



Ecosystem Global Sustainability Barometer Study

FINDINGS FOR EUROPE

2024 Edition

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Microsoft

October 2024



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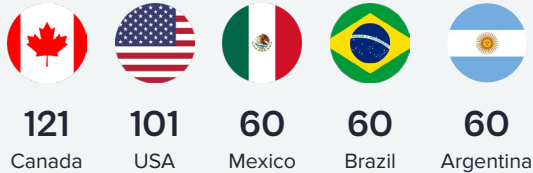
Study Overview



Study Overview - Demographics

Country

AMERICAS



ASIA PACIFIC



EUROPE



Industry

40%
Financial
Services

15%
Manufacturing

15%
Retail

5%
Construction
& Real Estate

5%
Energy &
Utilities

5%
Hospitality

5%
Primary
Industries

5%
Media &
Telecom

5%
Transport
and Logistics

Organization Size (number of employees)



25%
201 - 499



24%
500 - 999



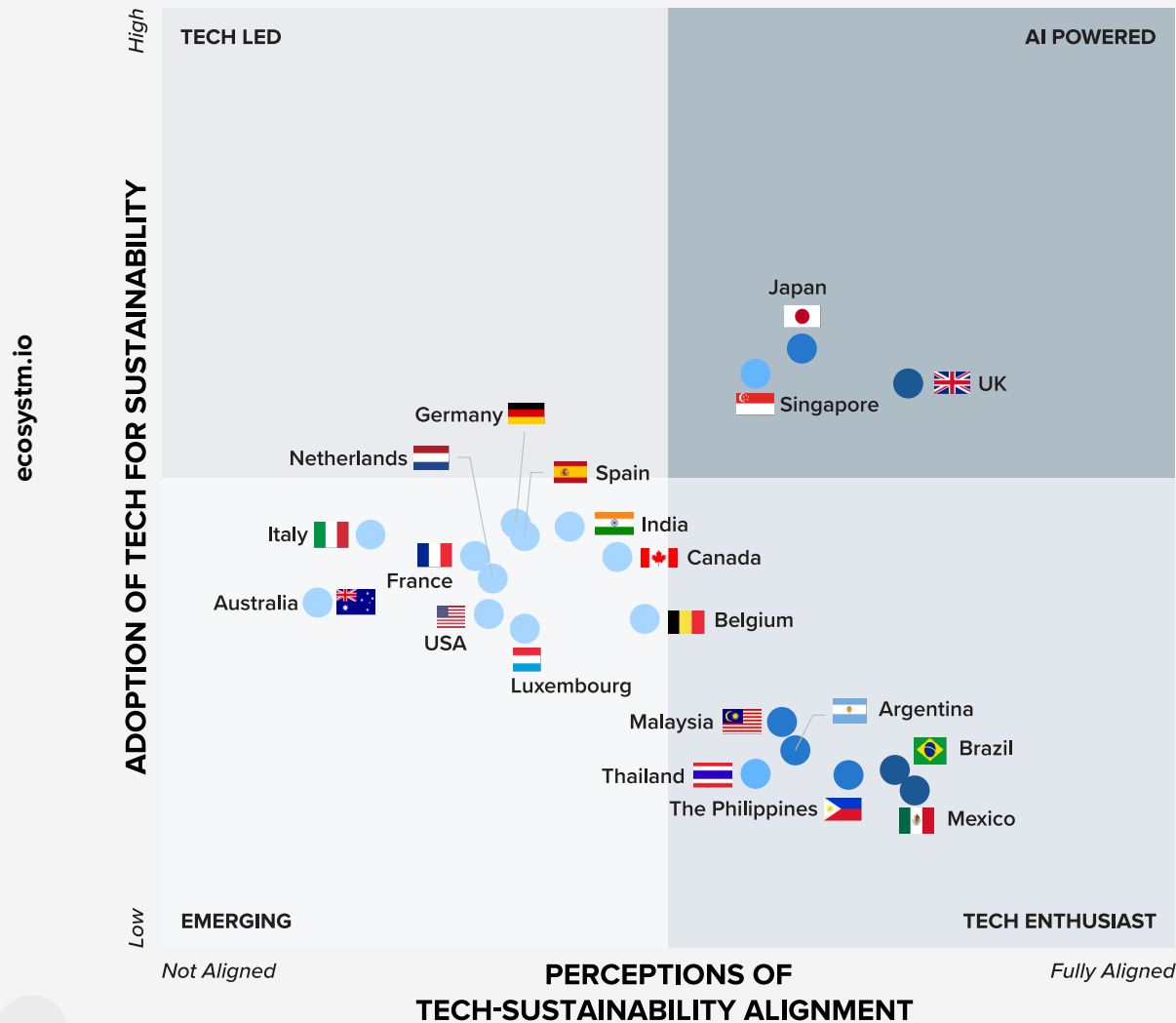
30%
1,000 - 4,999



21%
More than 5,000



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



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

Germany





Study Demographics



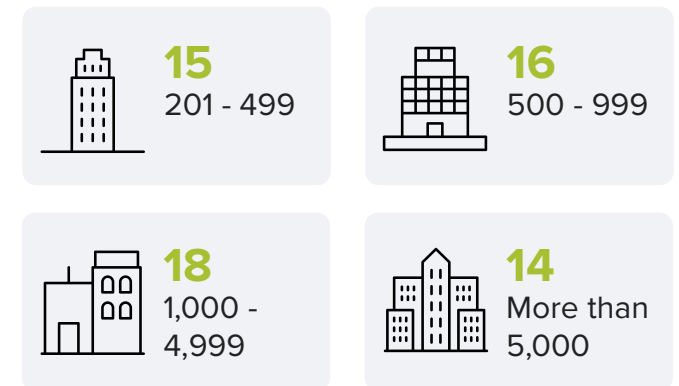
Function



Industry



Organization Size (No. of Emp.)



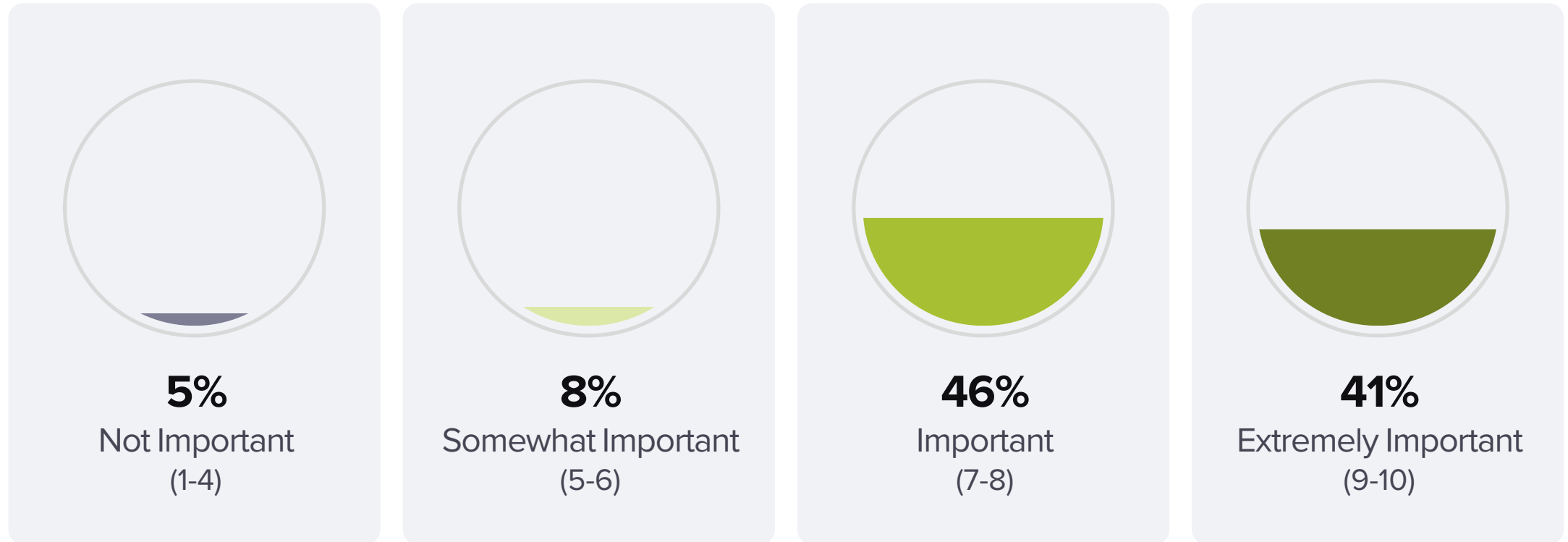
Strategy & Perception



The Importance of Sustainability in the Organization



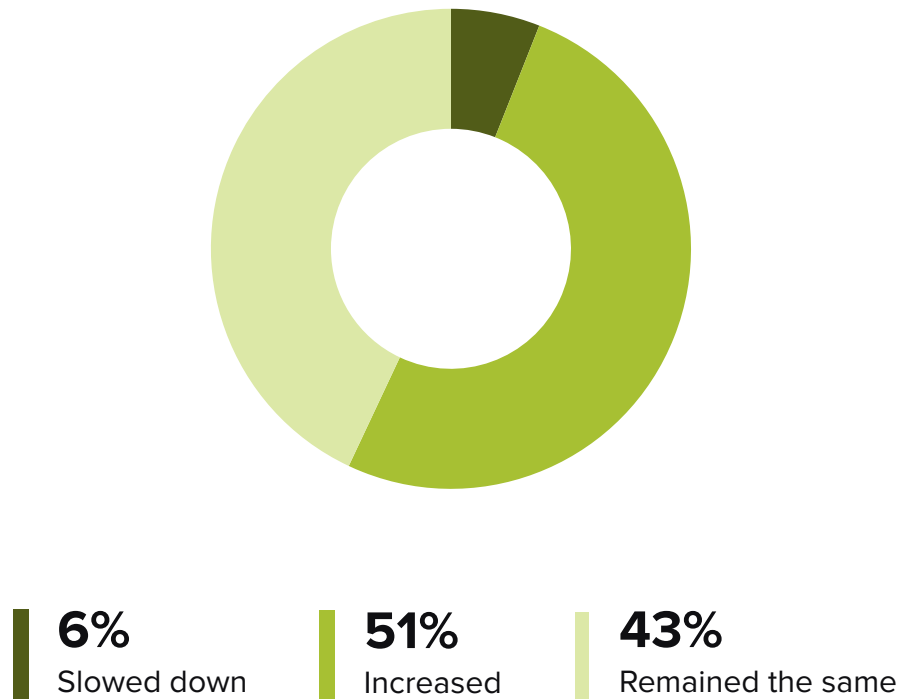
More organizations in Germany are considering sustainability to be of strategic importance than last year (18%).



Pace of Sustainability Efforts



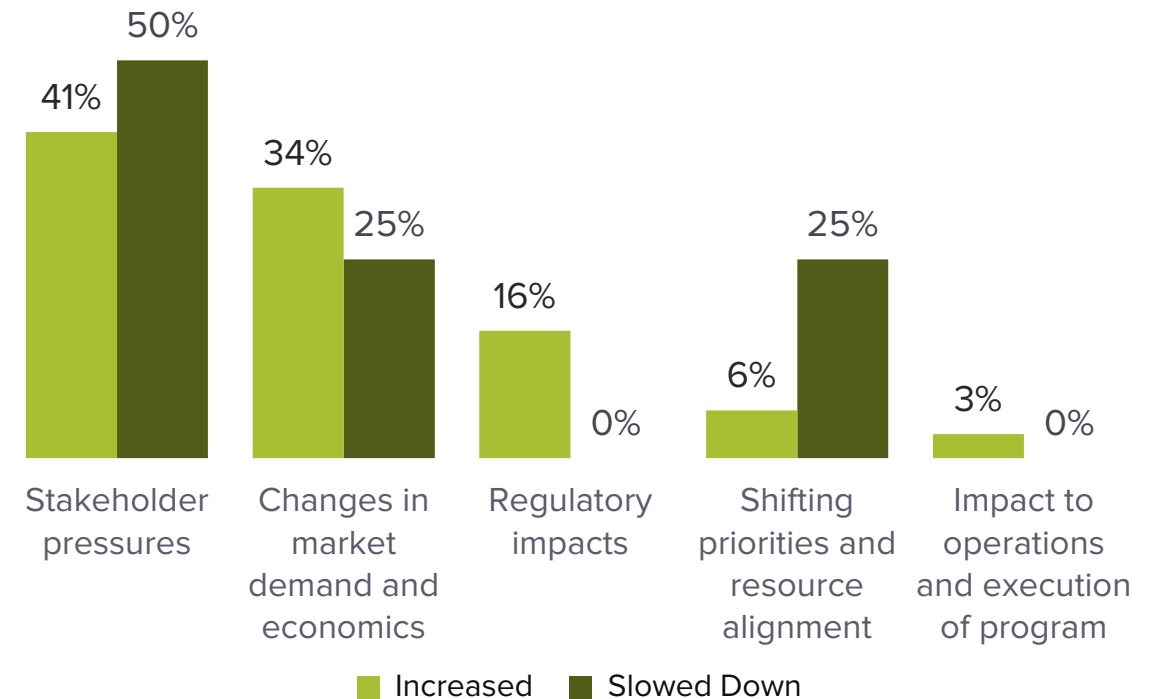
CHANGE FROM LAST YEAR



N = 63

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

REASONS FOR CHANGE



N = 36

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



43%

Sustainability is operationally embedded

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



16%

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 asset.

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

N = 63

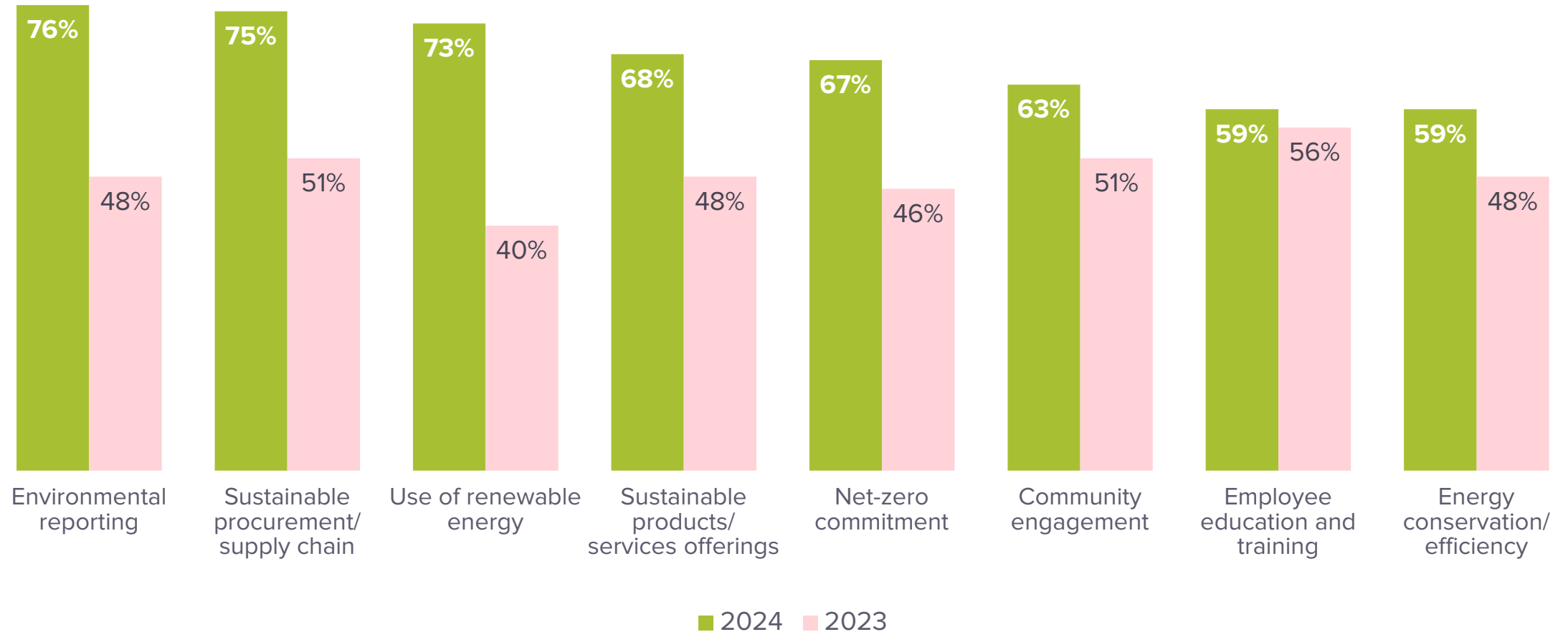
Modeled based on responses to multiple questions



Top Environmental Measures Undertaken



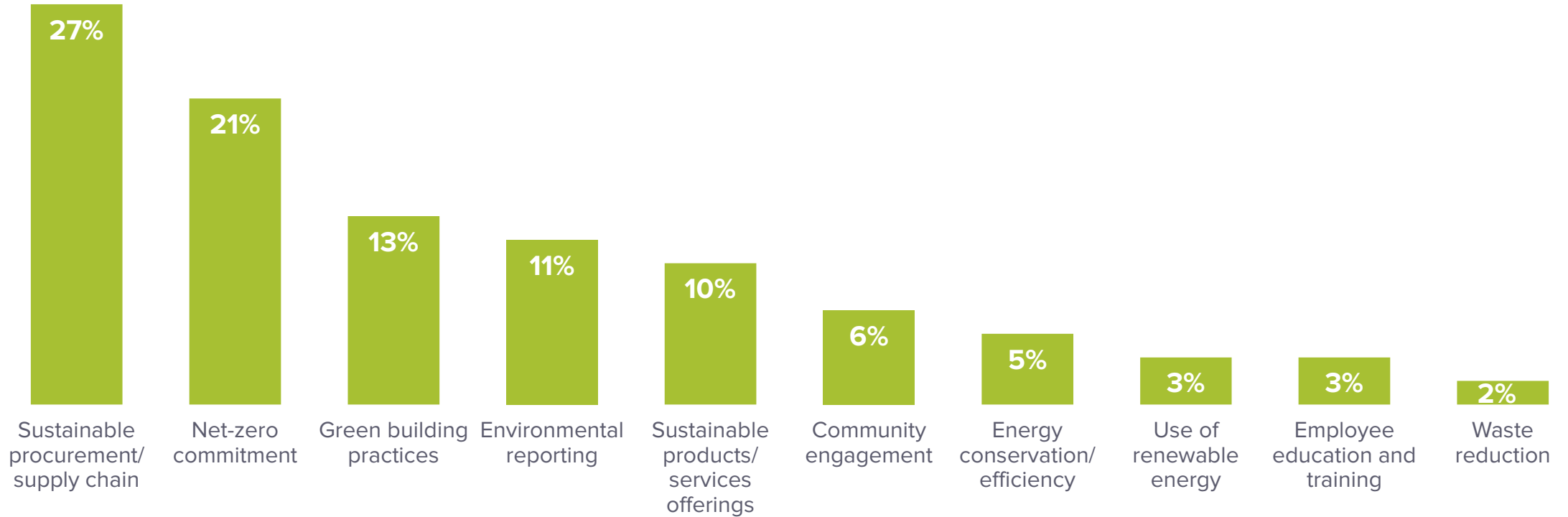
ecosystem.io



N = 63 (2023 N=120)

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

Most Impactful Environmental Measures



Top Stakeholders Advocating for Sustainability



54%



Employees

54%



Customers

51%



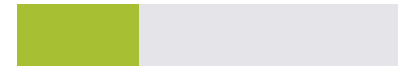
Investors/
Stakeholders

48%



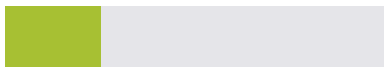
Supply chain
partners

32%



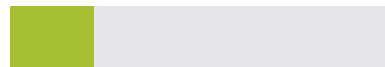
Government/
Regulators

25%



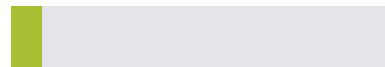
Bank/ Credit
providers

22%



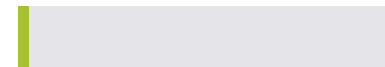
Insurers

8%



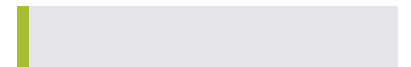
Communities

3%



Rating Agencies

3%

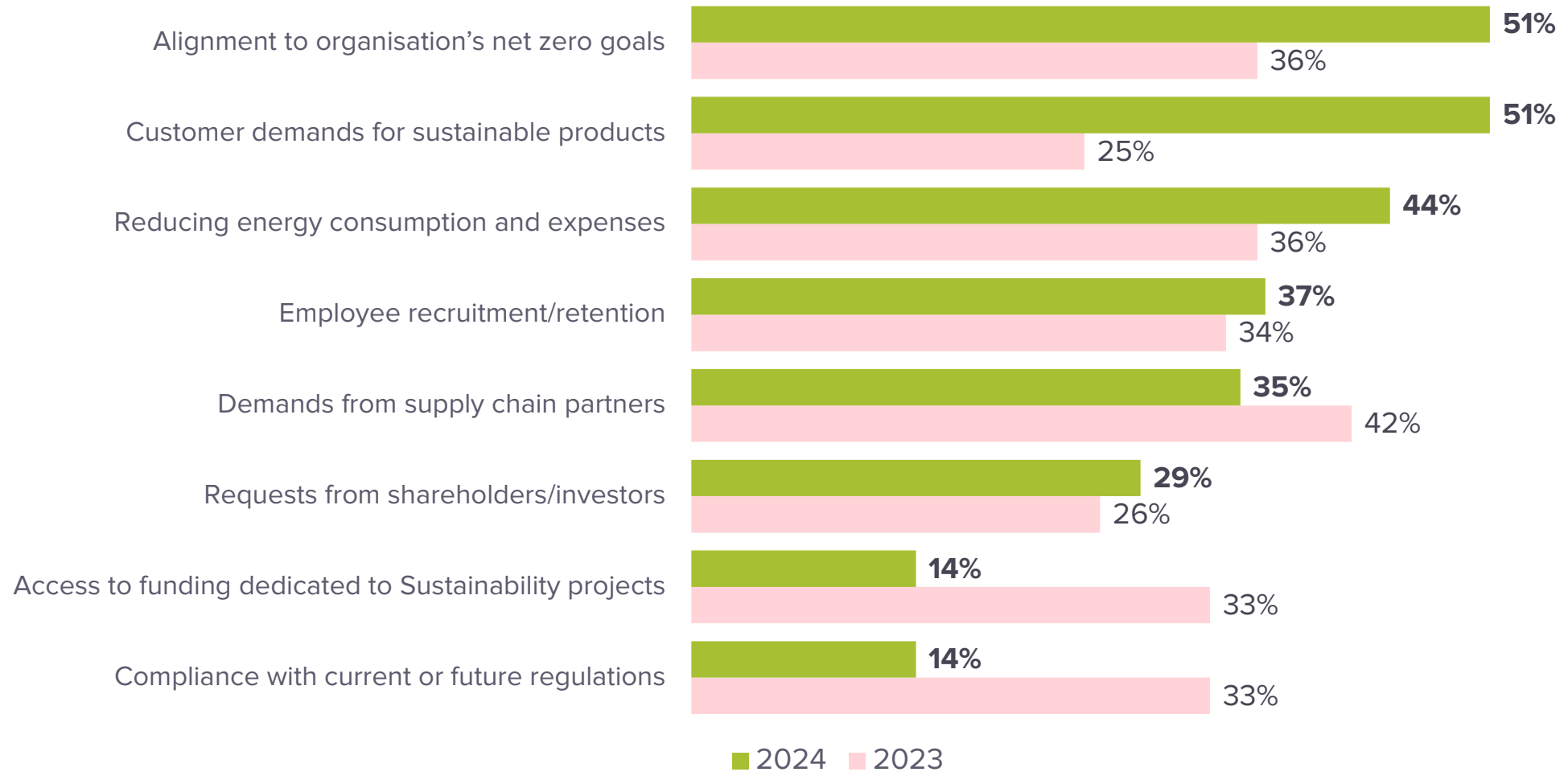


Non-profit
organizations

N = 63

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

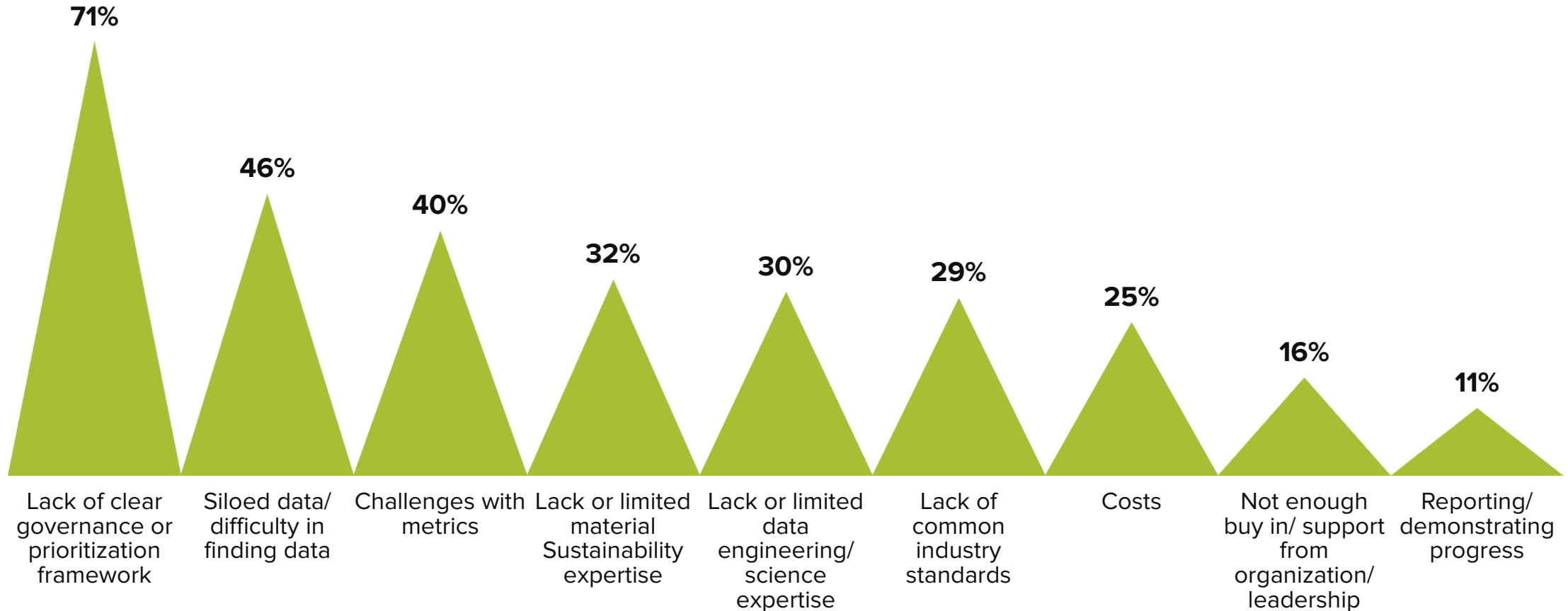
Main Drivers of Sustainability



N = 63 (2023 N=120)

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

Main Challenges of Adopting Sustainability



N = 63

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

How Governments Can Support Adoption of Sustainability



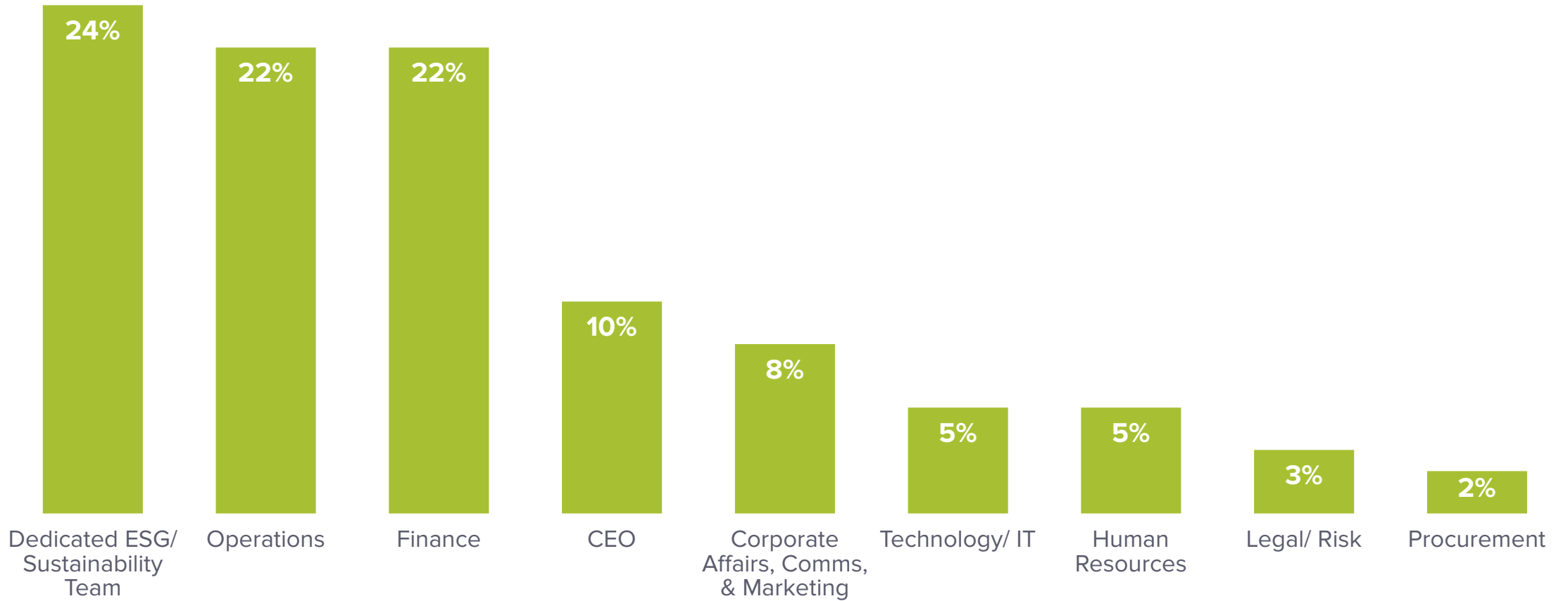
Execution



People, Governance, & Narrative



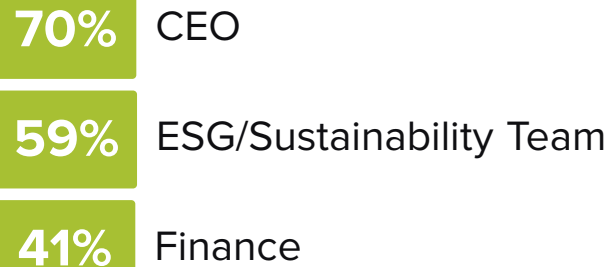
Sustainability Leadership



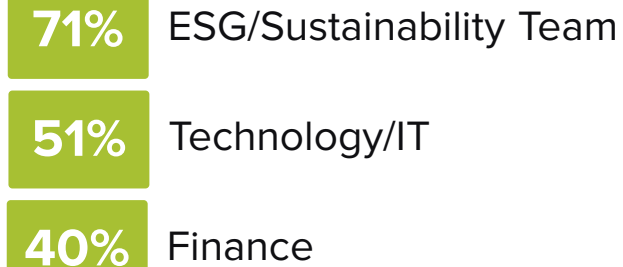
Role of Key Stakeholders



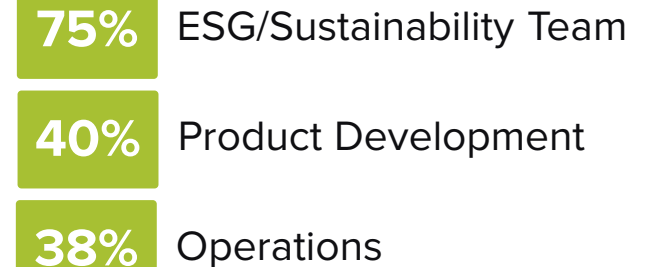
Defining The Vision



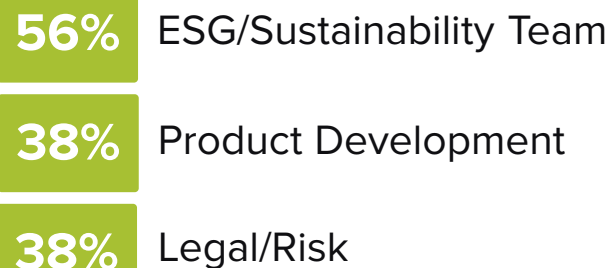
Delivering Sustainability Outcomes



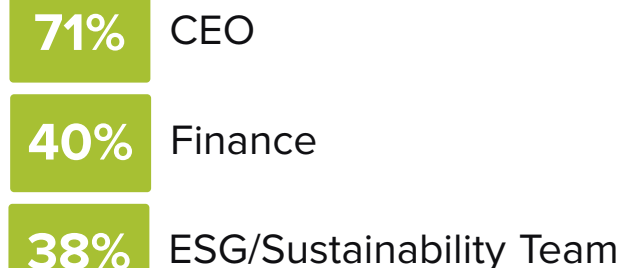
Providing the Data



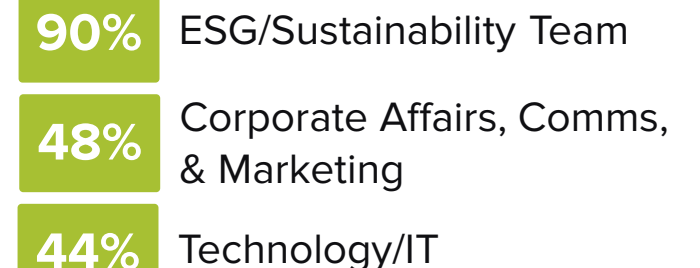
Managing the Data



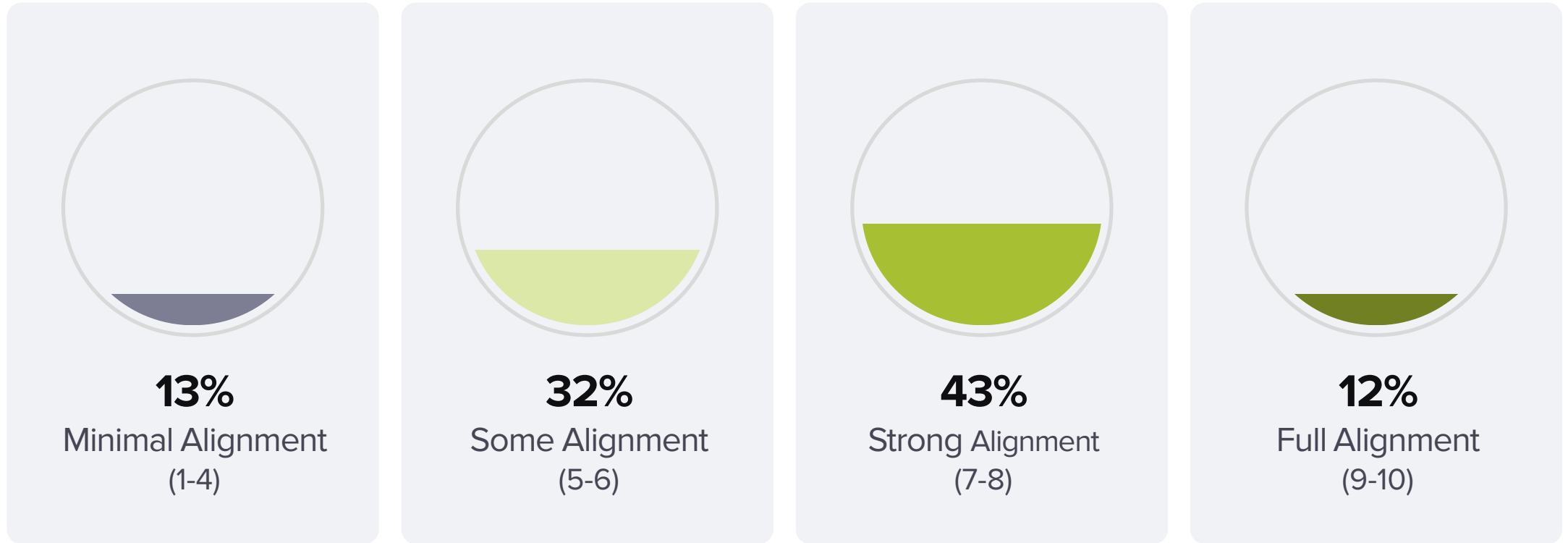
Deciding the Metrics



Reporting



Alignment Between Sustainability Team & Finance



Maturity of Employee Involvement in Sustainability



14%

Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives



19%

Basic Sustainability Awareness

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



46%

Emerging Sustainability Engagement

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



17%

KPI-Driven Sustainability

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

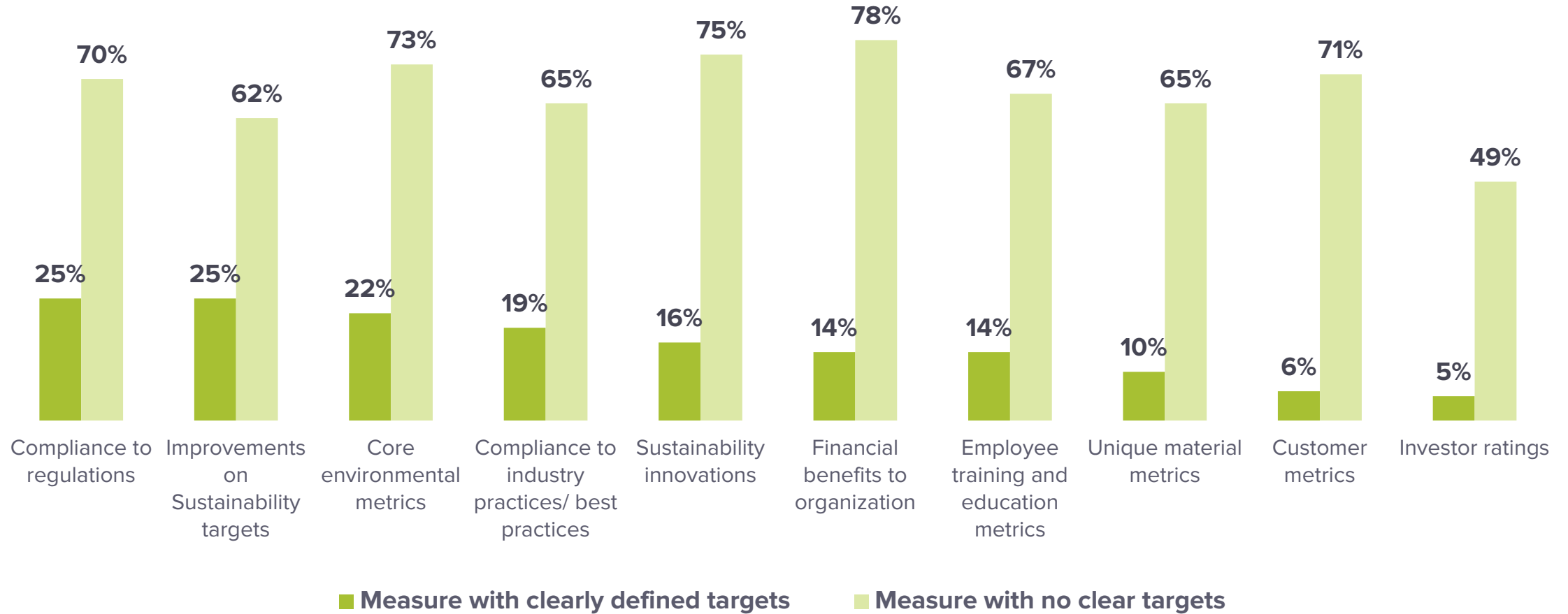


4%

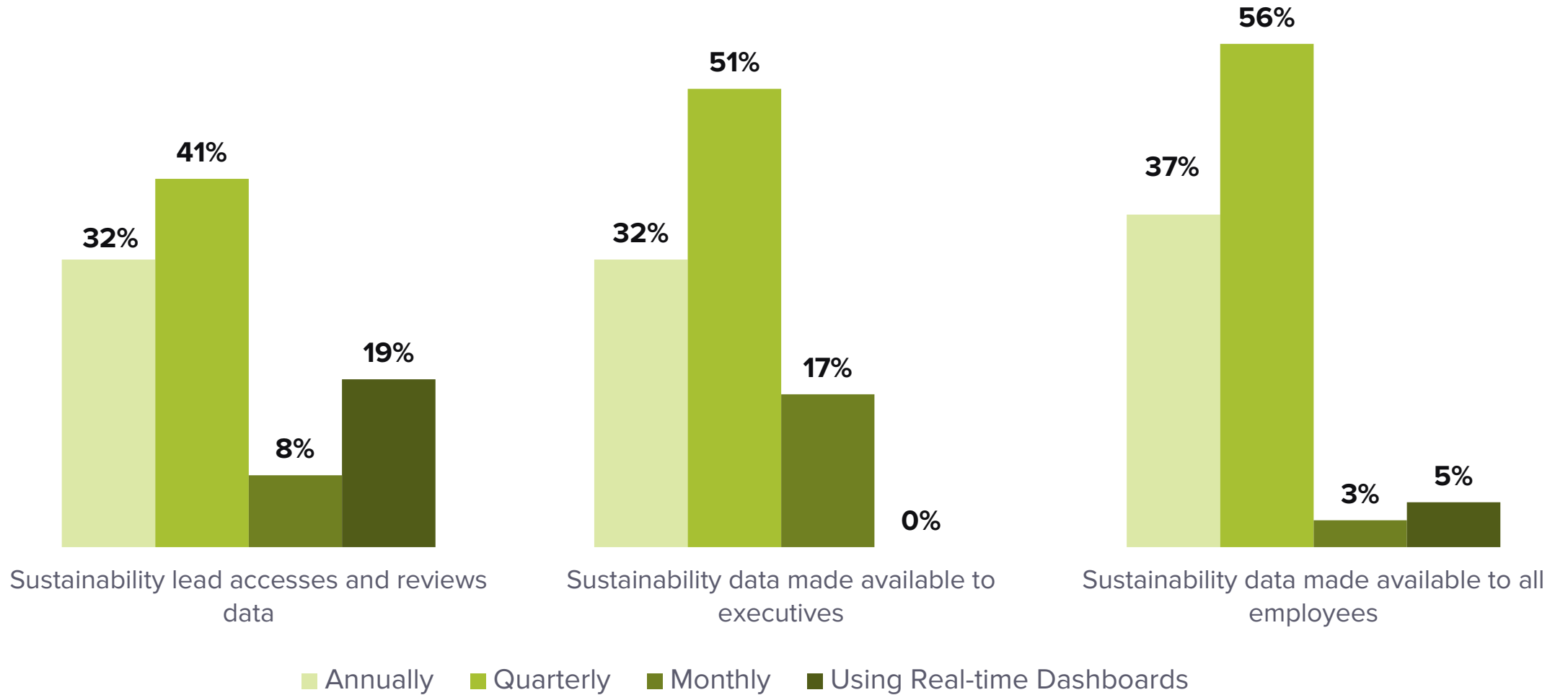
Sustainability as a Strategic Imperative

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

Metrics Used to Measure Sustainability



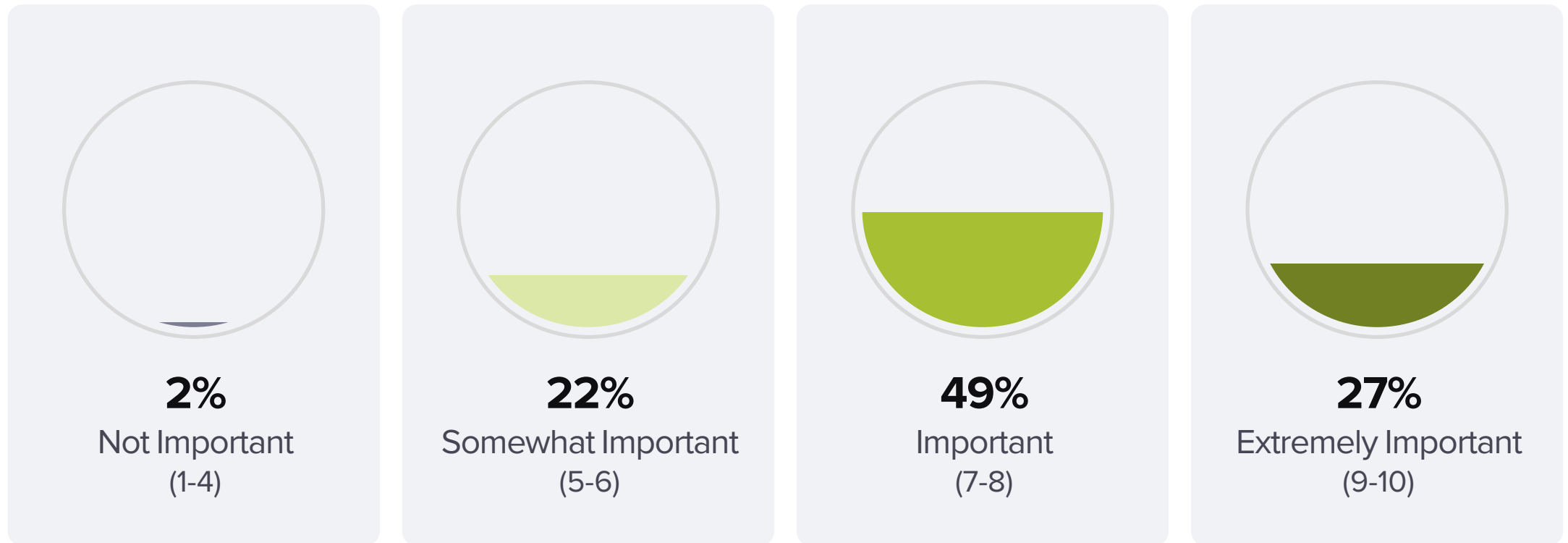
Sustainability Data Access and Sharing



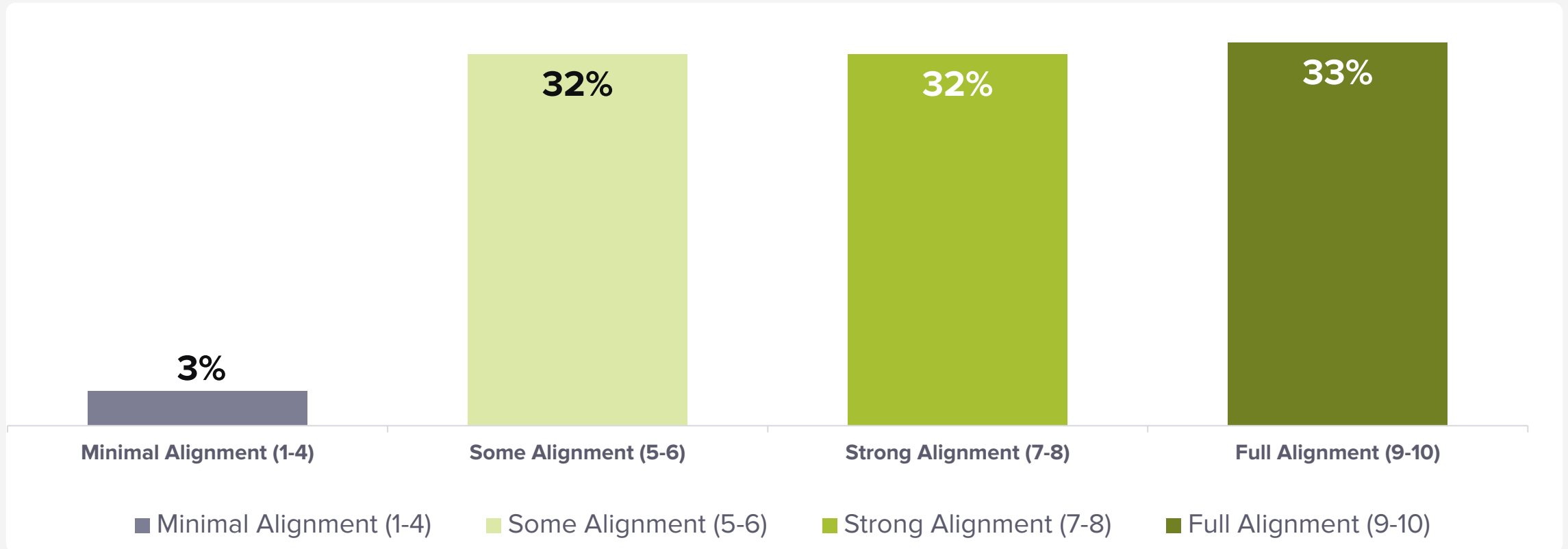
Technology



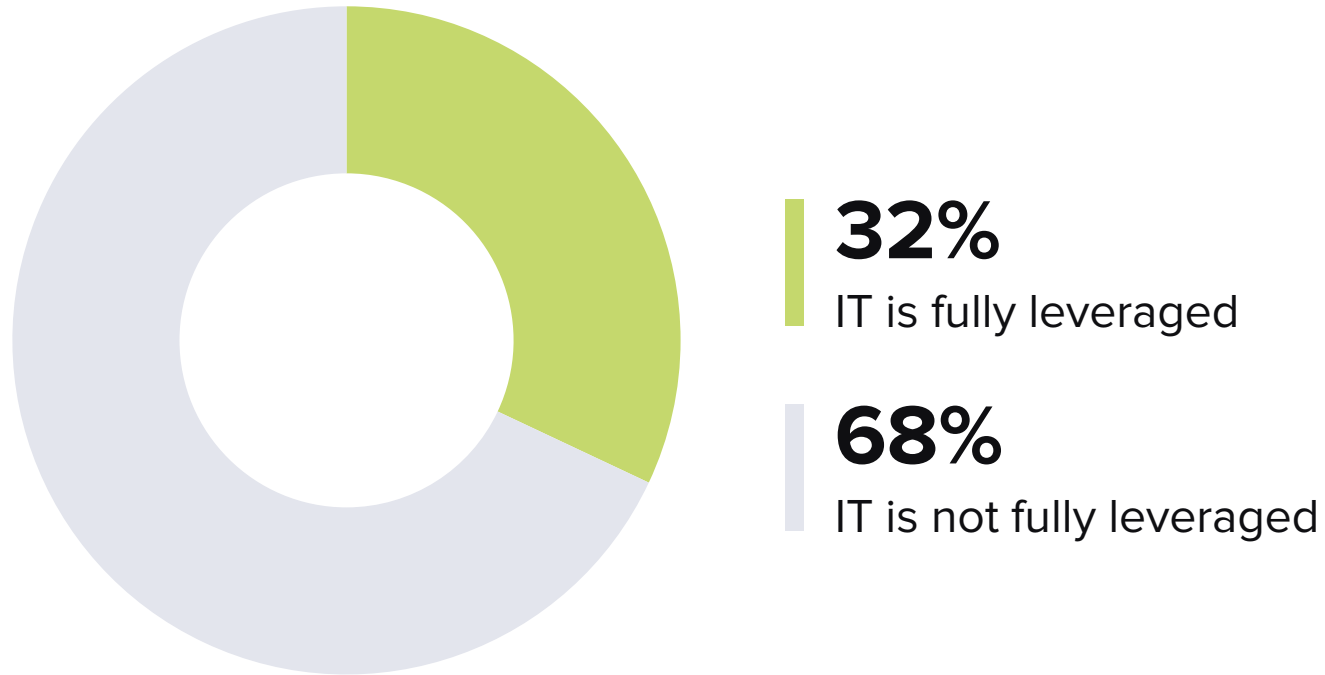
Importance of Technology in Achieving Sustainability Goals



