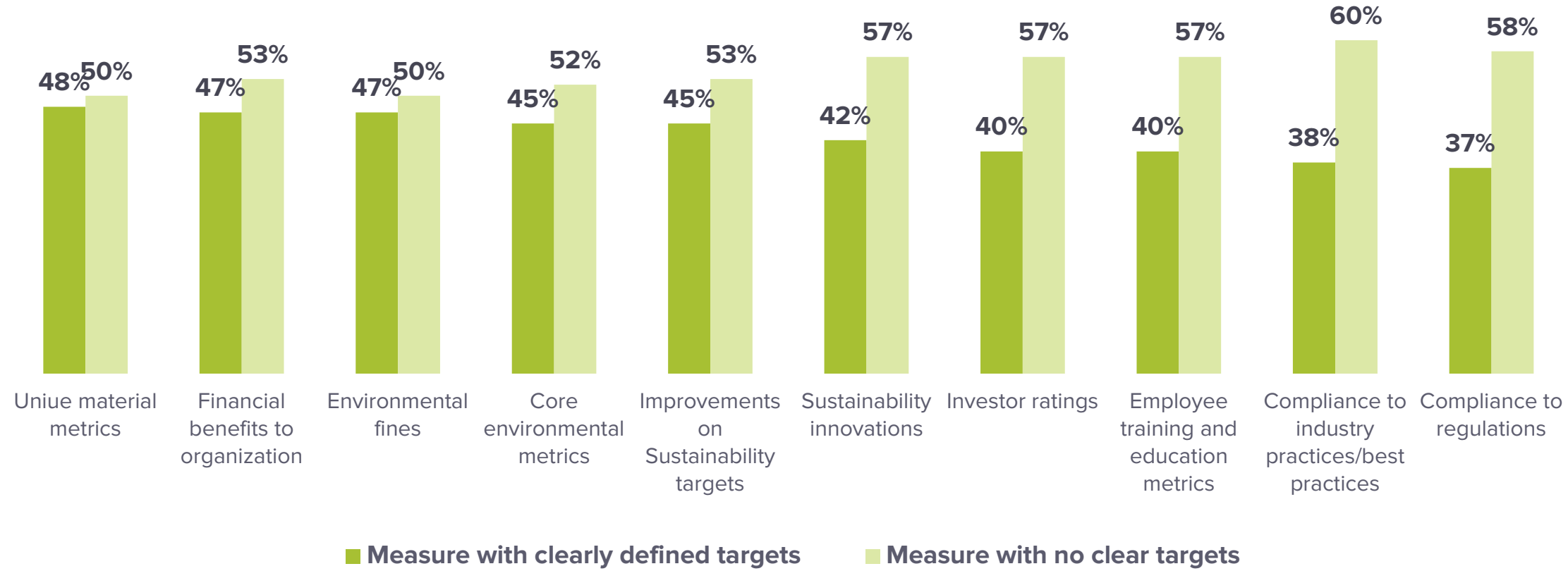
18%

Sustainability as a Strategic Imperative

Sustainability performance is tied to executive and key employee compensation, reinforcing its role as a strategic priority.