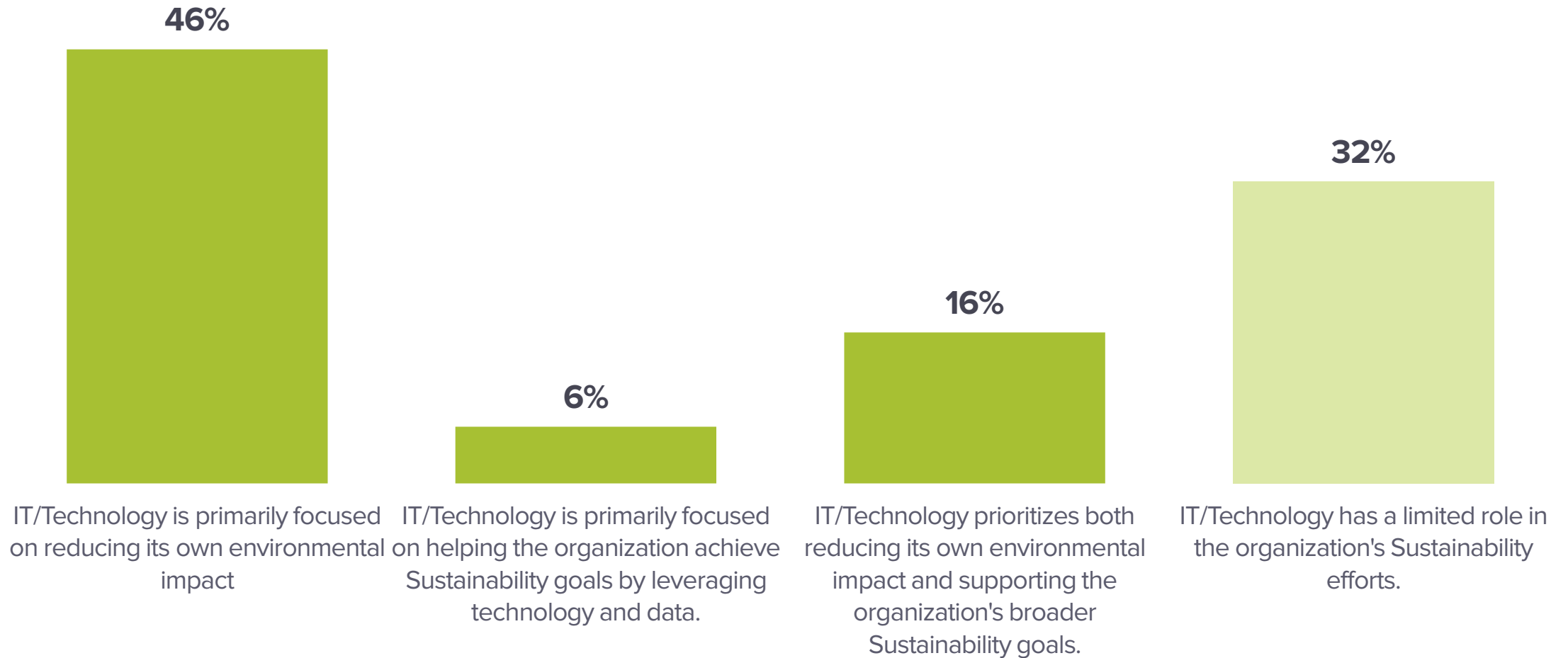
Alignment Between Sustainability Teams & Technology



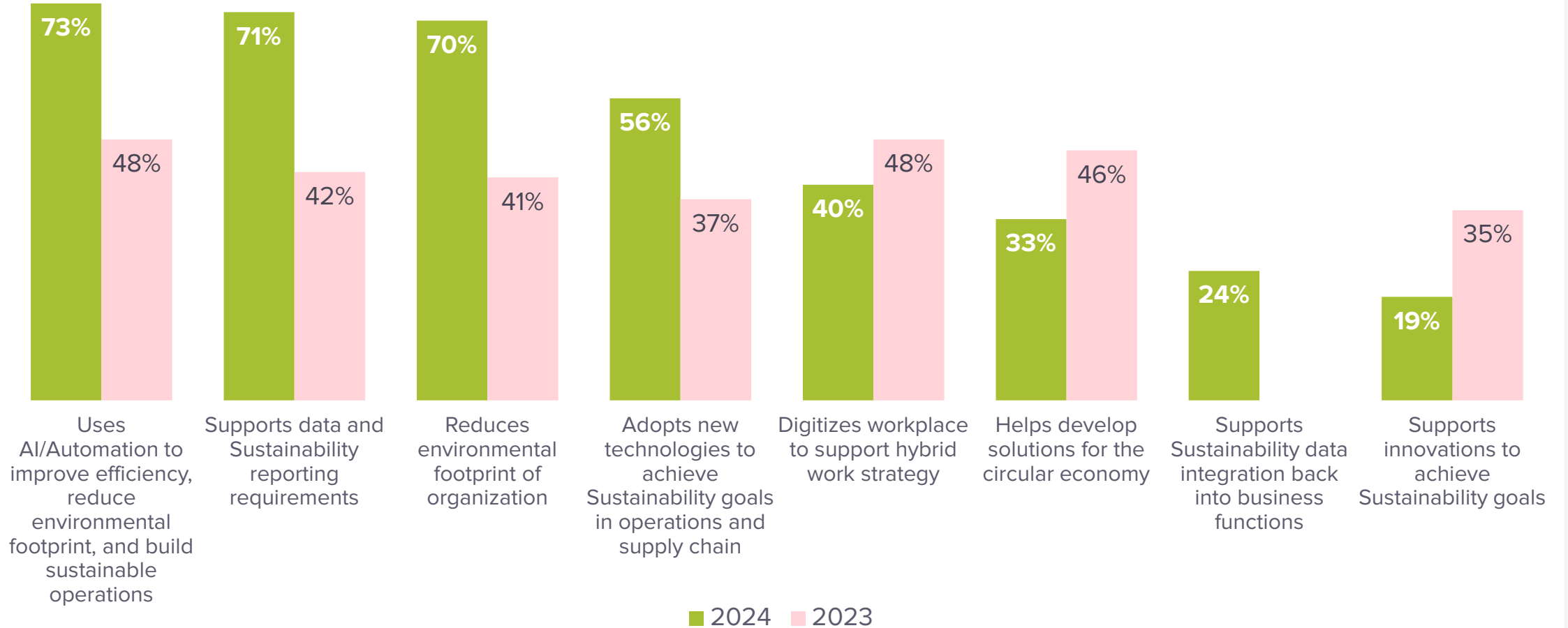
The Extent of Use of IT to Achieve Sustainability Goals



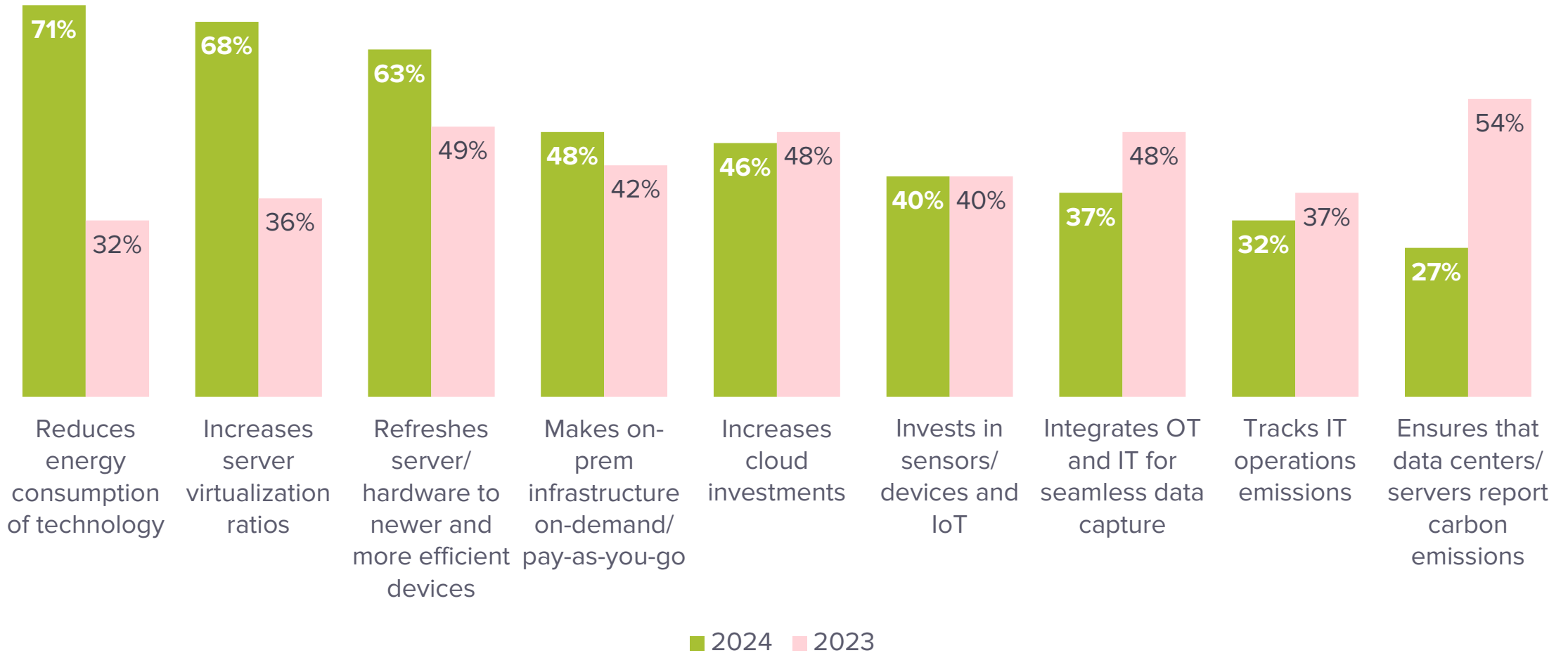
IT's Role in Achieving Sustainability Goals



Role of Technology in Supporting Sustainability



Technology Team's Steps to Reduce Carbon Footprint



Data-Driven Sustainability: Leveraging Insights for Impact



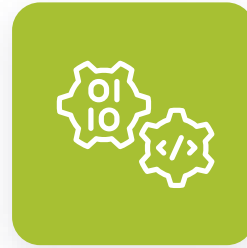
0%

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



22%

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



30%

We use data to track key Sustainability metrics for reporting



27%

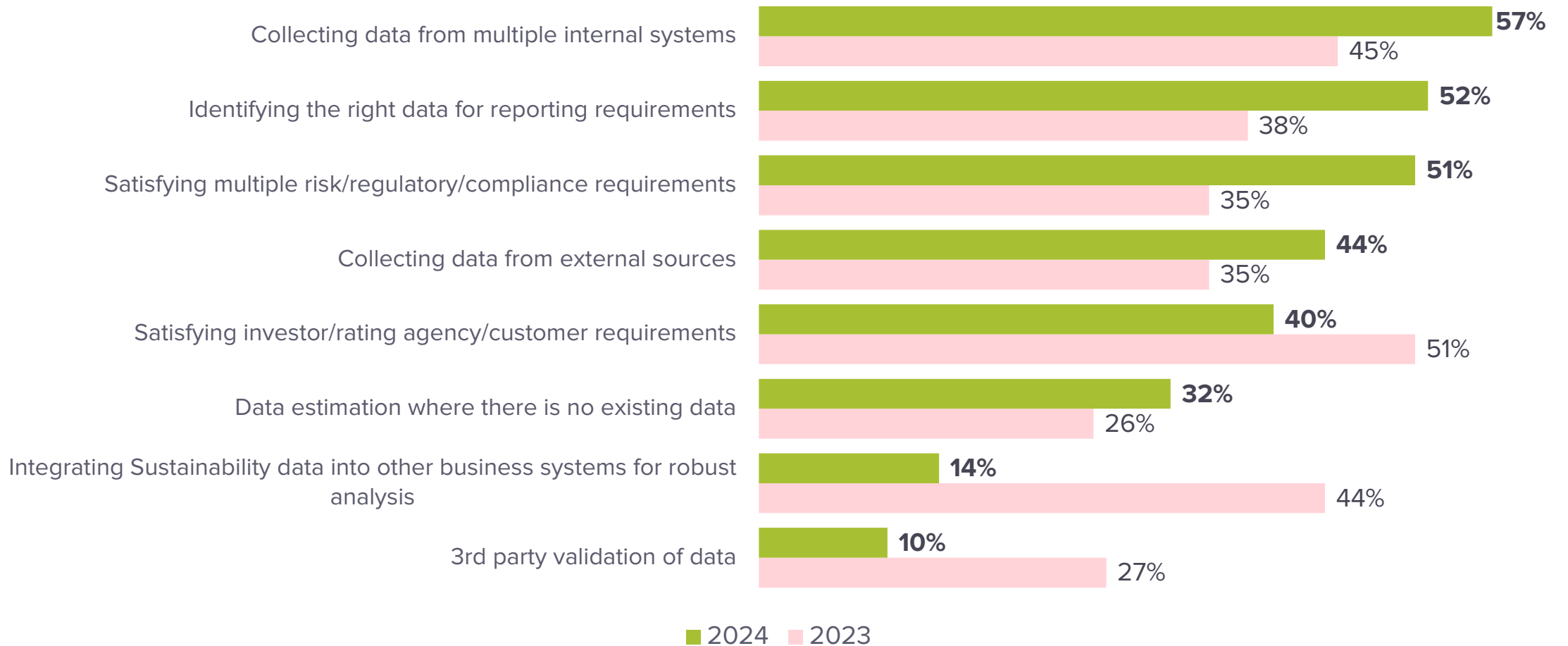
We use data to track, analyze, and optimize our Sustainability performance across business applications



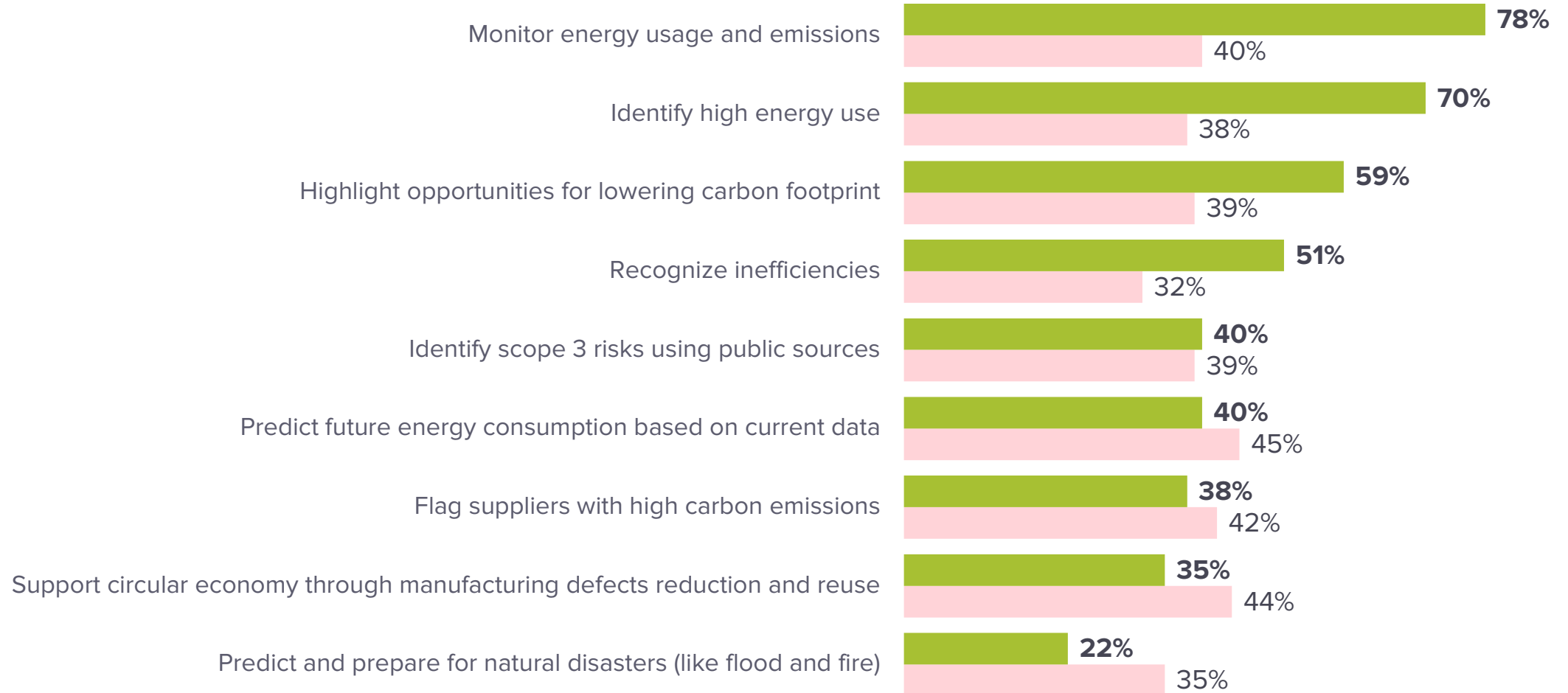
21%

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

Challenges of Supporting Sustainability Data Needs



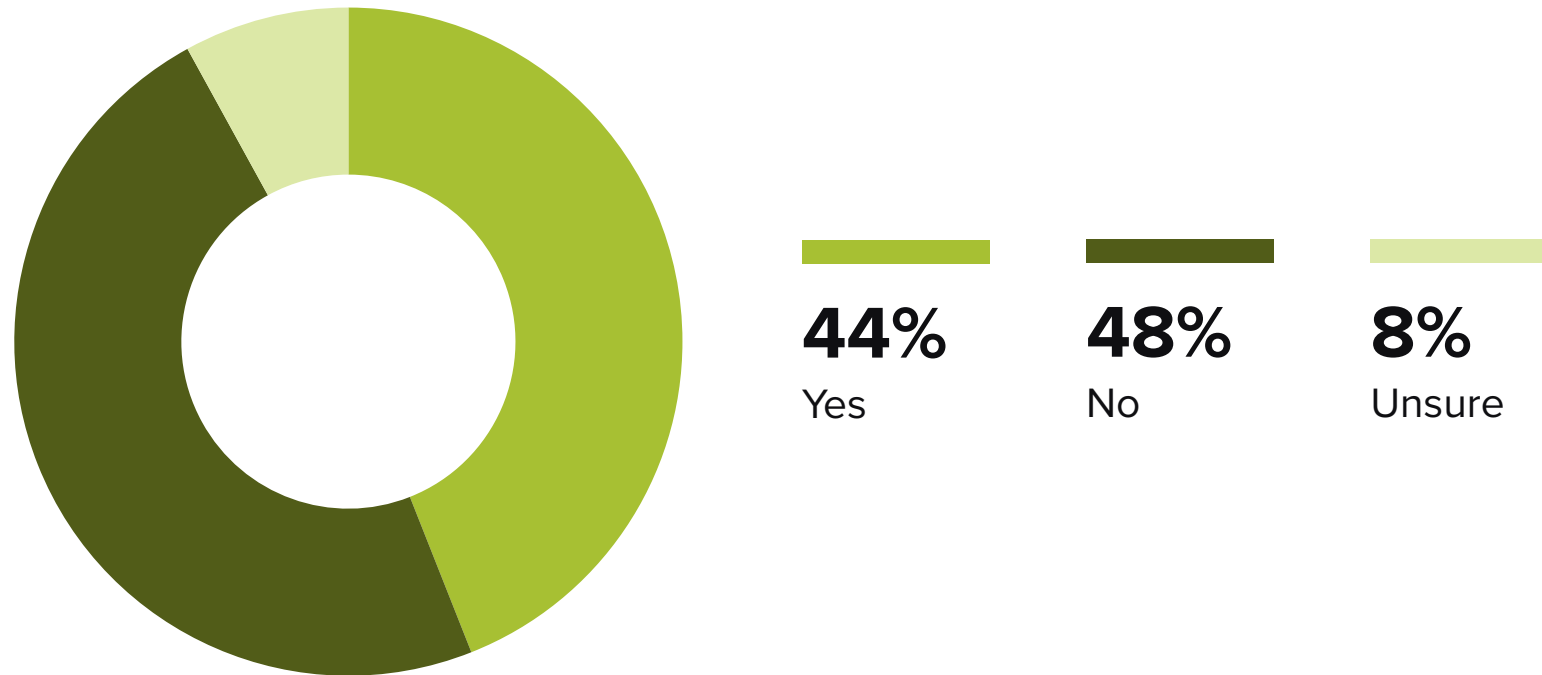
The Use of AI for Environmental Footprint Management



Environmental Impact of AI



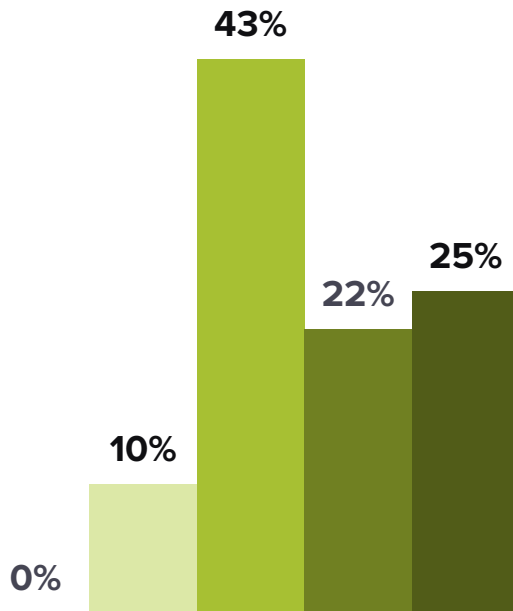
Is Impact Considered?



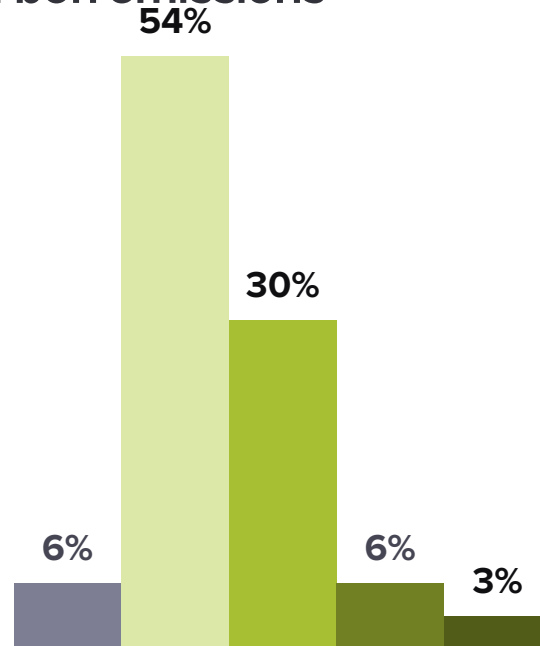
Perception on the Impact of AI



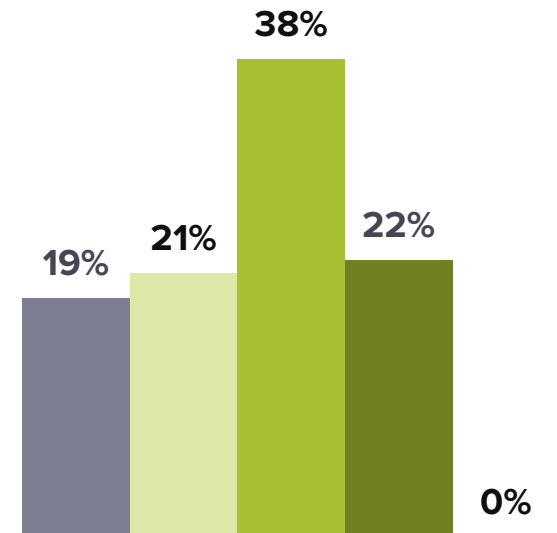
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions



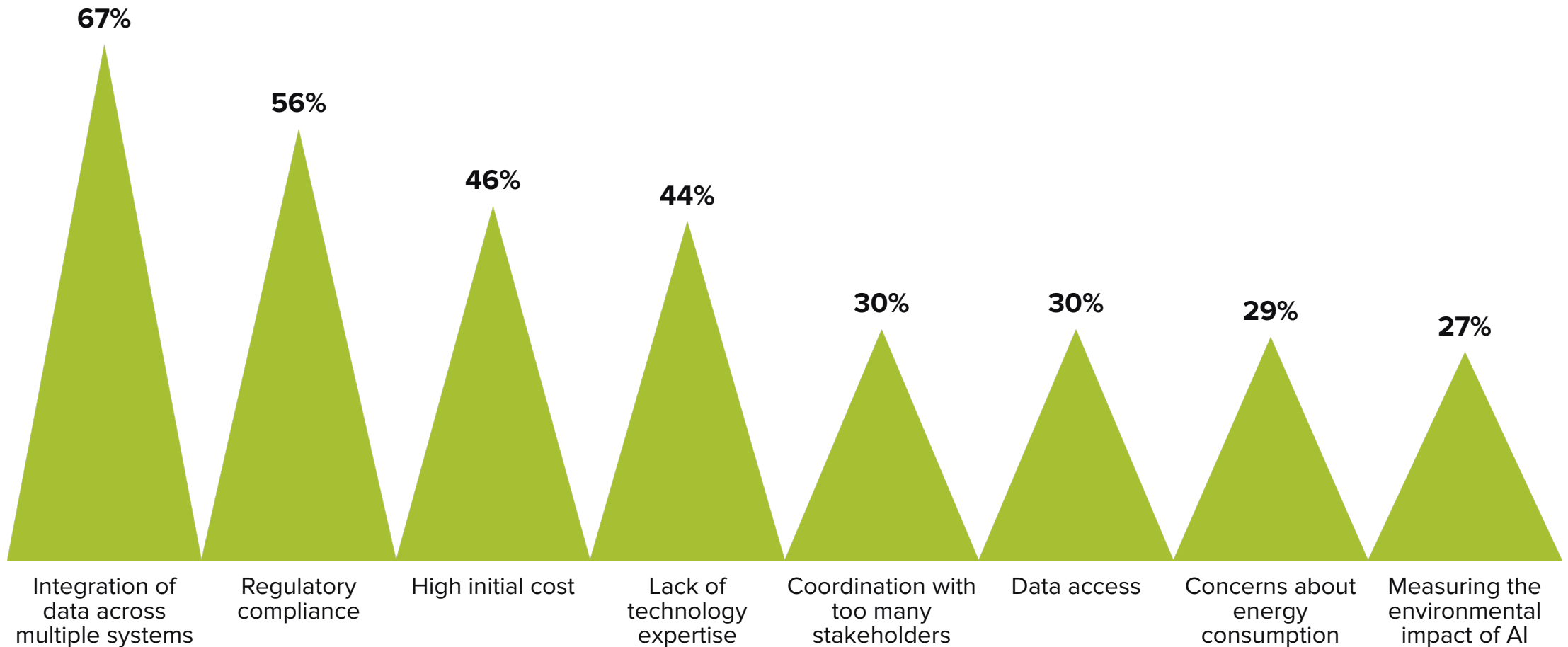
Impact of AI on the cost of Sustainability initiatives



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



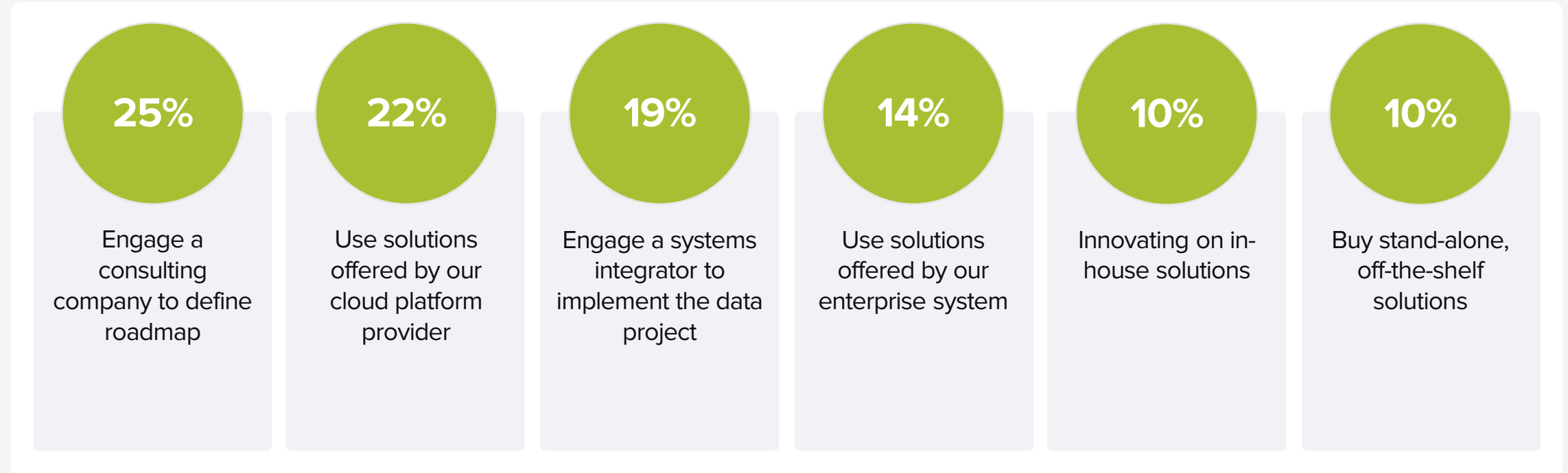
Key Challenges in Integrating AI for Sustainability Initiatives



N = 63

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

Building Sustainability Technology Capabilities



N = 63

Q: How is your organization building Sustainability reporting capabilities?

France



Study Demographics

Function

33



IT/Digital

Operations/ Logistics/
Procurement/ Production

Marketing/
Communications/
Corporate Affairs

Human Resources

Finance

Sustainability/ ESG/CSR

Product Development &
Research

Legal

Industry

21

Financial
Services

12

Retail

10

Manufacturing

3

Energy &
Utilities

3

Construction &
Real Estate

3

Hospitality

3

Primary
Industries

3

Media &
Telecom

3

Transport and
Logistics

Organization Size (No. of Emp.)



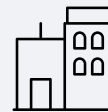
12

201 - 499



15

500 - 999



21

1,000 -
4,999



13

More than
5,000

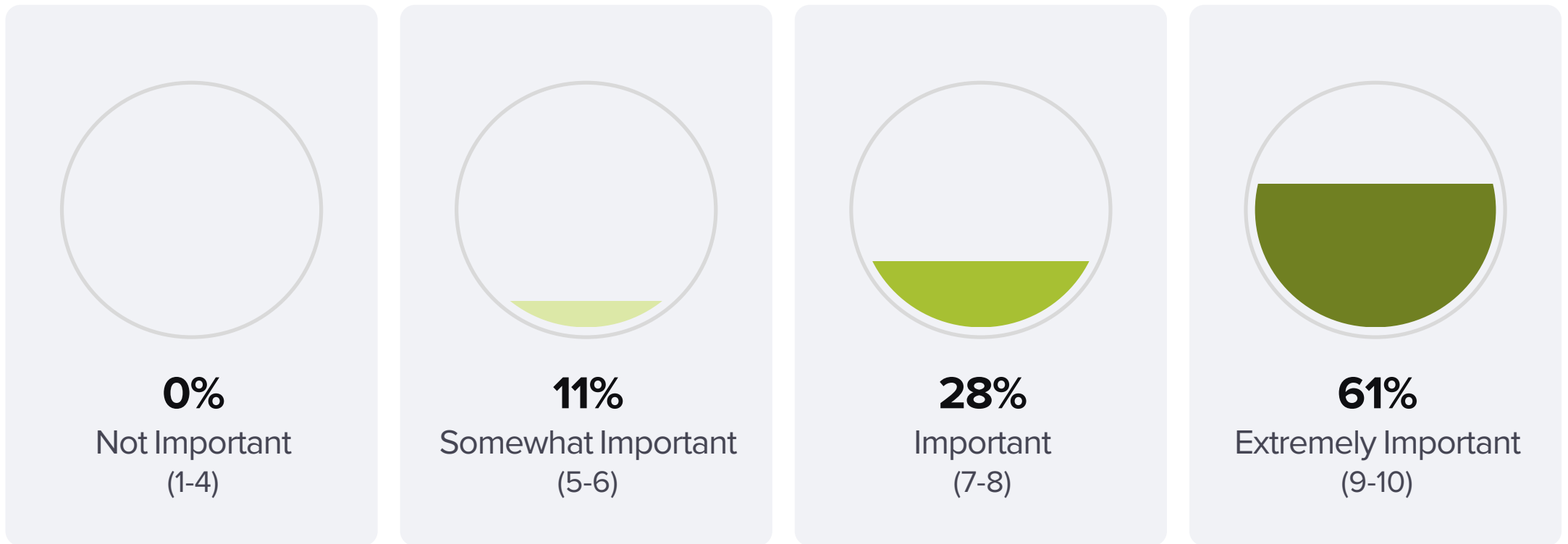
Strategy & Perception



The Importance of Sustainability in the Organization



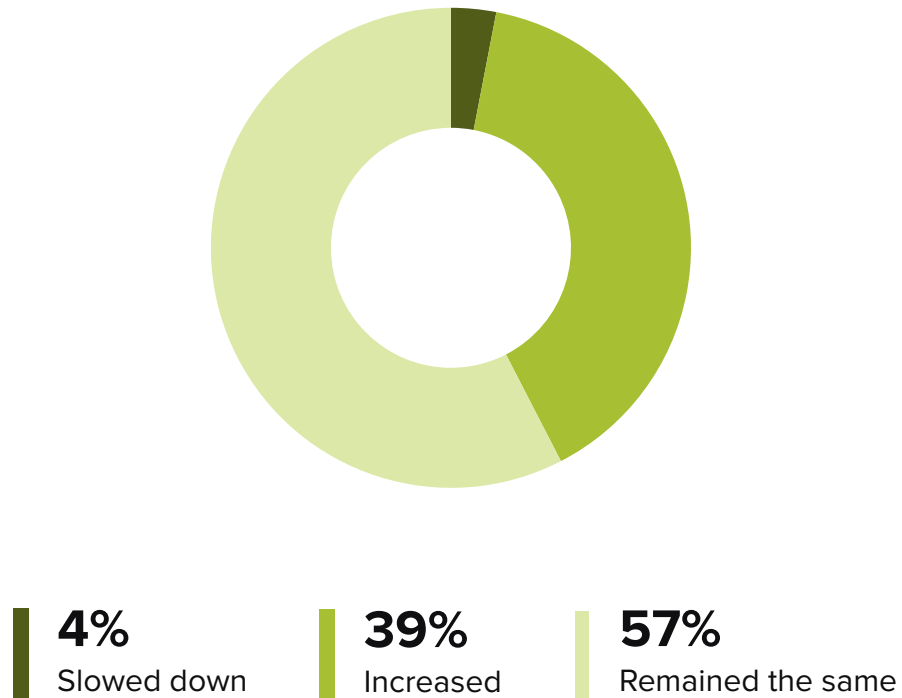
Significantly more organizations in France are considering sustainability to be of extreme strategic importance than last year (6%).



Pace of Sustainability Efforts



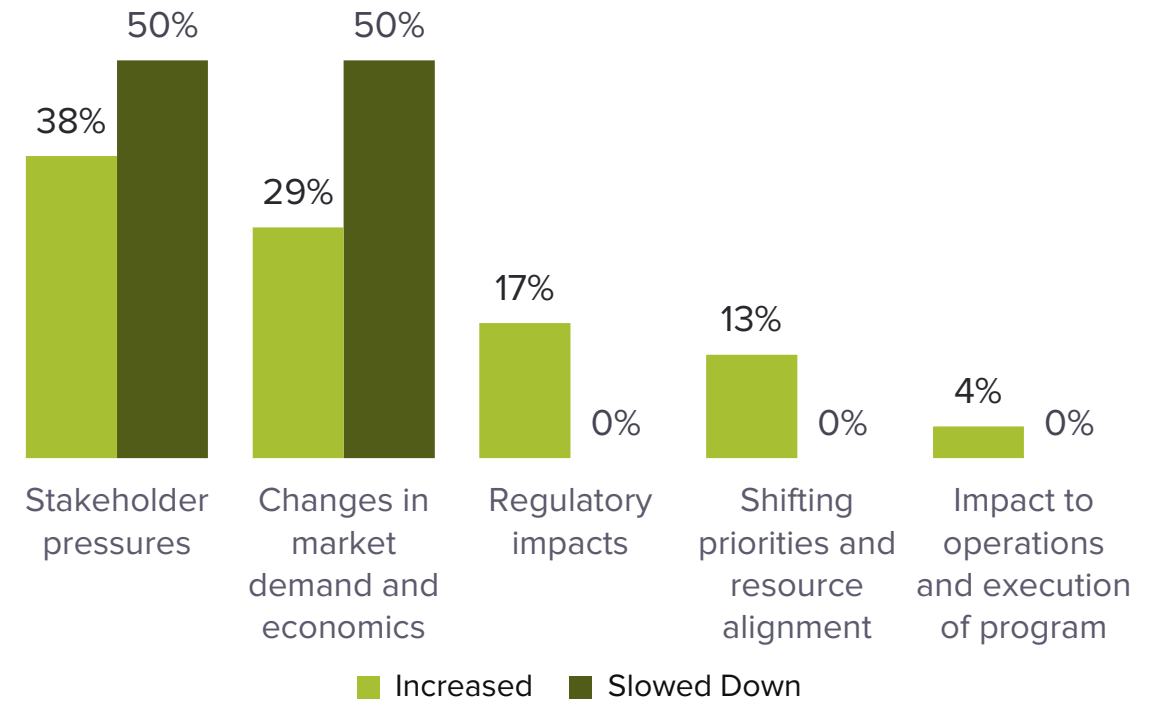
CHANGE FROM LAST YEAR



N = 61

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

REASONS FOR CHANGE



N = 26

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



36%

Sustainability is a strategic aspiration

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



47%

Sustainability is operationally embedded

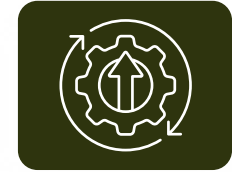
Goals and initiatives are incorporated into existing operational review and reporting processes, but impact is not fully measured or quantified



10%

Sustainability is data-driven

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



2%

Sustainability is a strategic asset.

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

N = 61

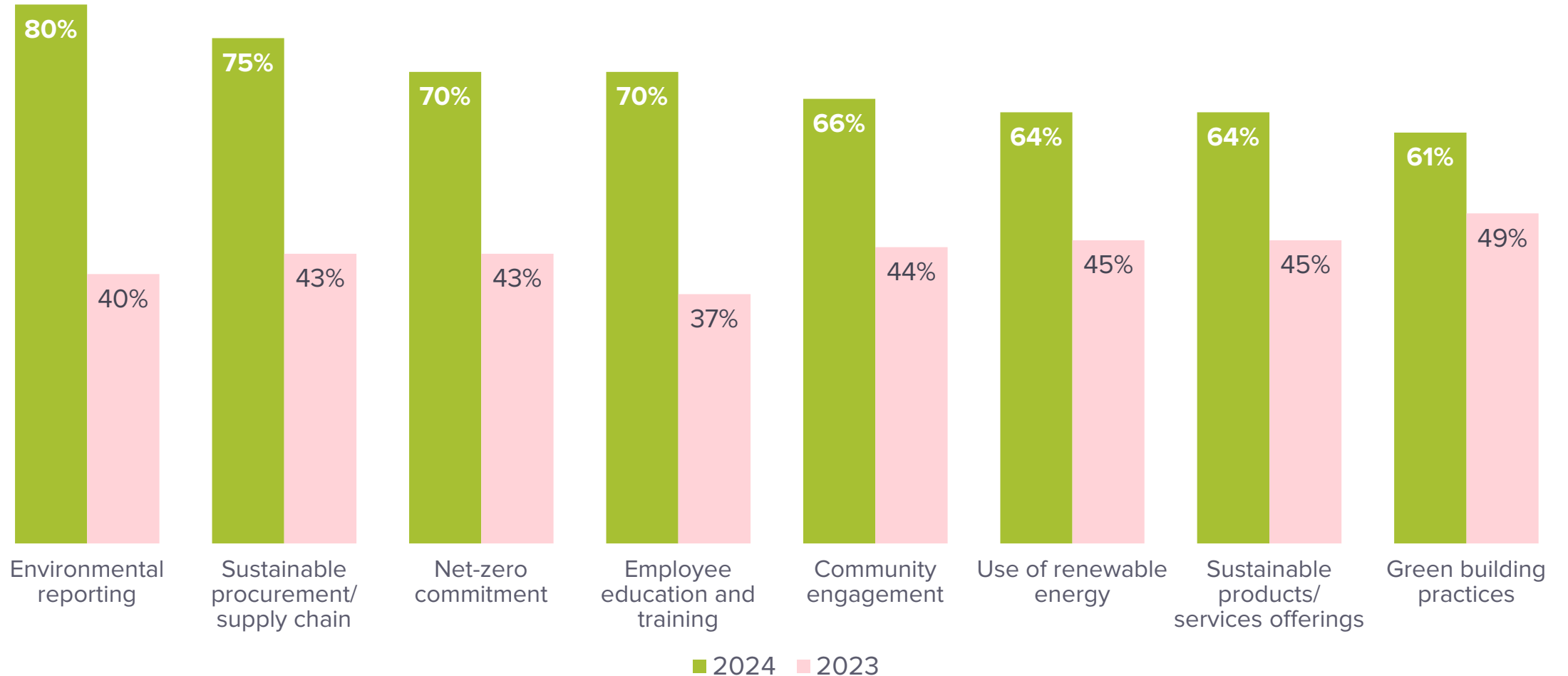
Modeled based on responses to multiple questions



Top Environmental Measures Undertaken



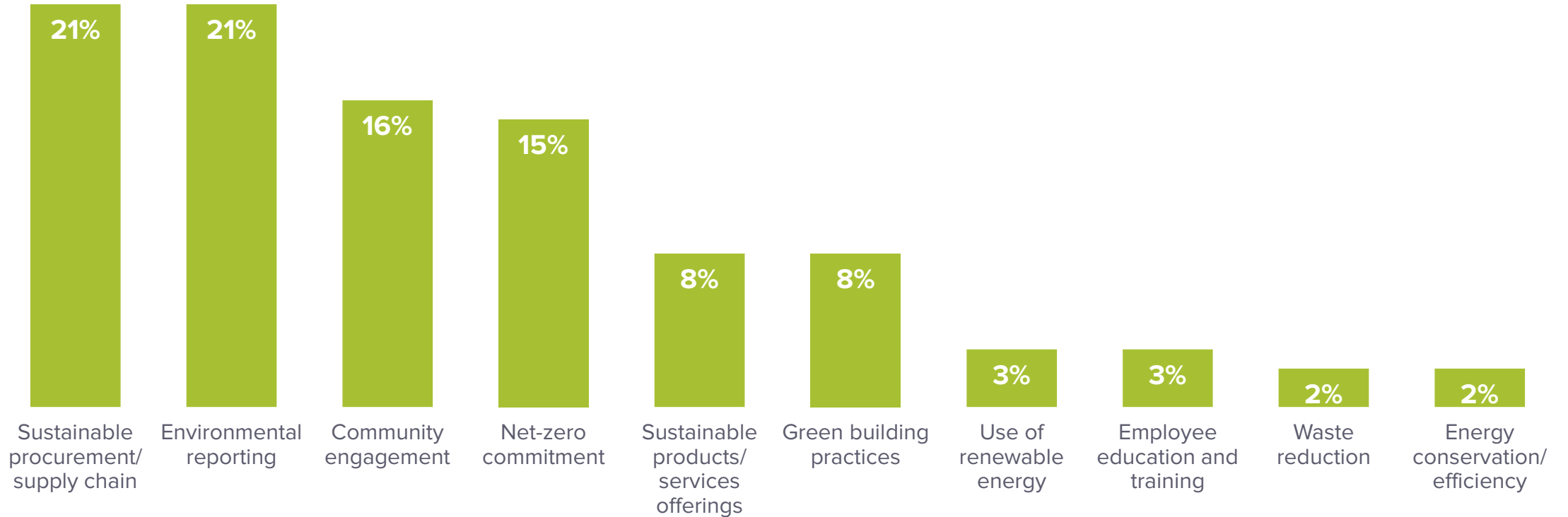
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Most Impactful Environmental Measures

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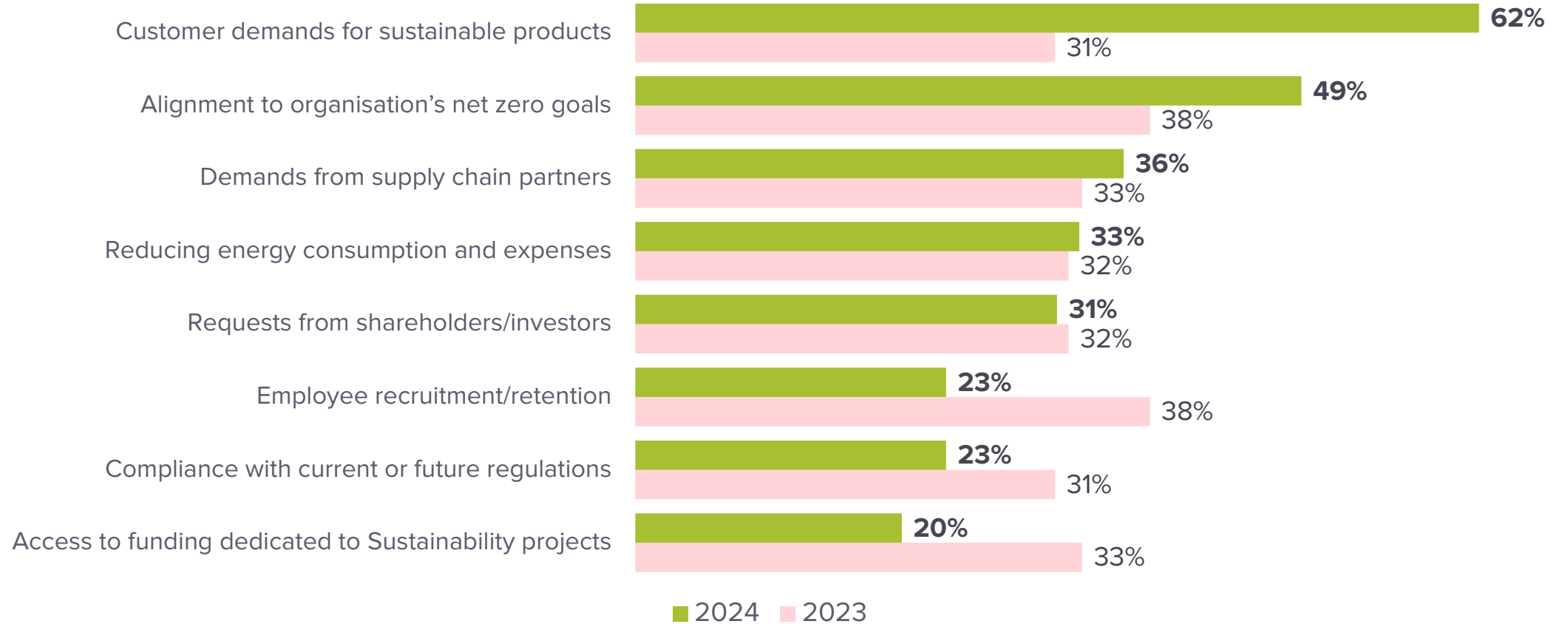