N = 60
Modeled based on responses to multiple questions

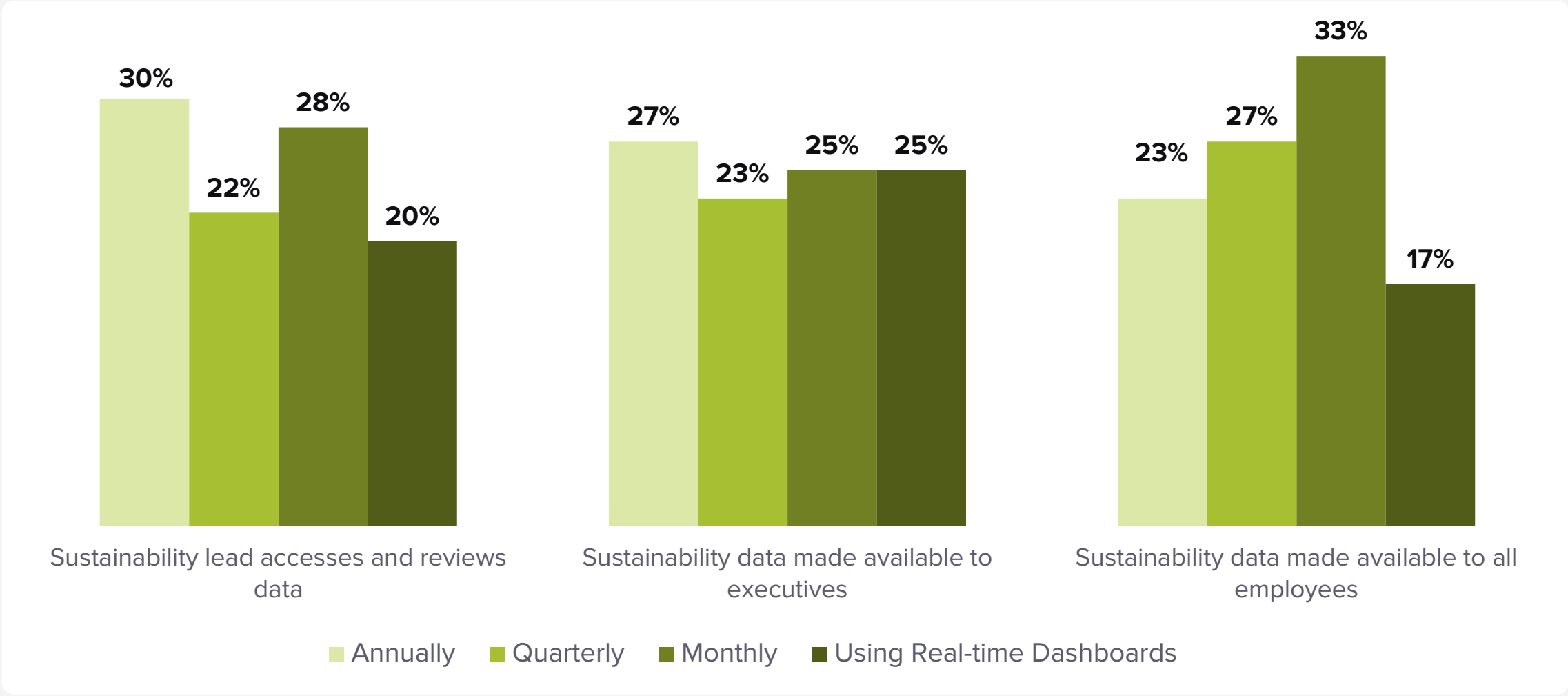
Metrics Used to Measure Sustainability



N = 60

Q: Which are the metrics used in your organization to measure Sustainability efforts? (Depicting the metrics adopted with clearly-defined metrics)

Sustainability Data Access and Sharing



N = 60
Q: How frequently does your organization access/ share data internally on Sustainability progress with key stakeholders?

Technology

Importance of Technology in Achieving Sustainability Goals

0%
Not Important
(1-4)

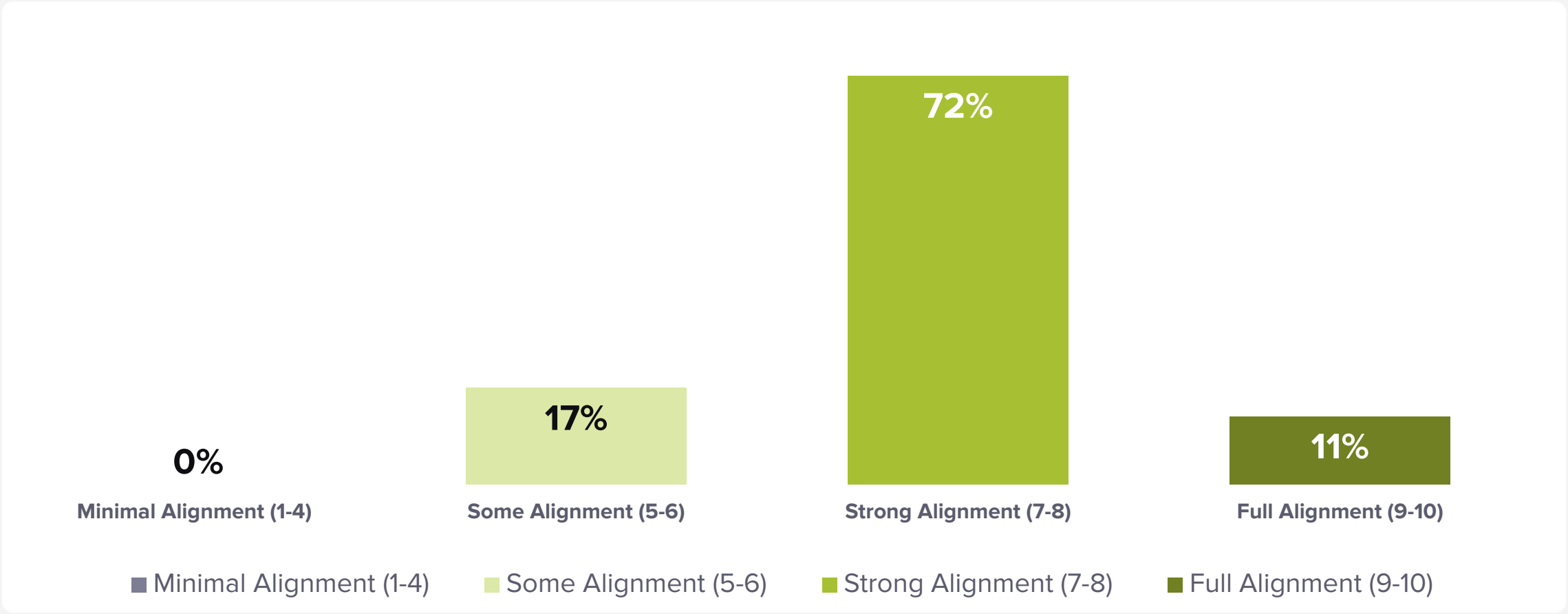
18%
Somewhat Important
(5-6)

52%
Important
(7-8)

30%
Extremely Important
(9-10)

N = 60
Q: On a scale of 1-10, how would you rate the importance of Technology to achieving Sustainability goals? (Where 1='Not important at all' and 10='Absolutely critical')

Alignment Between Sustainability Teams & Technology



N = 60
Q: Rate the alignment between IT/Technology and Sustainability Teams on a scale of 1-10 (Where 1='Not aligned' and 10='Completely aligned')

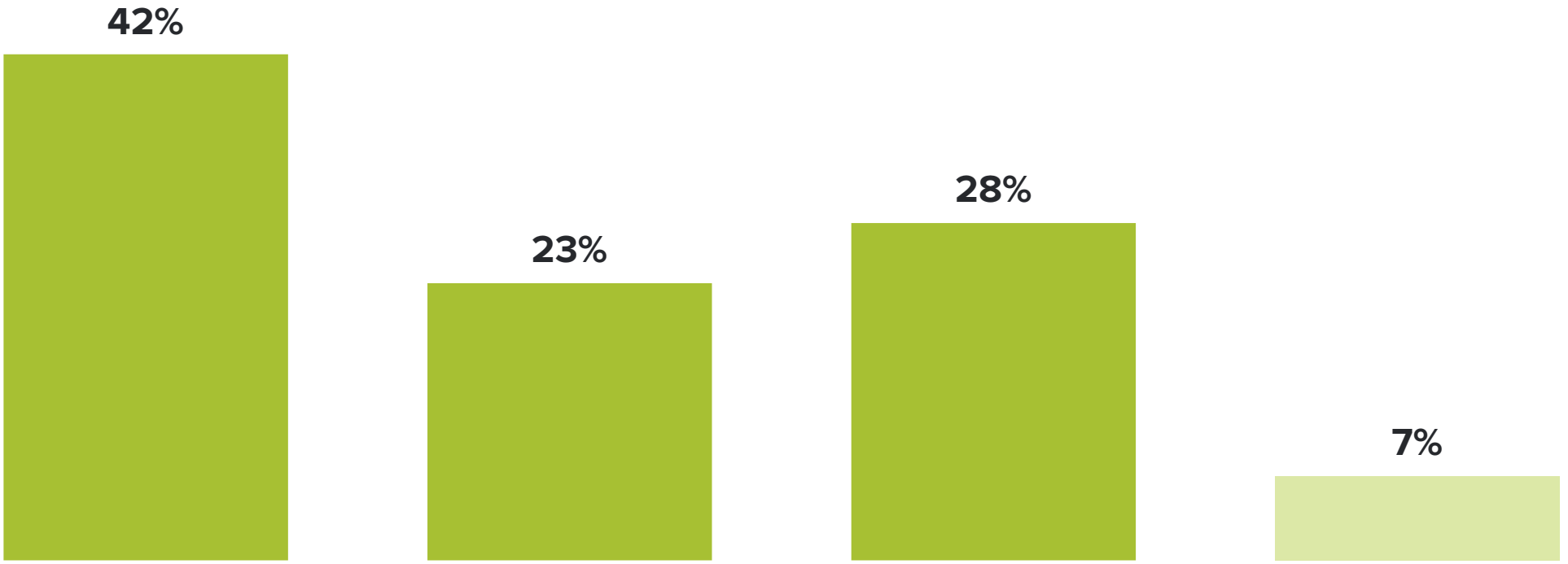
The Extent of Use of IT to Achieve Sustainability Goals