Top Stakeholders Advocating for Sustainability

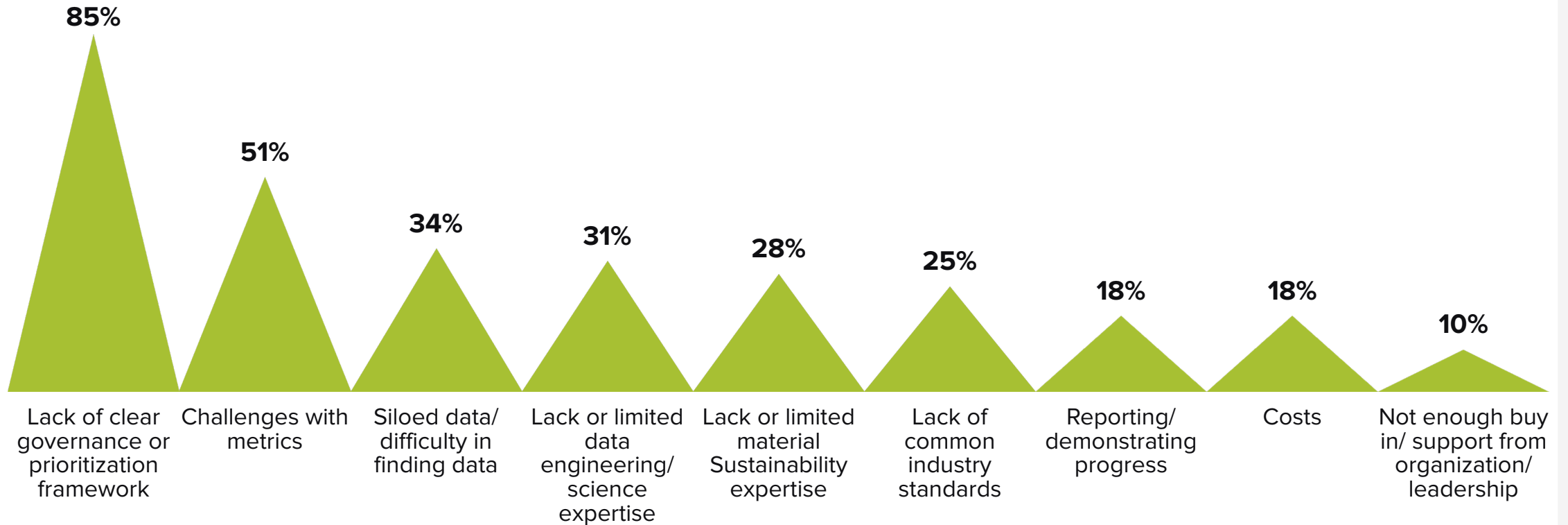


Main Drivers of Sustainability



Main Challenges of Adopting Sustainability

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N = 61

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

How Governments Can Support Adoption of Sustainability



Execution



People, Governance, & Narrative

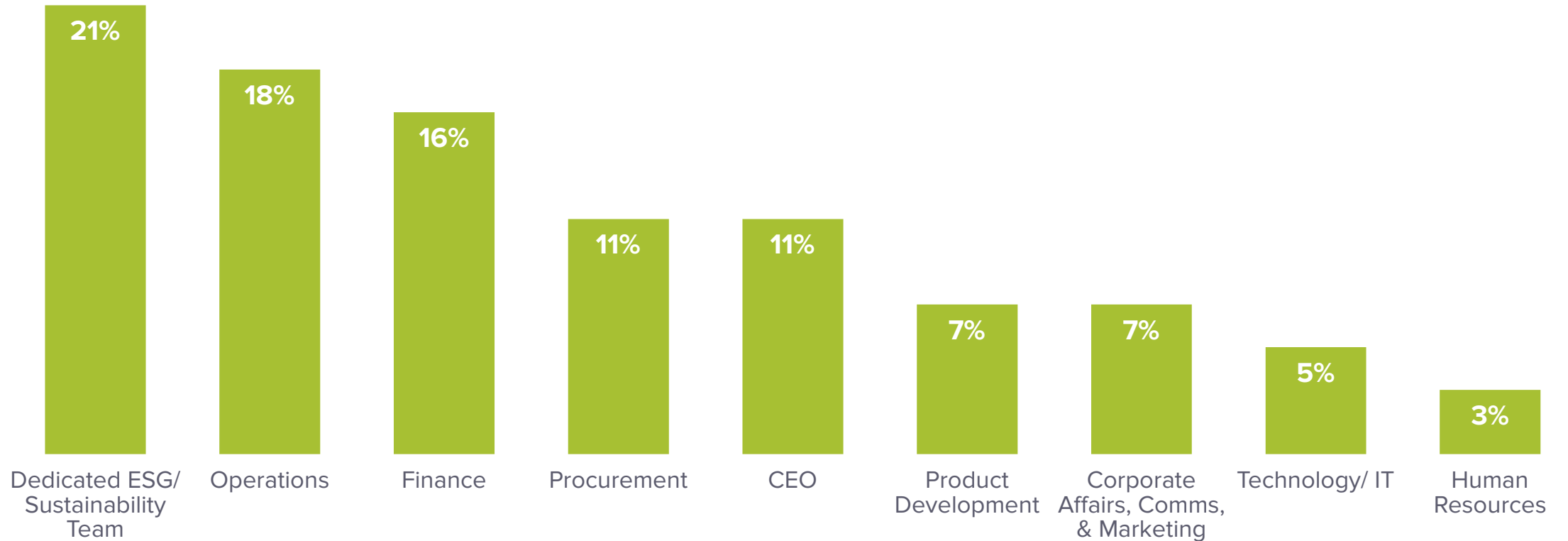




Sustainability Leadership



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Role of Key Stakeholders



Defining The Vision

66% ESG/Sustainability Team

61% CEO

41% Finance

Delivering Sustainability Outcomes

72% ESG/Sustainability Team

51% Technology/IT

51% Finance

Providing the Data

84% ESG/Sustainability Team

34% Operations

33% Product Development

Managing the Data

67% ESG/Sustainability Team

33% Product Development

31% Legal/Risk

Deciding the Metrics

69% CEO

41% Finance

39% Legal/Risk

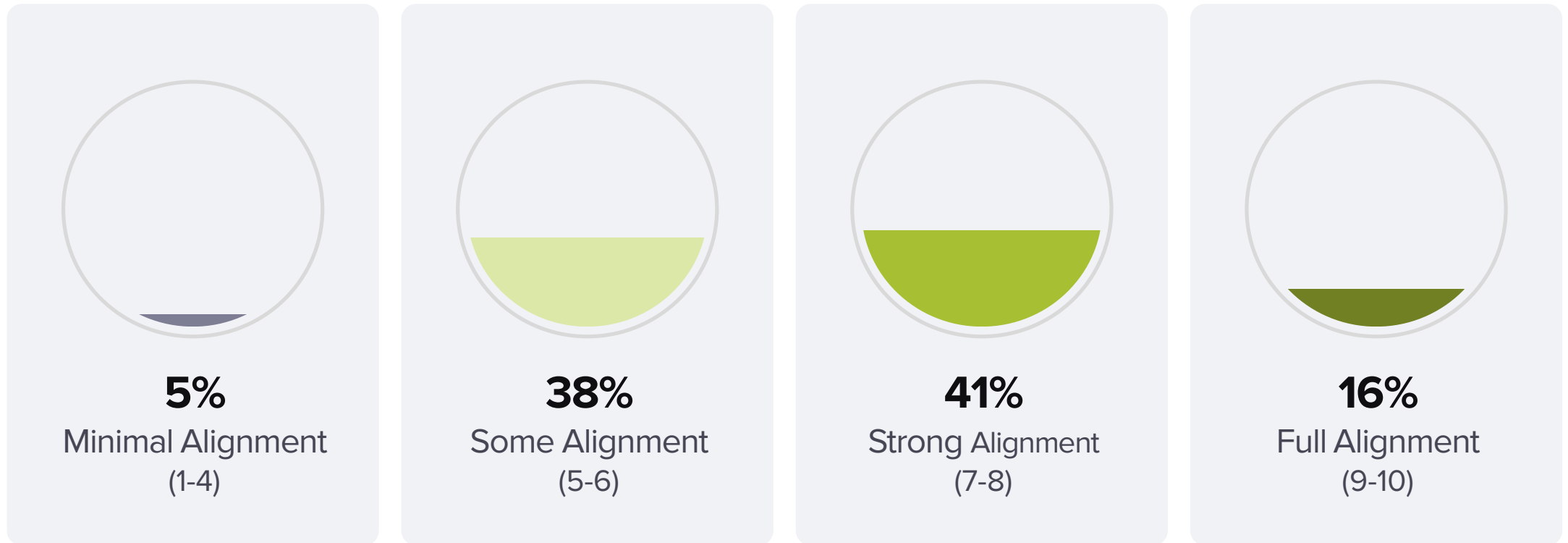
Reporting

93% ESG/Sustainability Team

52% Corporate Affairs, Comms, & Marketing

41% Technology/IT

Alignment Between Sustainability Team & Finance



Maturity of Employee Involvement in Sustainability



5% 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



48% Emerging Sustainability Engagement

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



23% KPI-Driven Sustainability

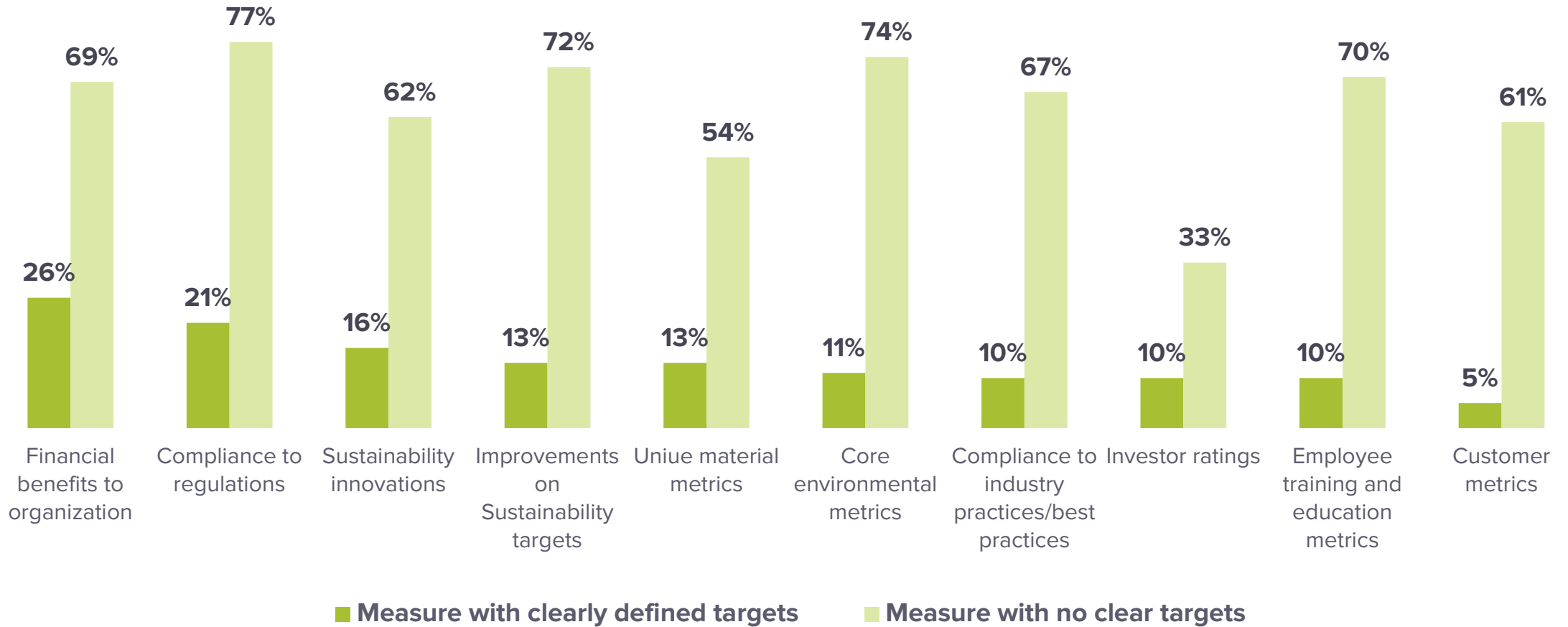
Sustainability KPIs are set relevant to employee roles, fostering a more focused and targeted approach to sustainability



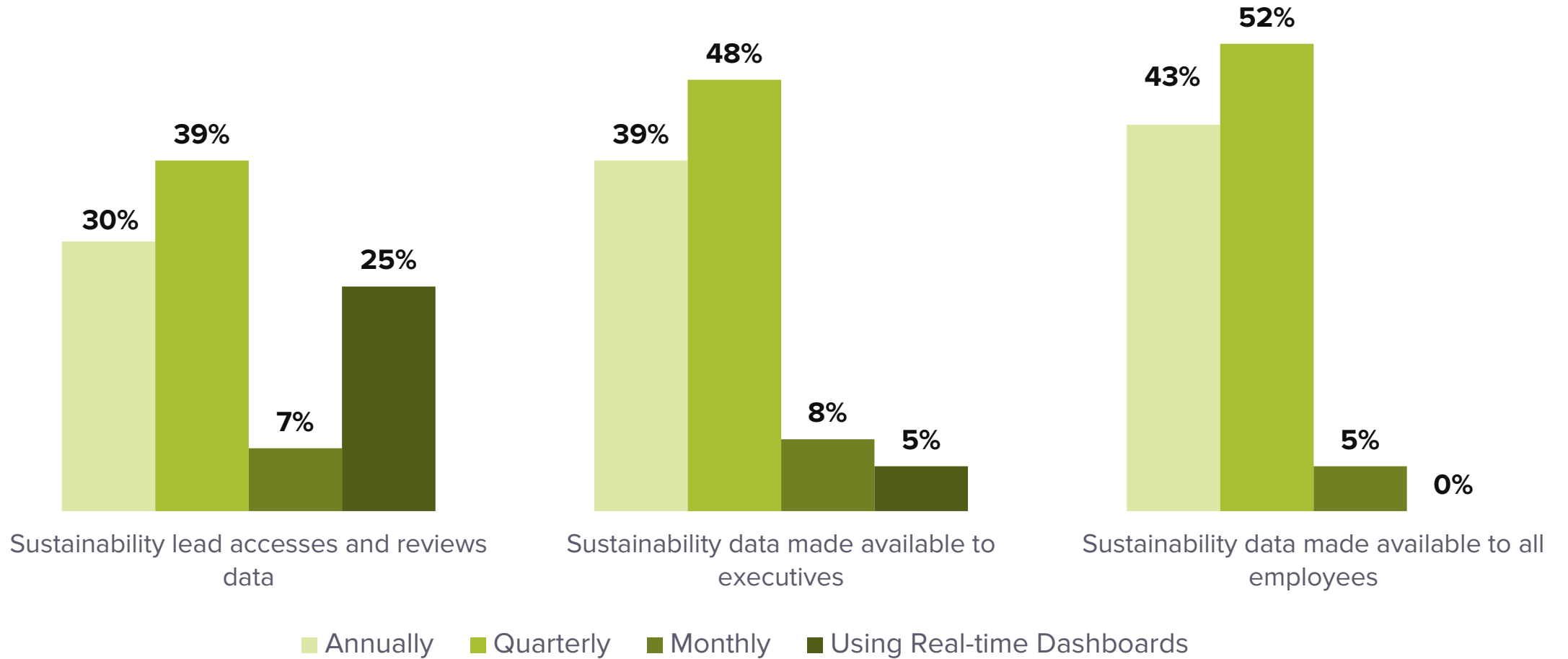
8% Sustainability as a Strategic Imperative

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

Metrics Used to Measure Sustainability



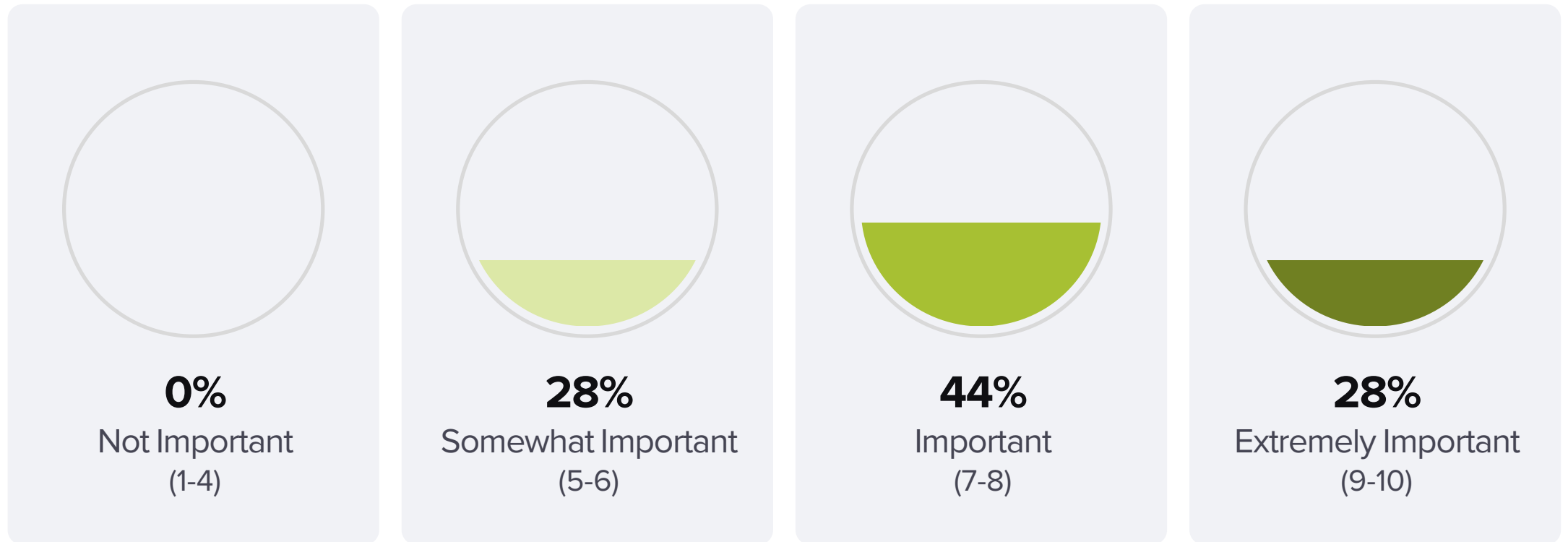
Sustainability Data Access and Sharing



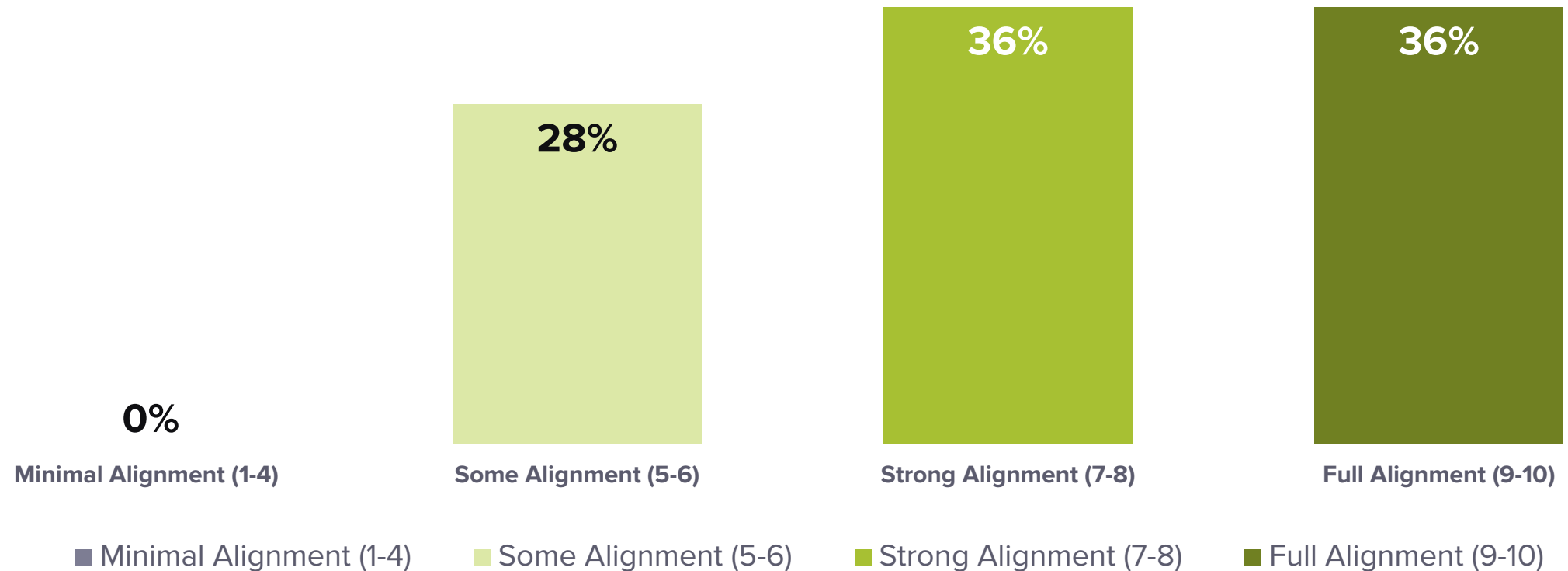
Technology



Importance of Technology in Achieving Sustainability Goals

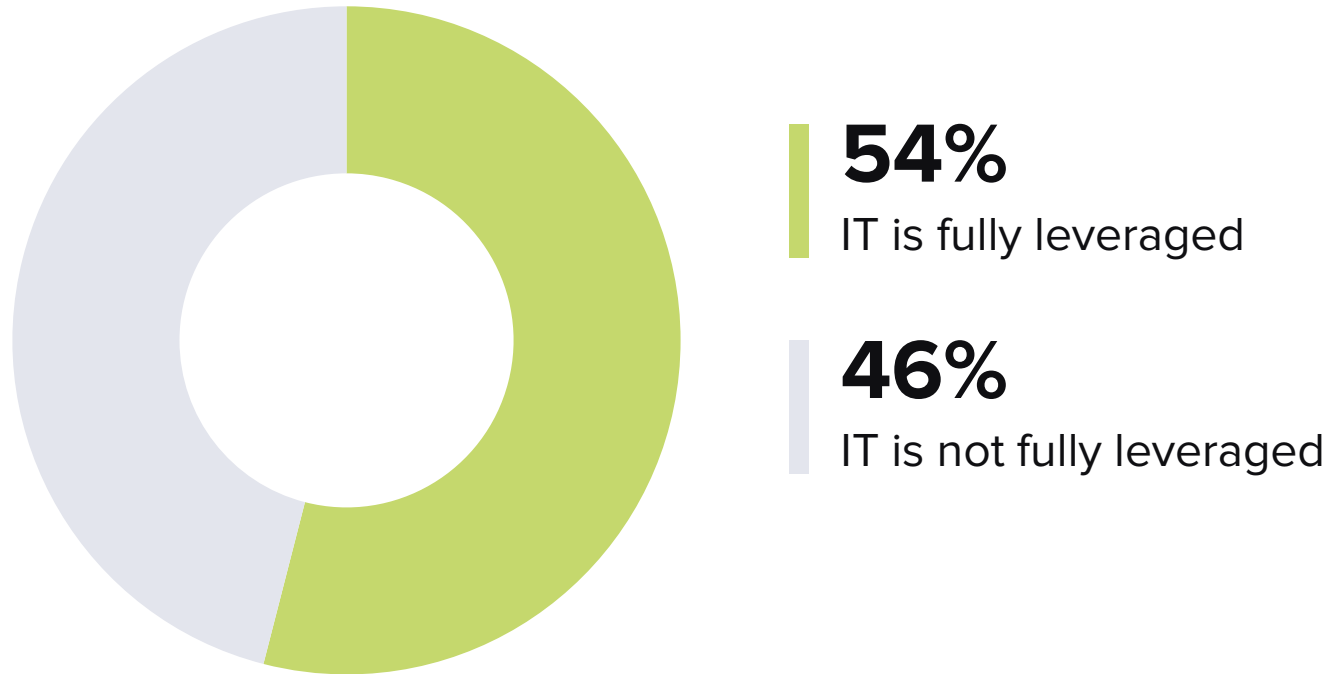


Alignment Between Sustainability Teams & Technology

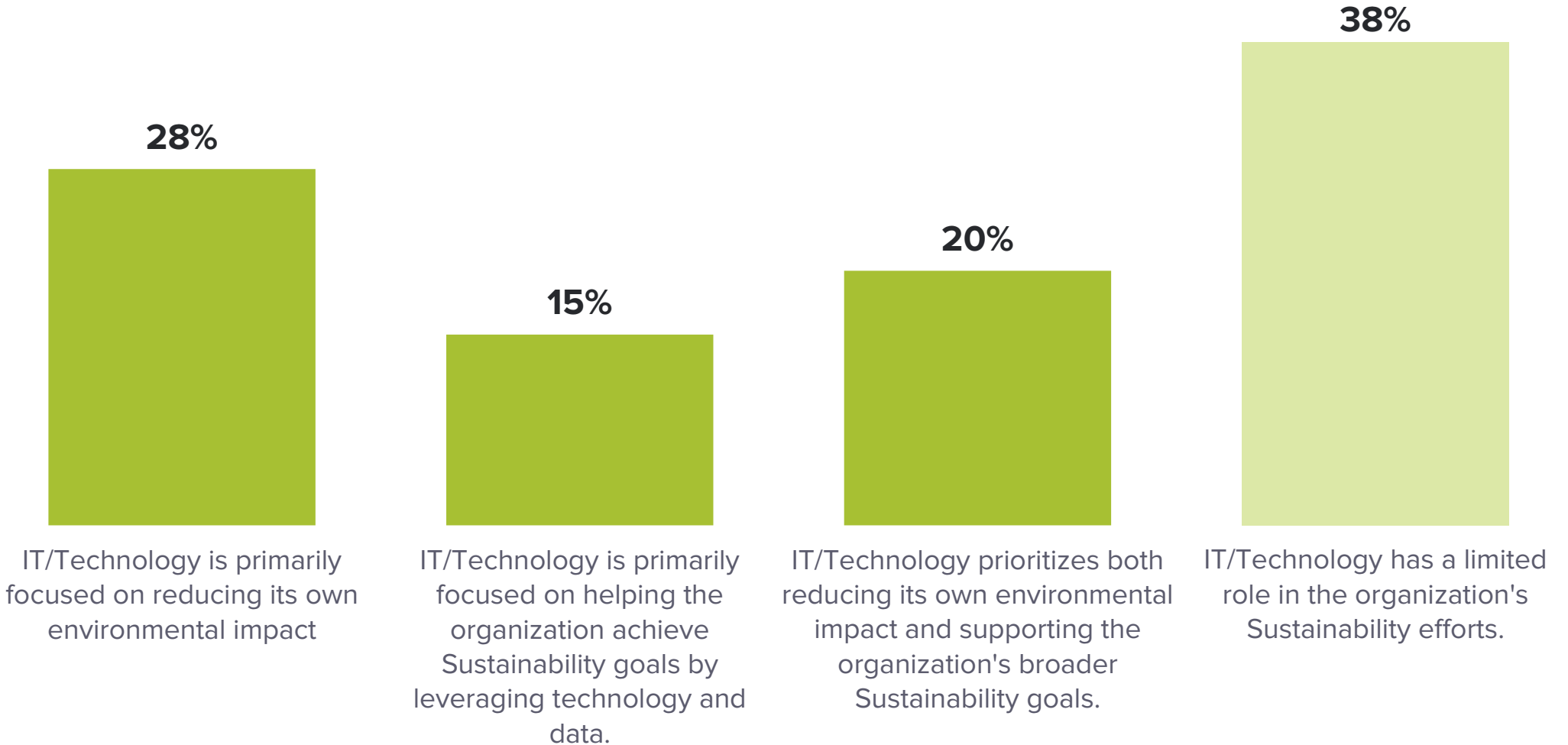




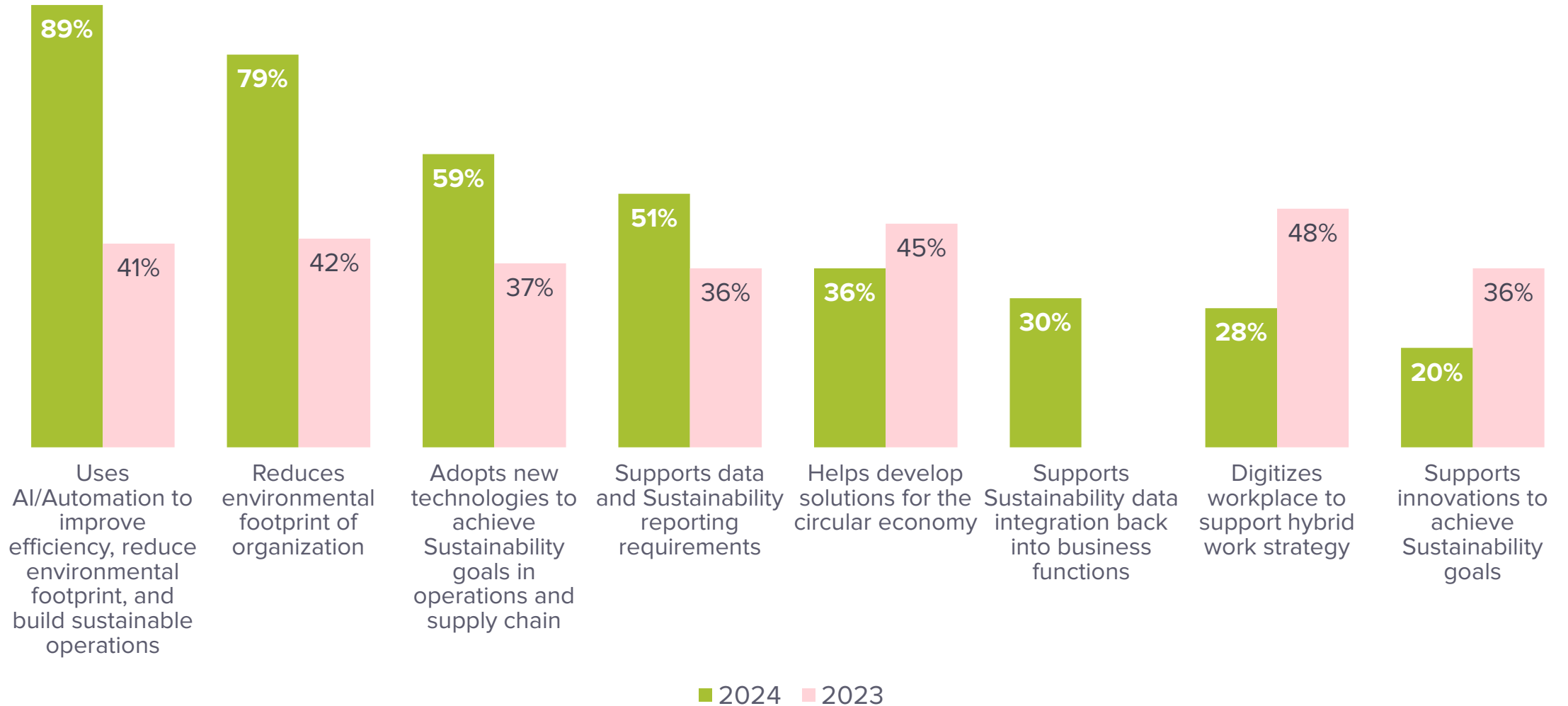
The Extent of Use of IT to Achieve Sustainability Goals



IT's Role in Achieving Sustainability Goals



Role of Technology in Supporting Sustainability

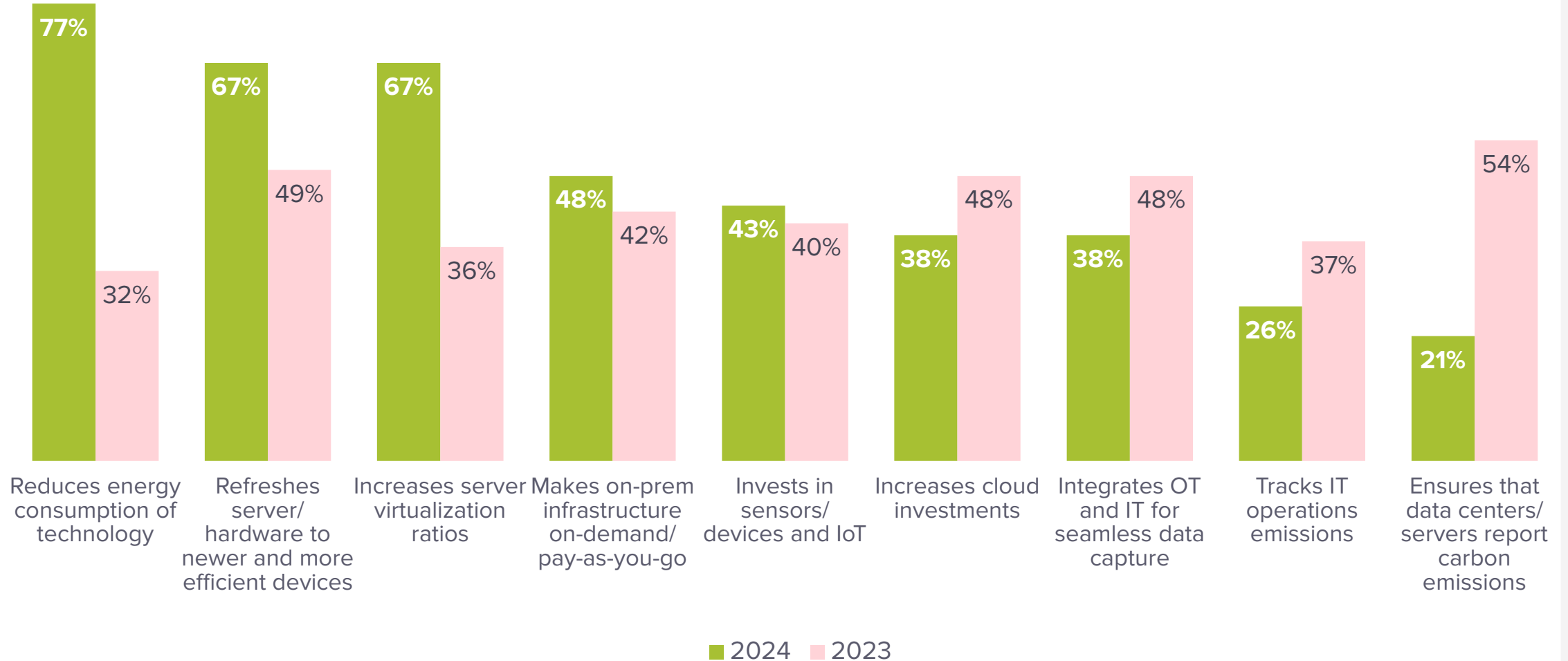




Technology Team's Steps to Reduce Carbon Footprint



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Data-Driven Sustainability: Leveraging Insights for Impact



0%

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



31%

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



36%

We use data to track key Sustainability metrics for reporting



20%

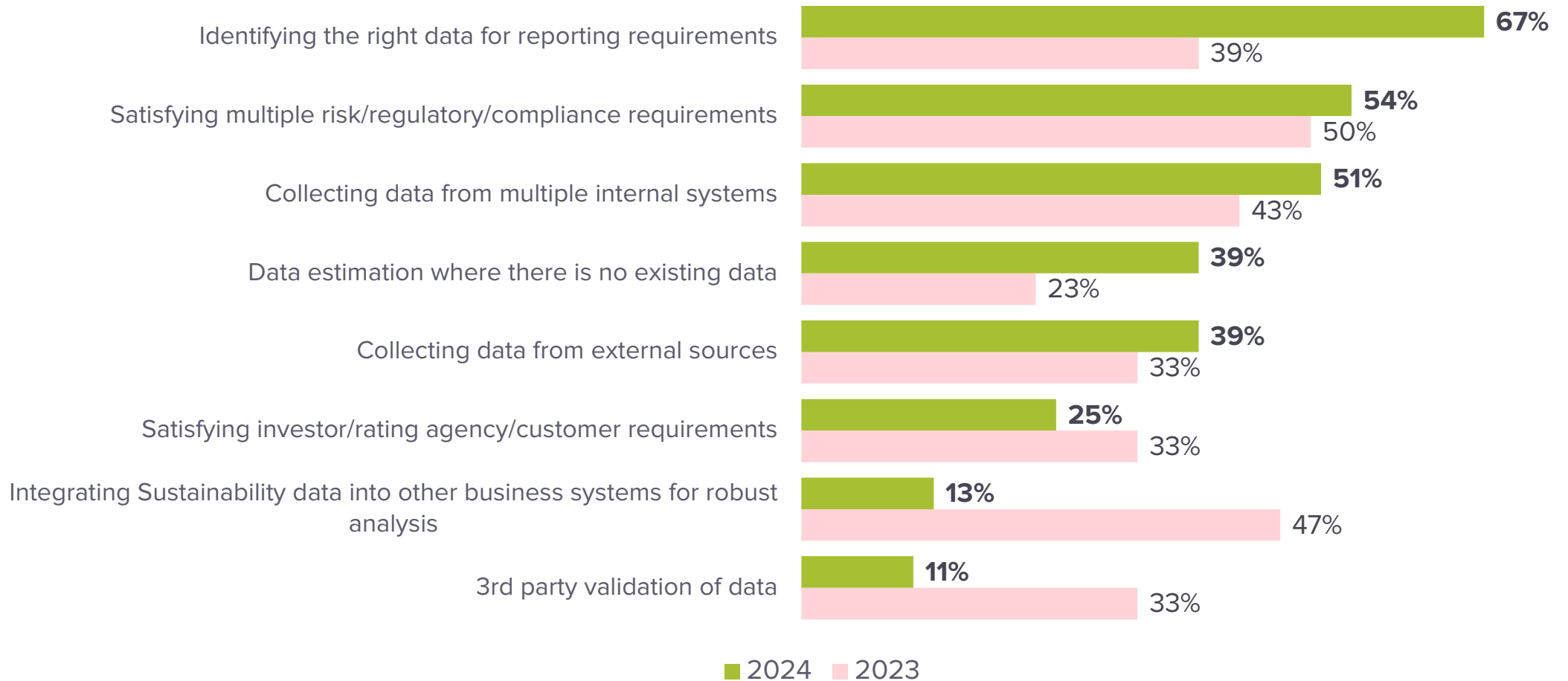
We use data to track, analyze, and optimize our Sustainability performance across business applications



13%

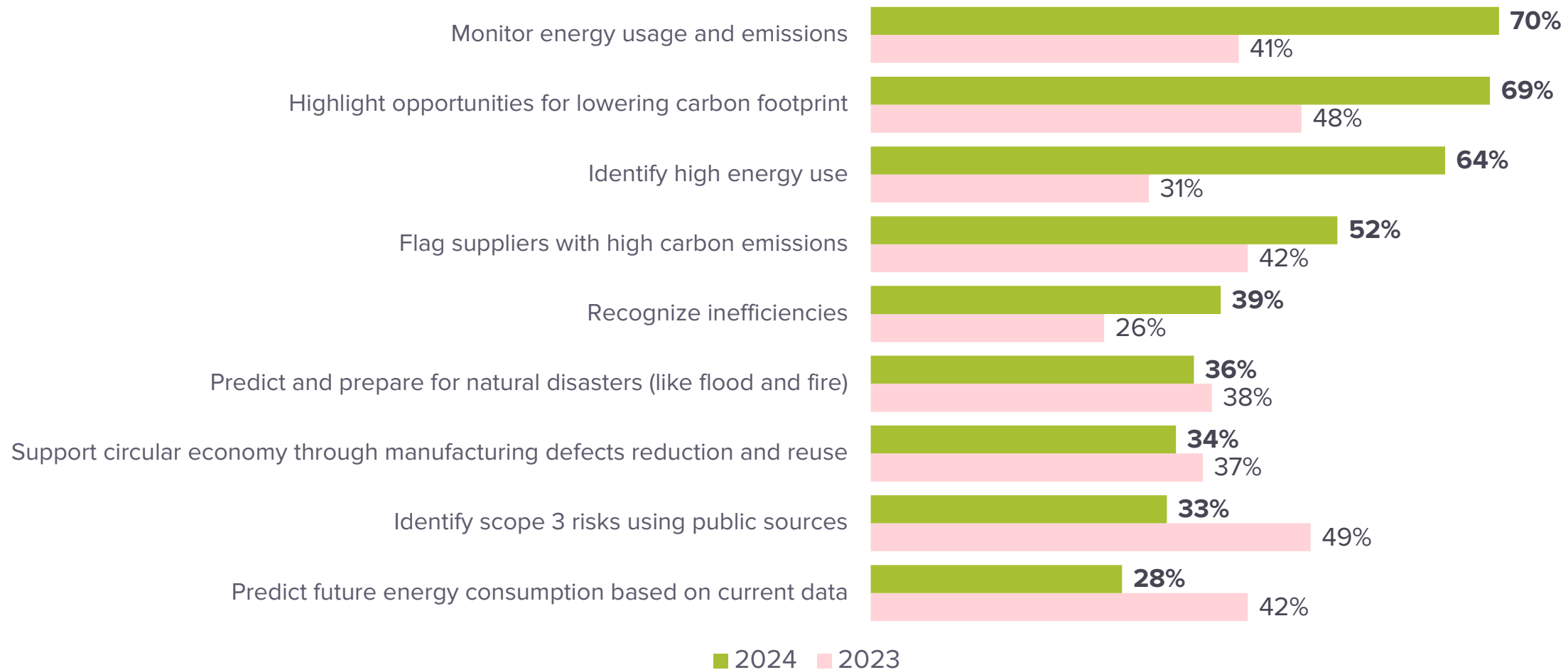
We use data from our Sustainability initiatives to guide the organization's transformation journey

Challenges of Supporting Sustainability Data Needs



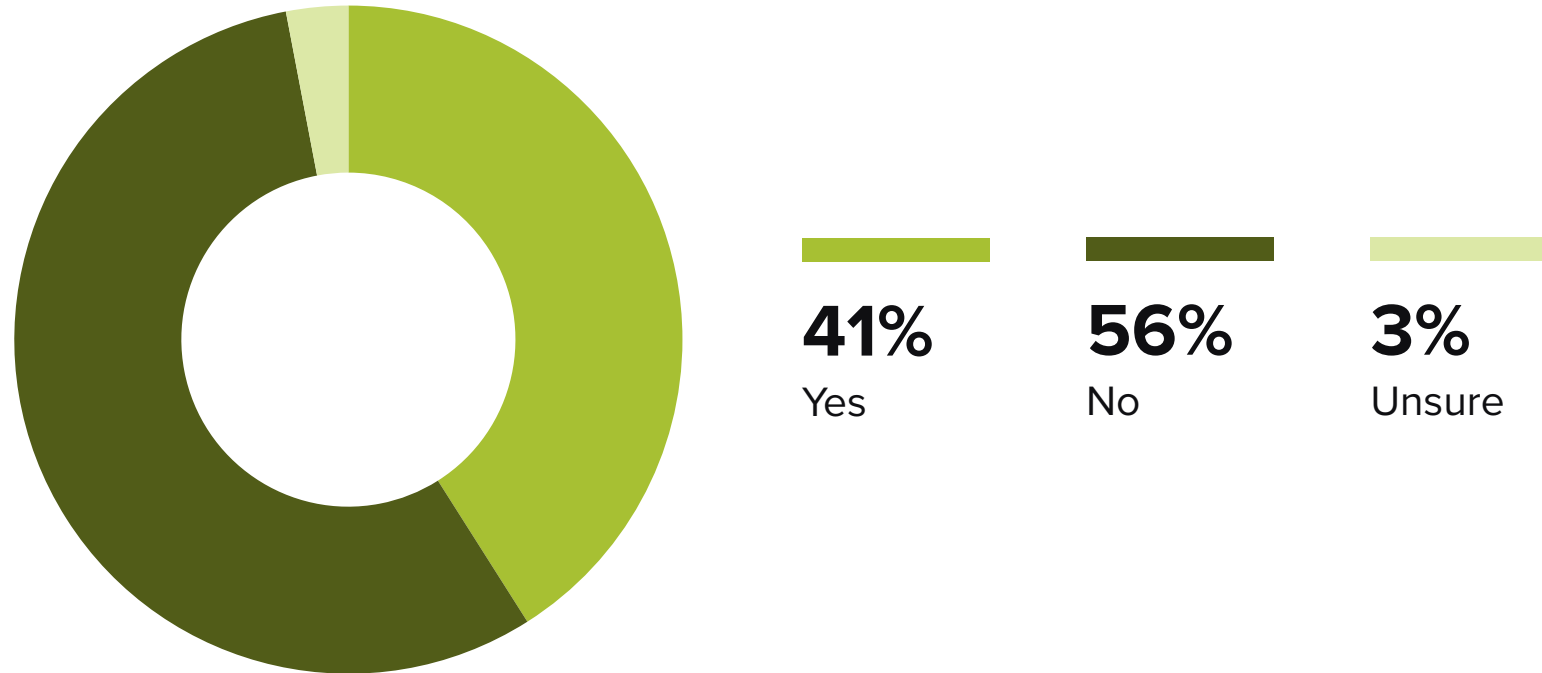


The Use of AI for Environmental Footprint Management



Environmental Impact of AI

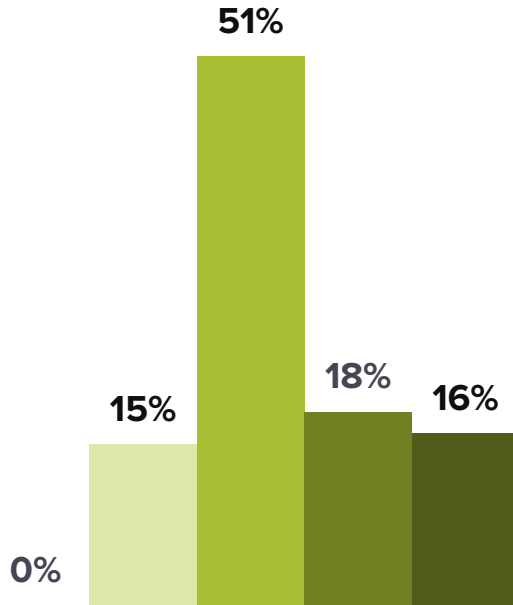
Is Impact Considered?



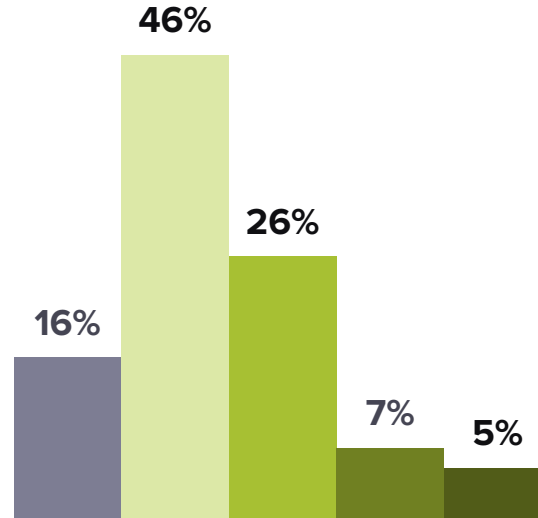
Perception on the Impact of AI



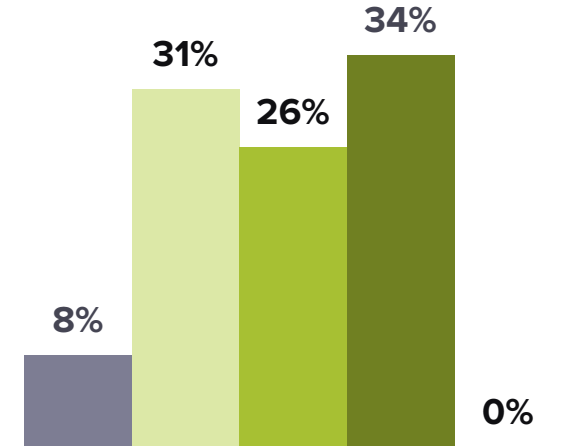
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions

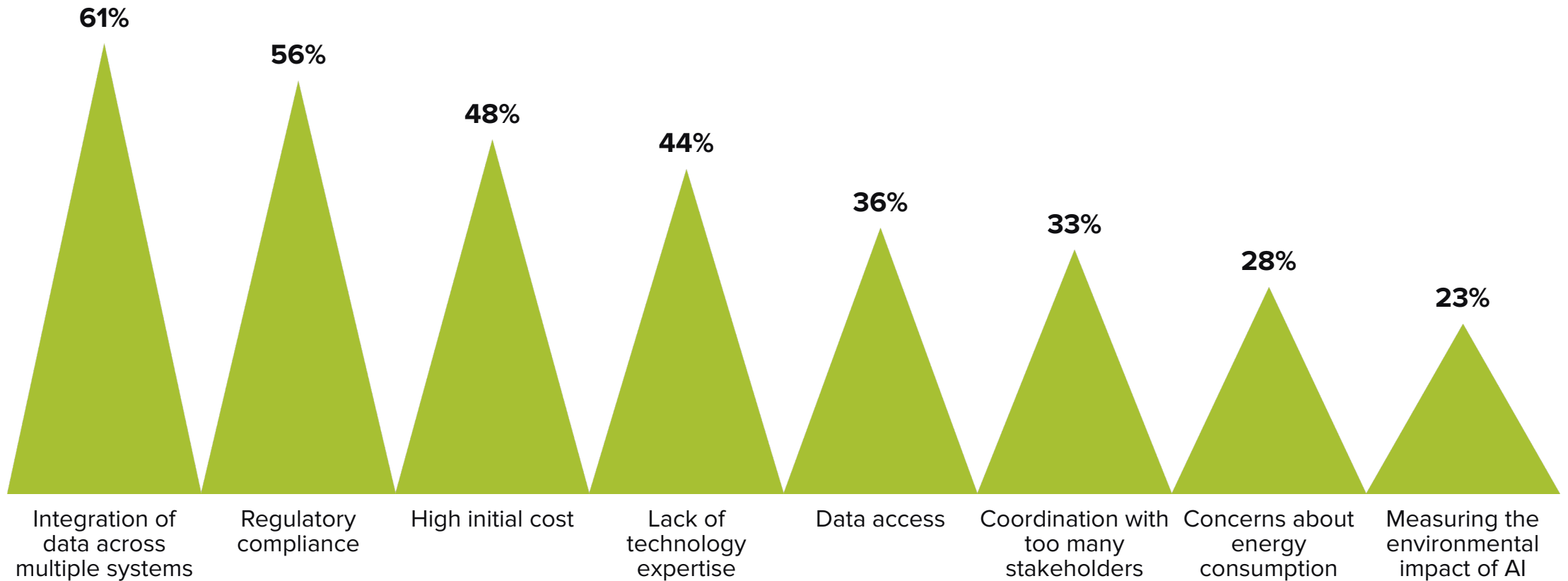


Impact of AI on the cost of Sustainability initiatives



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

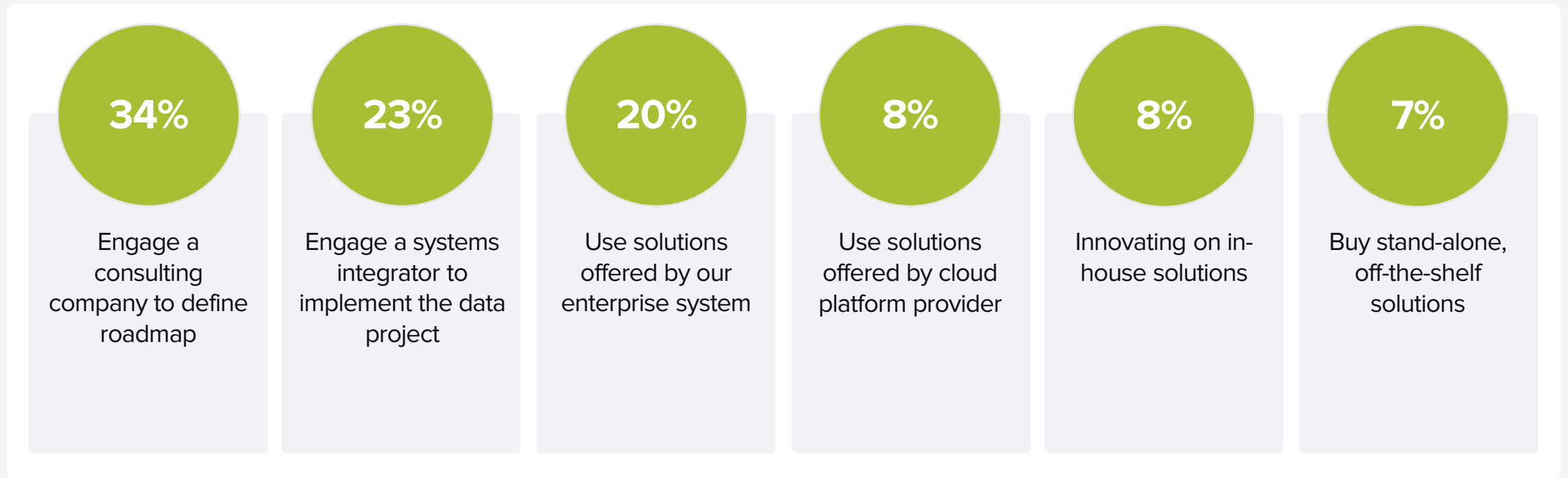
Key Challenges in Integrating AI for Sustainability Initiatives



N = 61

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

Building Sustainability Technology Capabilities



N = 61

Q: How is your organization building Sustainability reporting capabilities?

Spain





Study Demographics



Function

39



IT/Digital

8

Operations/ Logistics/
Procurement/
Production

4

Marketing/
Communications/
Corporate Affairs

4

Sustainability/ ESG/CSR

3

Finance

1

Product Development
& Research

1

Human Resources

1

Legal

1

Risk & Compliance

Industry

23

Financial
Services

11

Manufacturing

9

Retail

5

Construction &
Real Estate

3

Energy &
Utilities

3

Transport and
Logistics

3

Primary
Industries

3

Media &
Telecom

2

Hospitality

Organization Size (No. of Emp.)