22%
IT is fully leveraged

78%
IT is not fully leveraged

N = 60
Q: Do you feel the organization leverages the full potential of IT/Technology in achieving Sustainability?

IT's Role in Achieving Sustainability Goals

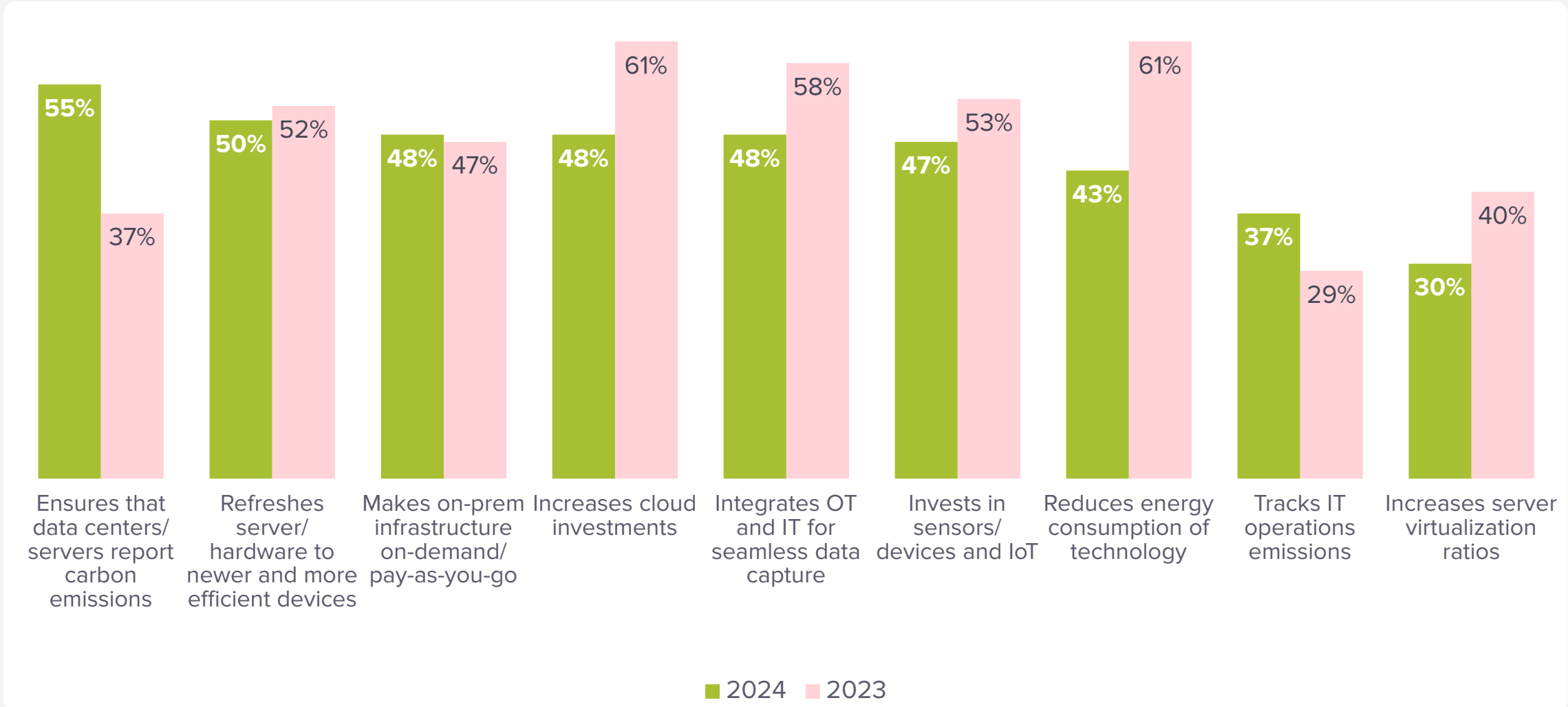


N = 60
Q: What is the extent of the involvement of IT in achieving your organization's Sustainability goals?

Role of Technology in Supporting Sustainability

N = 60 (2023 N=62)
Q: How does the IT/technology team support the organization's Sustainability goals?

Technology Team's Steps to Reduce Carbon Footprint



N = 60 (2023 N=62)
Q: What actions does your IT/technology team take to reduce their carbon footprint?

Data-Driven Sustainability: Leveraging Insights for Impact

22%

We do not use data to track or measure our Sustainability efforts

15%

We collect some data on our Sustainability initiatives, but we don't use it for analysis or decision-making

37%

We use data to track key Sustainability metrics for reporting

8%

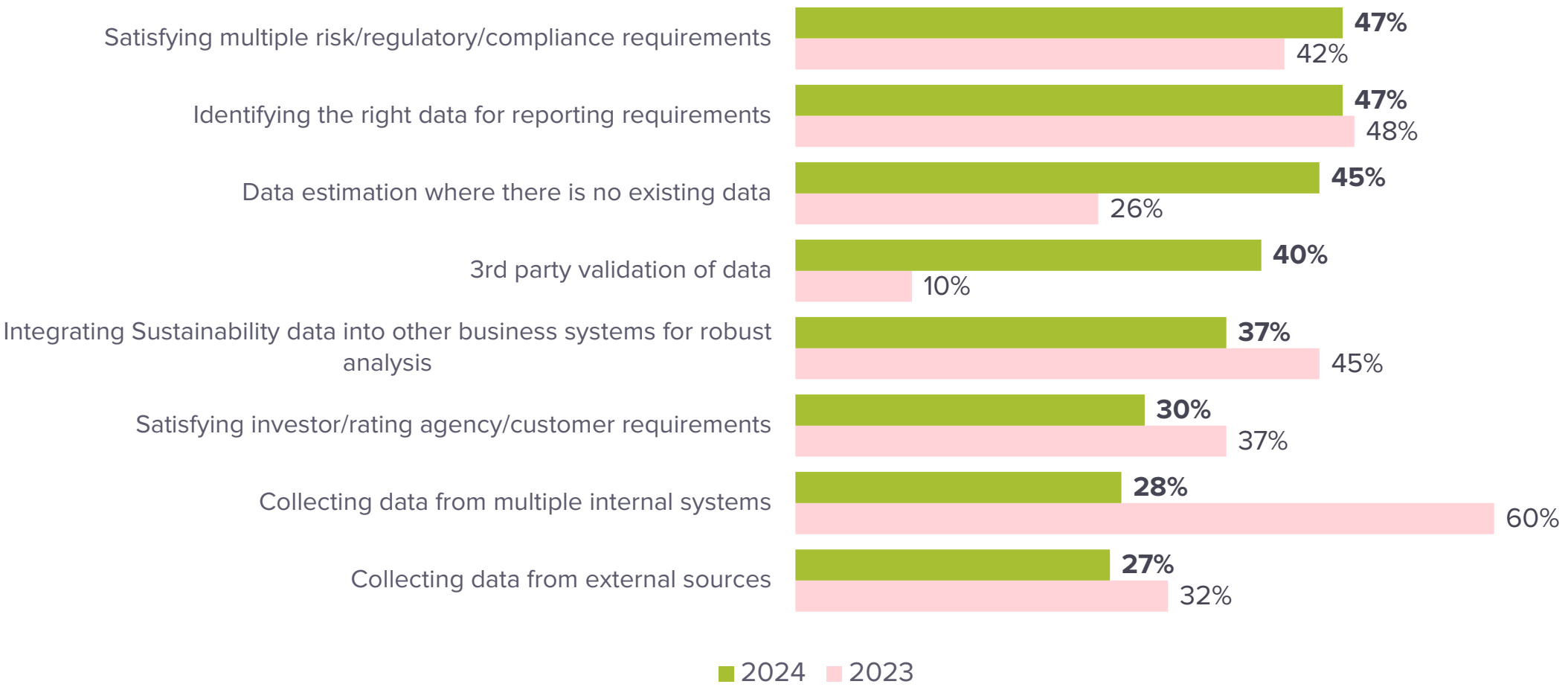
We use data to track, analyze, and optimize our Sustainability performance across business applications