16

201 - 499



11

500 - 999



9

1,000 -
4,999



26

More than
5,000

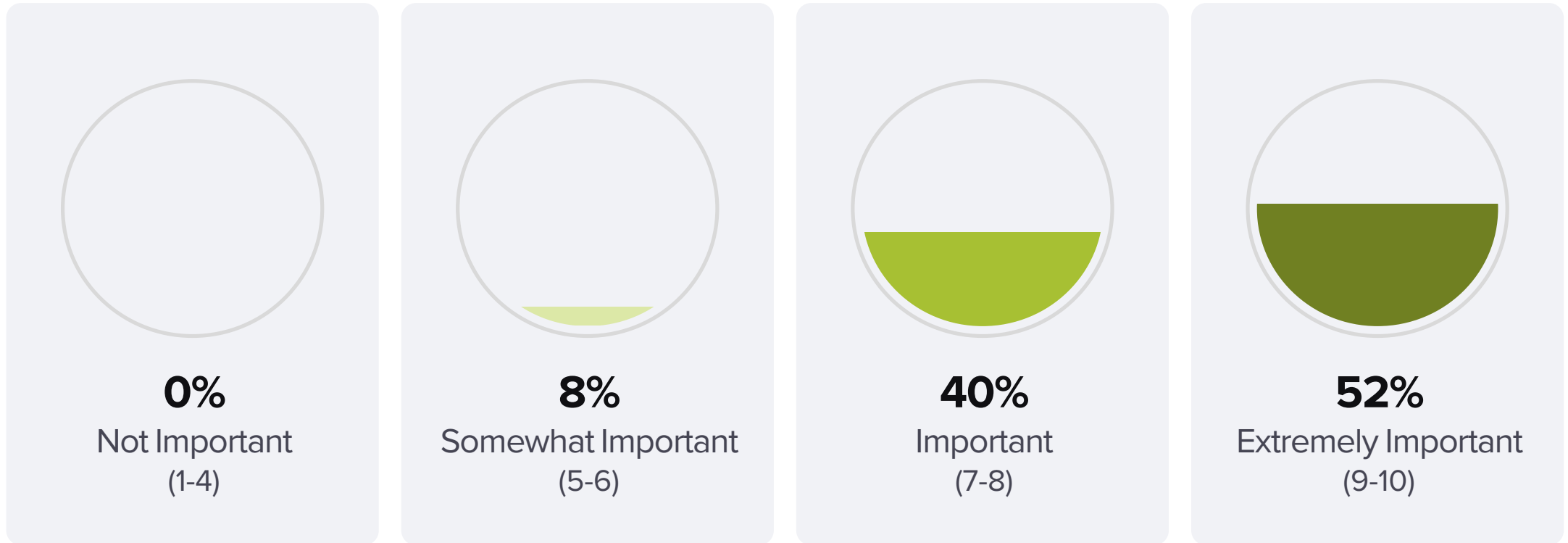
Strategy & Perception



The Importance of Sustainability in the Organization



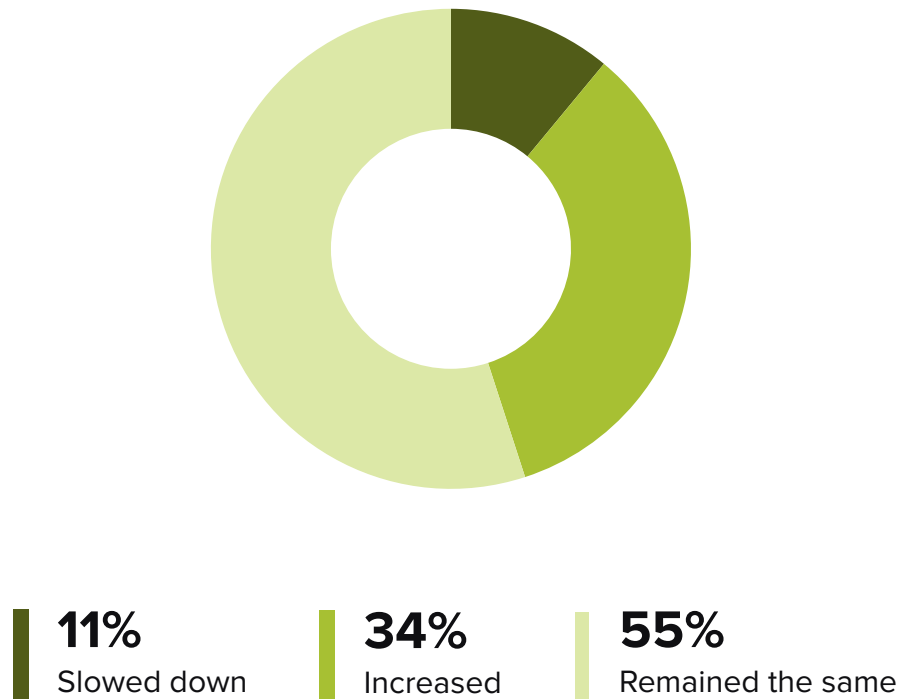
Significantly more organizations in Spain are considering sustainability to be of extreme strategic importance than last year (5%).



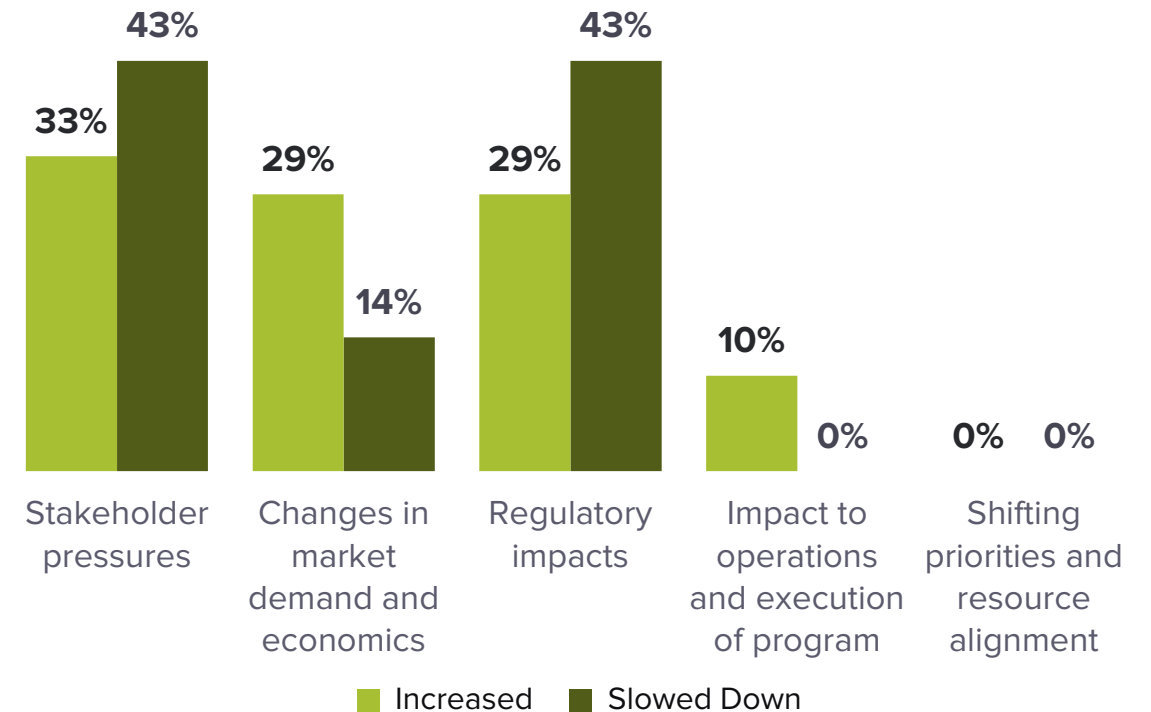
Pace of Sustainability Efforts



CHANGE FROM LAST YEAR



REASONS FOR CHANGE



N = 62

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

N = 28

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

Maturity of Organizations' Sustainability Strategies



8%

Sustainability is acknowledged but not integrated

Recognized as important but remains peripheral to the core corporate strategy



37%

Sustainability is a strategic aspiration

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



44%

Sustainability is operationally embedded

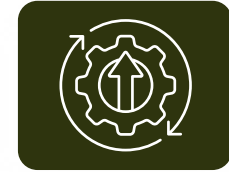
Goals and initiatives are incorporated into existing operational review and reporting processes, but impact is not fully measured or quantified



5%

Sustainability is data-driven

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



6%

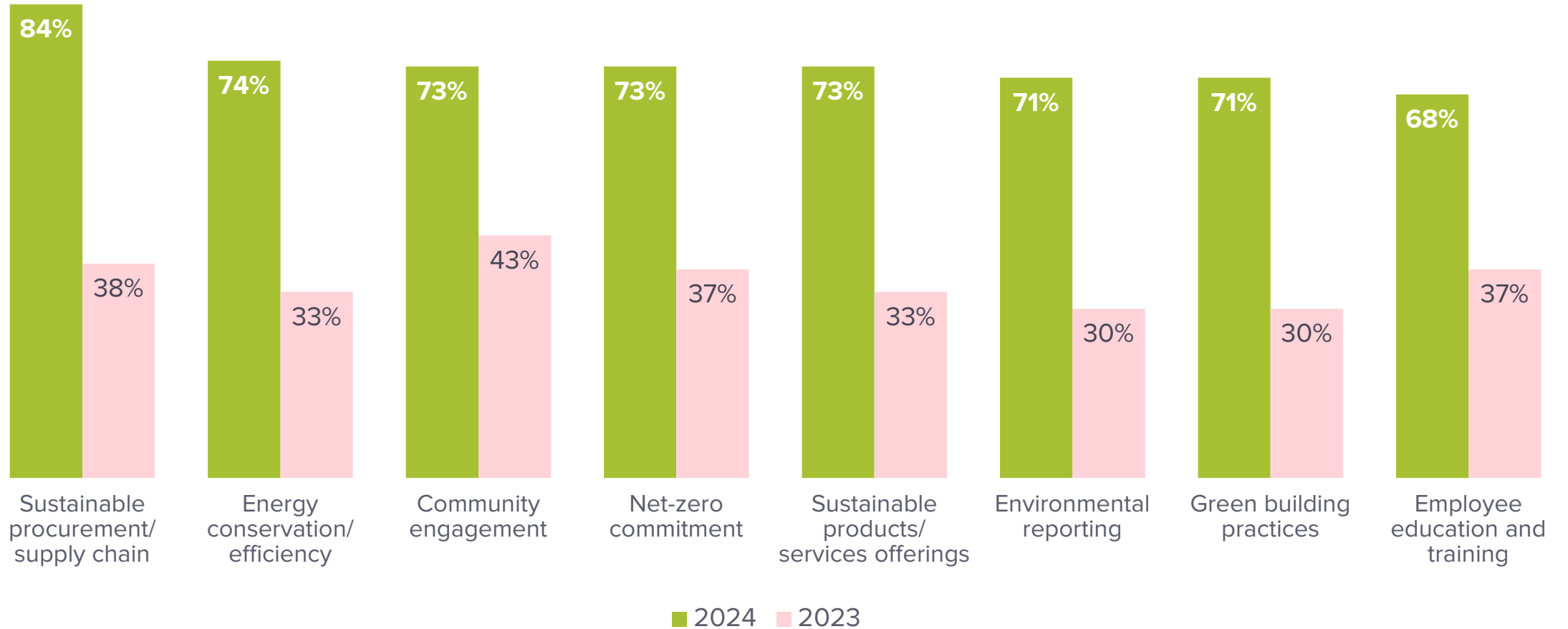
Sustainability is a strategic asset.

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

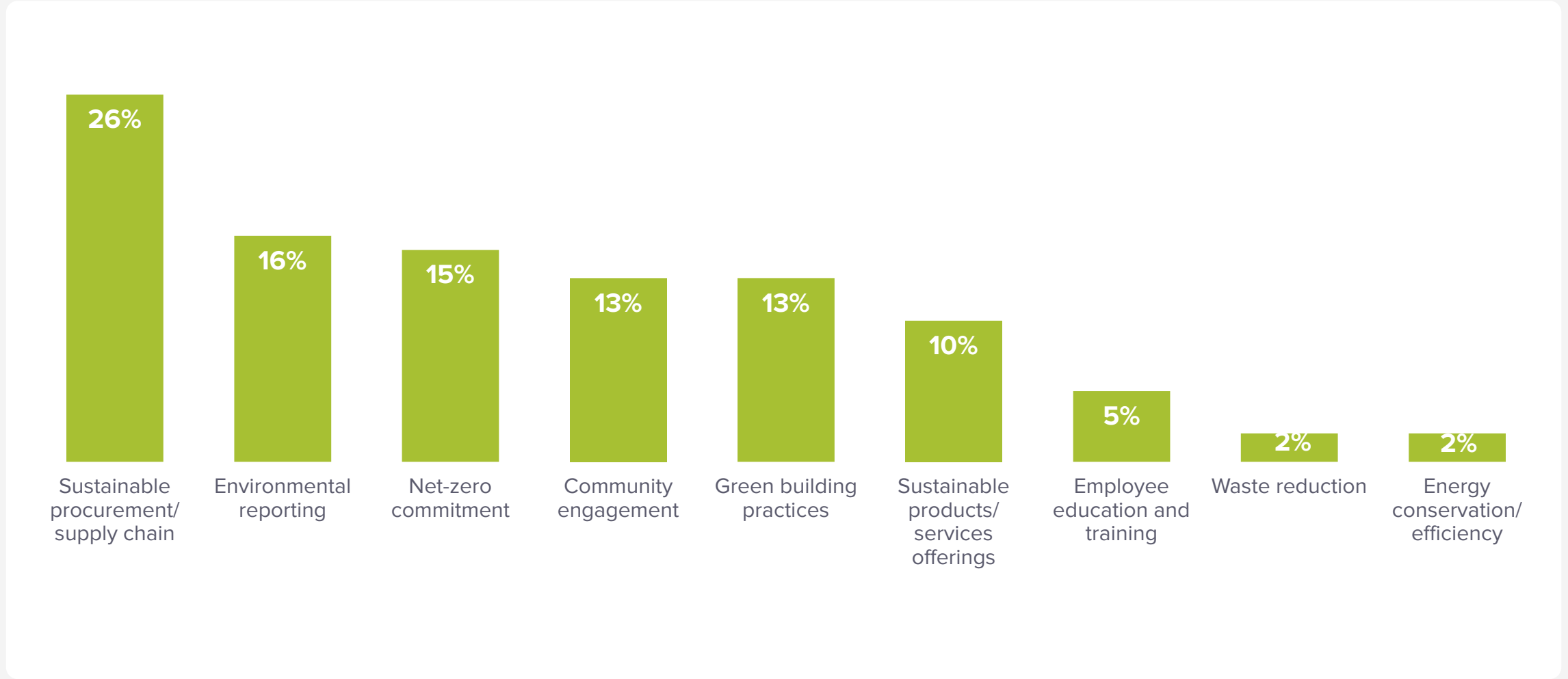
N = 62

Modeled based on responses to multiple questions

Top Environmental Measures Undertaken



Most Impactful Environmental Measures





Top Stakeholders Advocating for Sustainability



61%



Customers

58%



Employees

48%



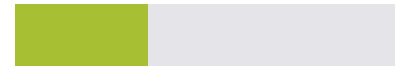
Supply chain
partners

44%



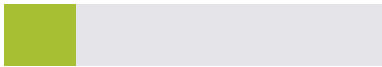
Investors/
shareholders

35%



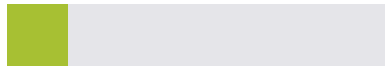
Government/
Regulators

19%



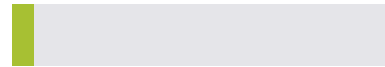
Insurers

16%



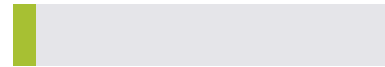
Bank/ Credit
providers

6%



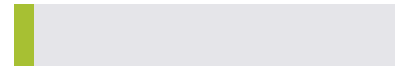
Communities

6%



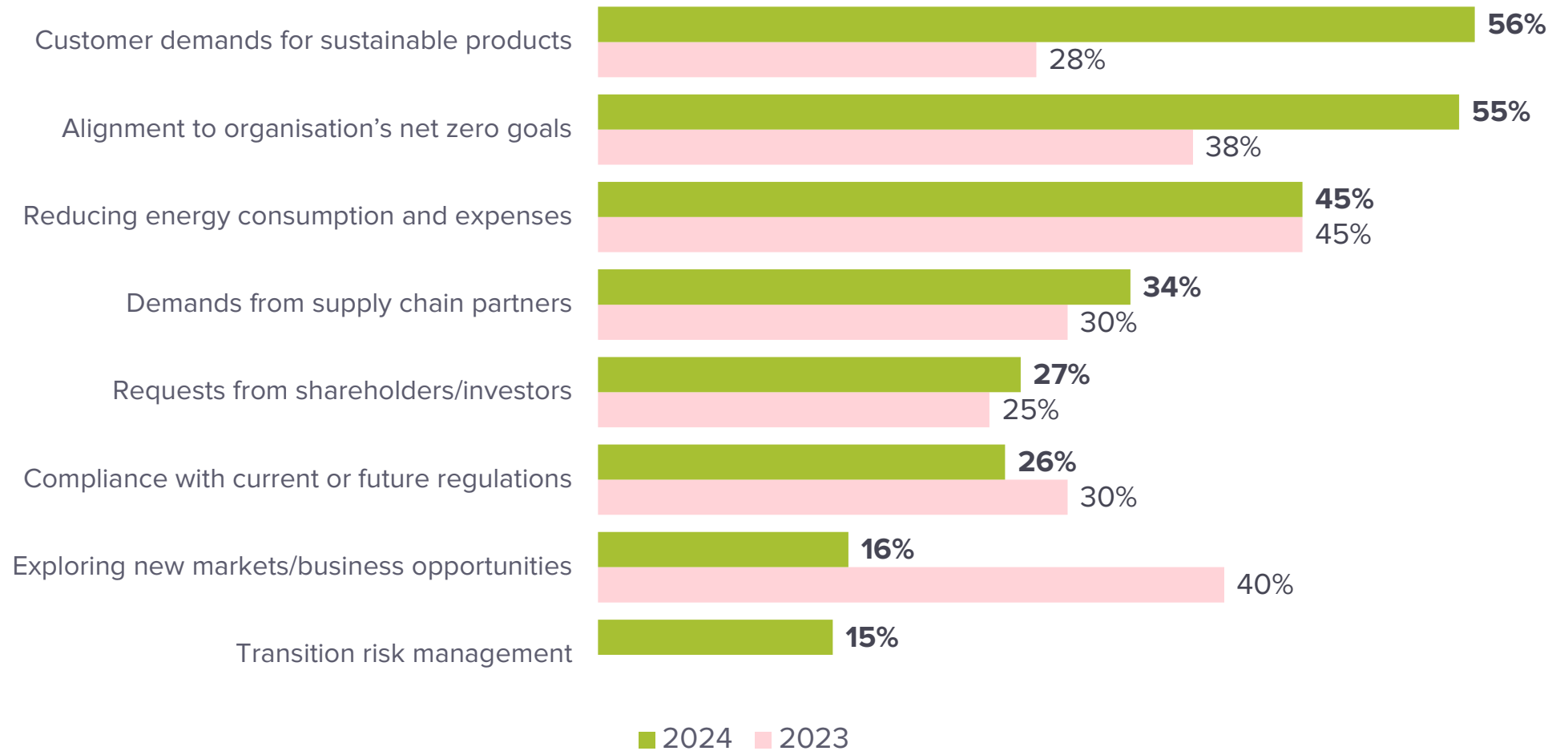
Non-profit
organizations

5%

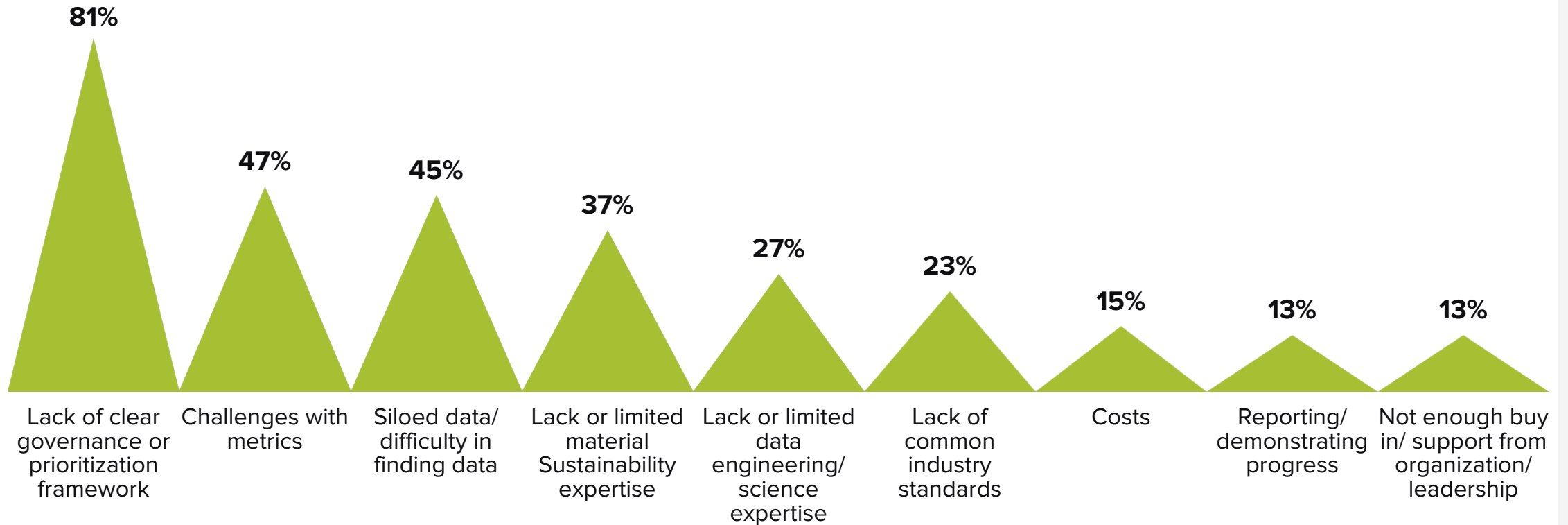


Rating agencies

Main Drivers of Sustainability



Main Challenges of Adopting Sustainability



N = 62

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

How Governments Can Support Adoption of Sustainability



Execution



People, Governance, & Narrative

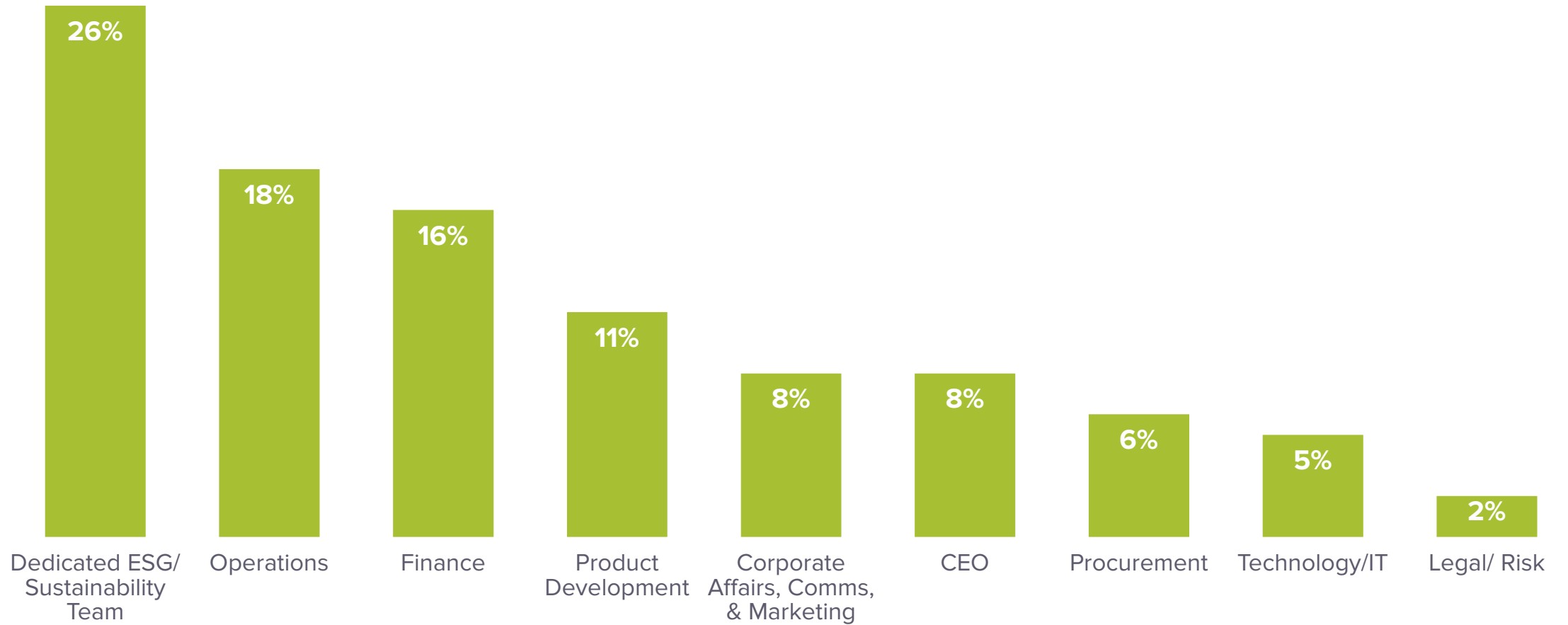




Sustainability Leadership



ecosystem.io



Role of Key Stakeholders



Defining The Vision

60%

CEO

52%

ESG/Sustainability Team

45%

Finance

Delivering Sustainability Outcomes

66%

ESG/Sustainability Team

52%

Technology/IT

45%

Finance

Providing the Data

81%

ESG/Sustainability Team

42%

Operations

35%

Technology/IT

Managing the Data

74%

ESG/Sustainability Team

44%

Legal/Risk

37%

Technology/IT

Deciding the Metrics

73%

CEO

44%

ESG/Sustainability Team

37%

Finance

Reporting

85%

ESG/Sustainability Team

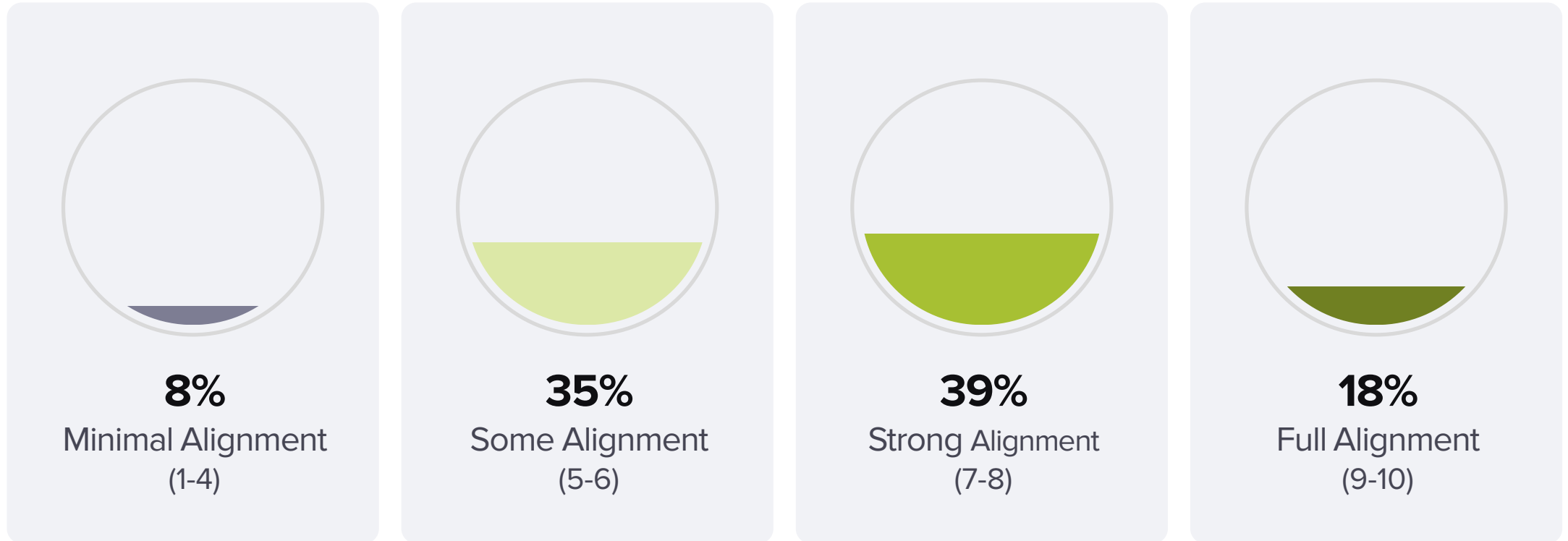
47%

Corporate Affairs, Comms, & Marketing

40%

Technology/IT

Alignment Between Sustainability Team & Finance



Maturity of Employee Involvement in Sustainability



8%

Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives



21%

Basic Sustainability Awareness

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



52%

Emerging Sustainability Engagement

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



15%

KPI-Driven Sustainability

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

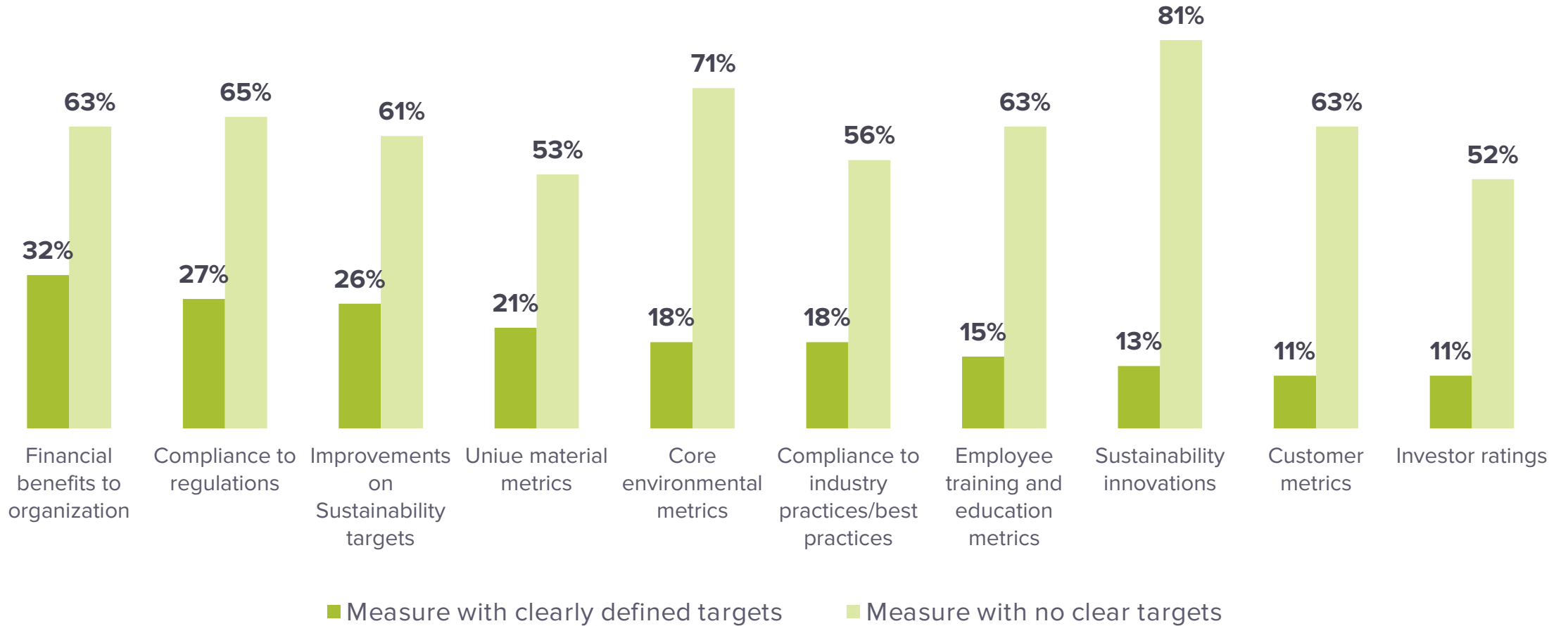


4%

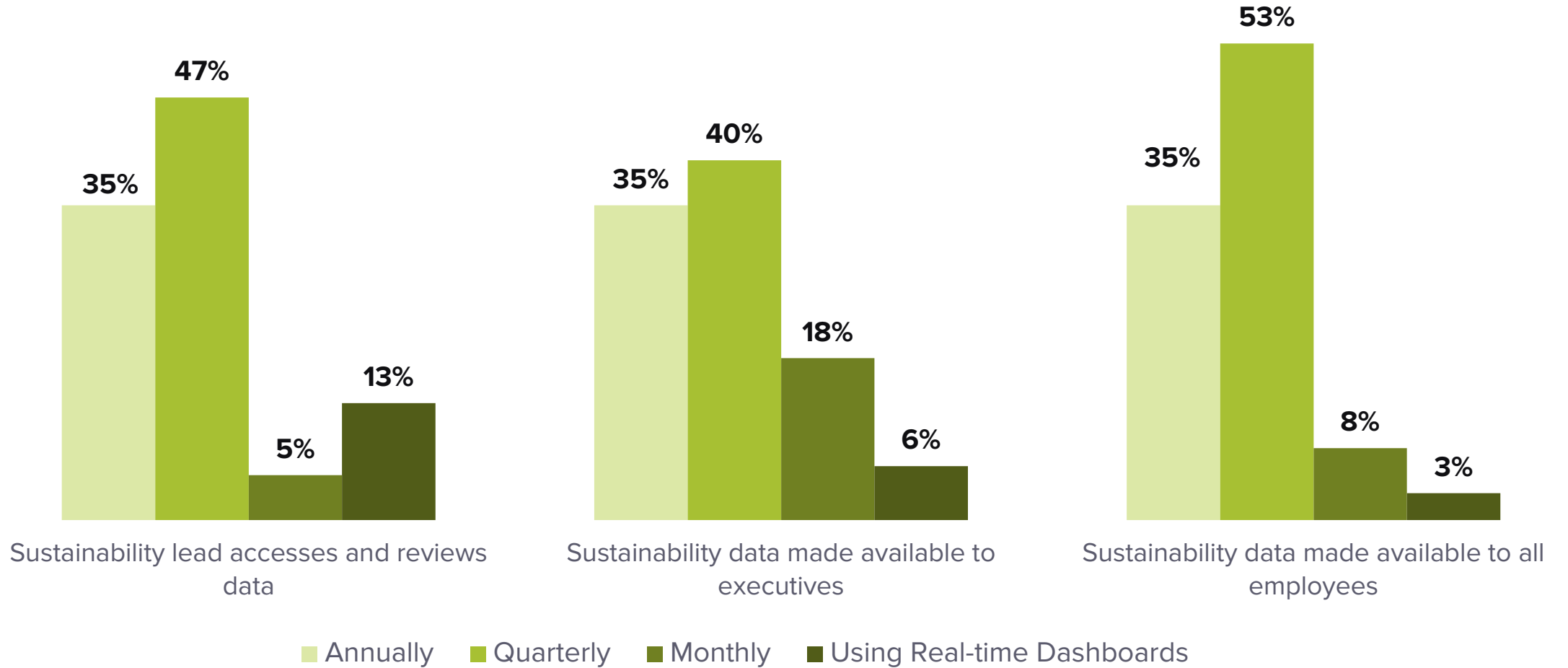
Sustainability as a Strategic Imperative

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

Metrics Used to Measure Sustainability



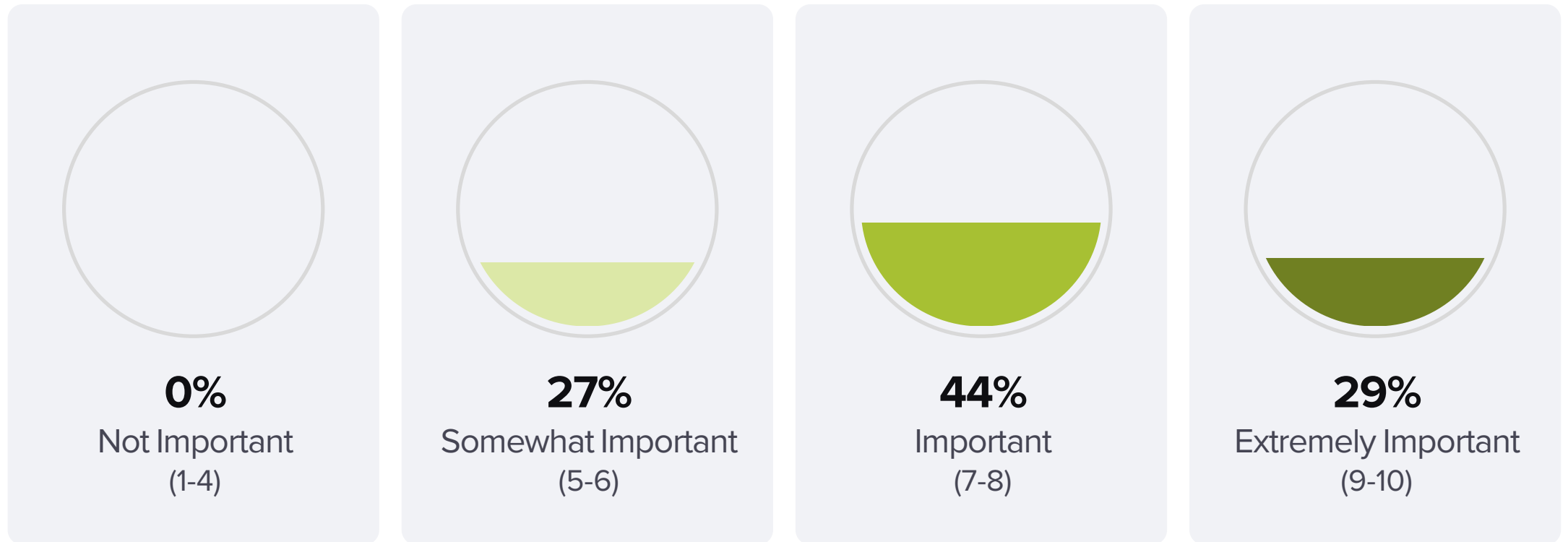
Sustainability Data Access and Sharing



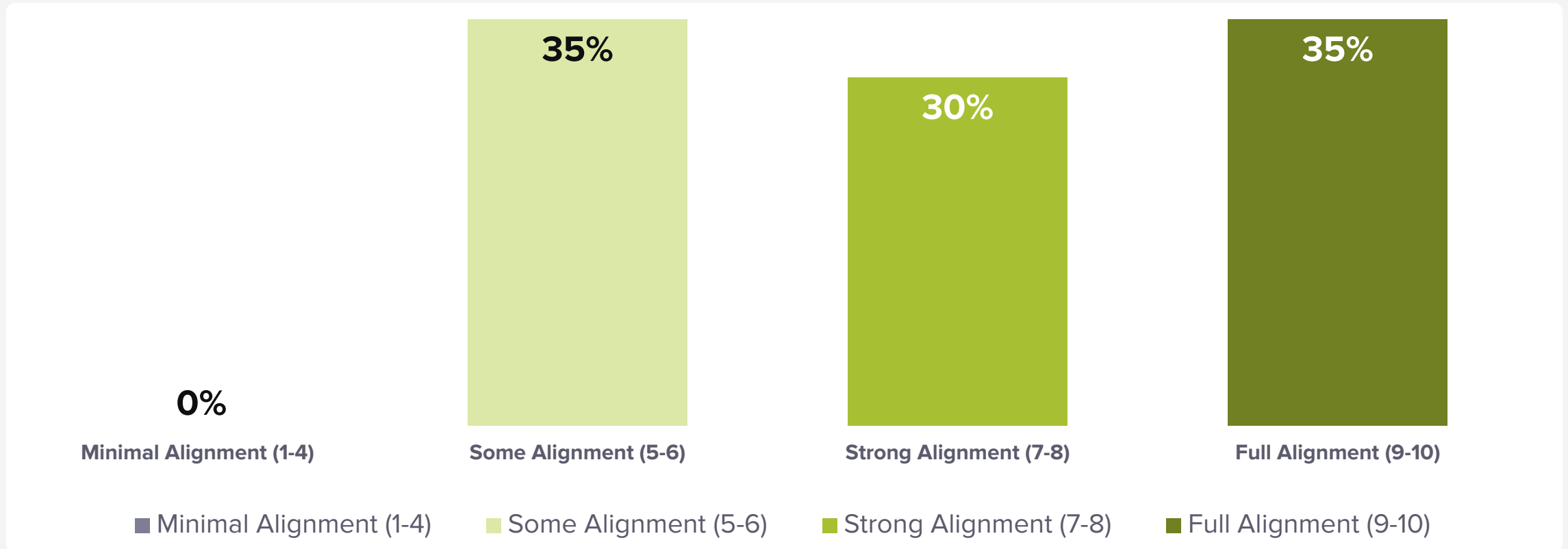
Technology



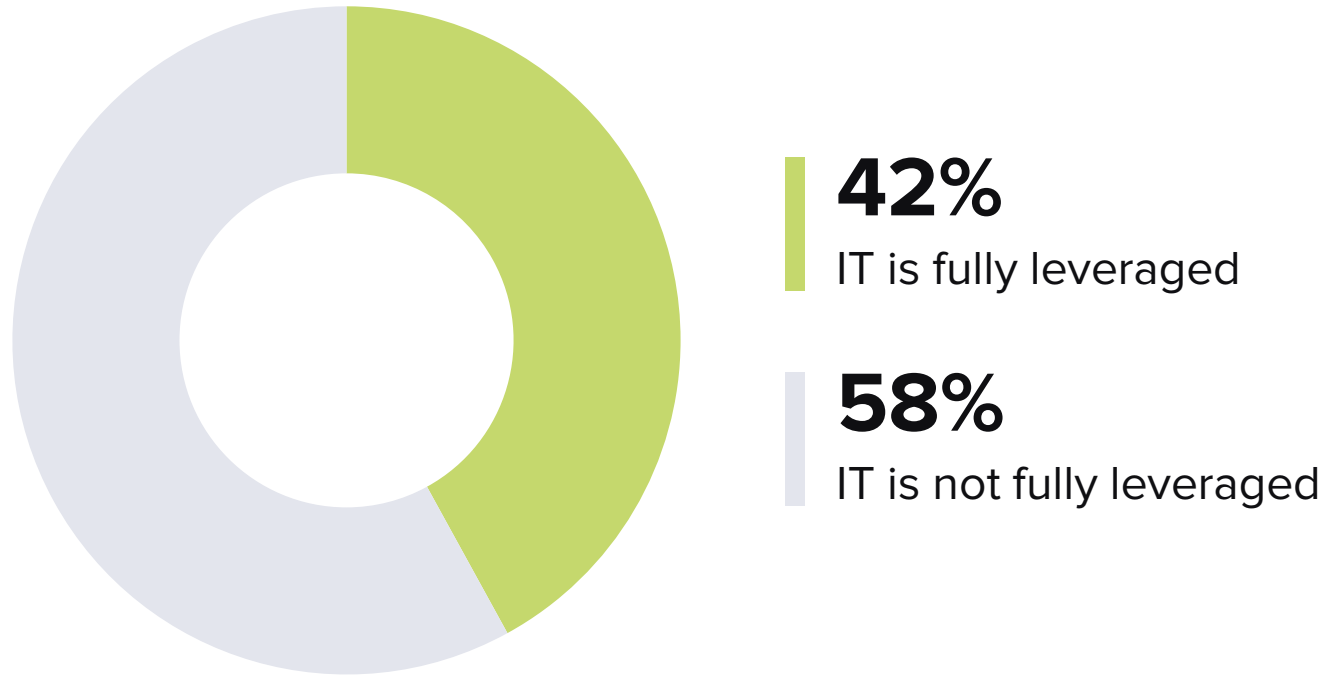
Importance of Technology in Achieving Sustainability Goals



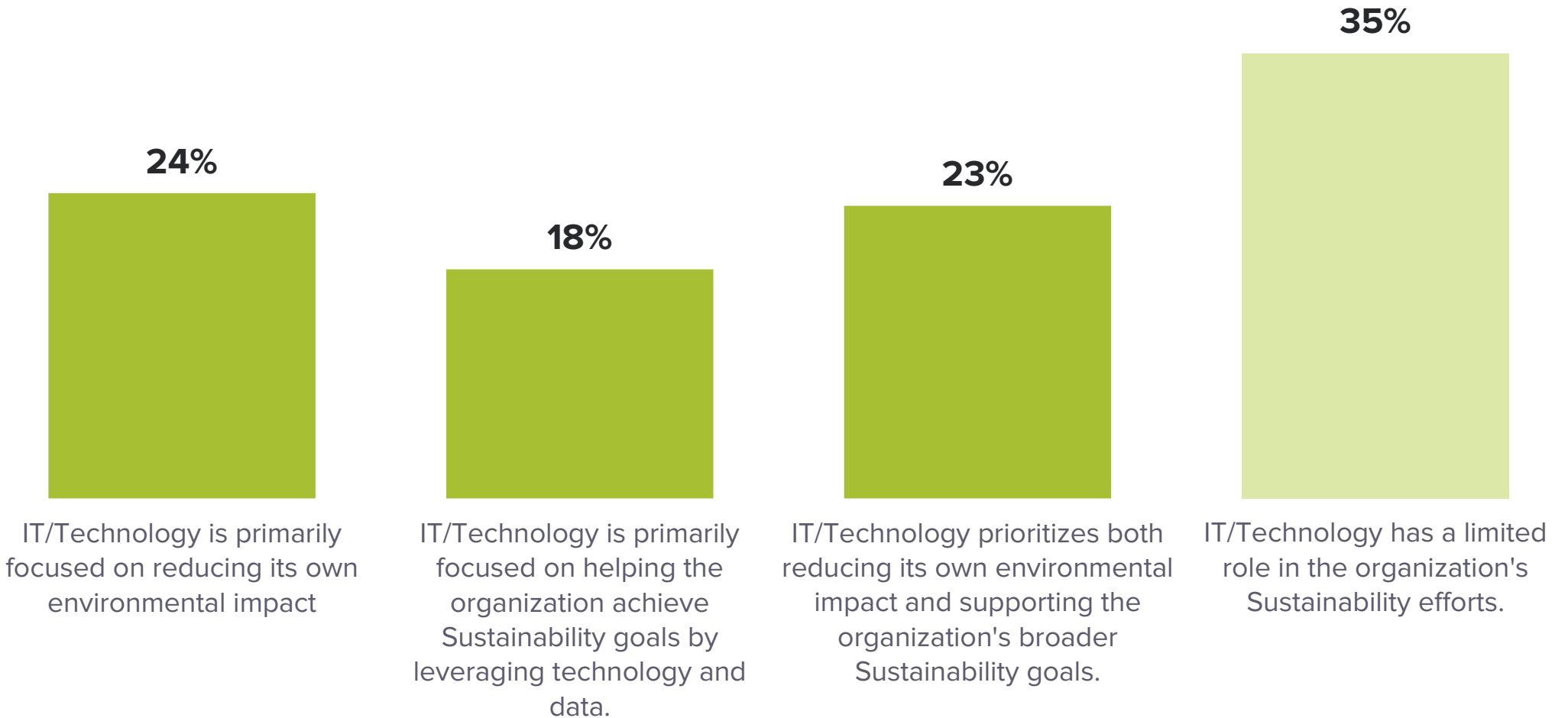
Alignment Between Sustainability Teams & Technology



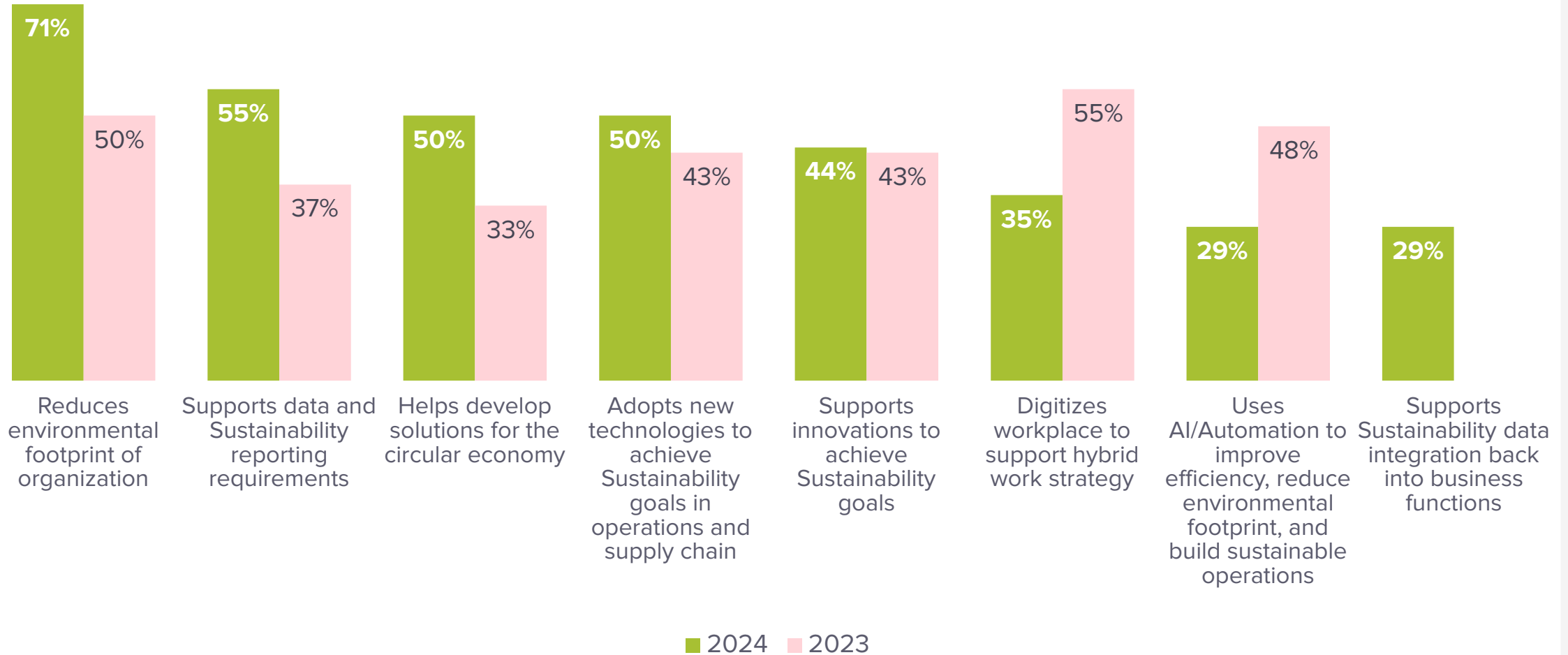
The Extent of Use of IT to Achieve Sustainability Goals