18%

We use data from our Sustainability initiatives to guide the organization's transformation journey

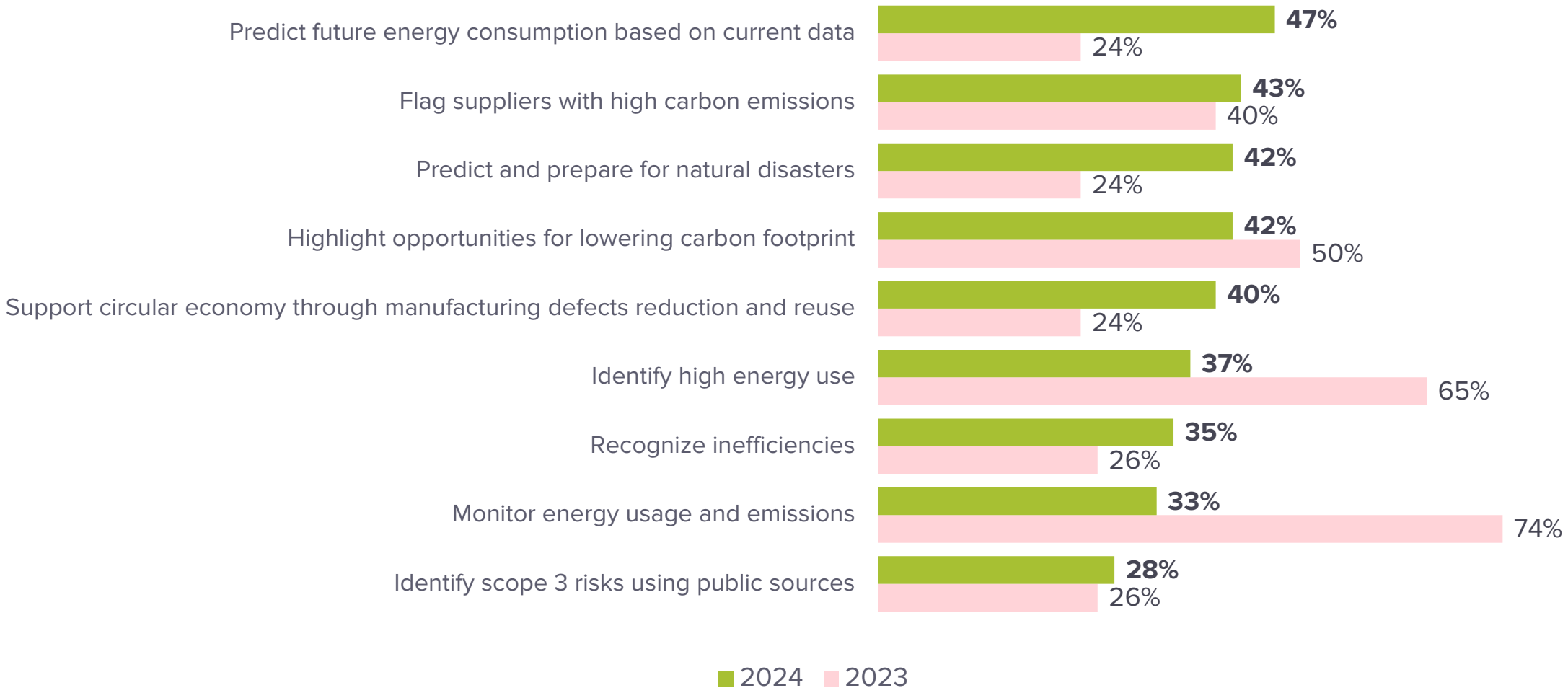
N = 60
Q: To what extent does your organization leverage data to inform and support its Sustainability initiatives?