IT's Role in Achieving Sustainability Goals



Role of Technology in Supporting Sustainability

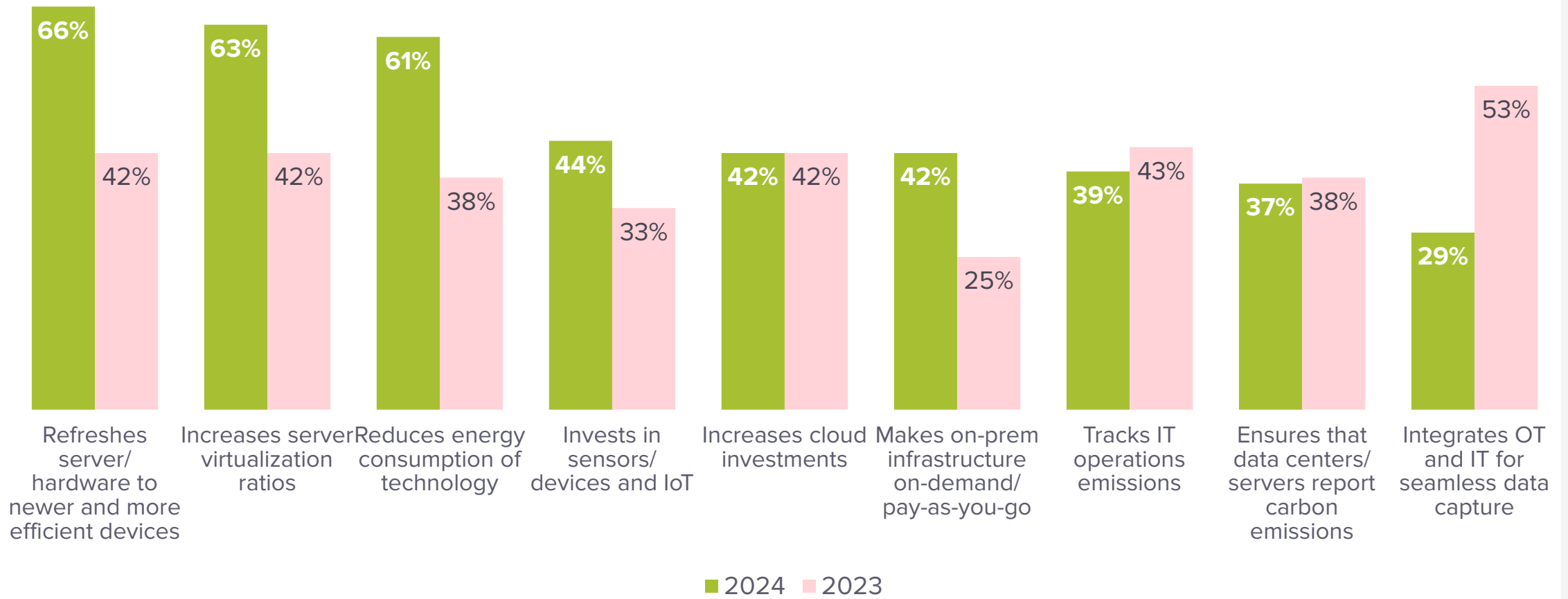




Technology Team's Steps to Reduce Carbon Footprint



ecosystem.io



Data-Driven Sustainability: Leveraging Insights for Impact



0%

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



32%

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



32%

We use data to track key Sustainability metrics for reporting



15%

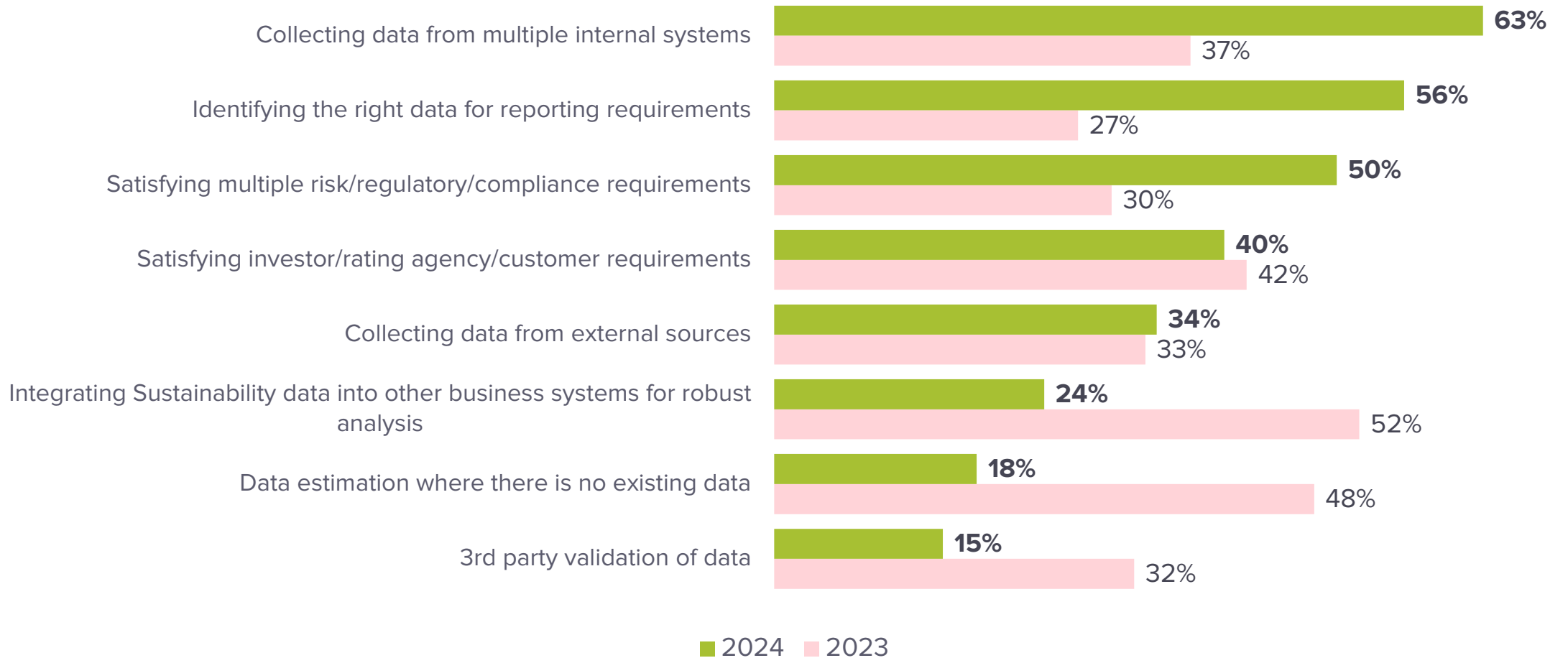
We use data to track, analyze, and optimize our Sustainability performance across business applications



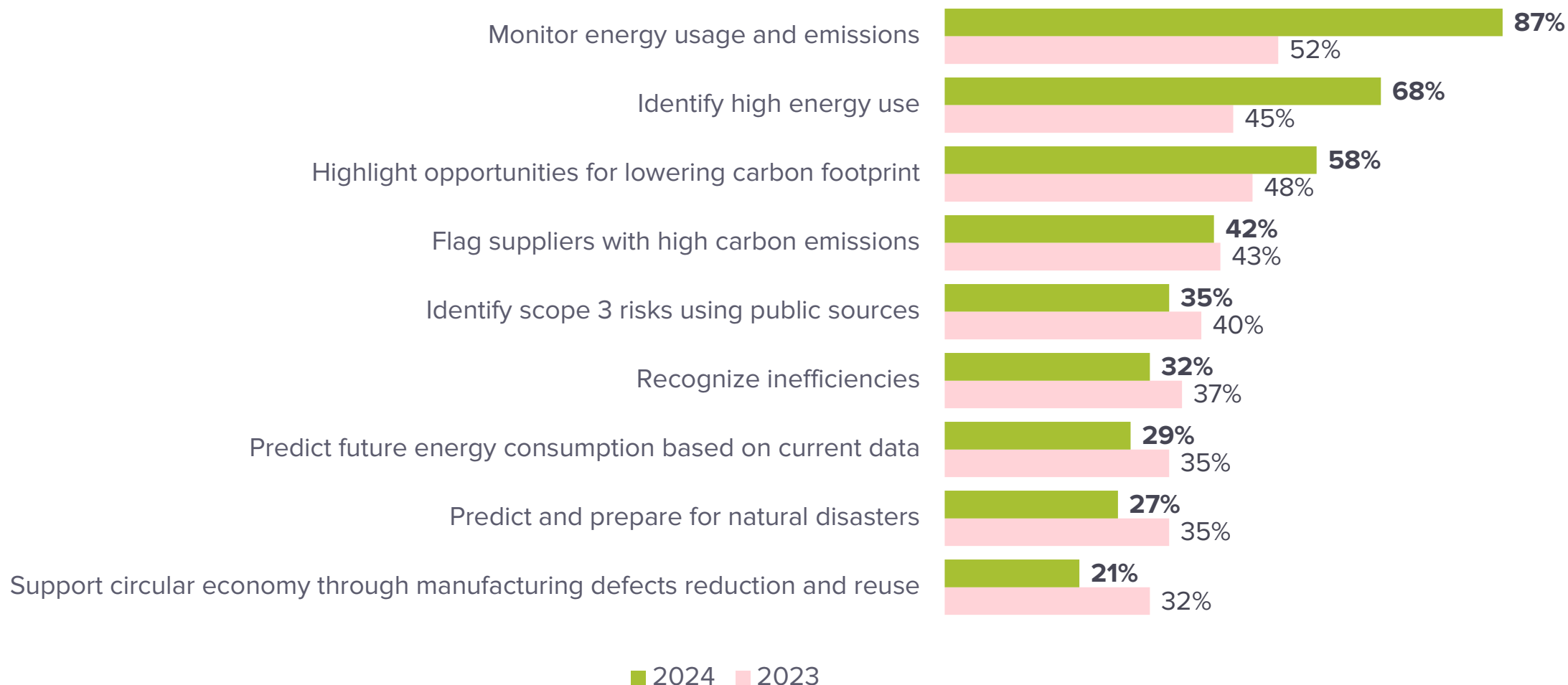
21%

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

Challenges of Supporting Sustainability Data Needs



The Use of AI for Environmental Footprint Management



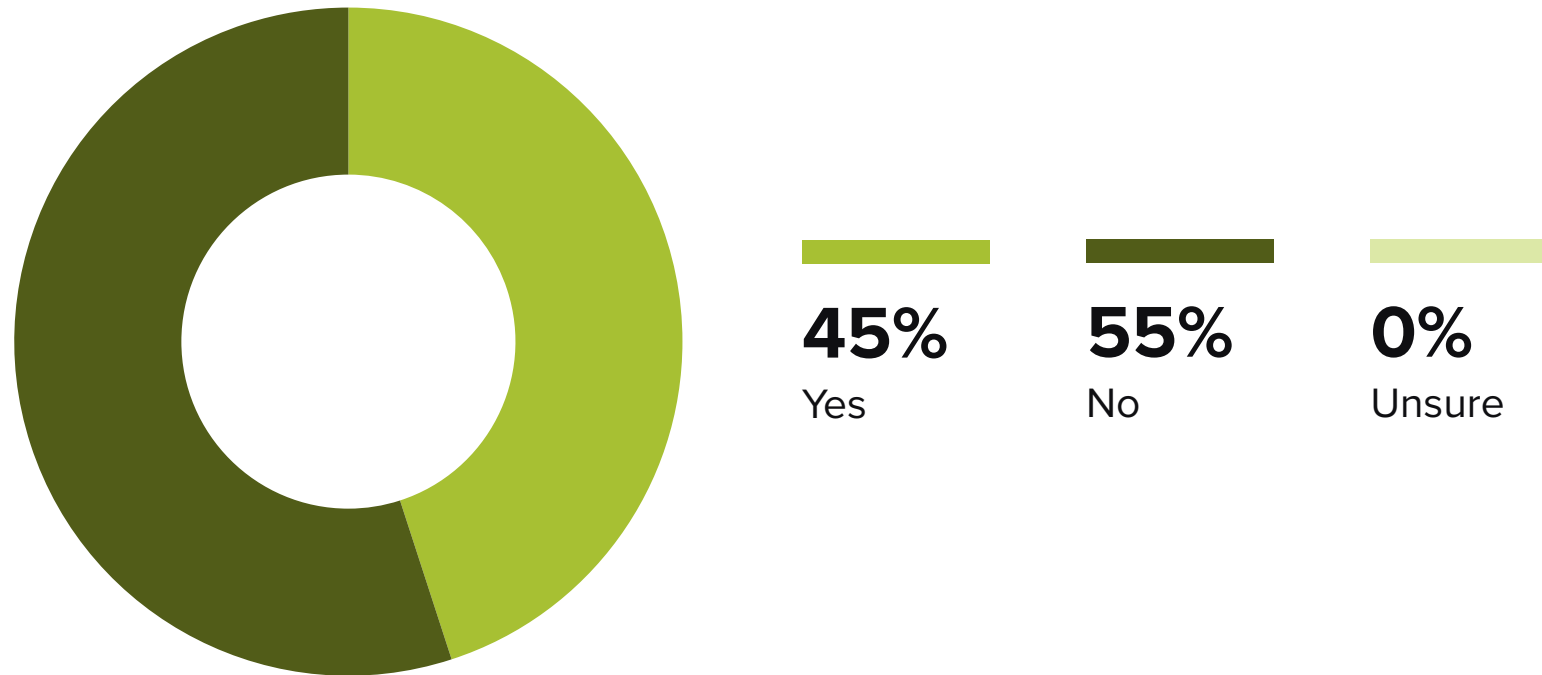
N = 62; (2023 N=60)

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

Environmental Impact of AI



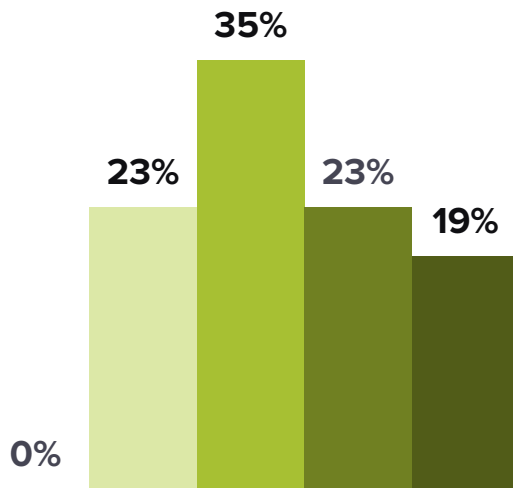
Is Impact Considered?



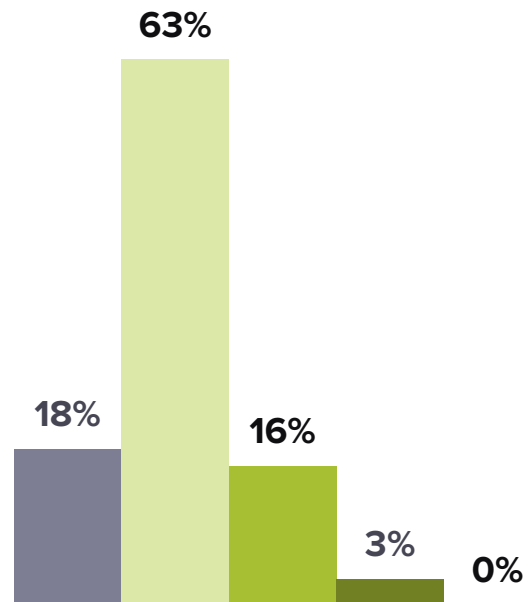
Perception on the Impact of AI



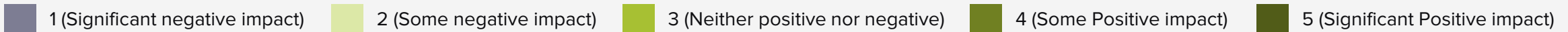
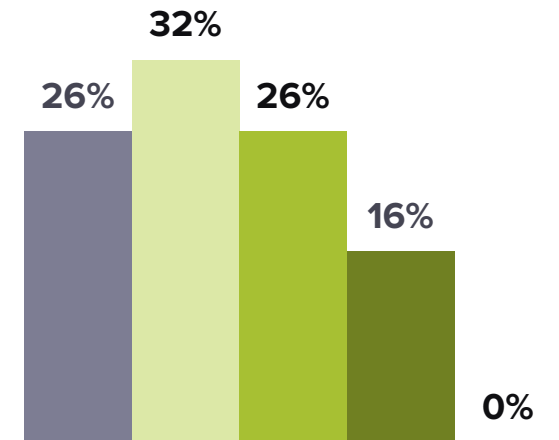
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions

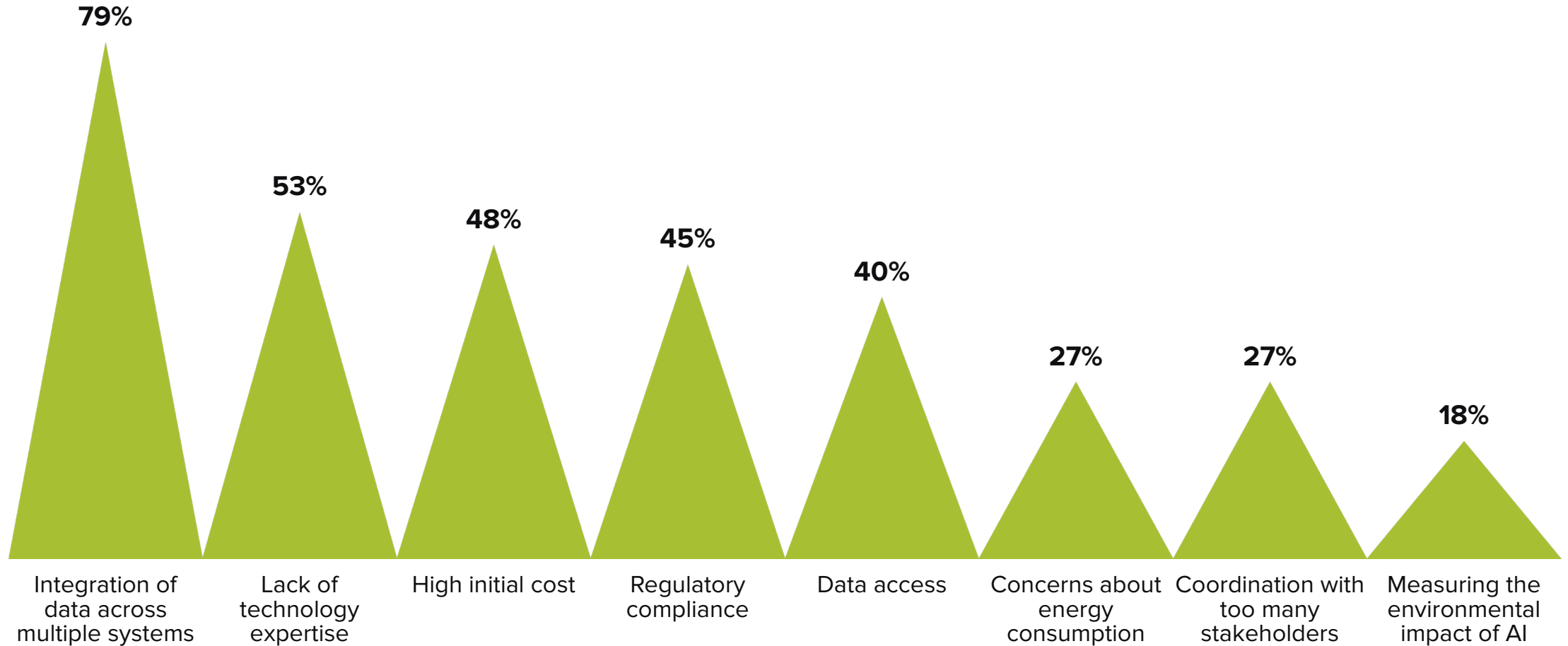


Impact of AI on the cost of Sustainability initiatives

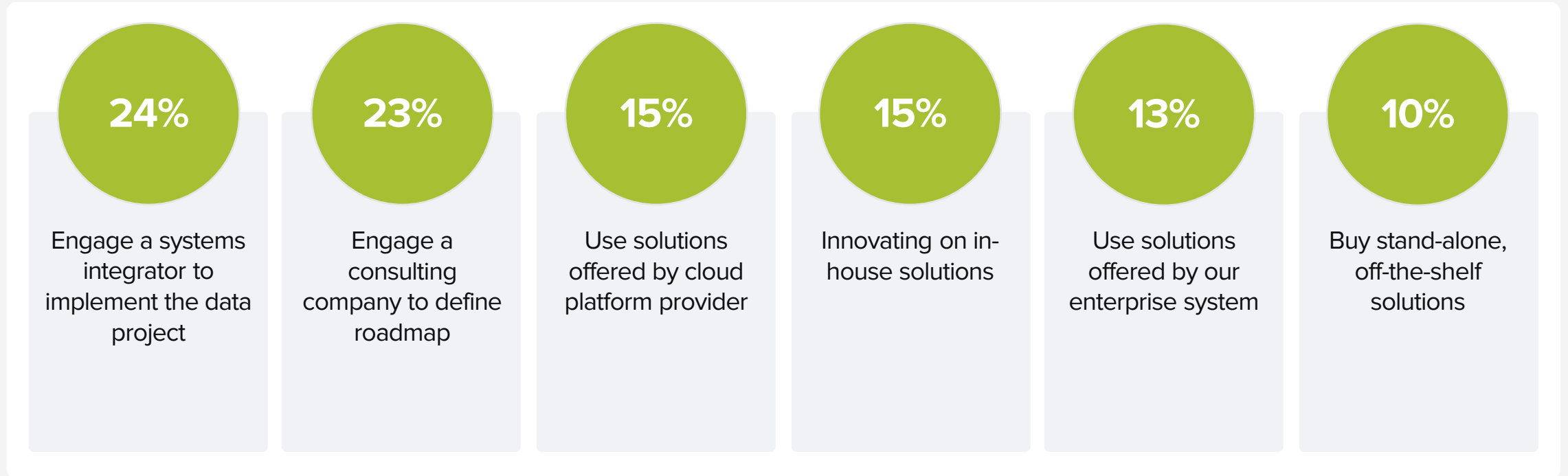




Key Challenges in Integrating AI for Sustainability Initiatives



Building Sustainability Technology Capabilities



N = 62

Q: How is your organization building Sustainability reporting capabilities?

United Kingdom





Study Demographics

ecosystem.io

Function

30



IT/Digital

7



Management

5



Legal

4



Human Resources

4



Sustainability/ESG/CSR

3



Operations/ Logistics/
Procurement/
Production

3



Risk & Compliance

2



Finance

2



Product Development
& Research

Industry

24

Financial
Services

9

Manufacturing

9

Retail

3

Energy &
Utilities

3

Construction &
Real Estate

3

Hospitality

3

Primary
Industries

3

Media &
Telecom

3

Transport and
Logistics

Organization Size (No. of Emp.)



16

201 - 499



10

500 - 999



23

1,000 -
4,999



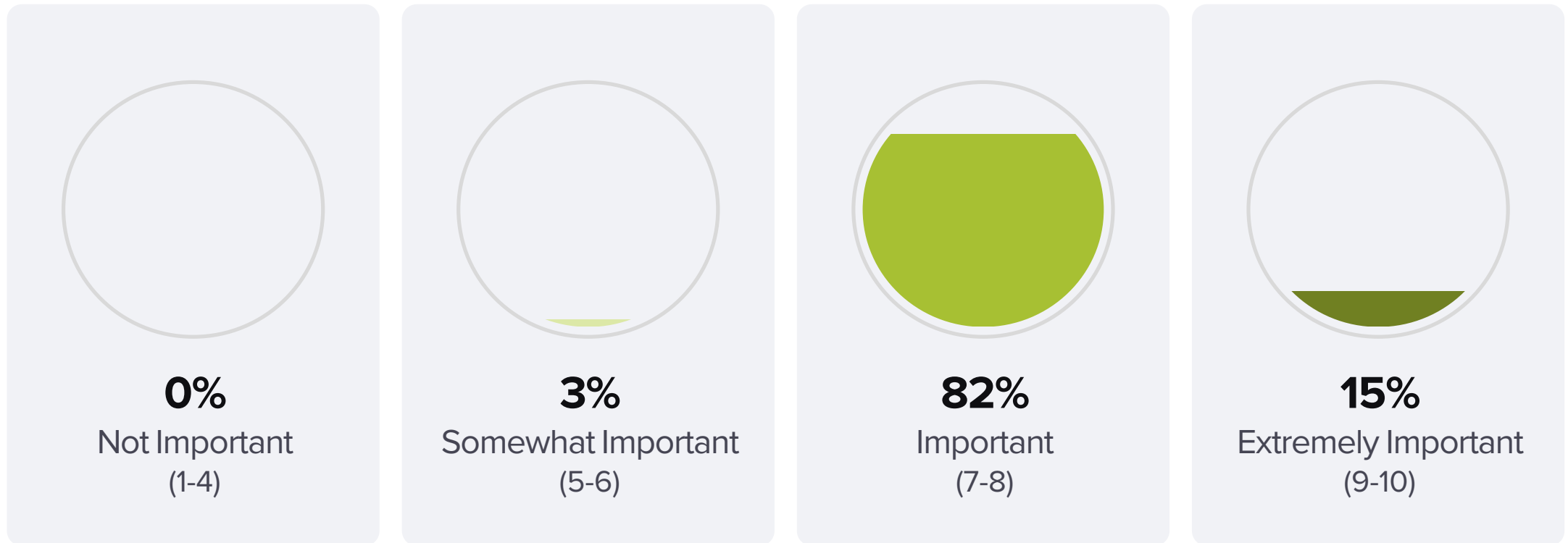
11

More than
5,000

Strategy & Perception



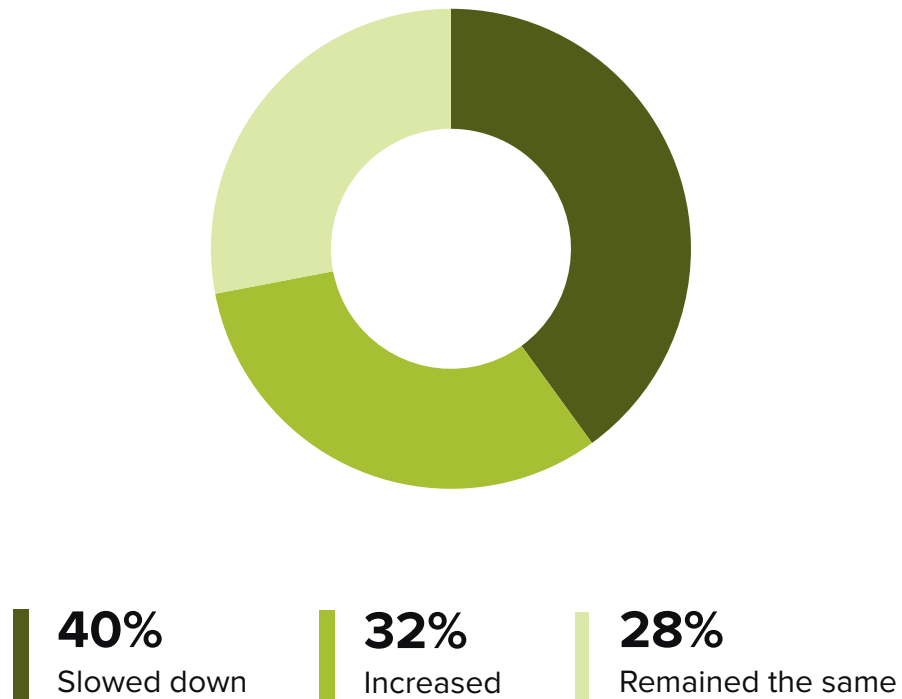
The Importance of Sustainability in the Organization



Pace of Sustainability Efforts



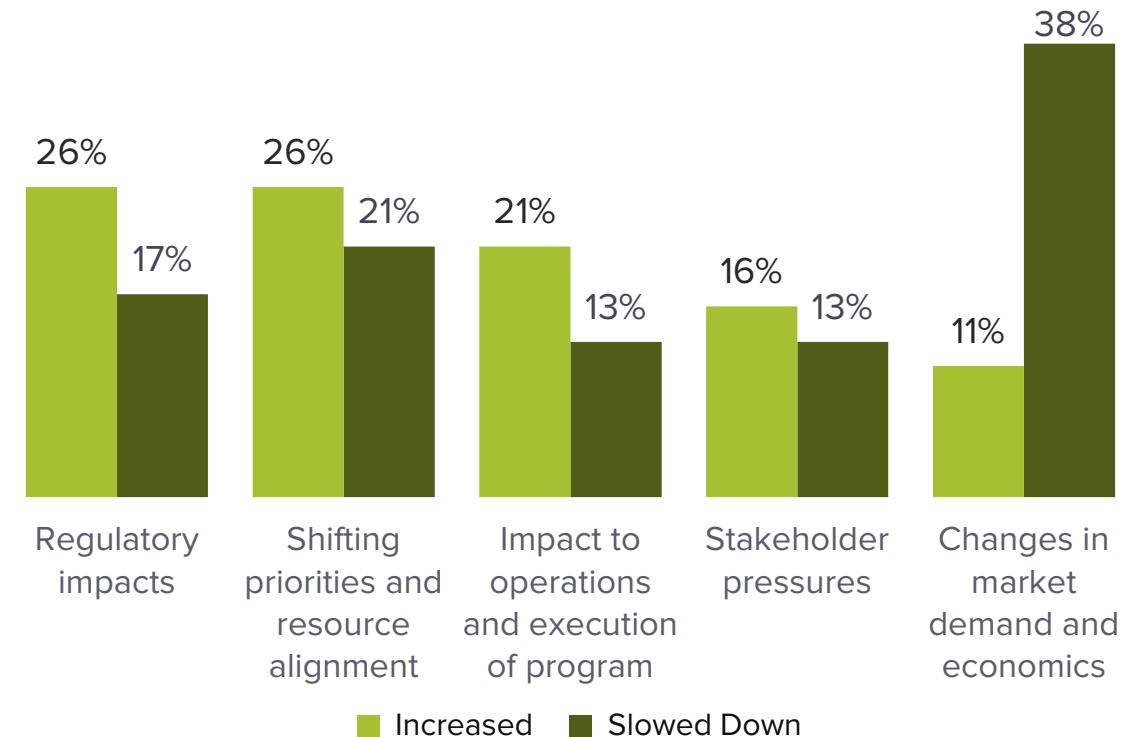
CHANGE FROM LAST YEAR



N = 60

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

REASONS FOR CHANGE



N = 43

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



17%

Sustainability is a strategic aspiration

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



57%

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



9%

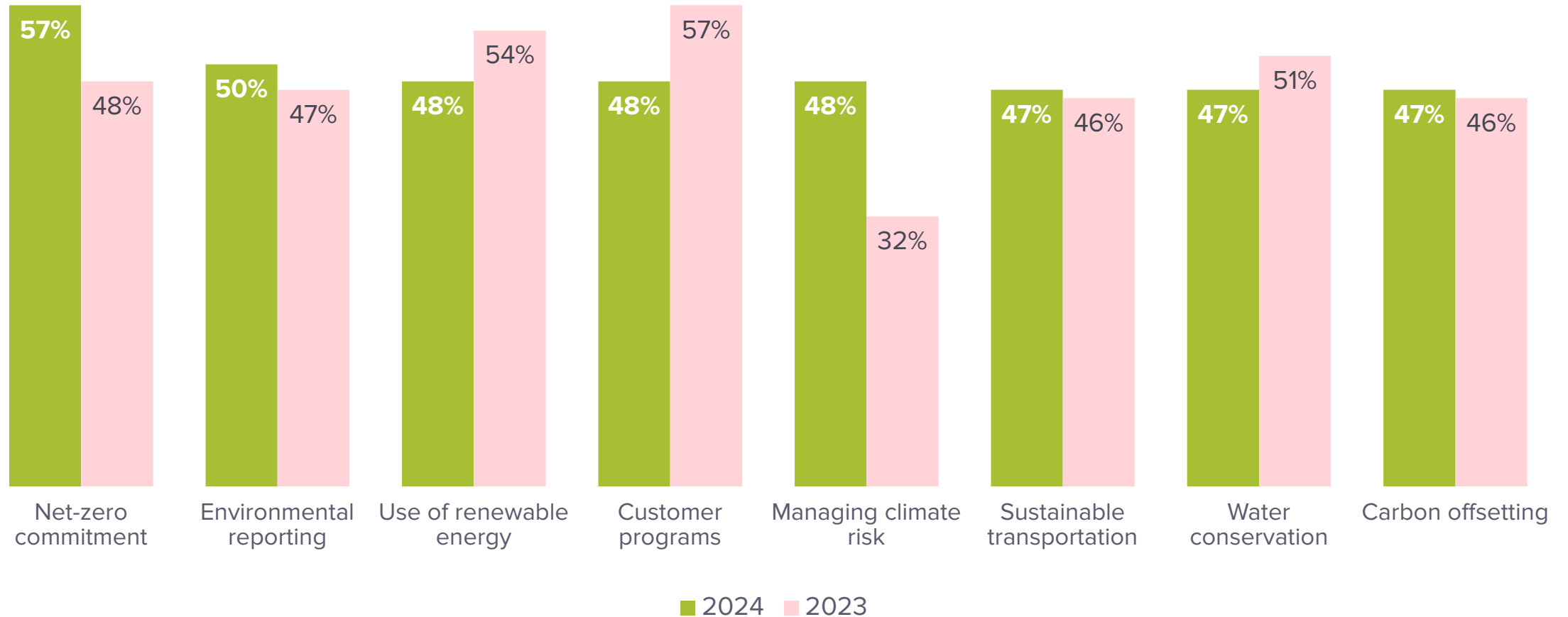
Sustainability is a strategic asset.

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

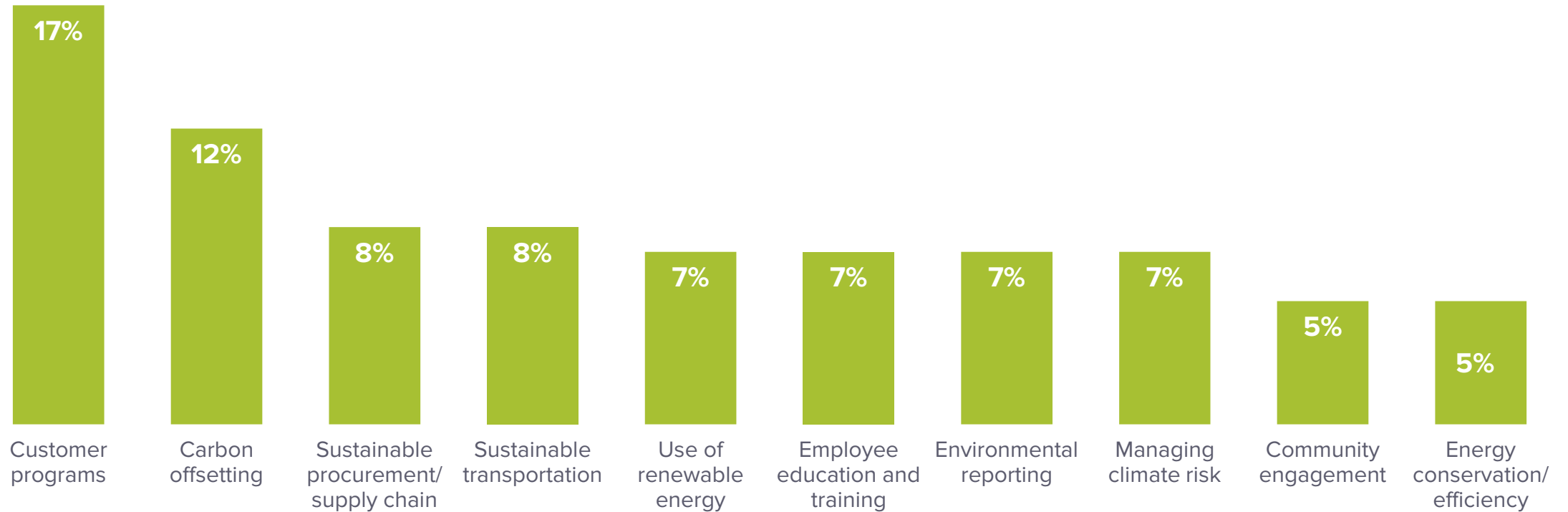
N = 60

Modeled based on responses to multiple questions

Top Environmental Measures Undertaken



Most Impactful Environmental Measures



Top Stakeholders Advocating for Sustainability



58%



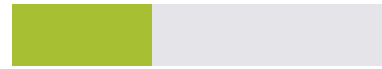
Supply chain partners

42%



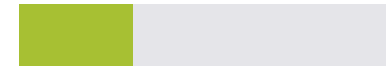
Government/Regulators

37%



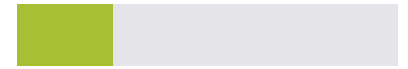
Customers

30%



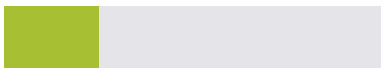
Communities

25%



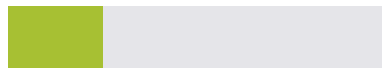
Investors/
shareholders

25%



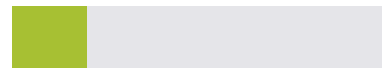
Bank/ Credit providers

25%



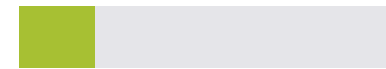
Insurers

20%



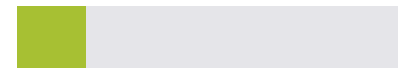
Employees

20%



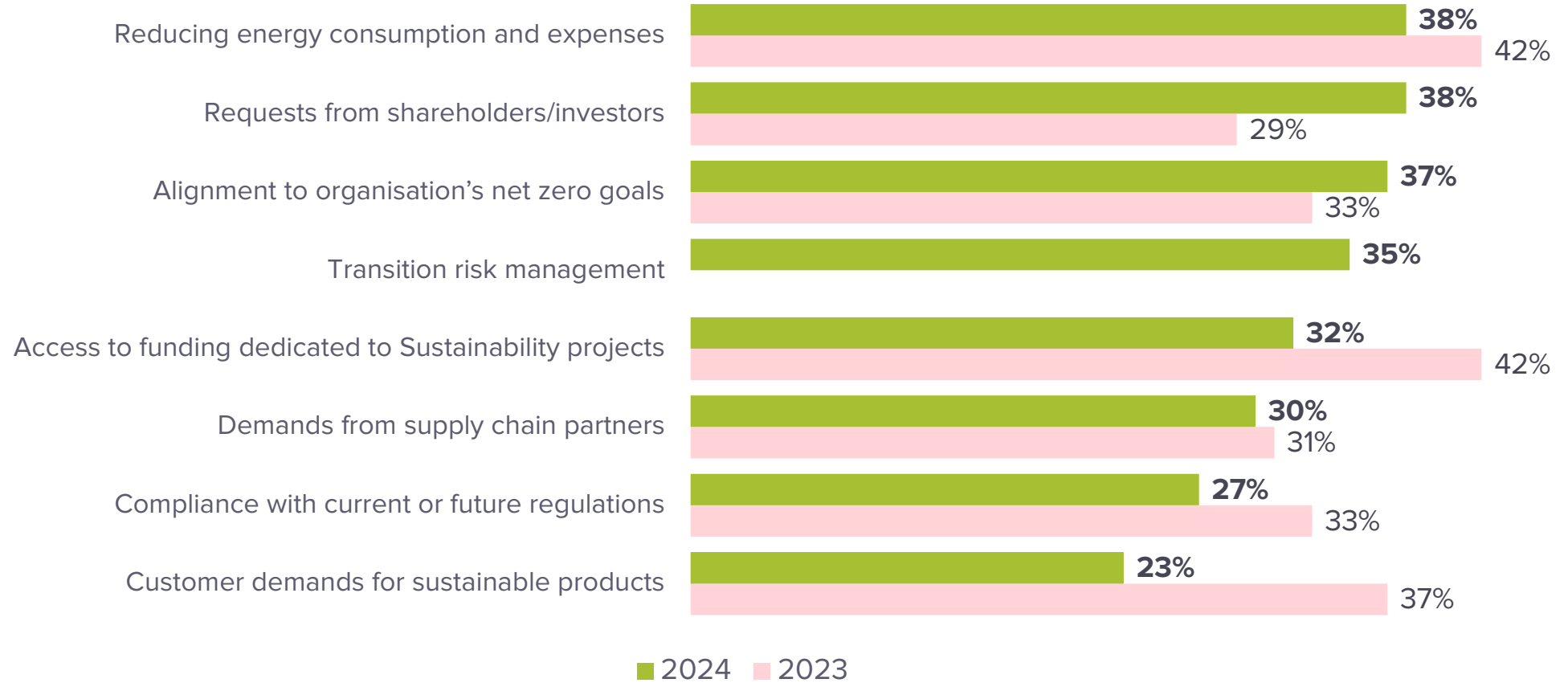
Rating Agencies

18%

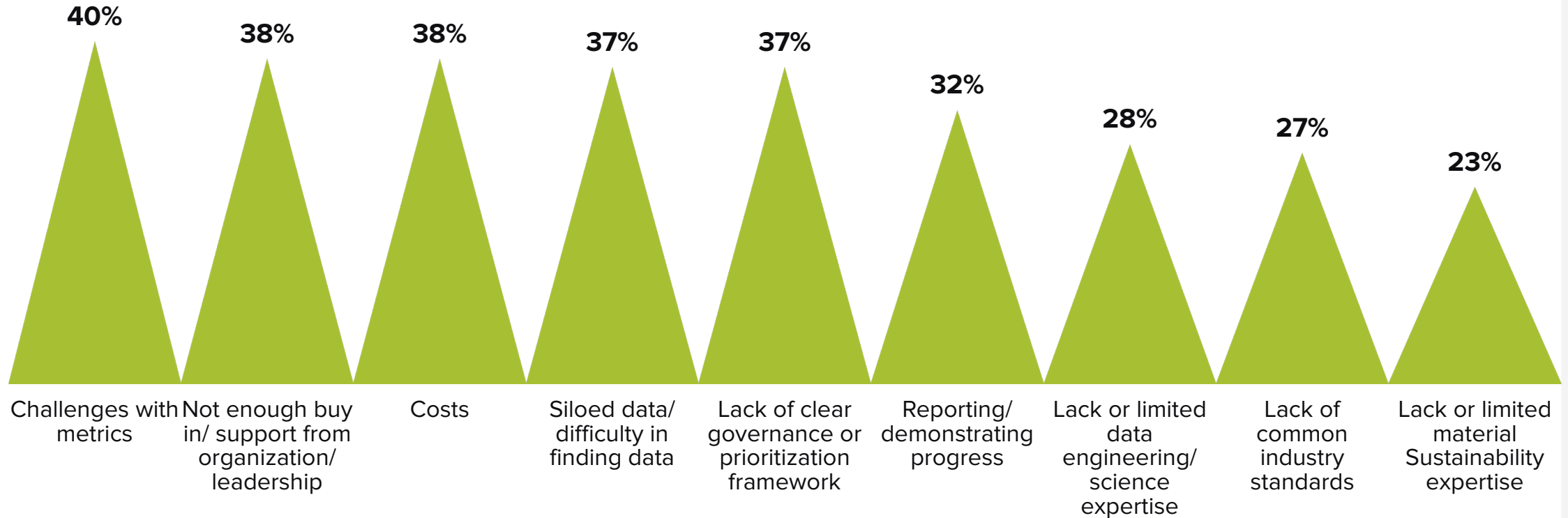


Non-profit organizations

Main Drivers of Sustainability



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

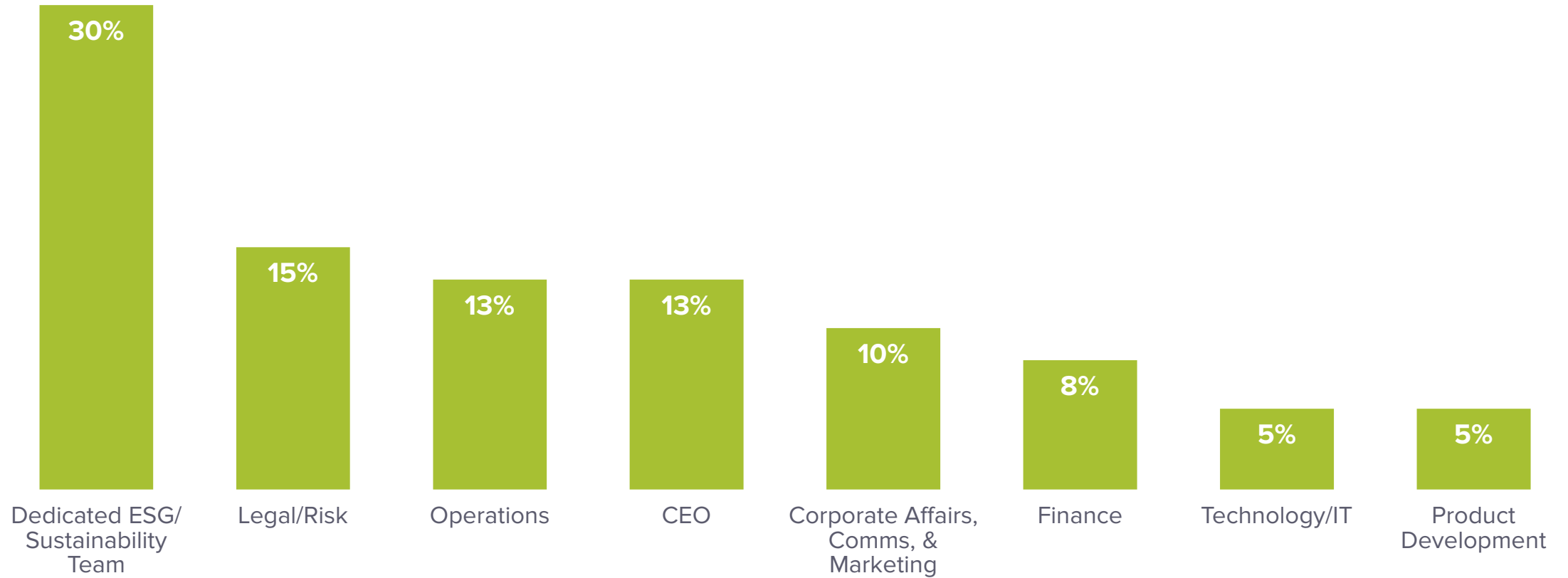




Execution

People, Governance, & Narrative

Sustainability Leadership



N = 60

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

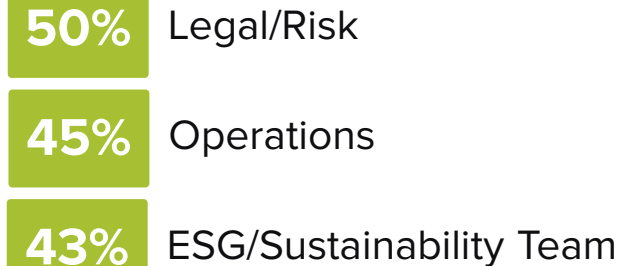
Role of Key Stakeholders



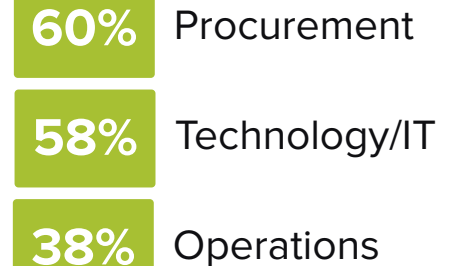
Defining The Vision



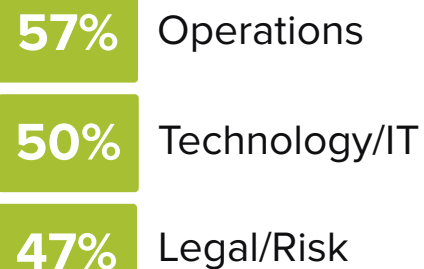
Delivering Sustainability Outcomes



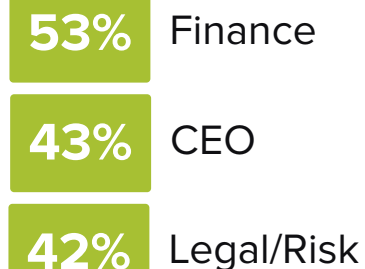
Providing the Data



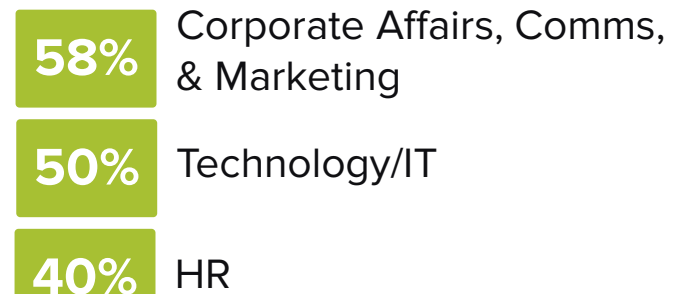
Managing the Data



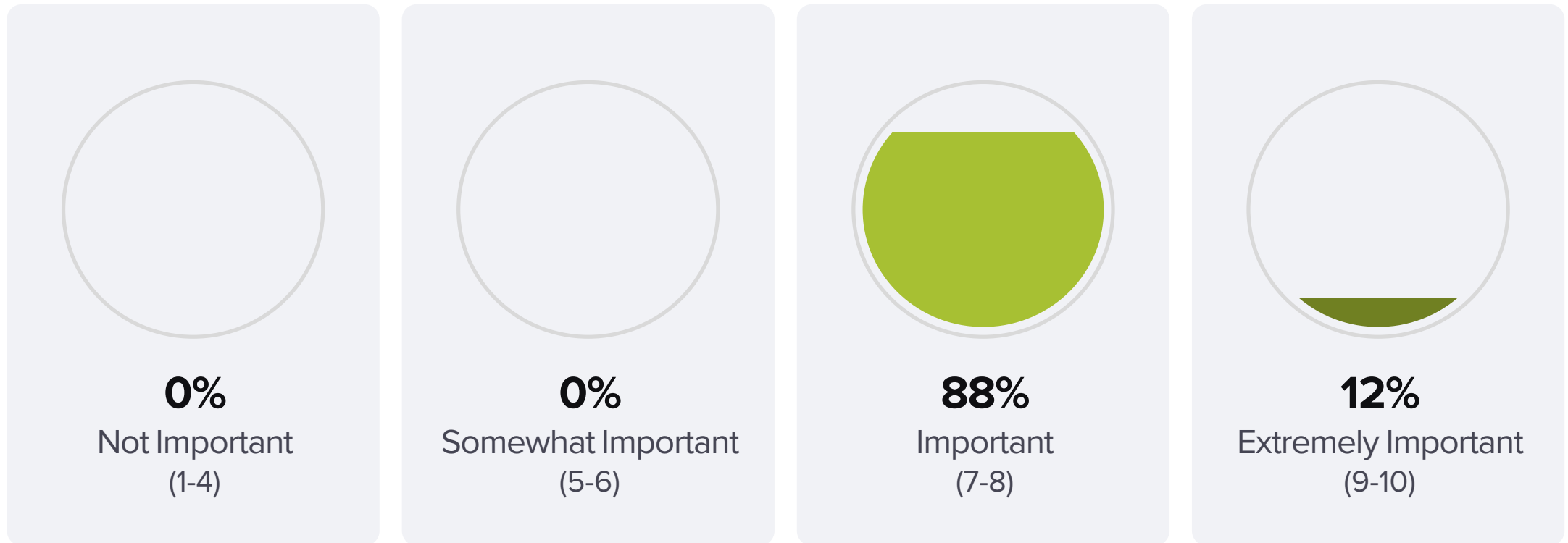
Deciding the Metrics



Reporting



Alignment Between Sustainability Team & Finance



Maturity of Employee Involvement in Sustainability



10%

Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives



7%

Basic Sustainability Awareness

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



35%

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



16%

Sustainability as a Strategic Imperative

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

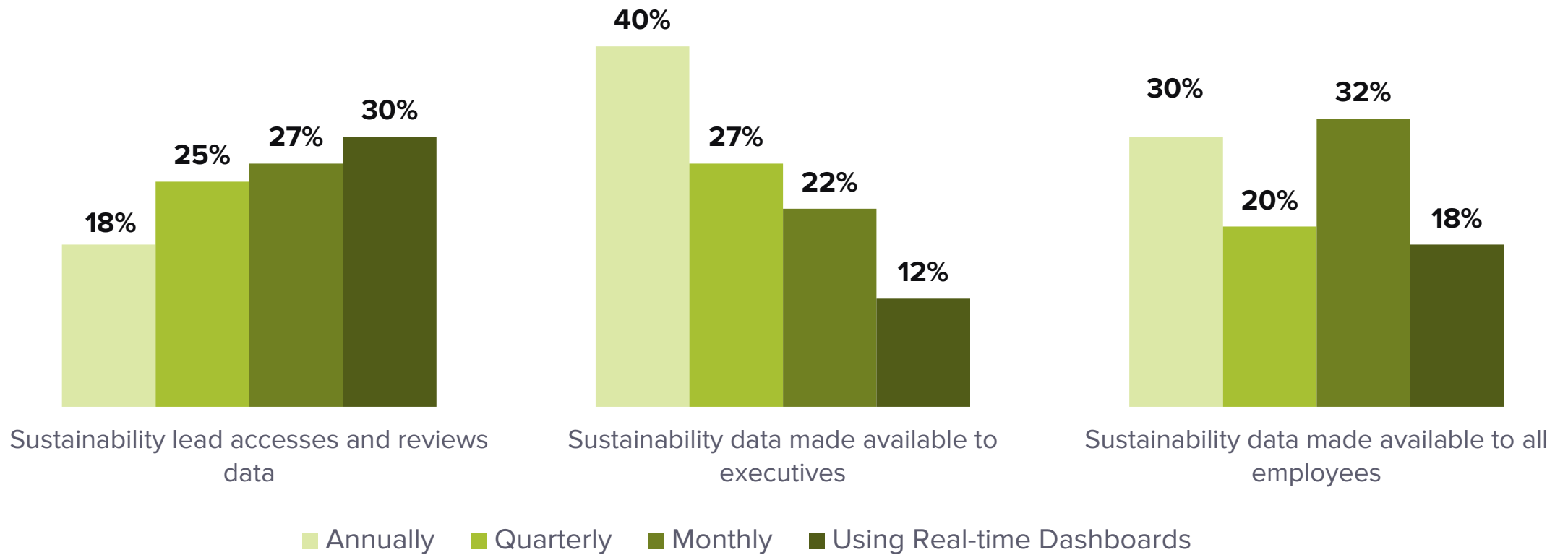


Metrics Used to Measure Sustainability

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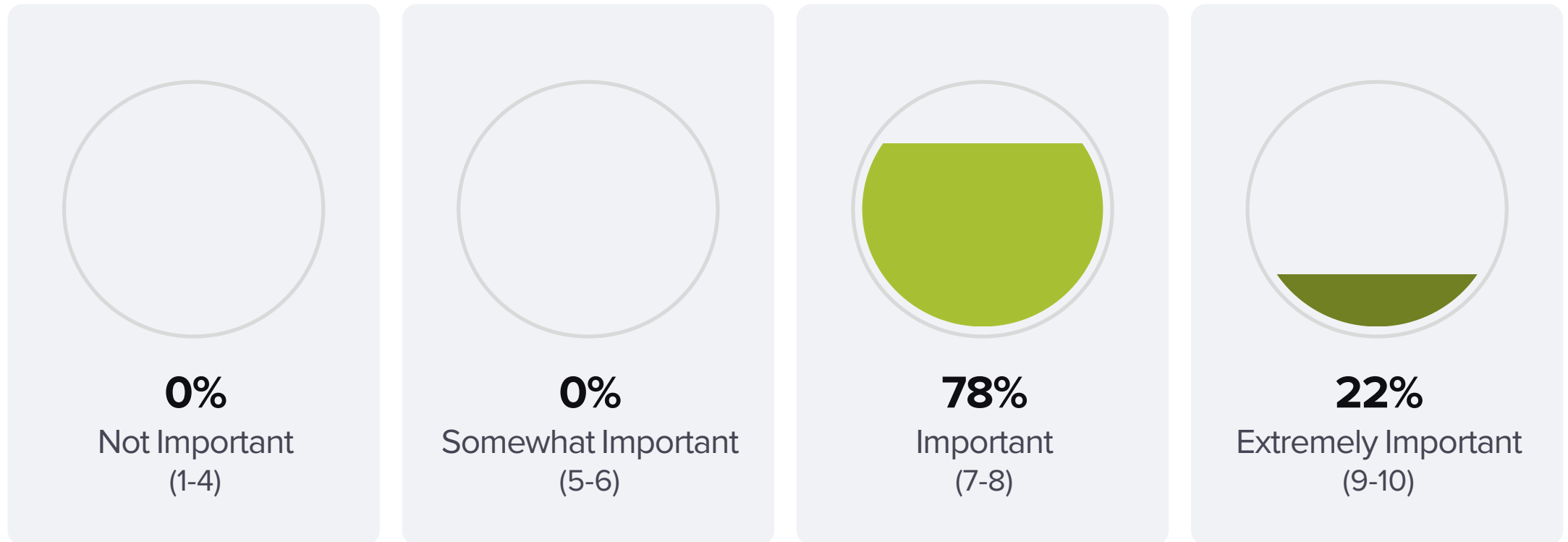
Sustainability Data Access and Sharing



Technology

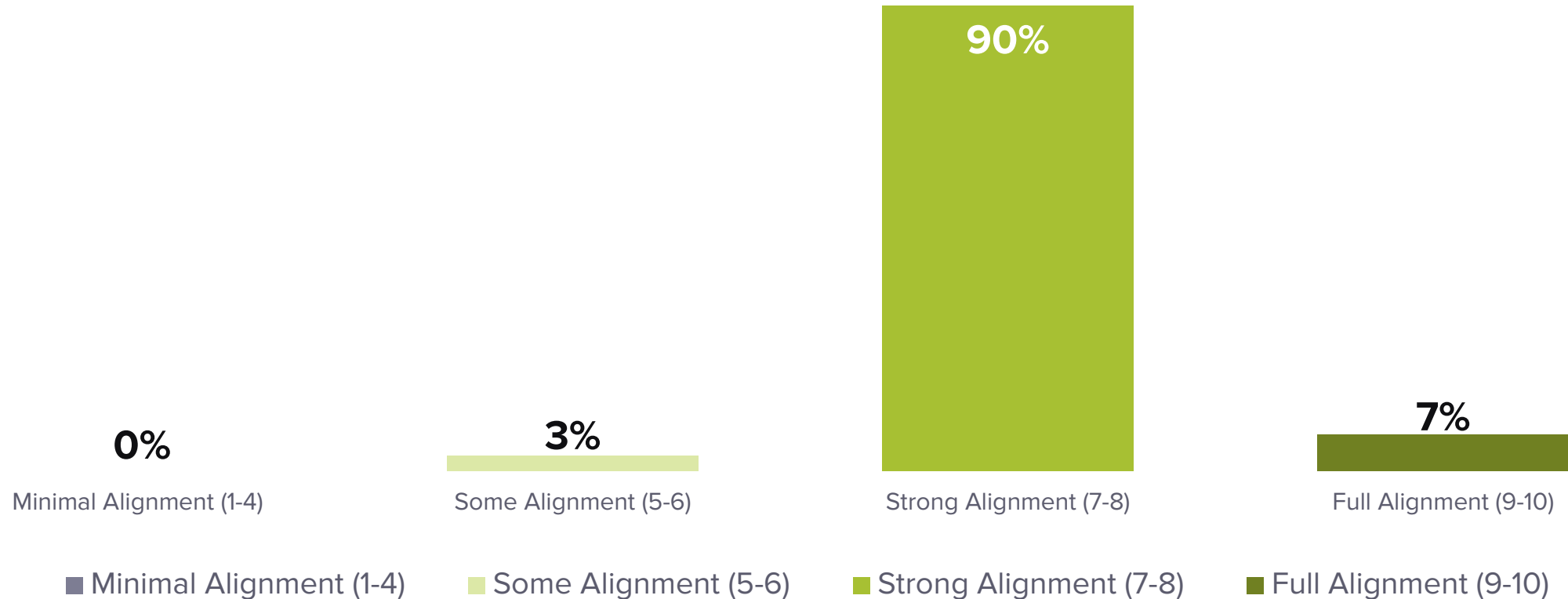


Importance of Technology in Achieving Sustainability Goals

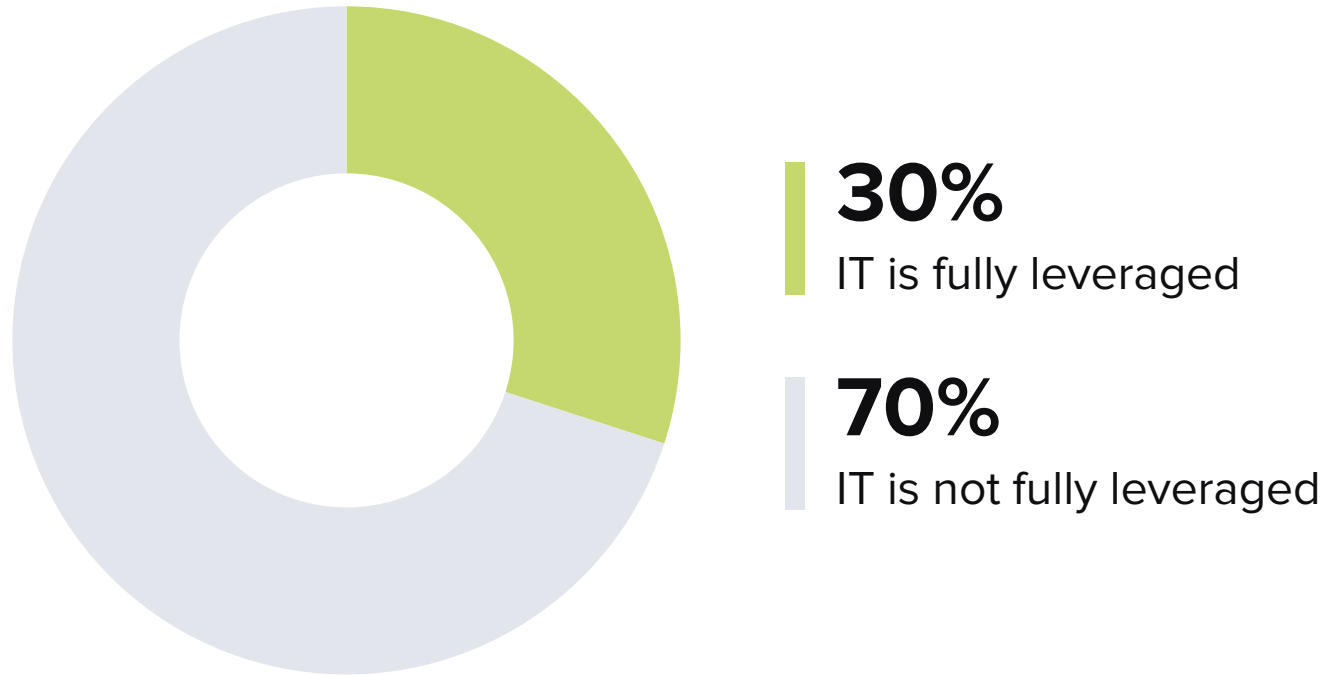




Alignment Between Sustainability Teams & Technology

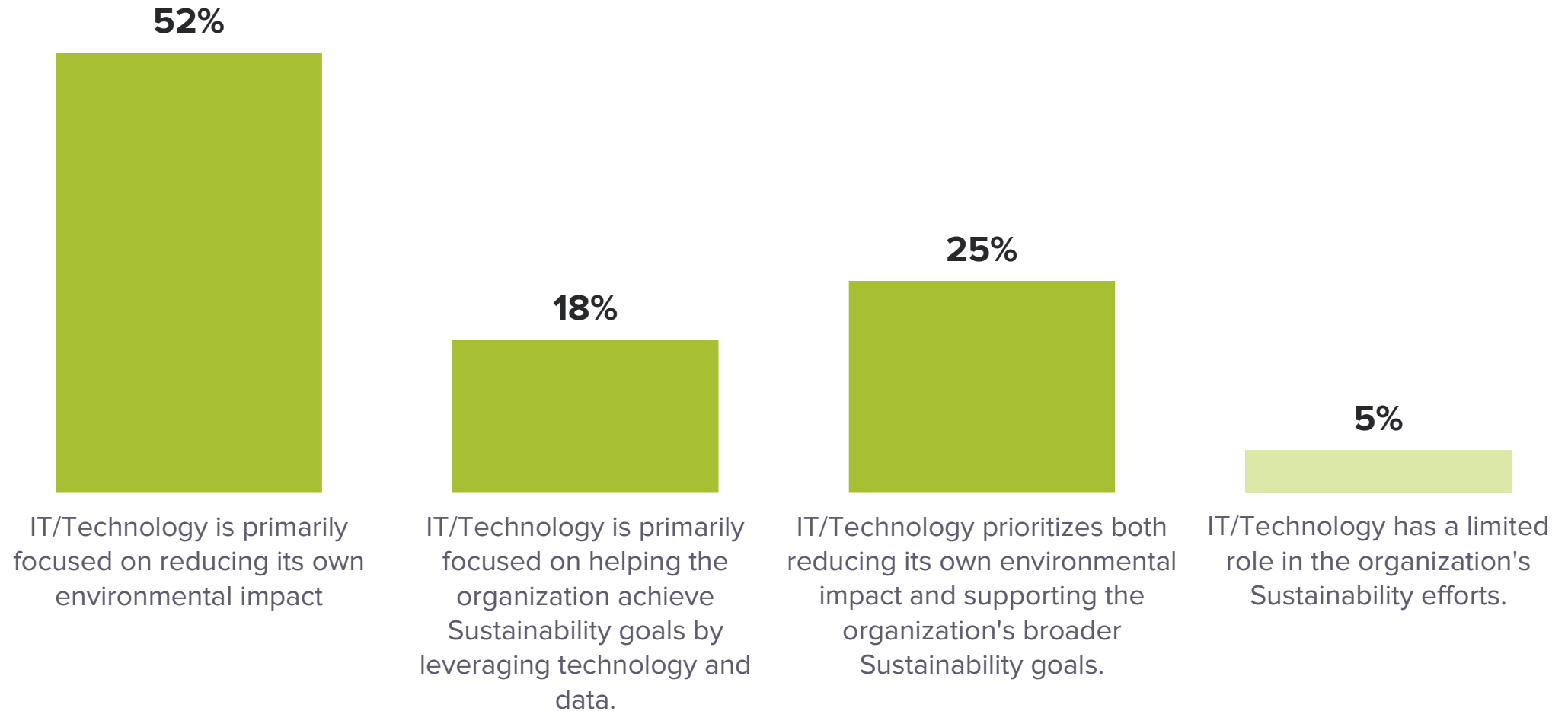


The Extent of Use of IT to Achieve Sustainability Goals





IT's Role in Achieving Sustainability Goals



Role of Technology in Supporting Sustainability

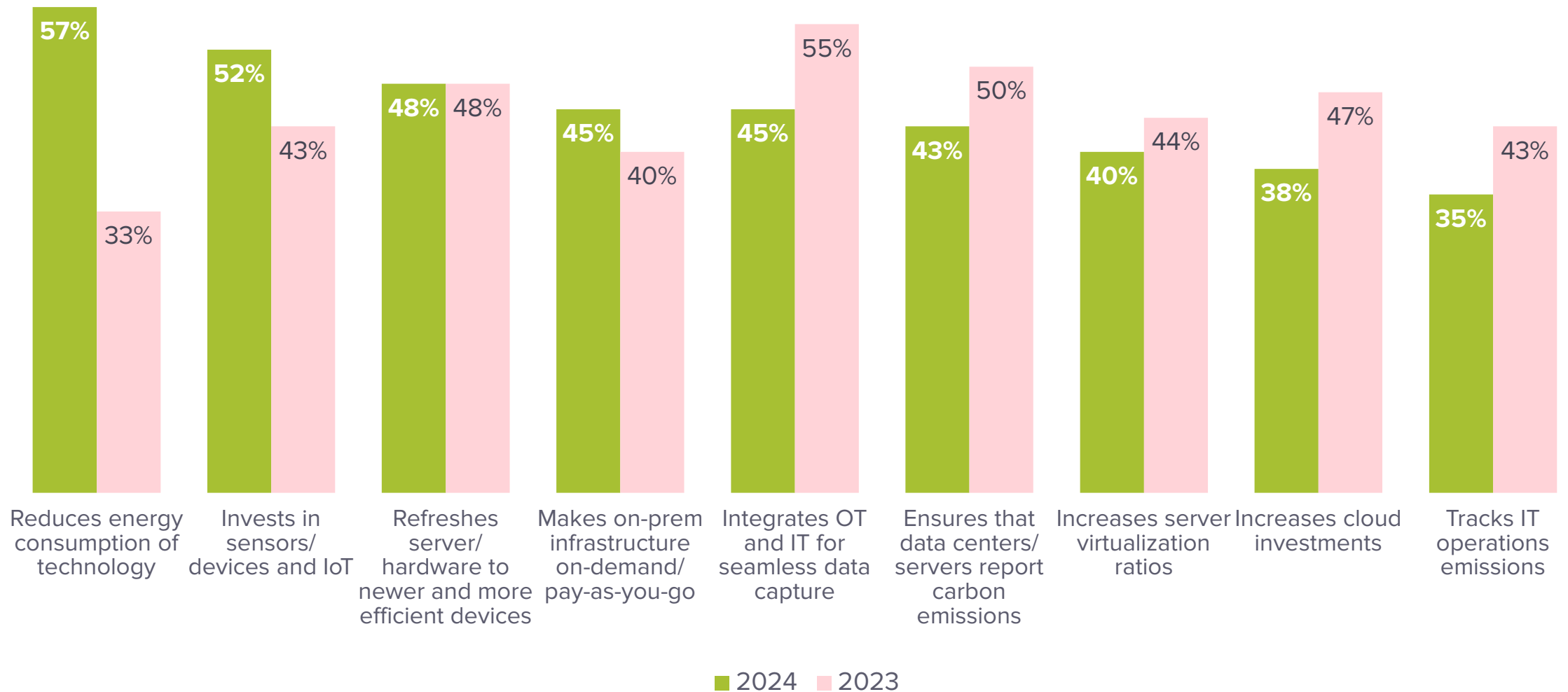




Technology Team's Steps to Reduce Carbon Footprint



ecosystem.io



Data-Driven Sustainability: Leveraging Insights for Impact



17%

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



22%

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



20%

We use data to track key Sustainability metrics for reporting



25%

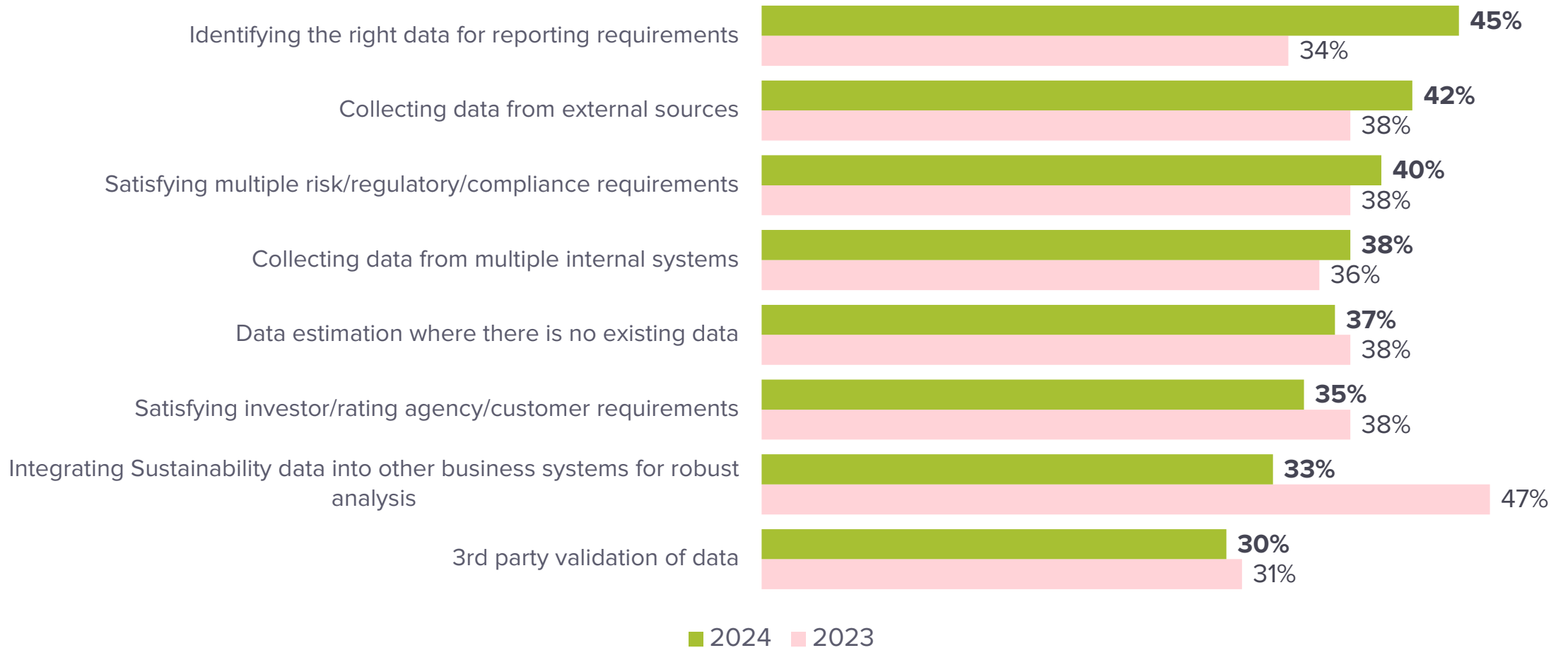
We use data to track, analyze, and optimize our Sustainability performance across business applications



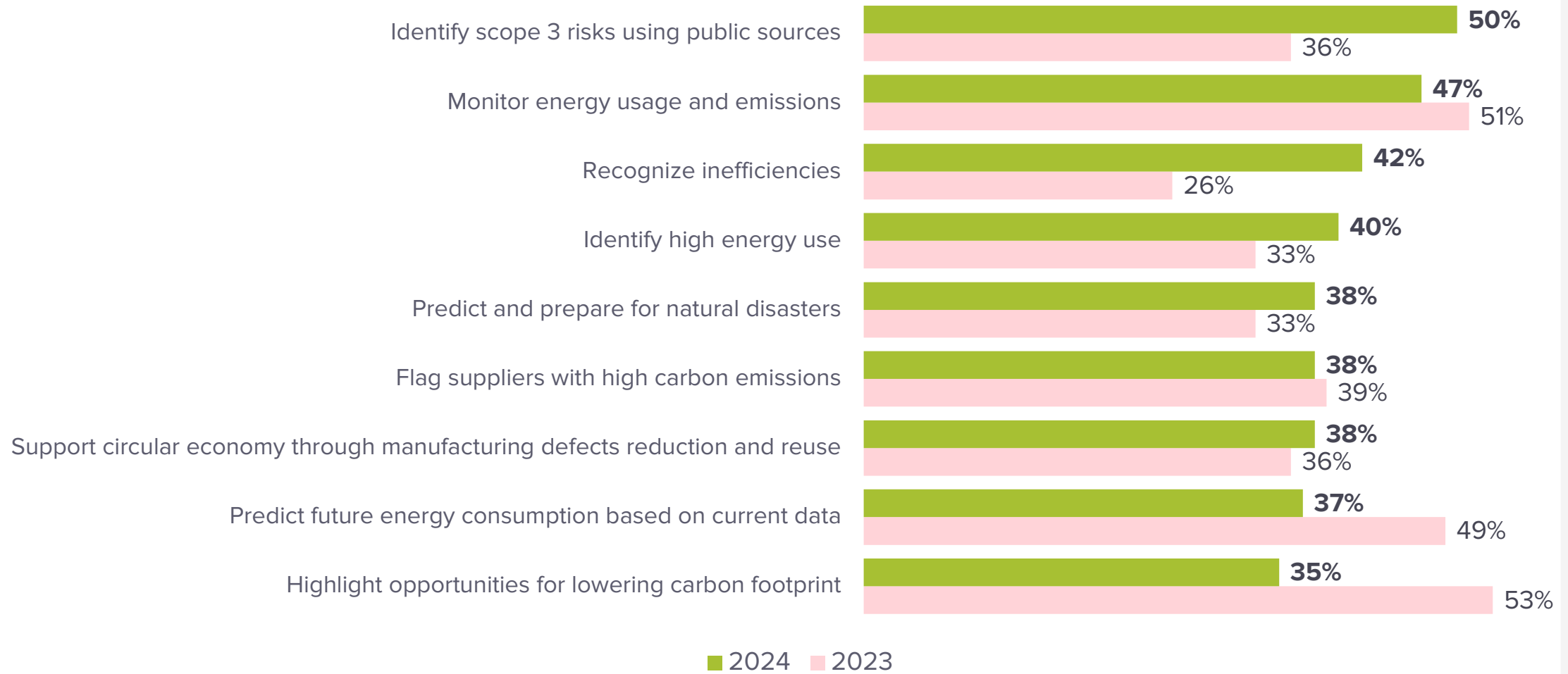
16%

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

Challenges of Supporting Sustainability Data Needs



The Use of AI for Environmental Footprint Management



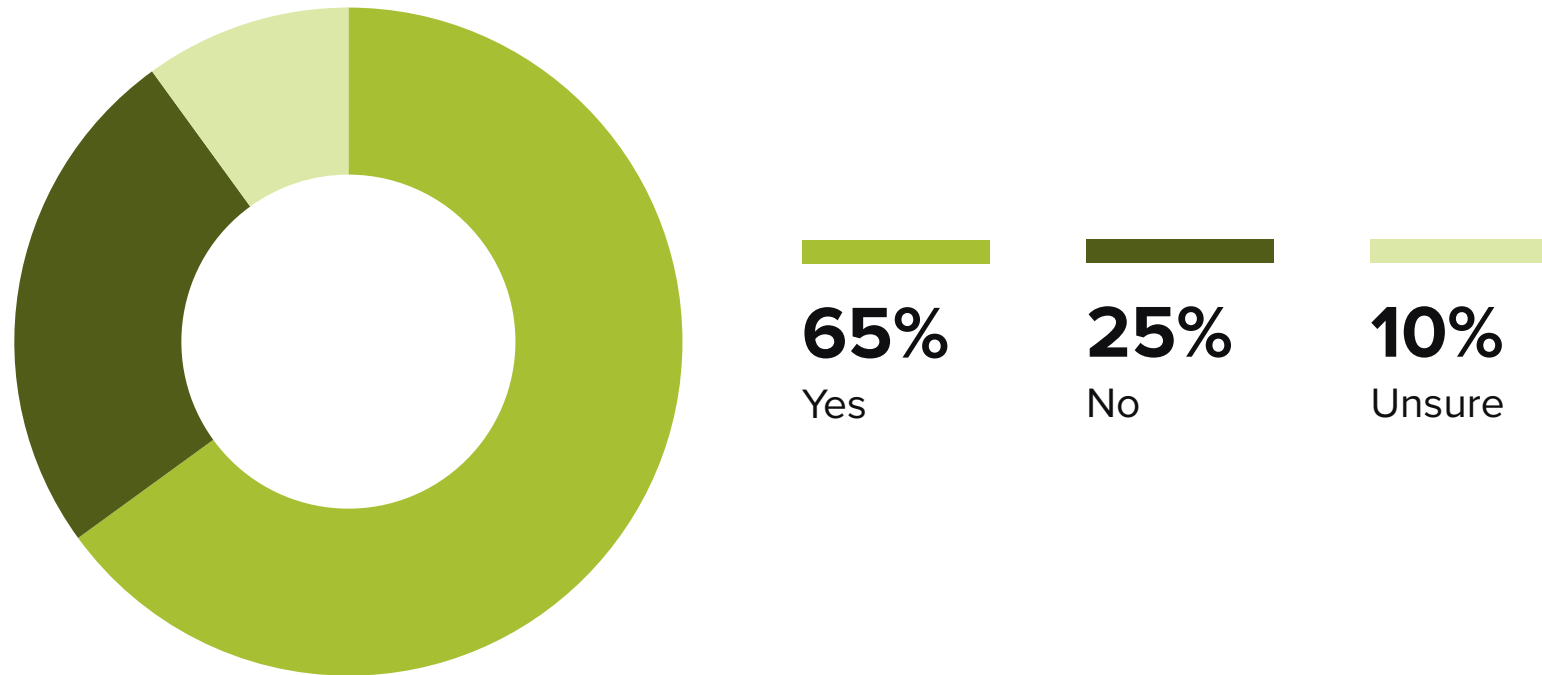
N = 60 (2023 N=120)

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

Environmental Impact of AI



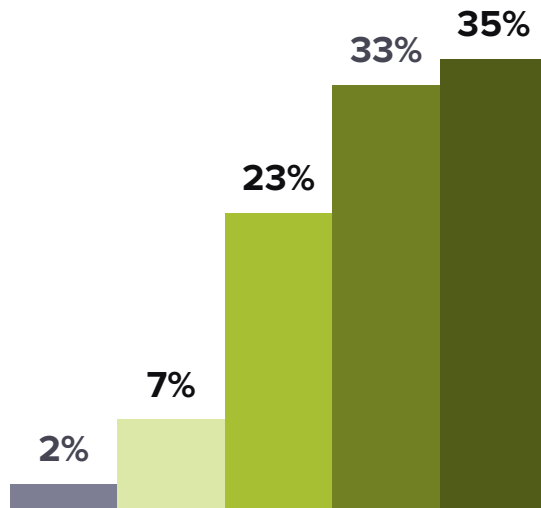
Is Impact Considered?



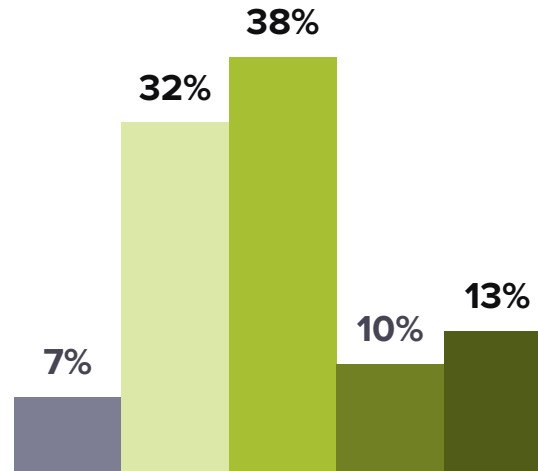
Perception on the Impact of AI



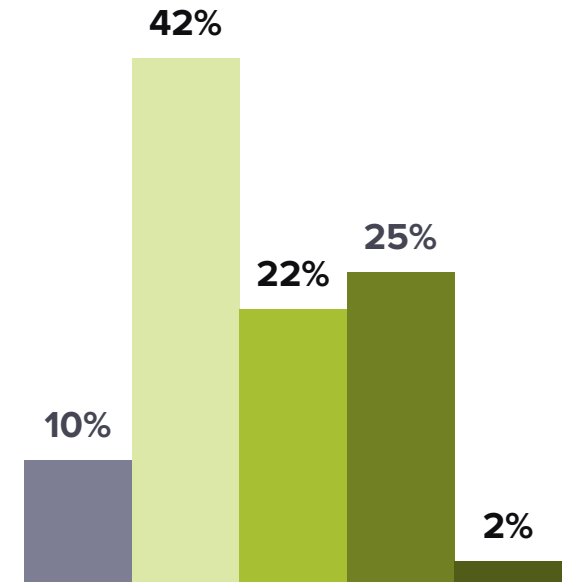
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions

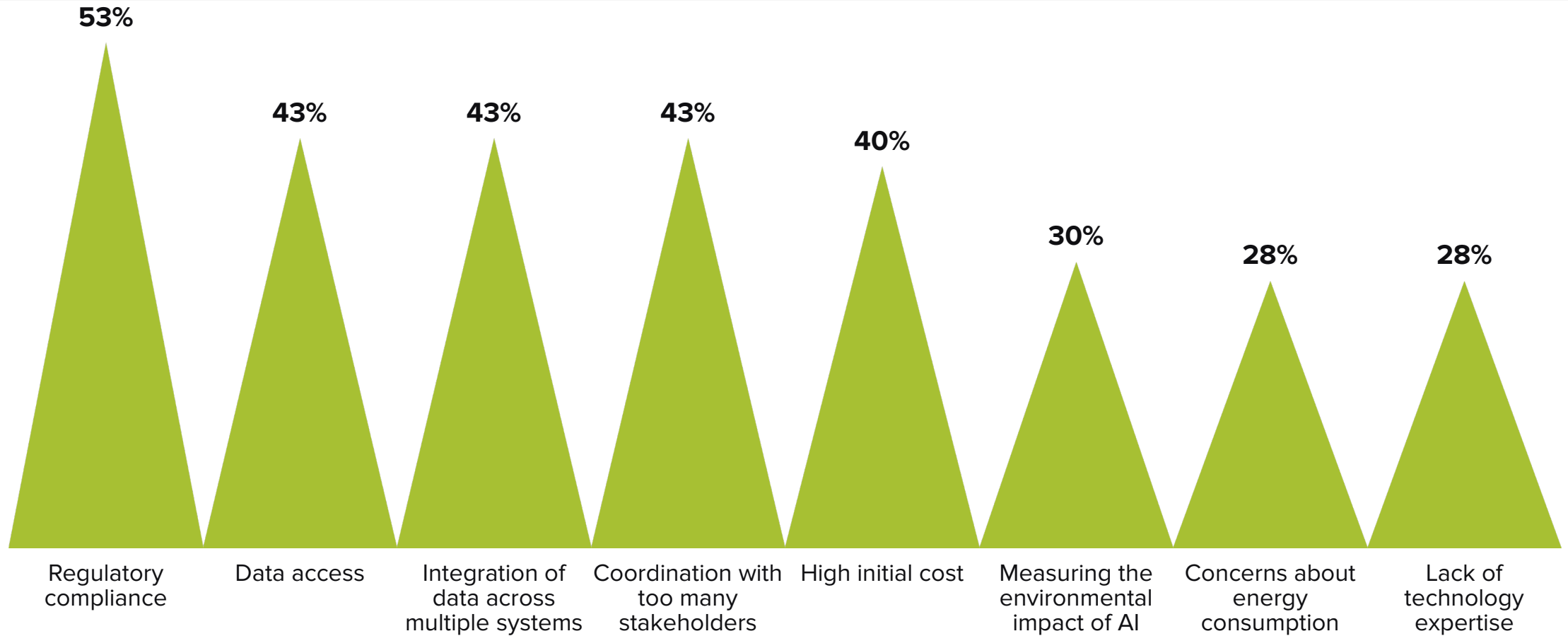


Impact of AI on the cost of Sustainability initiatives



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

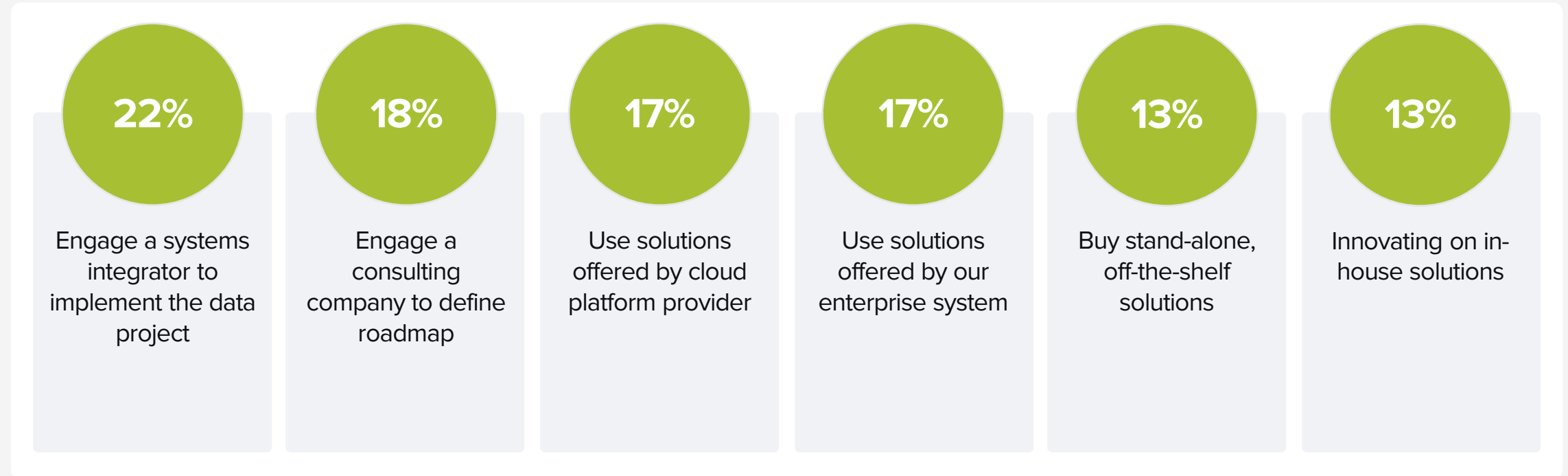
Key Challenges in Integrating AI for Sustainability Initiatives



N = 60

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

Building Sustainability Technology Capabilities



N = 60

Q: How is your organization building Sustainability reporting capabilities?

Italy





Study Demographics



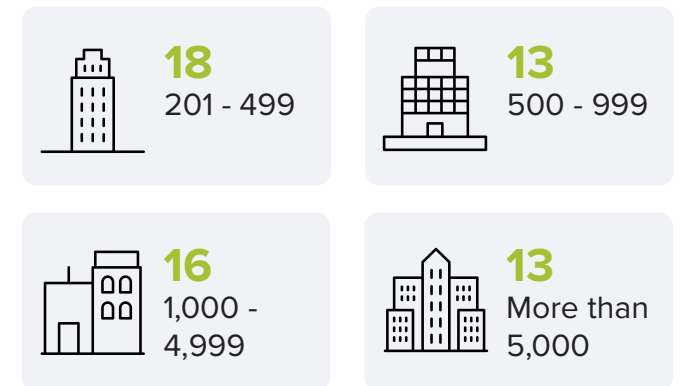
Function



Industry



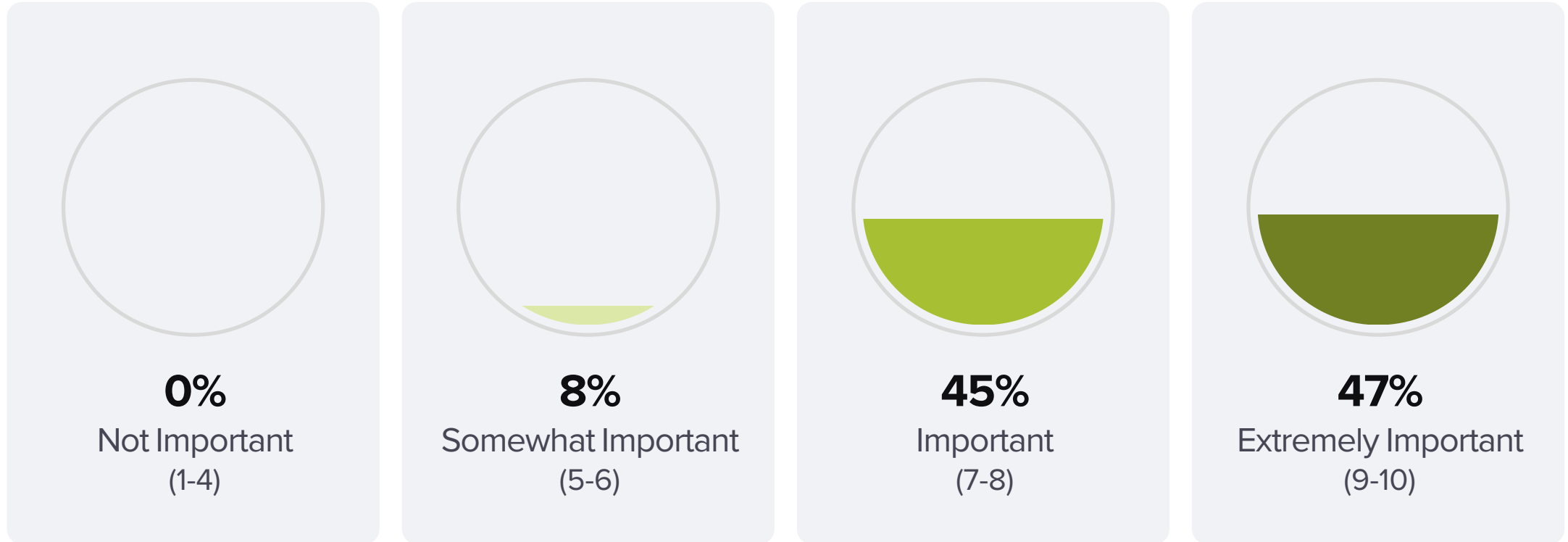
Organization Size (No. of Emp.)



Strategy & Perception



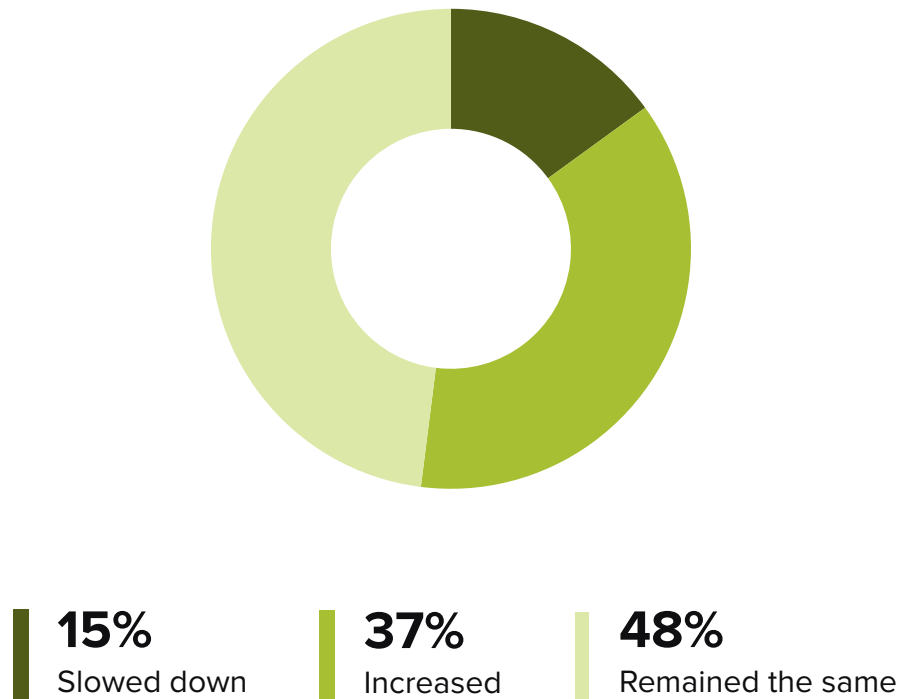
The Importance of Sustainability in the Organization



Pace of Sustainability Efforts



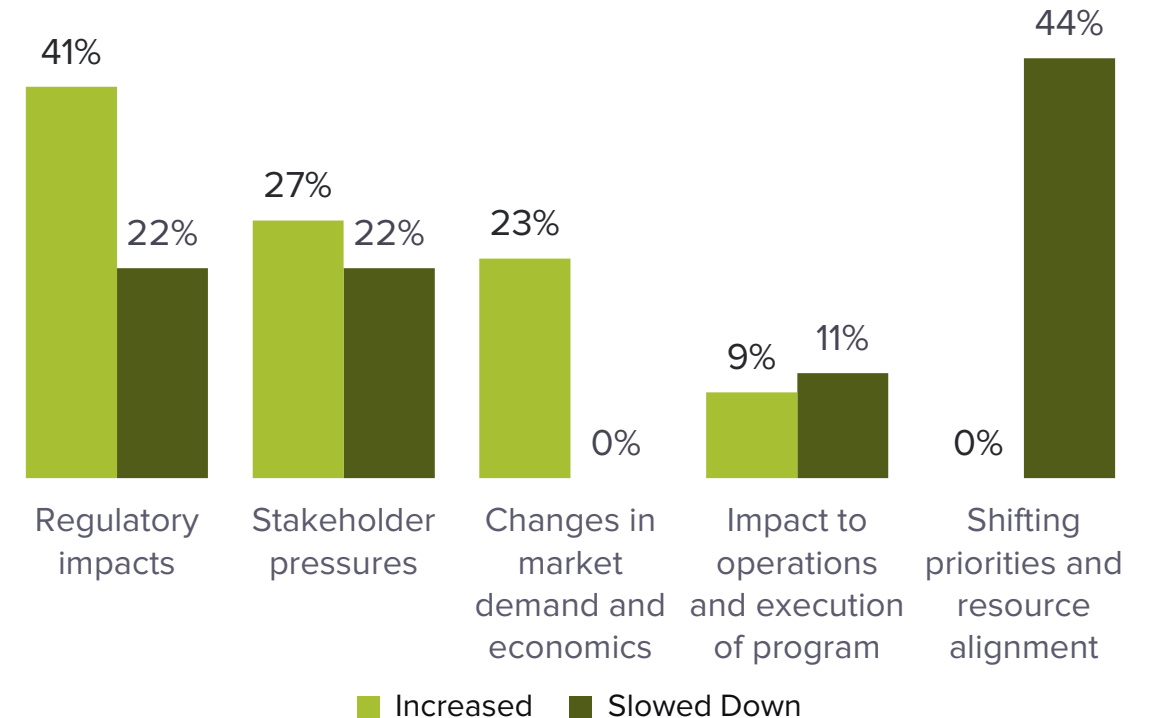
CHANGE FROM LAST YEAR



N = 60

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

REASONS FOR CHANGE



N = 31

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



28%

Sustainability is a strategic aspiration

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



52%

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



3%

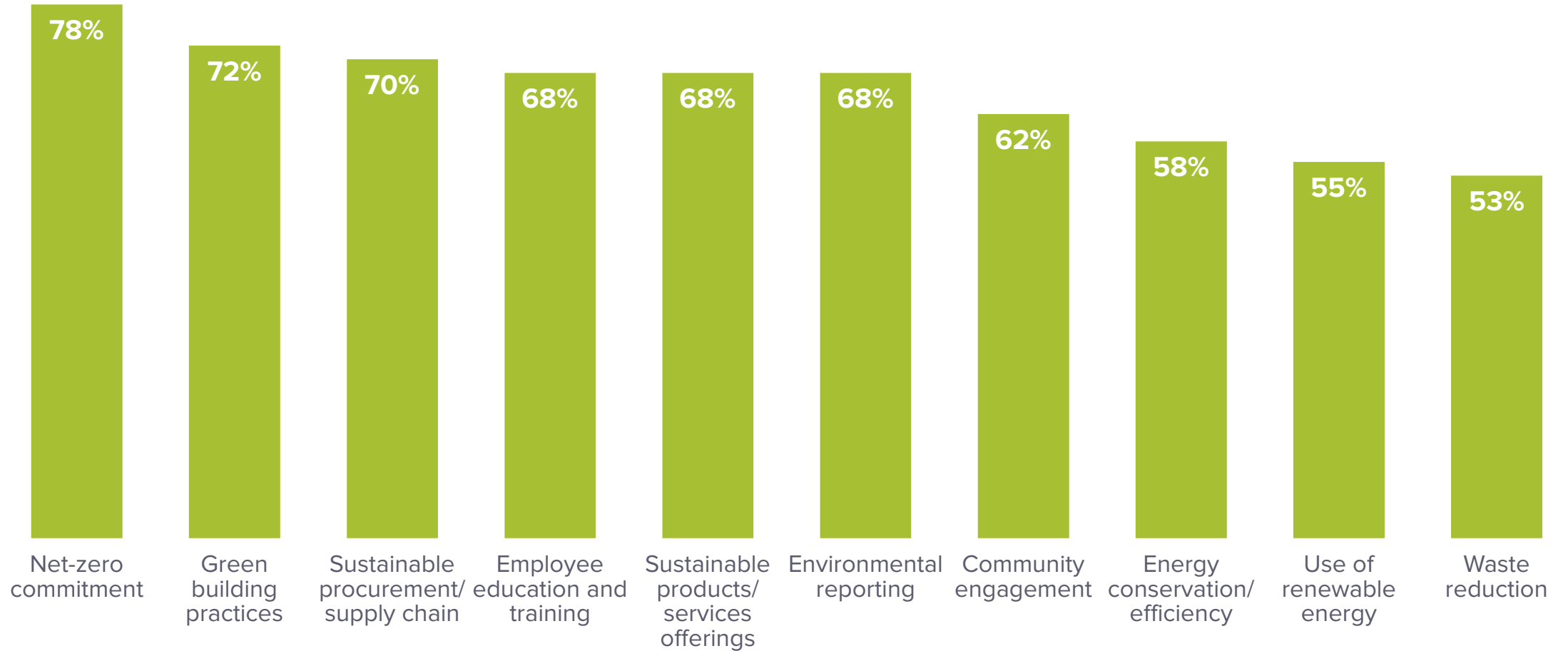
Sustainability is a strategic asset.