Challenges of Supporting Sustainability Data Needs



N = 60 (2023 N=62)
Q: What are the top 3 challenges in supporting your organization's Sustainability data needs?

The Use of AI for Environmental Footprint Management



N = 60
Q: How does your organization use data and AI to reduce, manage and report on global environmental footprint?

Environmental Impact of AI

Is Impact Considered?

5%
Yes

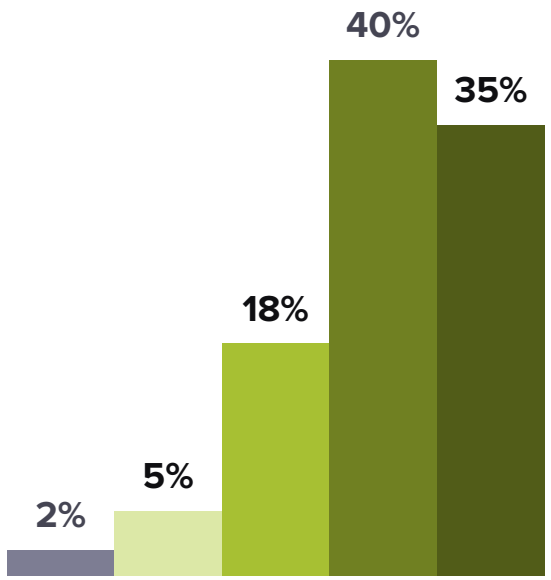
70%
No

25%
Unsure

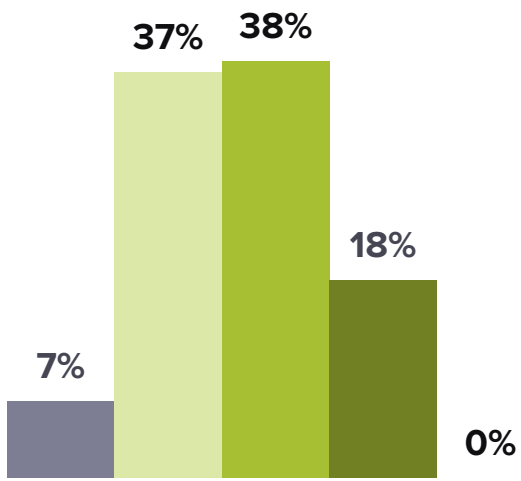
N = 60
Q: Does your organization consider the environmental impact (e.g., energy consumption, carbon footprint) when implementing AI solutions?

Perception on the Impact of AI

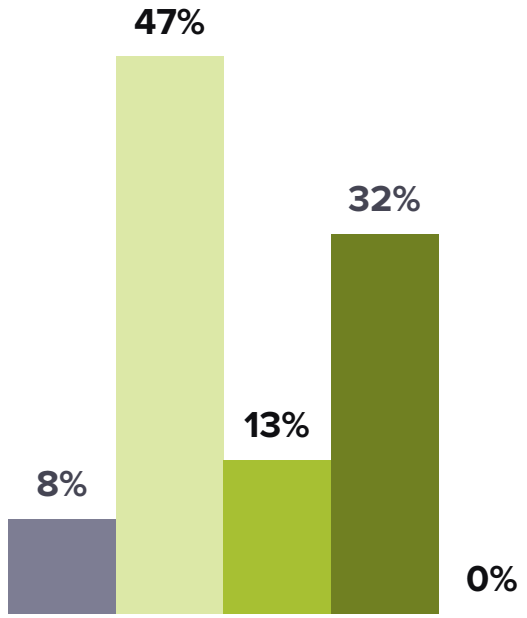
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions



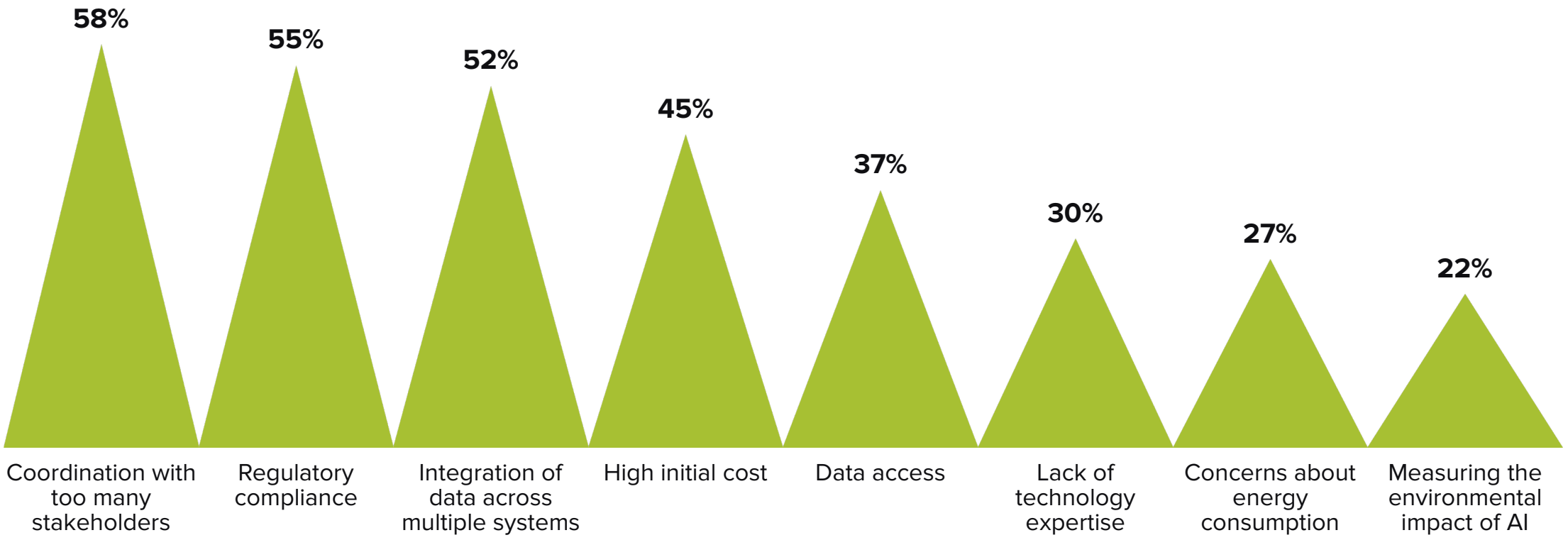
Impact of AI on the cost of Sustainability initiatives



1 (Significant negative impact) 2 (Some negative impact) 3 (Neither positive nor negative) 4 (Some Positive impact) 5 (Significant Positive impact)

N = 60
Q: Please indicate the expected scale of impact of the following.

Key Challenges in Integrating AI for Sustainability Initiatives



N = 60
Q: What are the key challenges of integrating AI for Sustainability initiatives?

Building Sustainability Technology Capabilities

27%	22%	15%	13%	13%	10%
Buy stand-alone, off-the-shelf solutions	Engage a systems integrator	Use solutions offered by cloud platform provider	Engage a consulting company to define roadmap	Innovating on in-house solutions	Use solutions offered by enterprise system

N = 60
Q: How is your organization building Sustainability reporting capabilities?

ecosystm.

Thank You

For further enquiries, please contact:

Sash Mukherjee

VP Industry Insights

sash.mukherjee@ecosystm.io

Ullrich Loeffler

CEO

ullrich@ecosystm.io