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





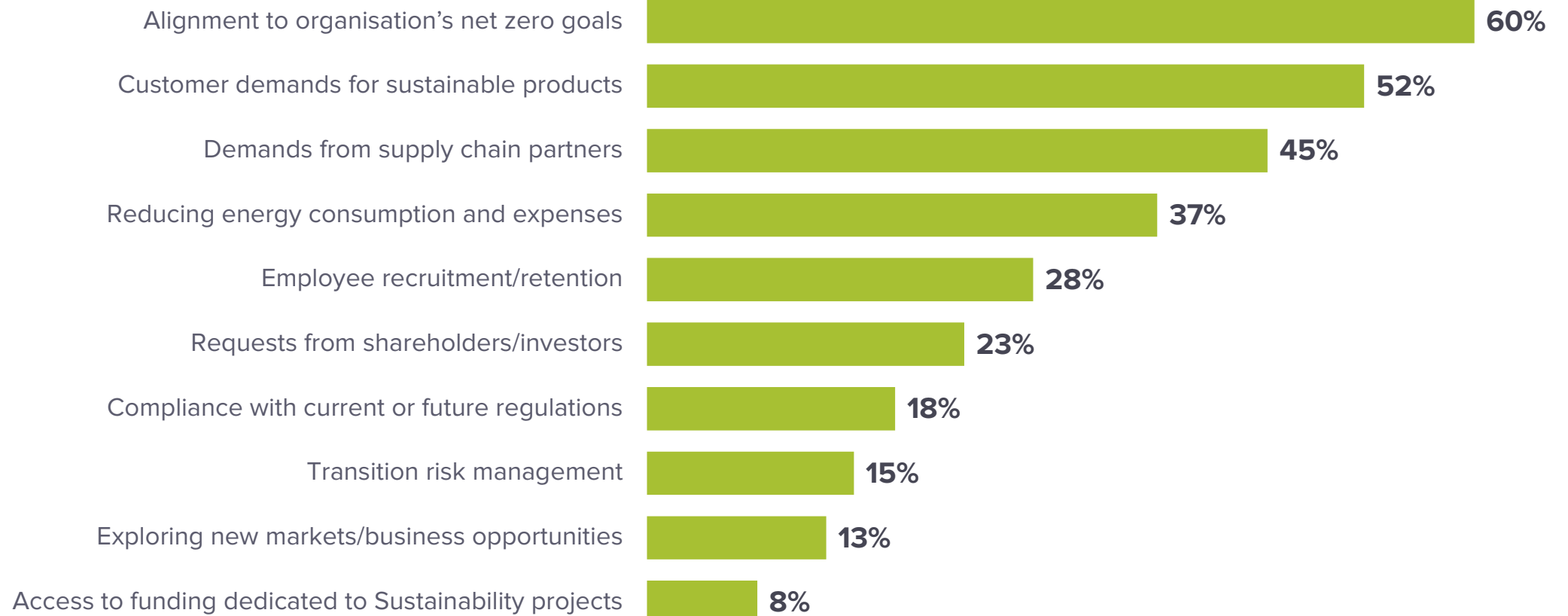
Top Stakeholders Advocating for Sustainability



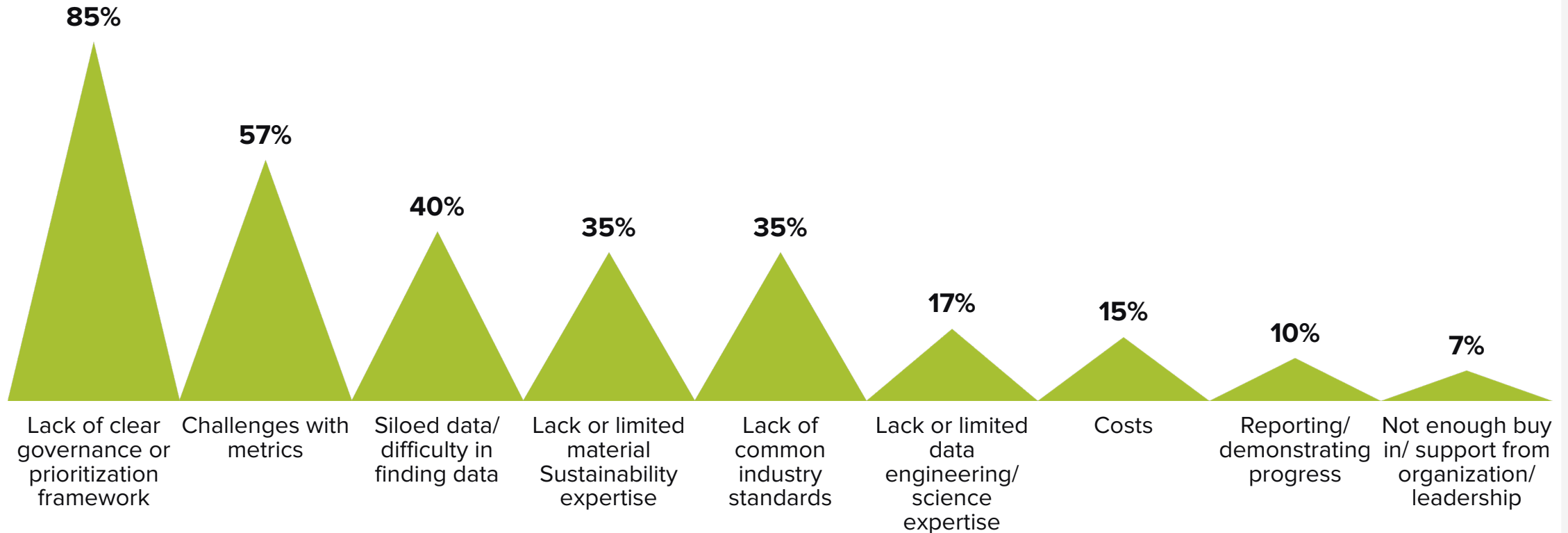
N = 60

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

Main Drivers of Sustainability



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



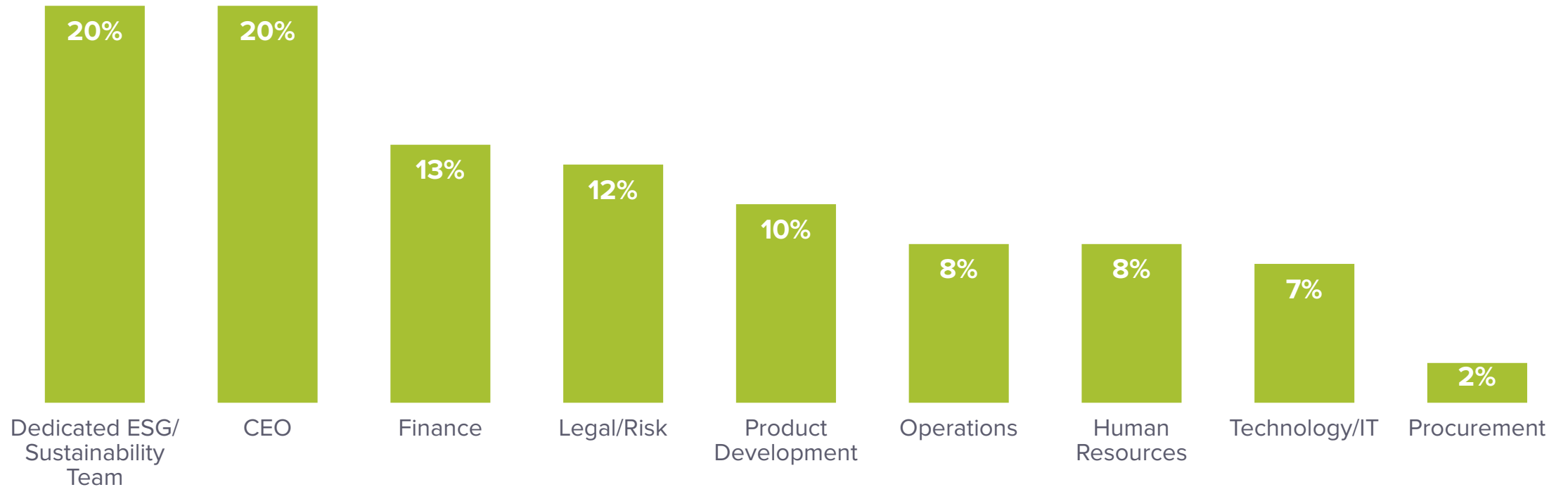
Execution



People, Governance, & Narrative



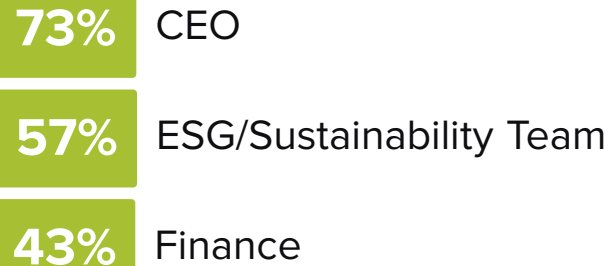
Sustainability Leadership



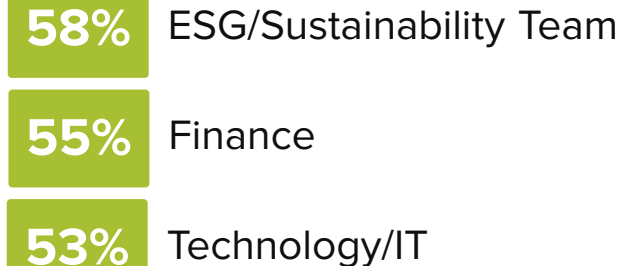
Role of Key Stakeholders



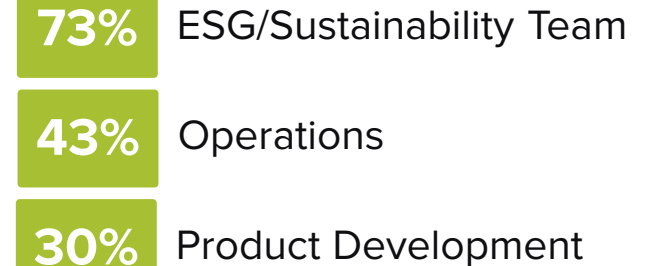
Defining The Vision



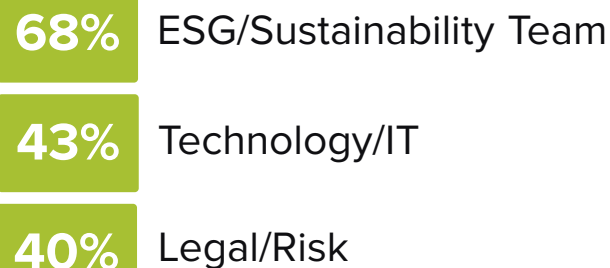
Delivering Sustainability Outcomes



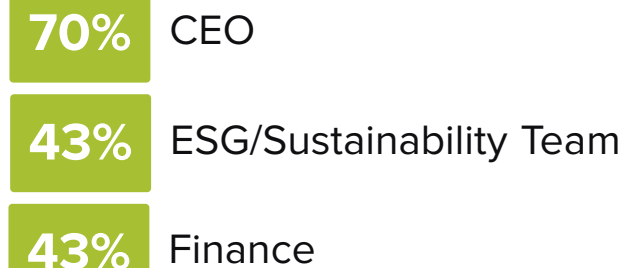
Providing the Data



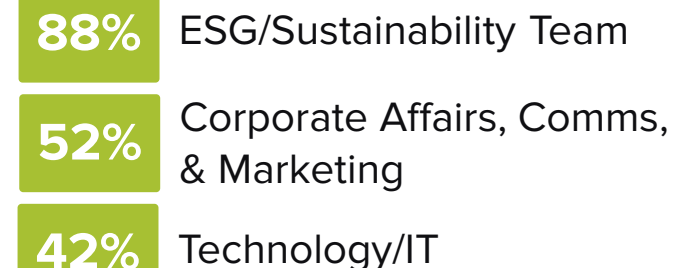
Managing the Data



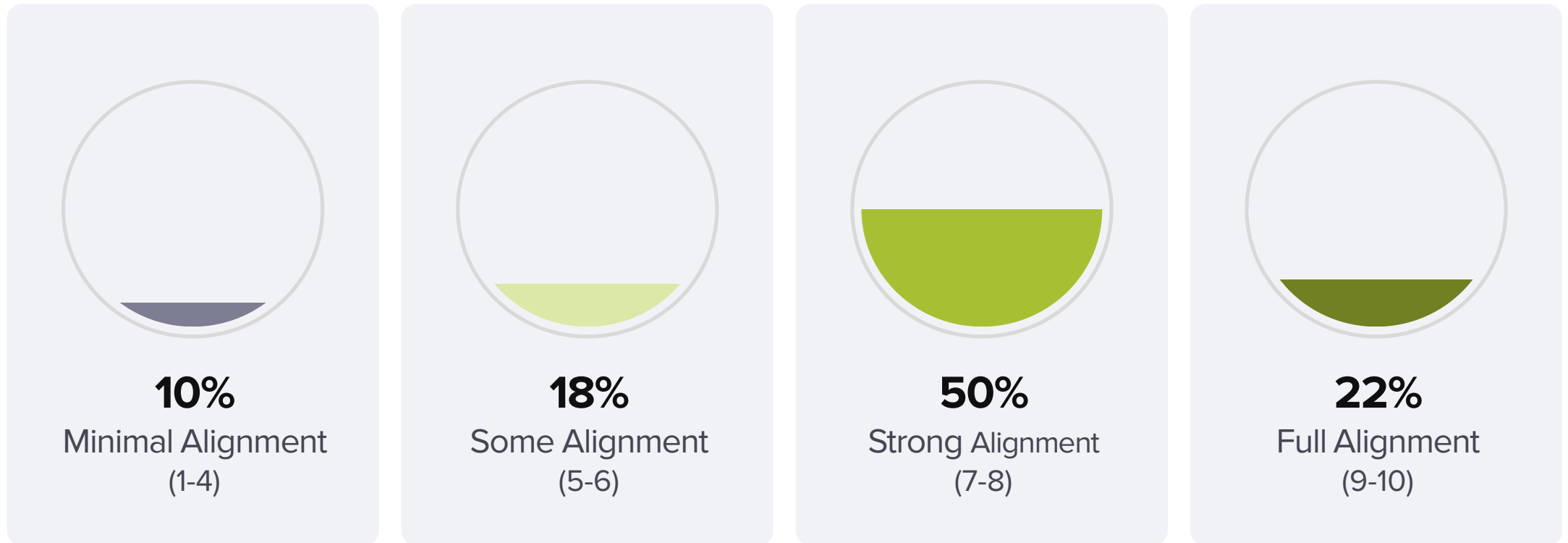
Deciding the Metrics



Reporting



Alignment Between Sustainability Team & Finance



Maturity of Employee Involvement in Sustainability



7% Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives



27% Basic Sustainability Awareness

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



42% Emerging Sustainability Engagement

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



20% KPI-Driven Sustainability

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



4% Sustainability as a Strategic Imperative

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

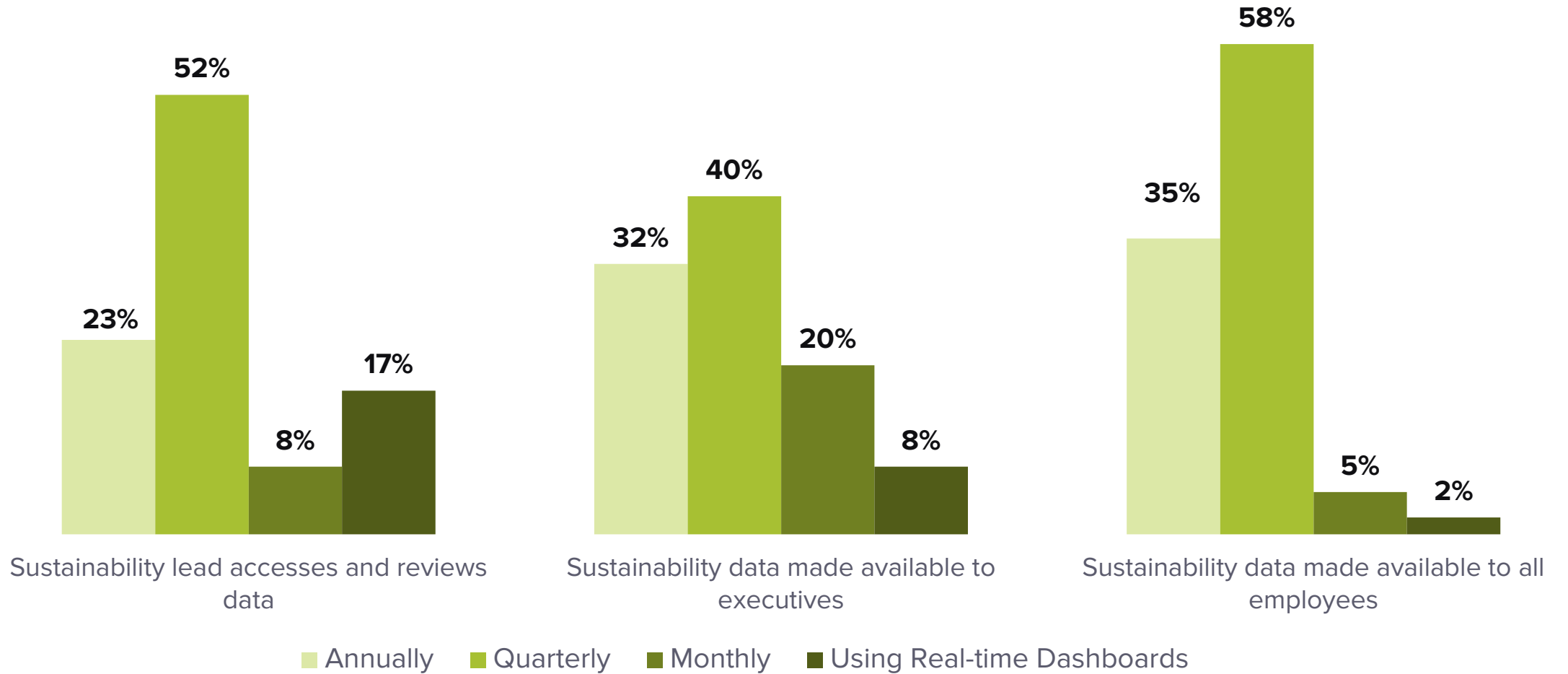


Metrics Used to Measure Sustainability

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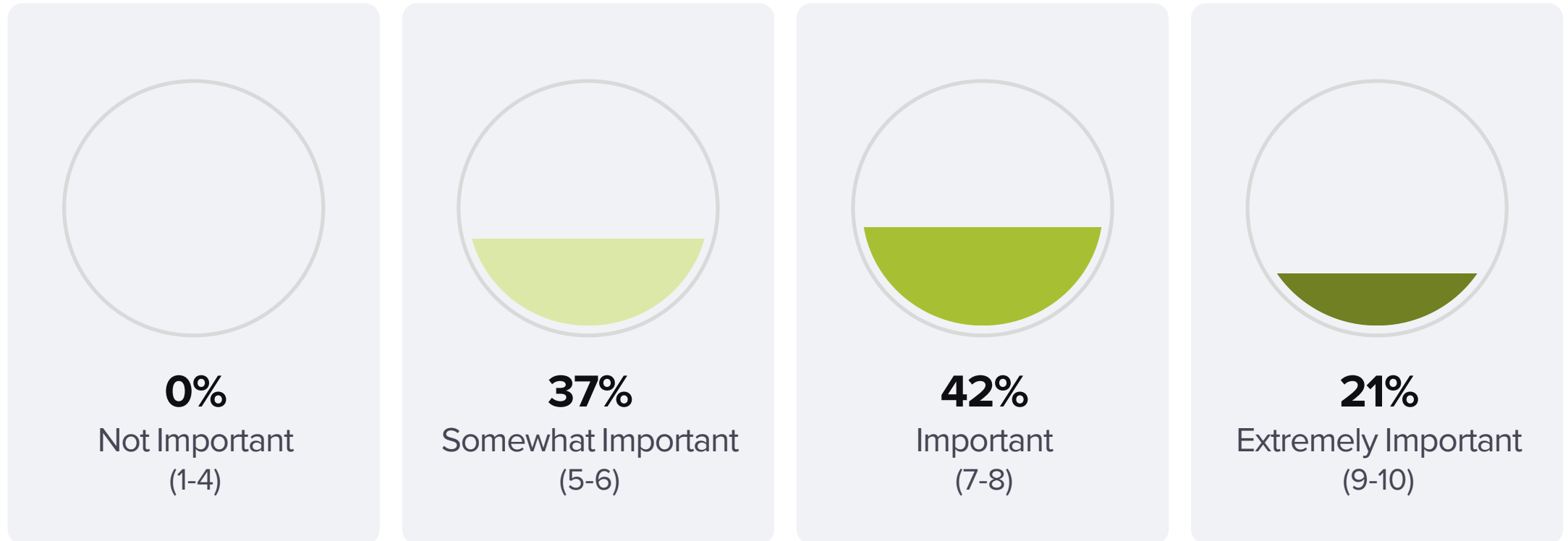
Sustainability Data Access and Sharing



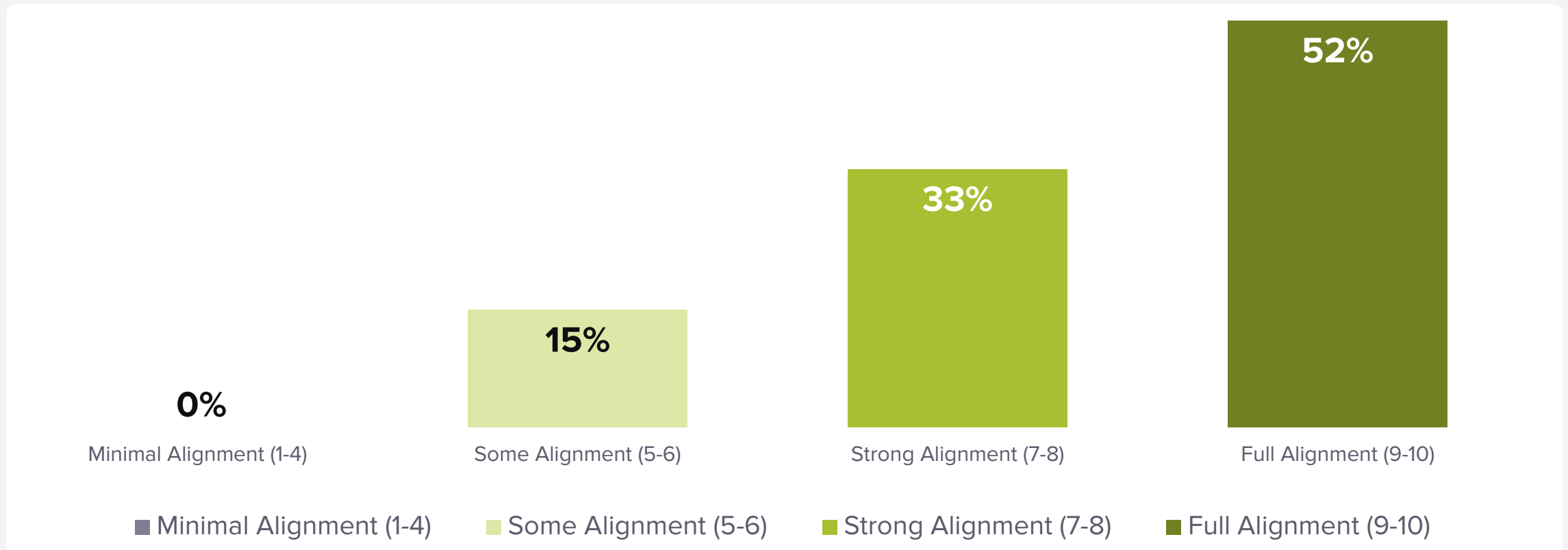
Technology



Importance of Technology in Achieving Sustainability Goals



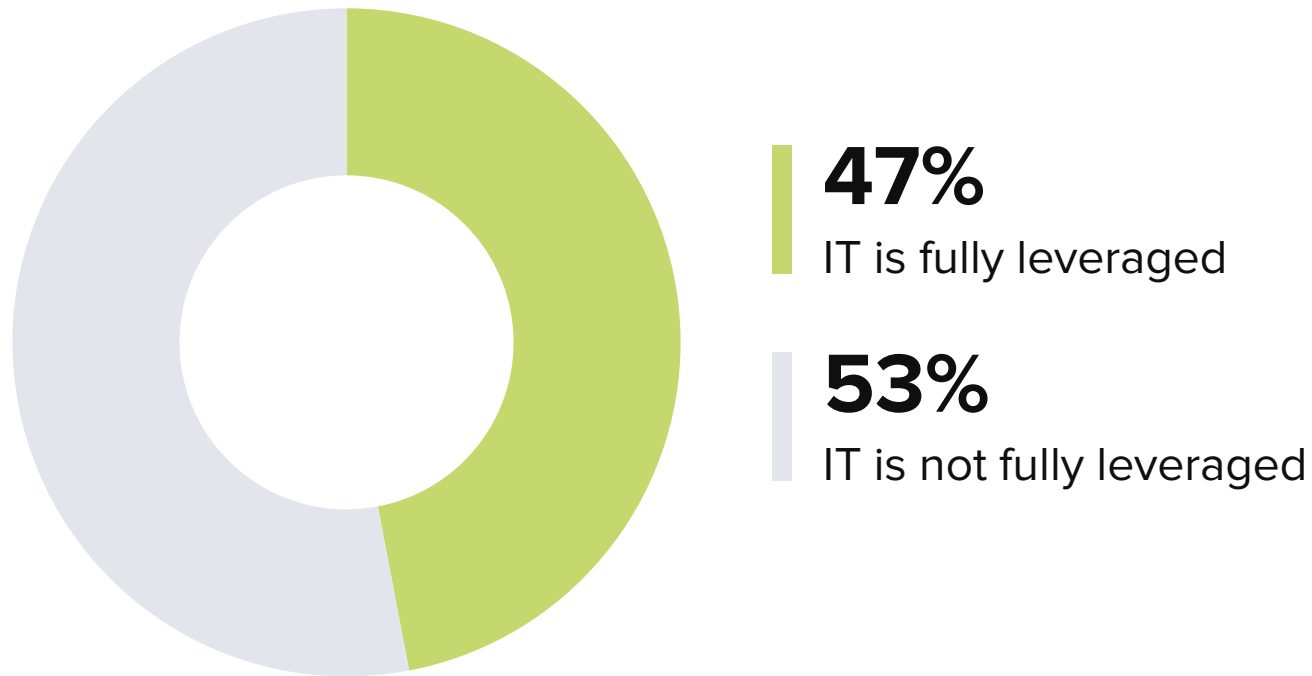
Alignment Between Sustainability Teams & Technology



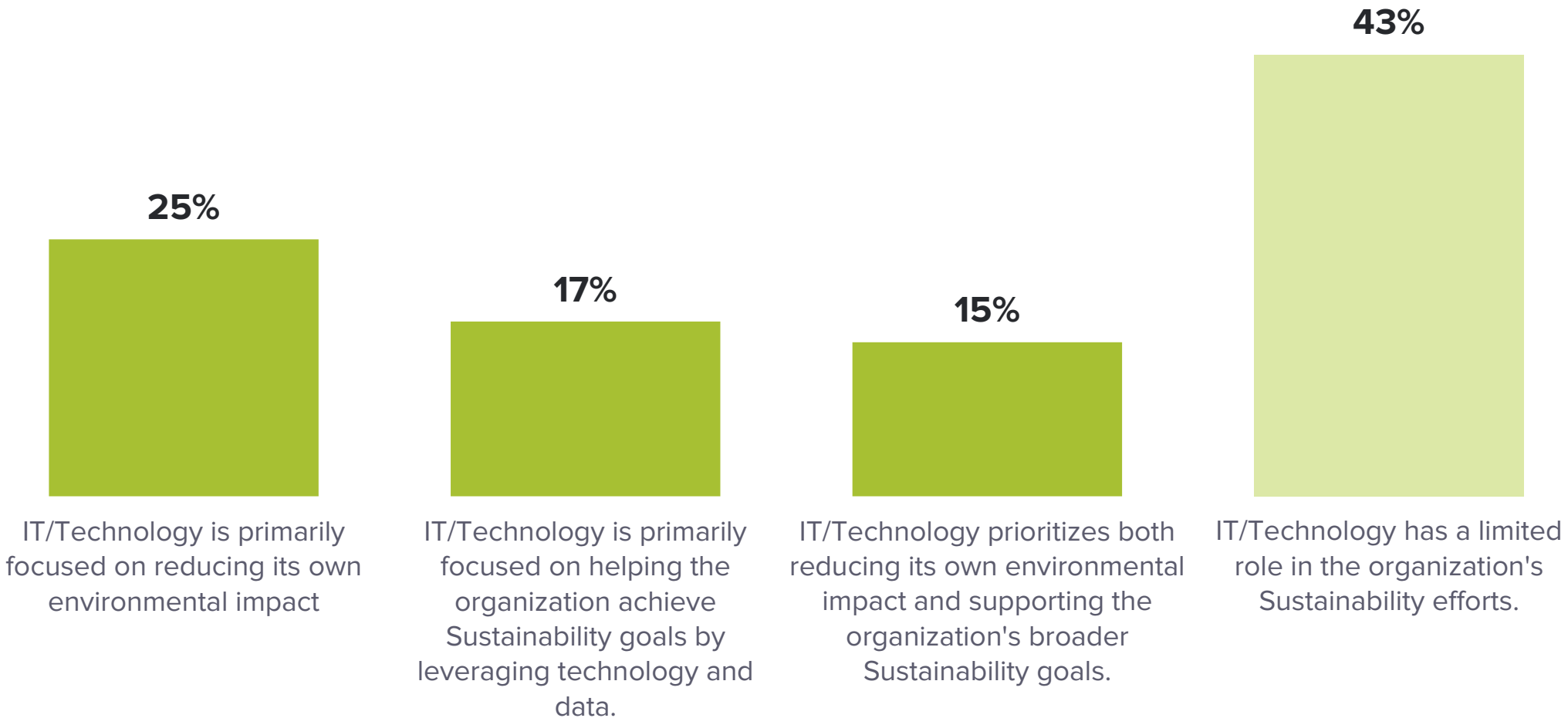
N = 60

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

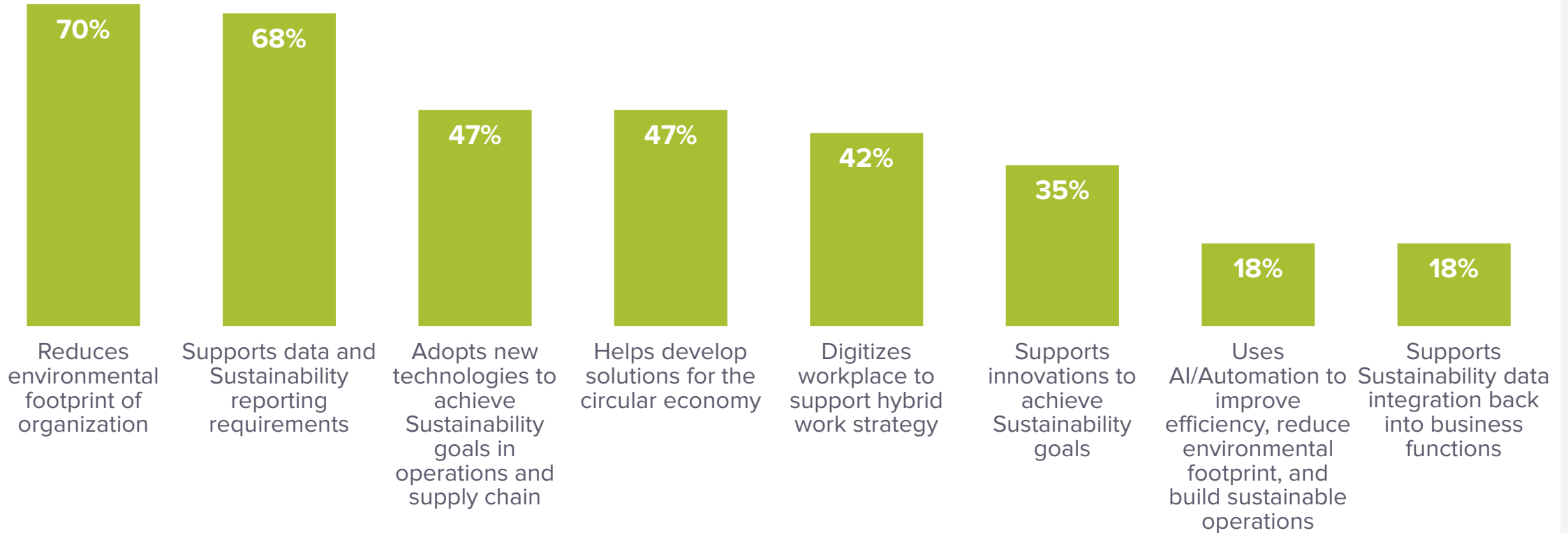
The Extent of Use of IT to Achieve Sustainability Goals



IT's Role in Achieving Sustainability Goals

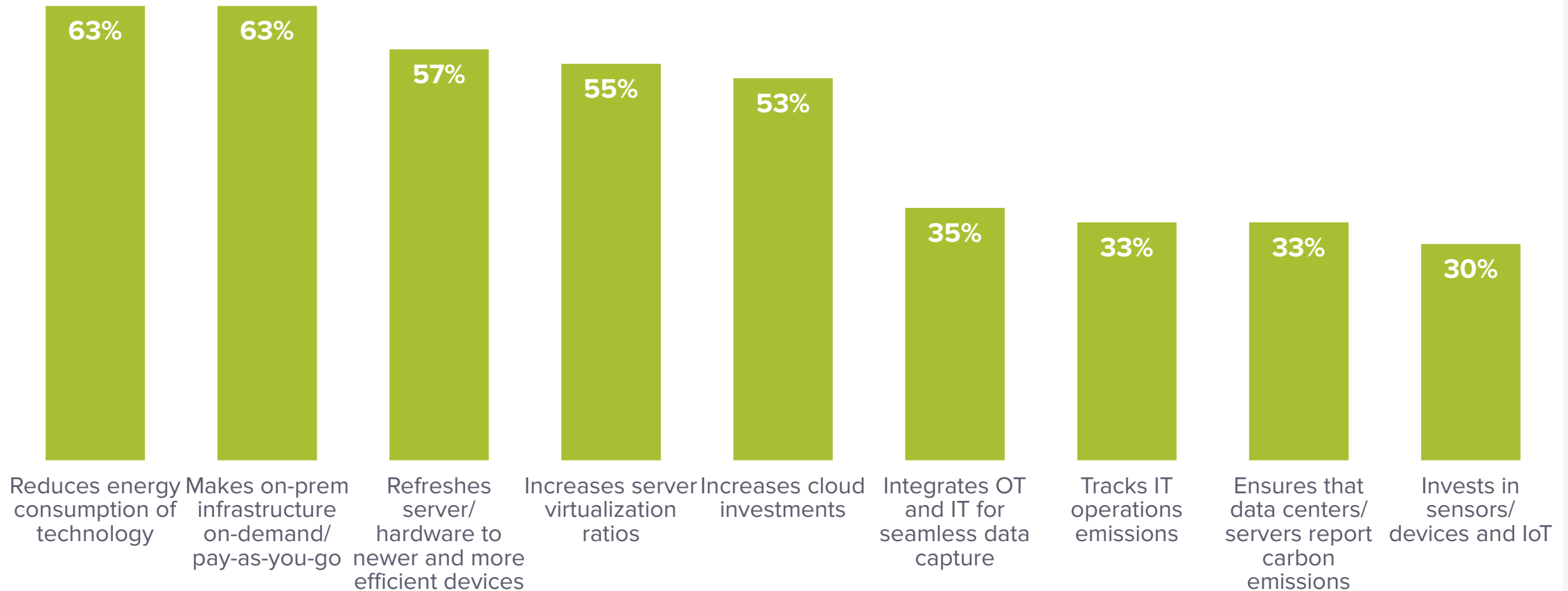


Role of Technology in Supporting Sustainability





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



0%

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



28%

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



25%

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

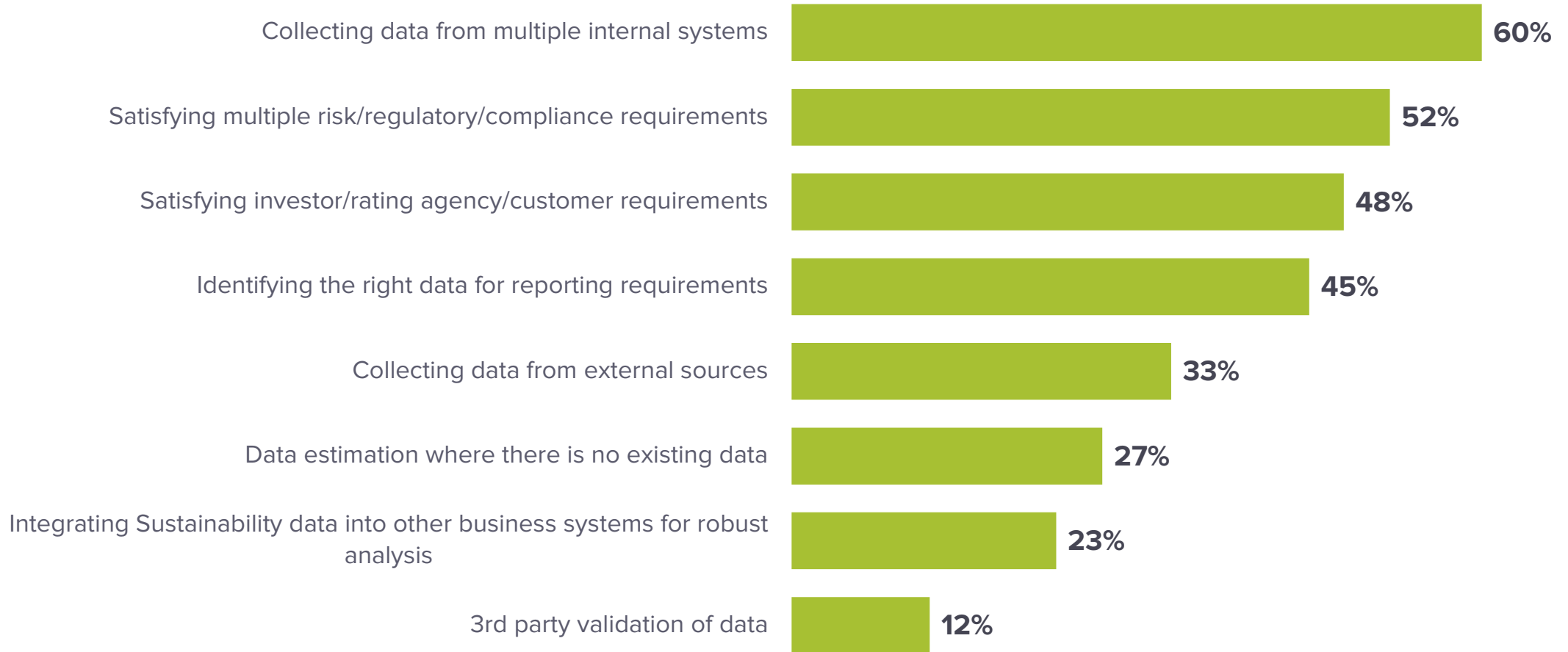


12%

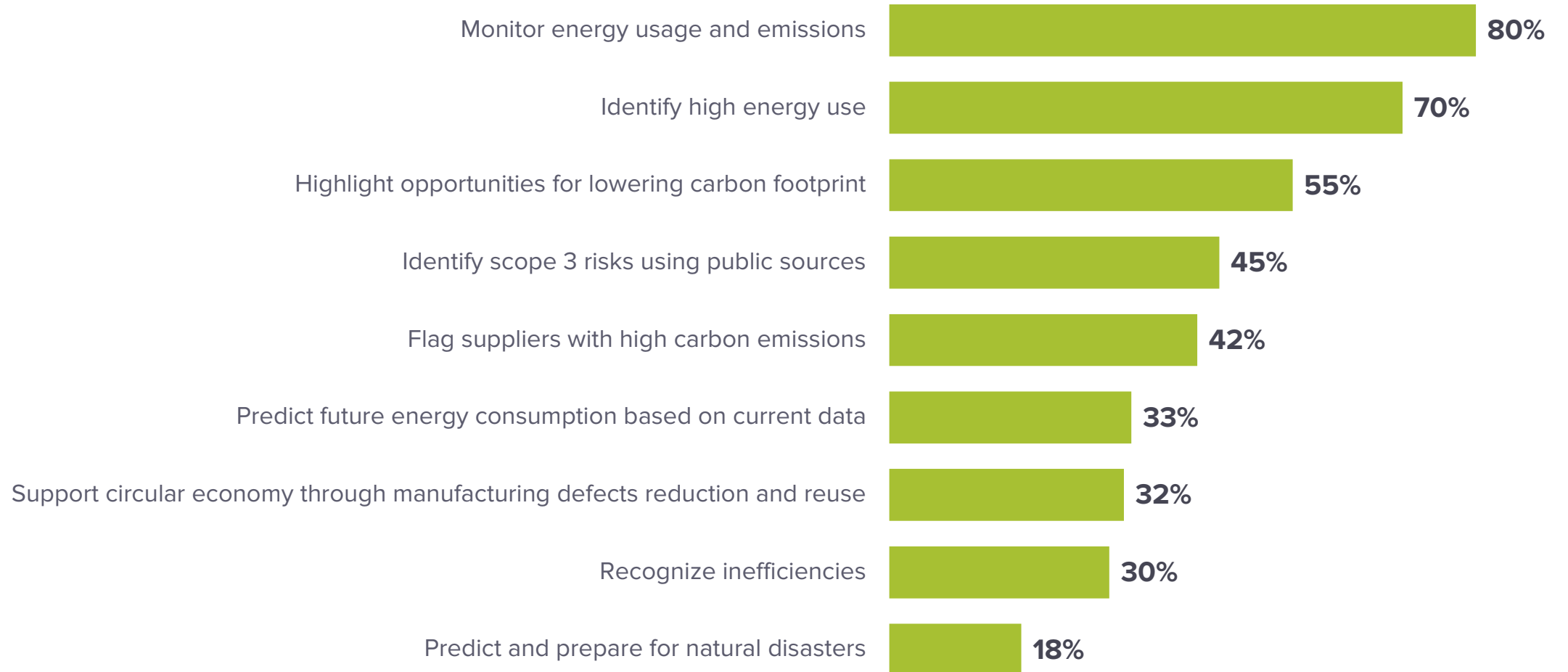
We use data from our Sustainability initiatives to guide the organization's transformation journey



Challenges of Supporting Sustainability Data Needs

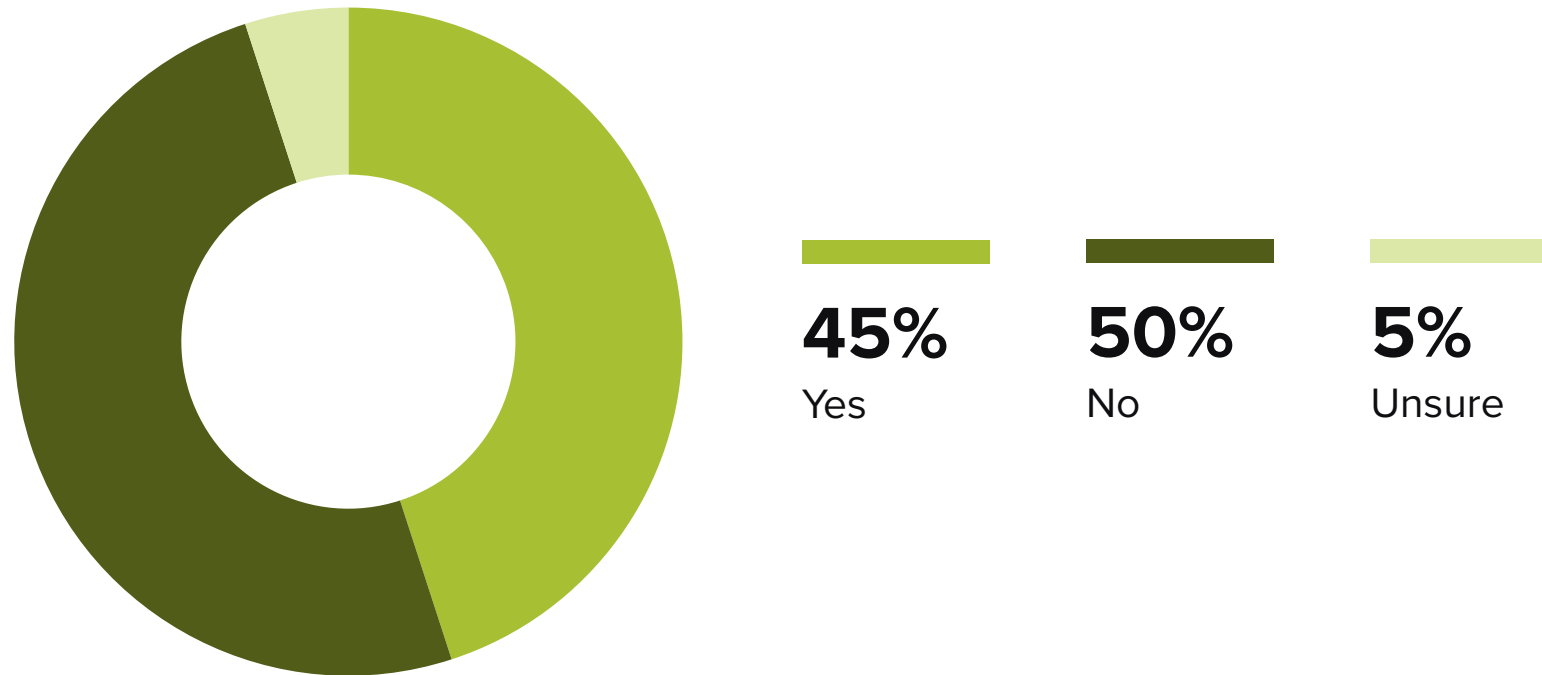


The Use of AI for Environmental Footprint Management



Environmental Impact of AI

Is Impact Considered?

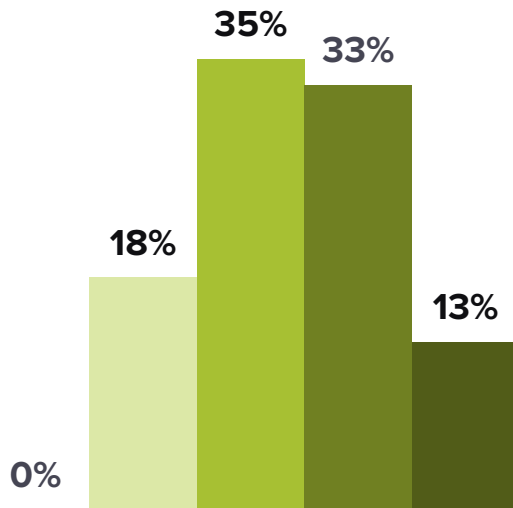


Perception on the Impact of AI

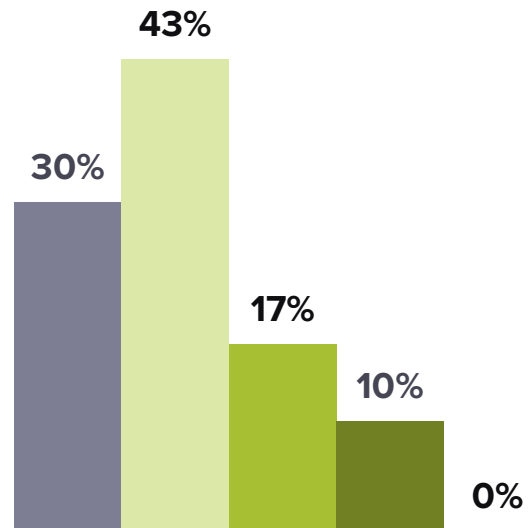


ecosystem.io

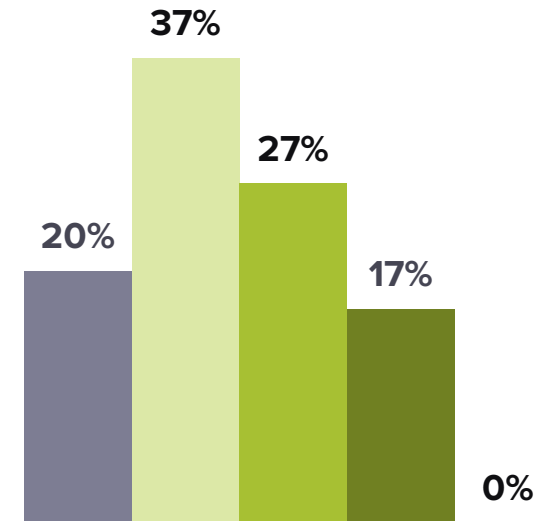
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions

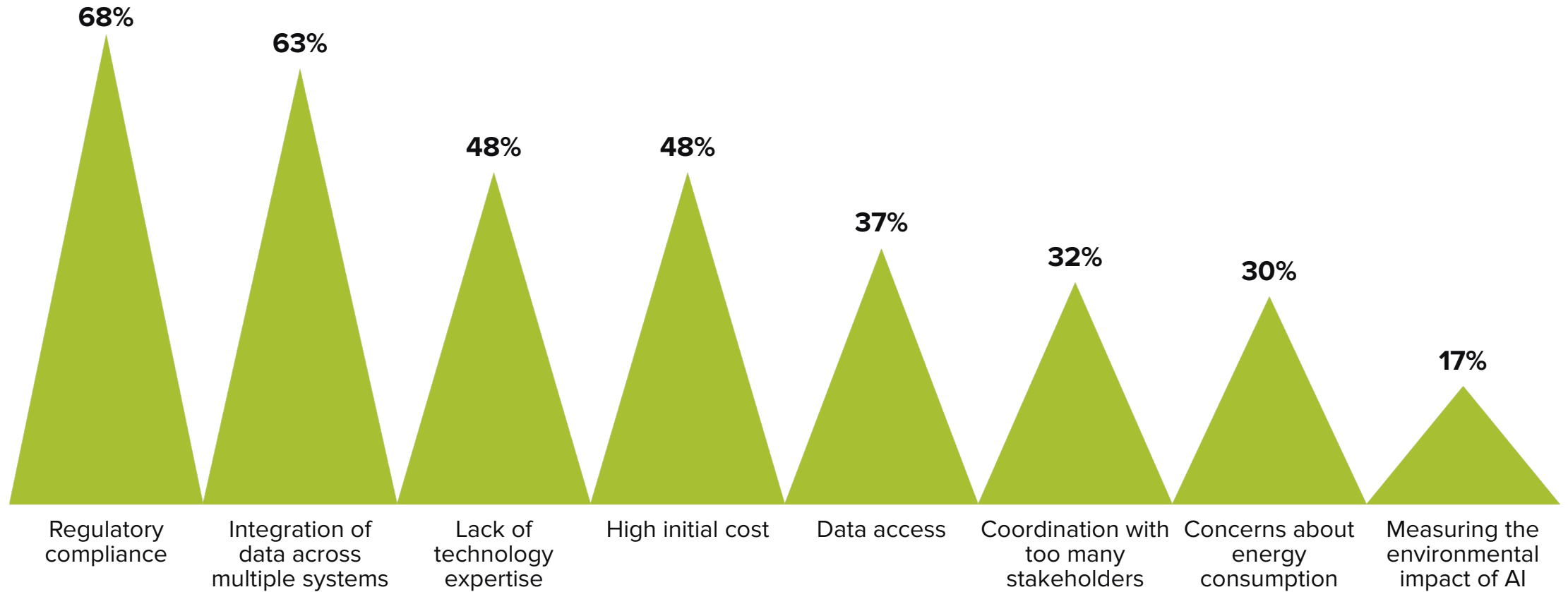


Impact of AI on the cost of Sustainability initiatives



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

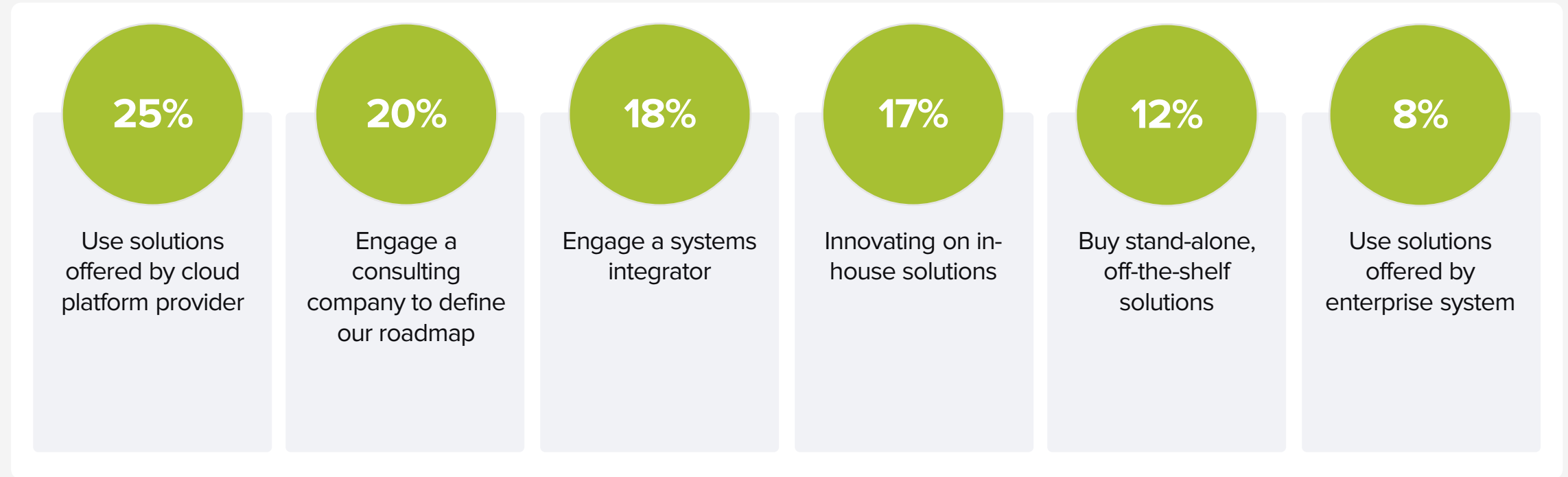
Key Challenges in Integrating AI for Sustainability Initiatives



N = 60

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

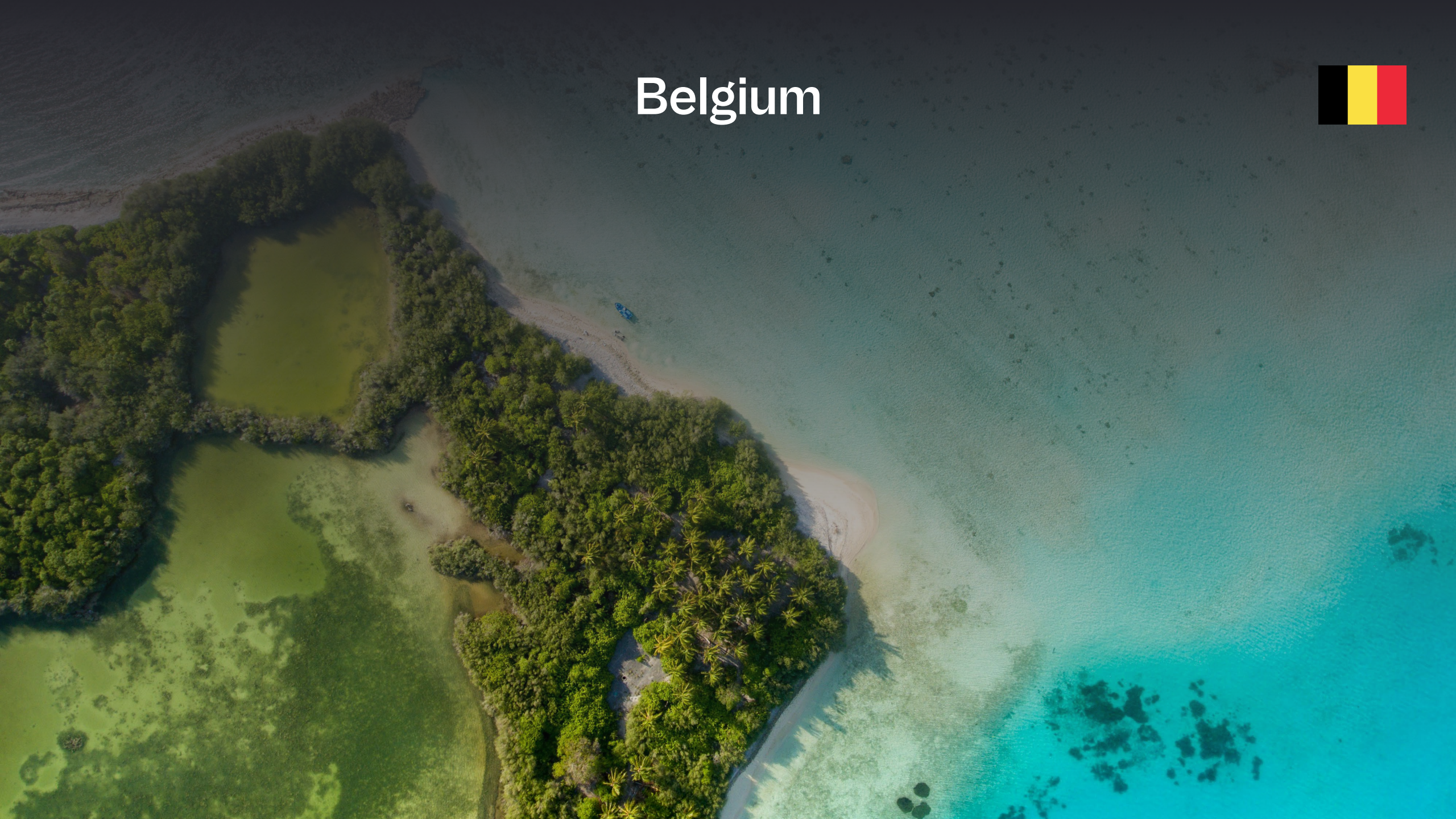
Building Sustainability Technology Capabilities



N = 60

Q: How is your organization building Sustainability reporting capabilities?

Belgium





Study Demographics - Belgium



Function

29



IT/Digital

5

Management

5

Human Resources

4

Operations/
Logistics/
Procurement/
Production

4

Marketing/
Communications/
Corporate Affairs

3

Product
Development &
Research

3

Finance

3

Risk & Compliance

3

Sustainability/
ESG/CSR

2

Legal

Industry

23

Financial
Services

9

Manufacturing

6

Retail

6

Media &
Telecom

5

Transport and
Logistics

3

Hospitality

3

Primary
Industries

3

Construction &
Real Estate

3

Energy &
Utilities

Organization Size (No. of Emp.)



16

201 - 499



17

500 - 999



18

1,000 -
4,999



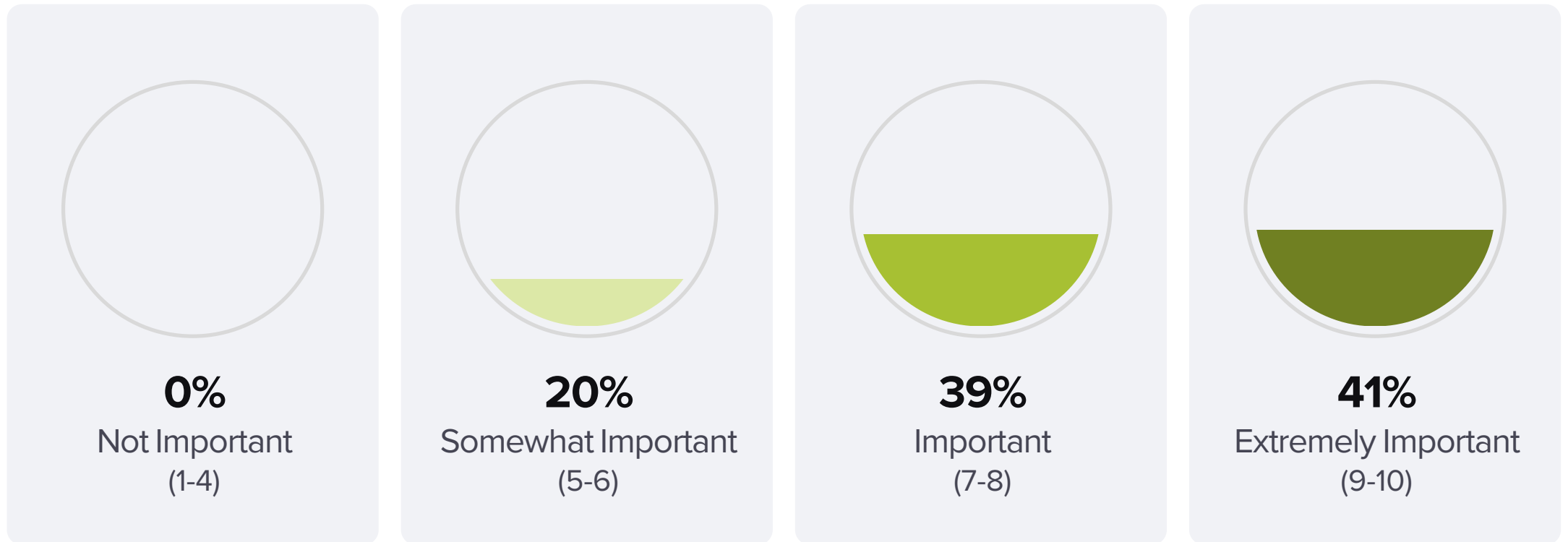
10

More than
5,000

Strategy & Perception



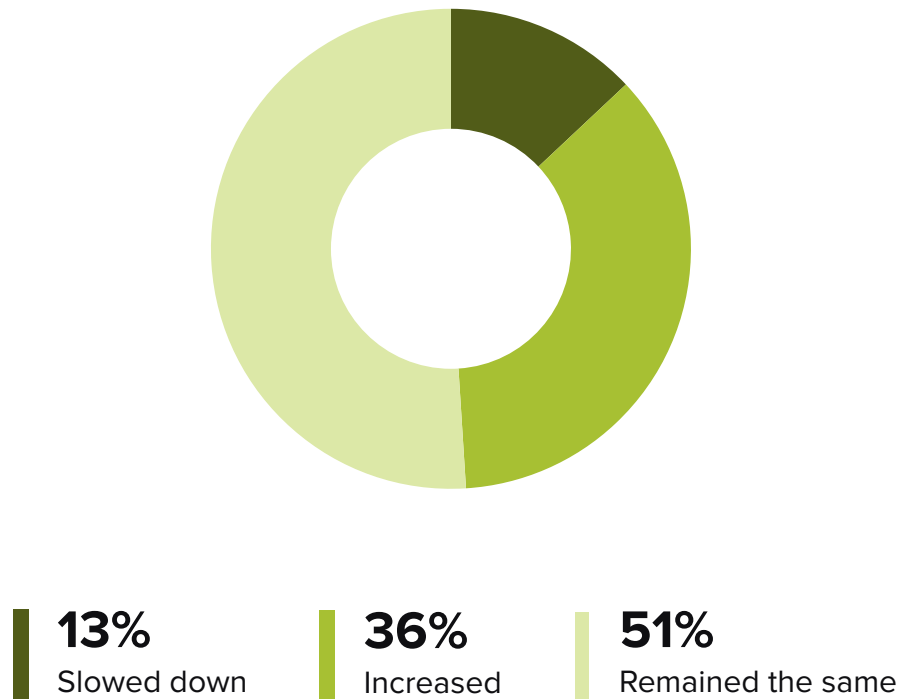
The Importance of Sustainability in the Organization



Pace of Sustainability Efforts



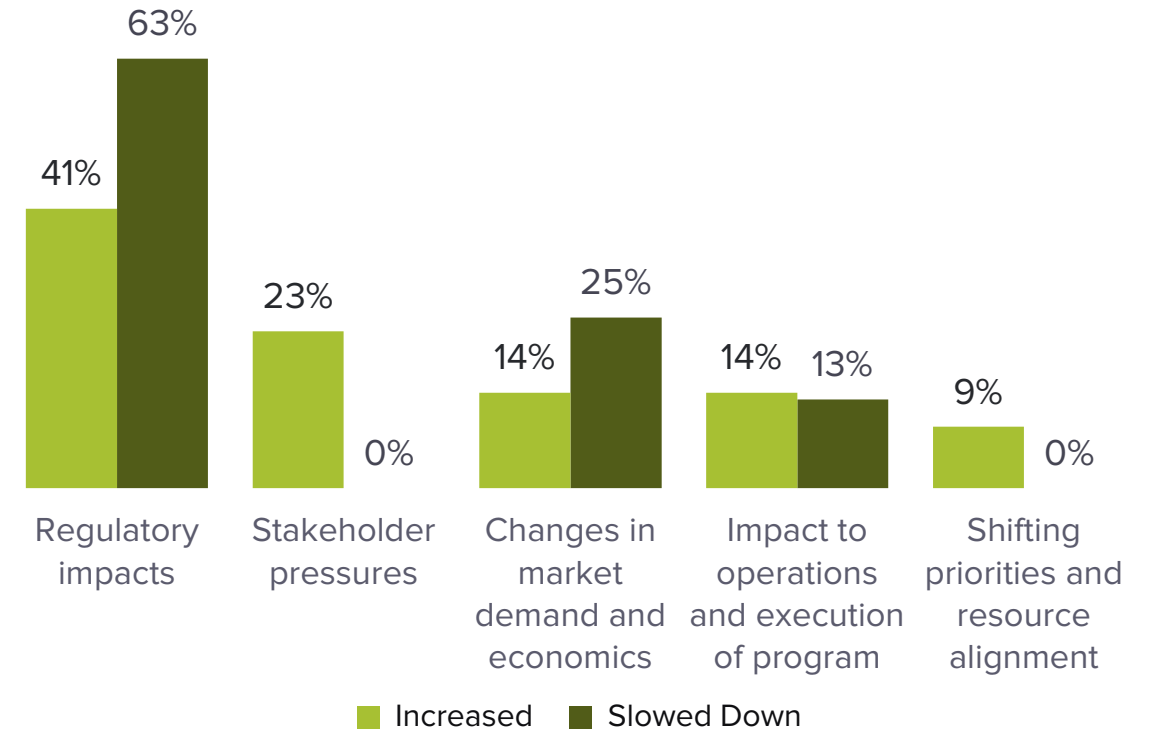
CHANGE FROM LAST YEAR



N = 61

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

REASONS FOR CHANGE



N = 30

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



20%

Sustainability is a strategic aspiration

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



64%

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



6%

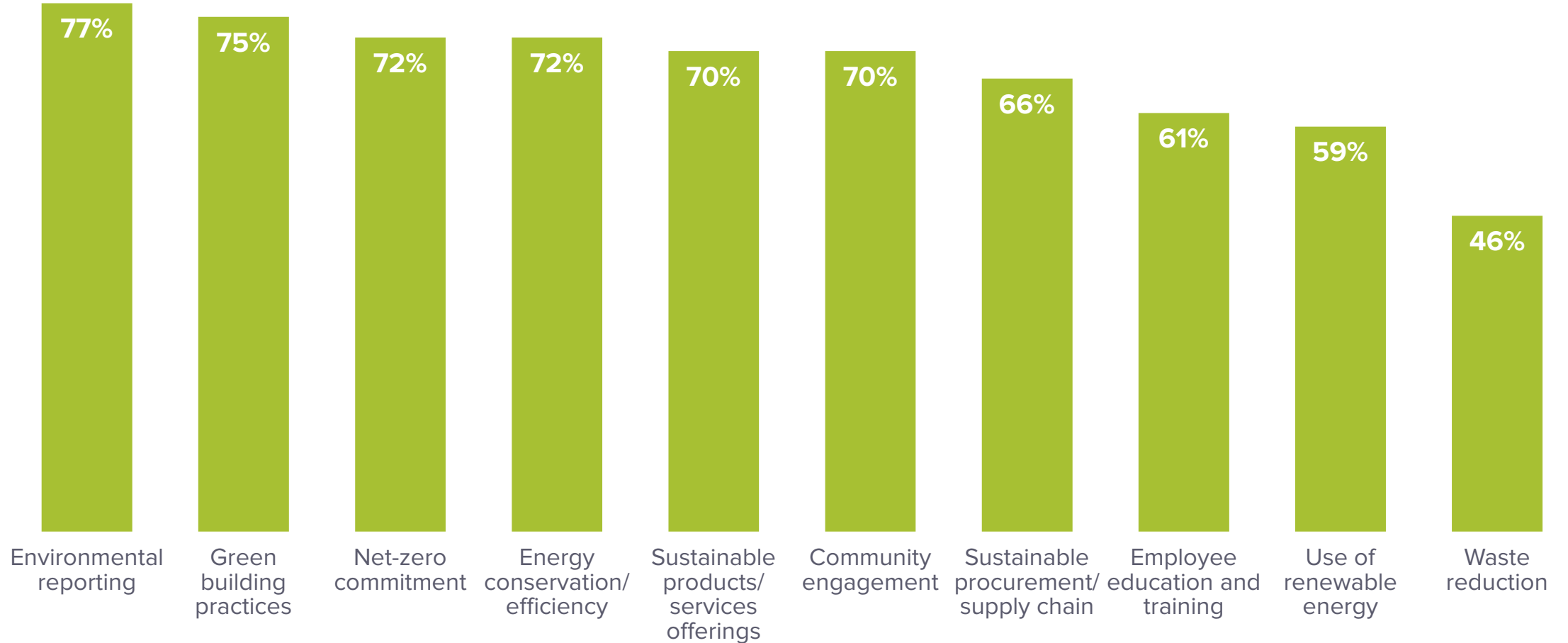
Sustainability is a strategic asset.

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

N = 61

Modeled based on responses to multiple questions

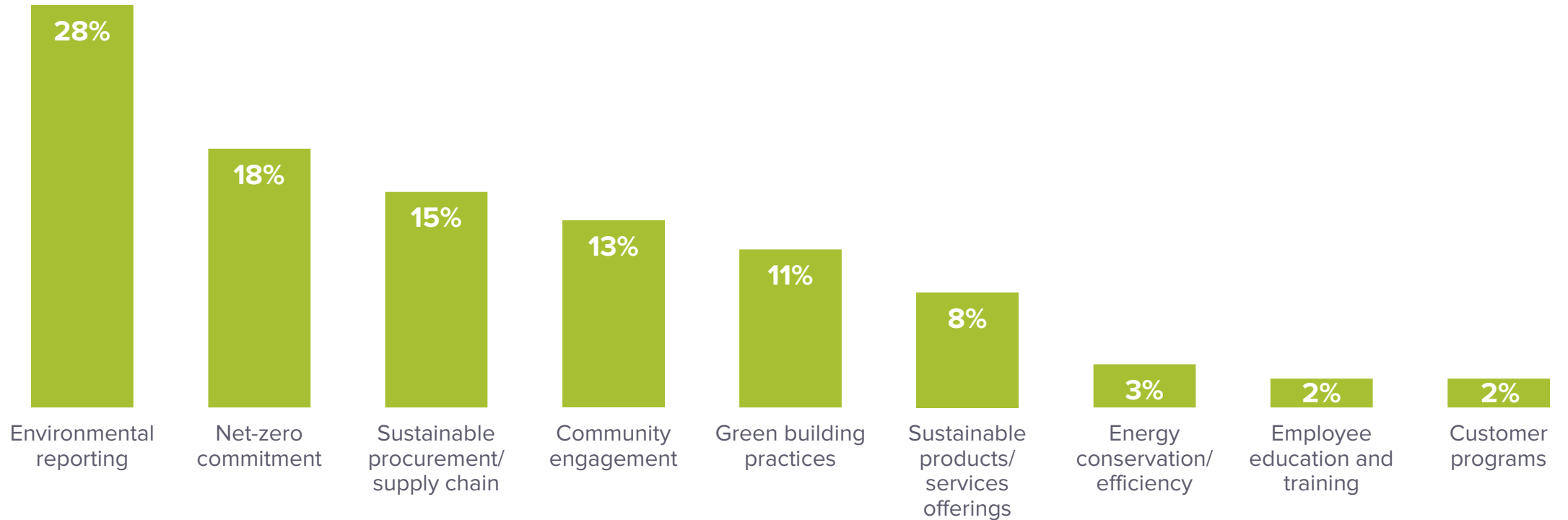
Top Environmental Measures Undertaken



N = 61

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

Most Impactful Environmental Measures



Top Stakeholders Advocating for Sustainability

62%



Investors/
shareholders

56%



Customers

51%



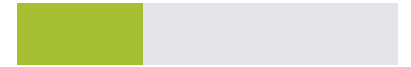
Employees

44%



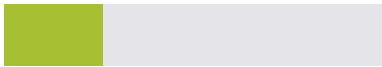
Government/
Regulators

33%



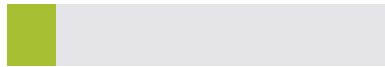
Bank/ Credit
providers

26%



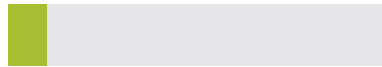
Supply chain
partners

13%



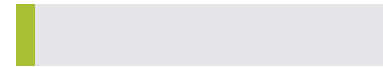
Insurers

10%



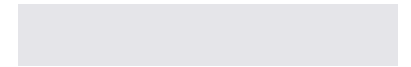
Rating agencies

5%



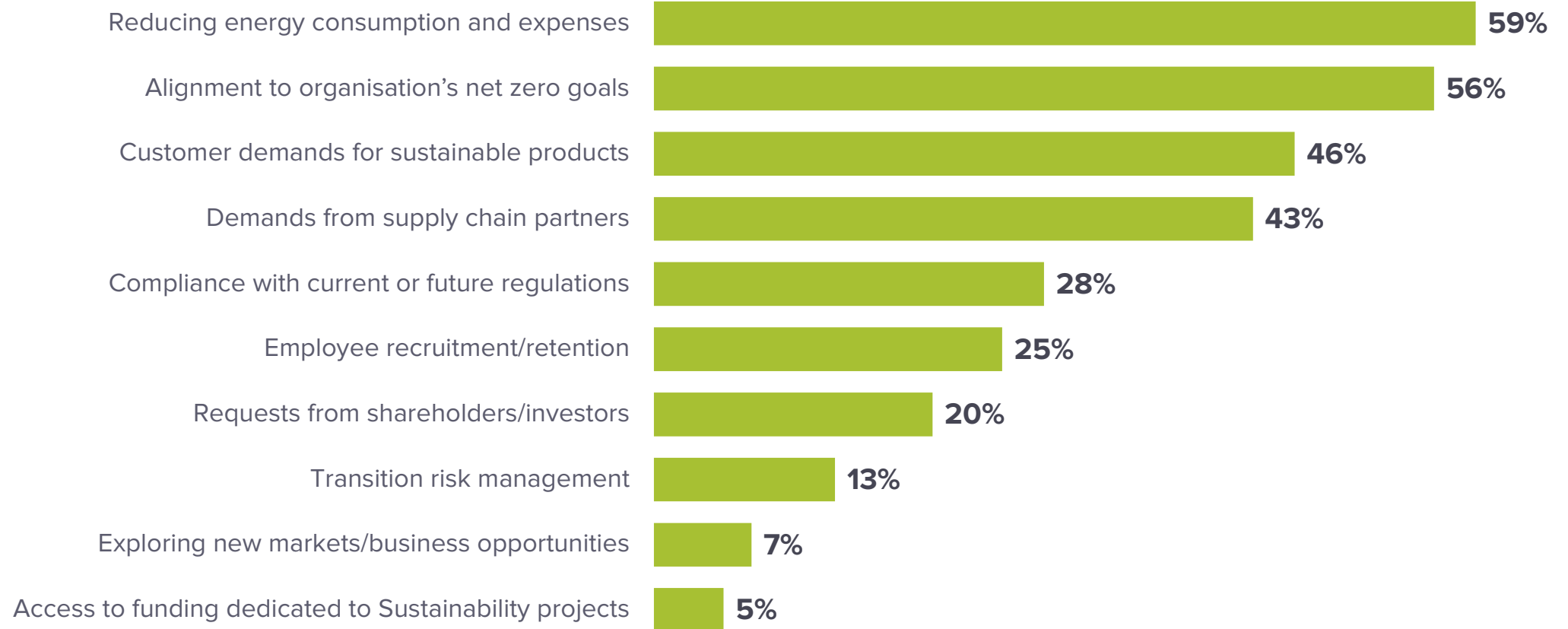
Communities

0%

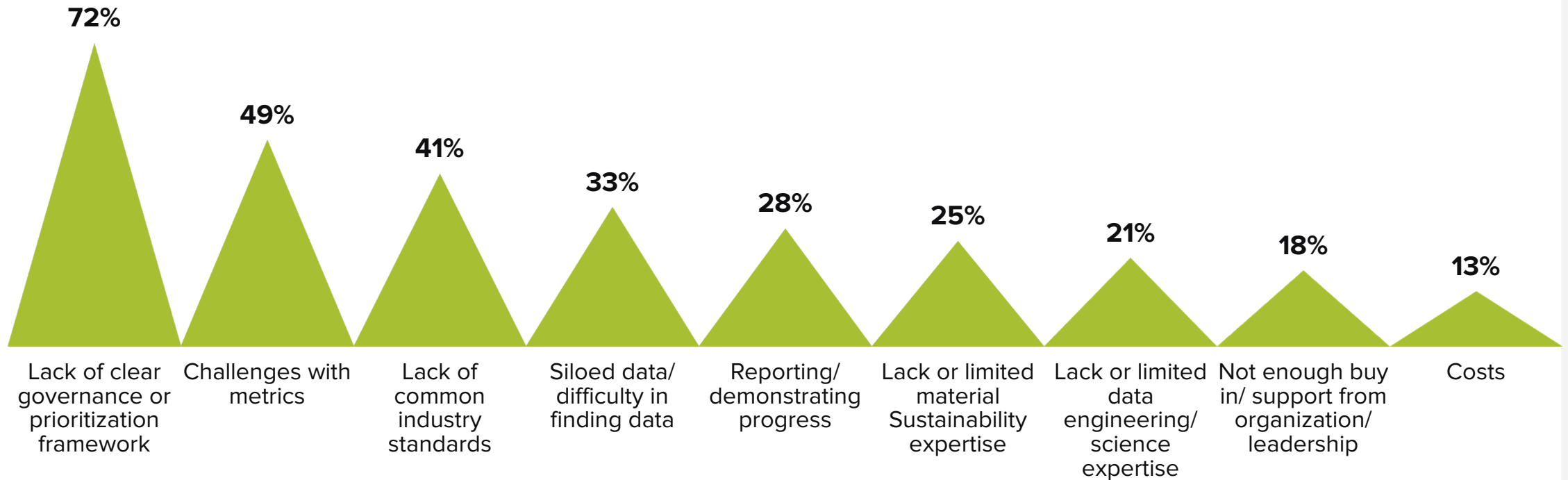


Non-profit
organizations

Main Drivers of Sustainability



Main Challenges of Adopting Sustainability



N = 61

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

How Governments Can Support Adoption of Sustainability



Execution



People, Governance, & Narrative

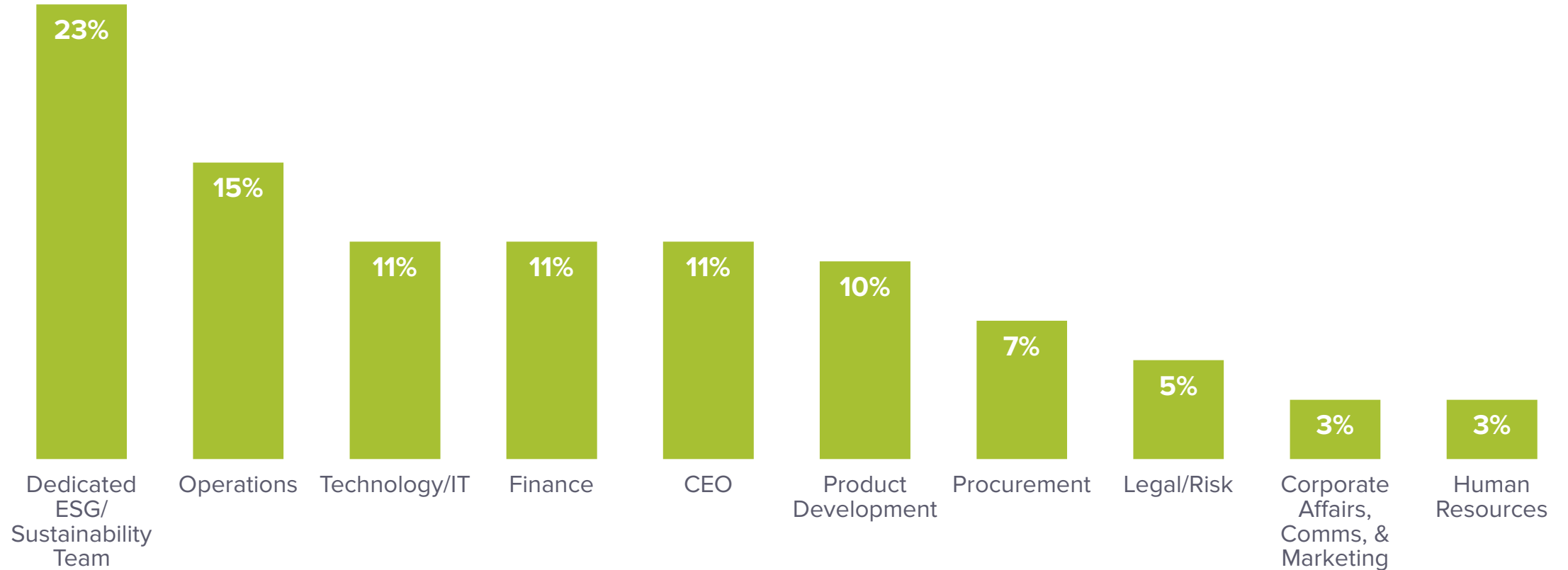




Sustainability Leadership



ecosystem.io



Role of Key Stakeholders



Defining The Vision

64% ESG/Sustainability Team

62% CEO

41% Finance

Delivering Sustainability Outcomes

70% ESG/Sustainability Team

59% Finance

51% Technology/IT

Providing the Data

79% ESG/Sustainability Team

36% Operations

36% Product Development

Managing the Data

67% ESG/Sustainability Team

39% Legal/Risk

36% Finance

Deciding the Metrics

72% CEO

44% Finance

34% Legal/Risk

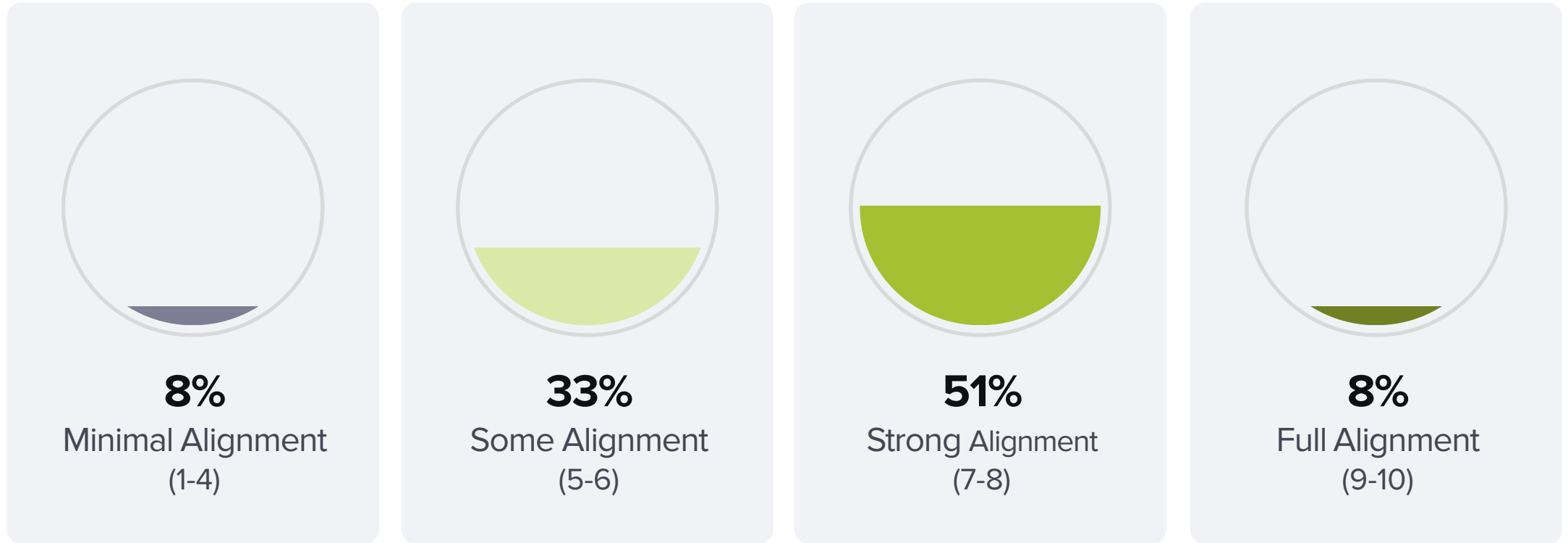
Reporting

93% ESG/Sustainability Team

44% Corporate Affairs, Comms, & Marketing

38% Technology/IT

Alignment Between Sustainability Team & Finance



Maturity of Employee Involvement in Sustainability



13%

Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives



20%

Basic Sustainability Awareness

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



44%

Emerging Sustainability Engagement

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



18%

KPI-Driven Sustainability

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



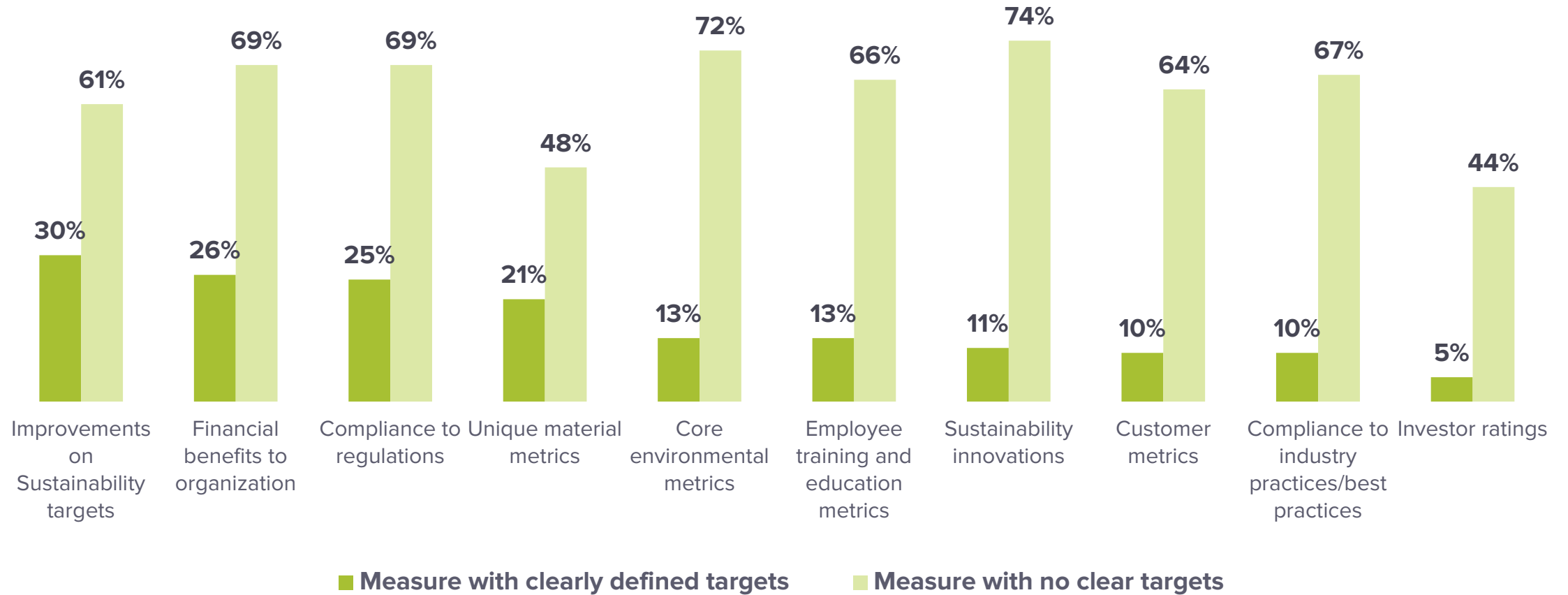
5%

Sustainability as a Strategic Imperative

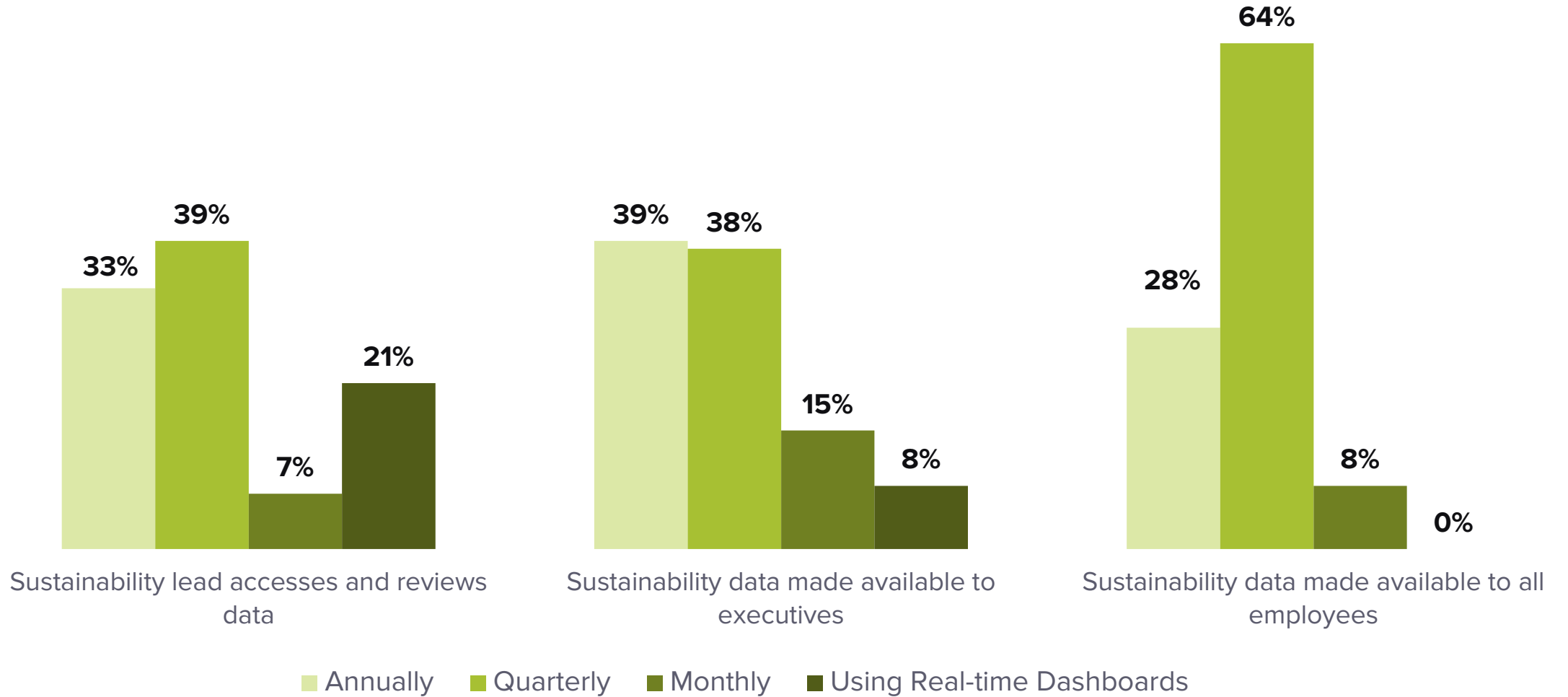
Sustainability performance is tied to executive and key employee compensation, reinforcing its role as a strategic priority.

Metrics Used to Measure Sustainability

ecosystem.io



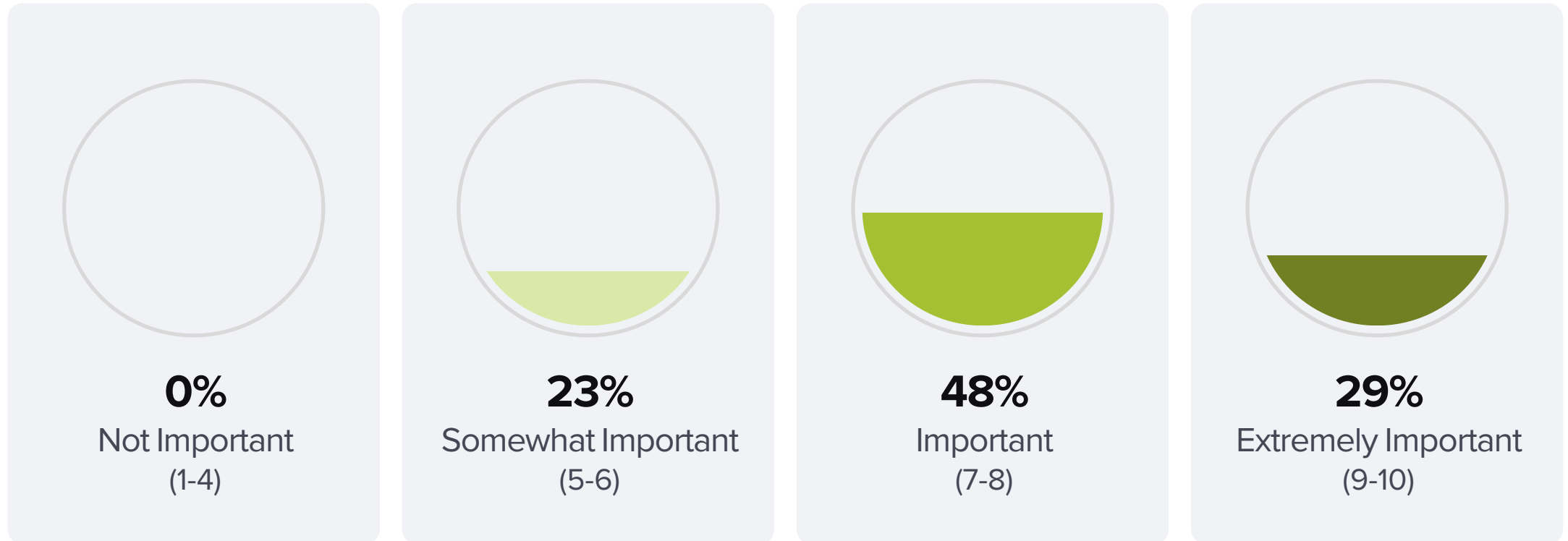
Sustainability Data Access and Sharing



Technology

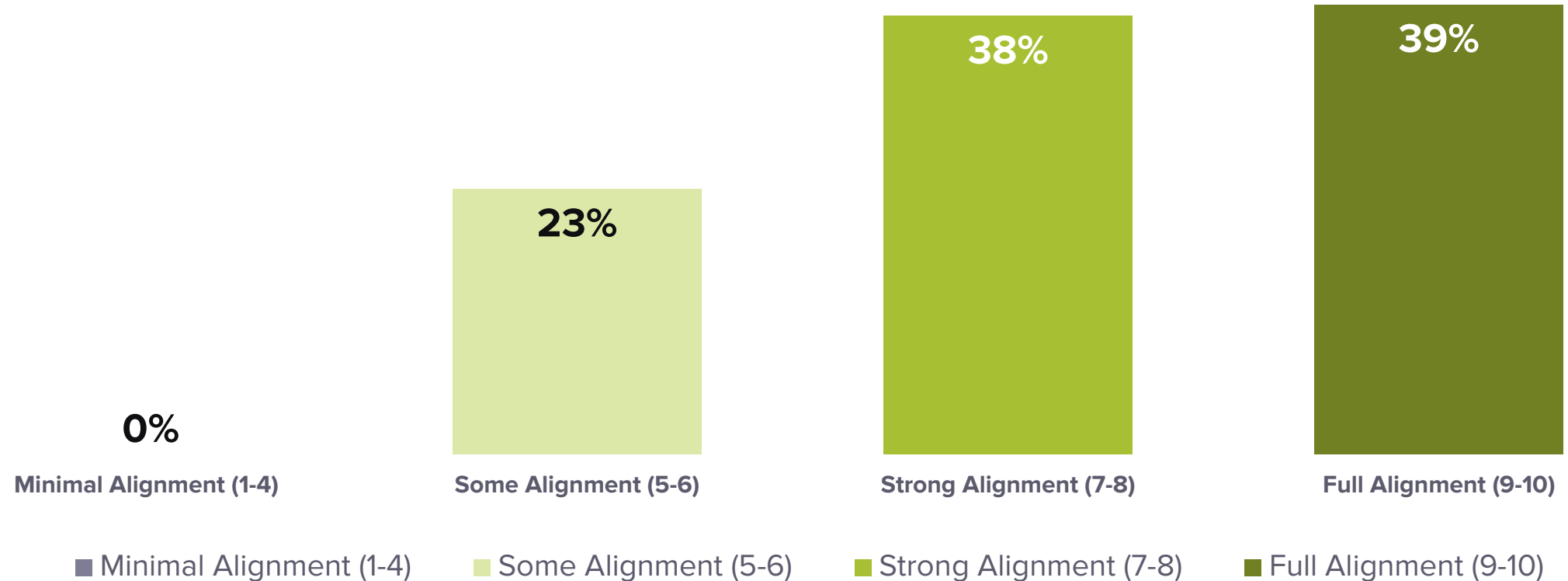


Importance of Technology in Achieving Sustainability Goals

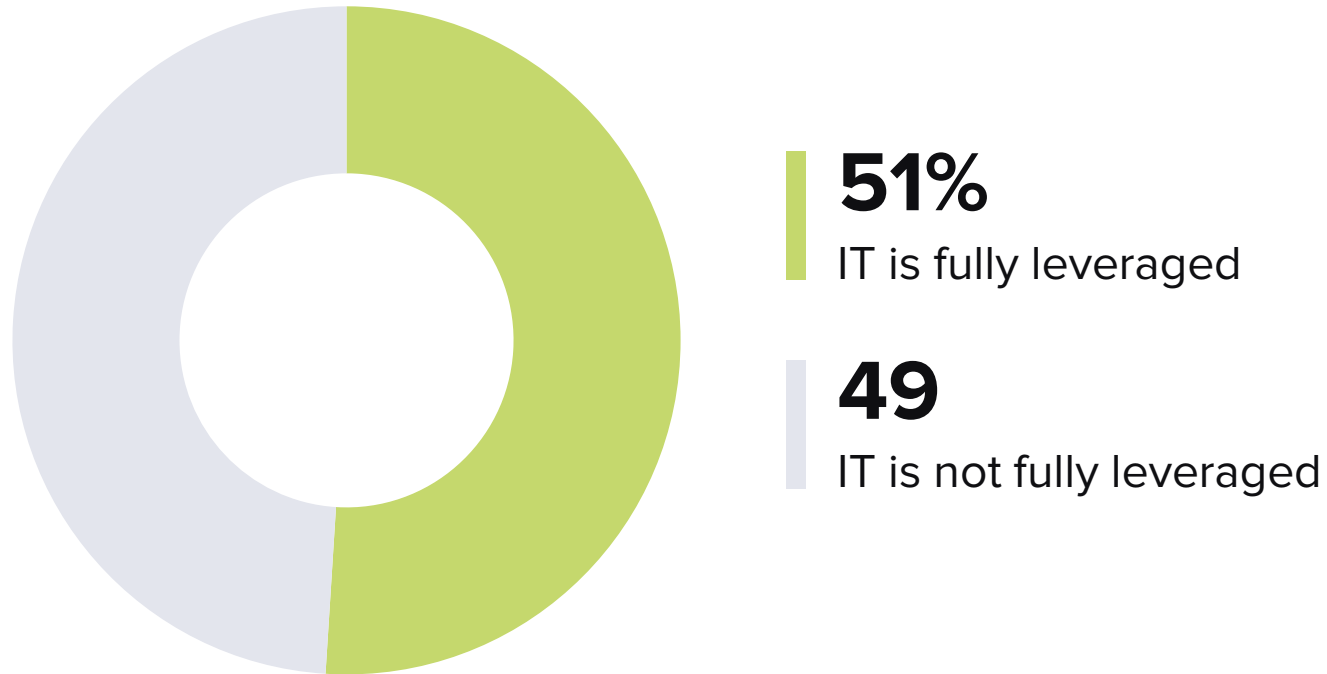




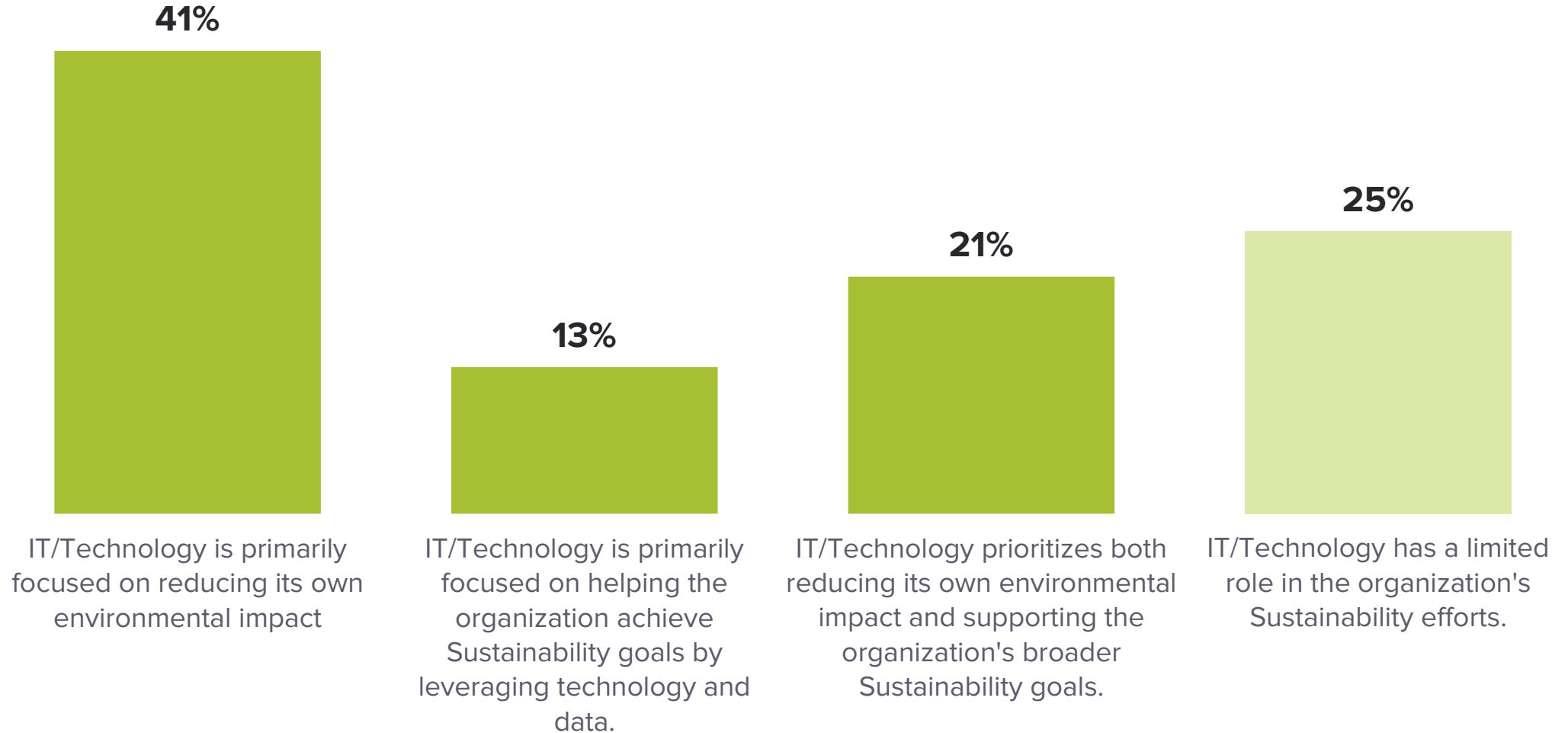
Alignment Between Sustainability Teams & Technology



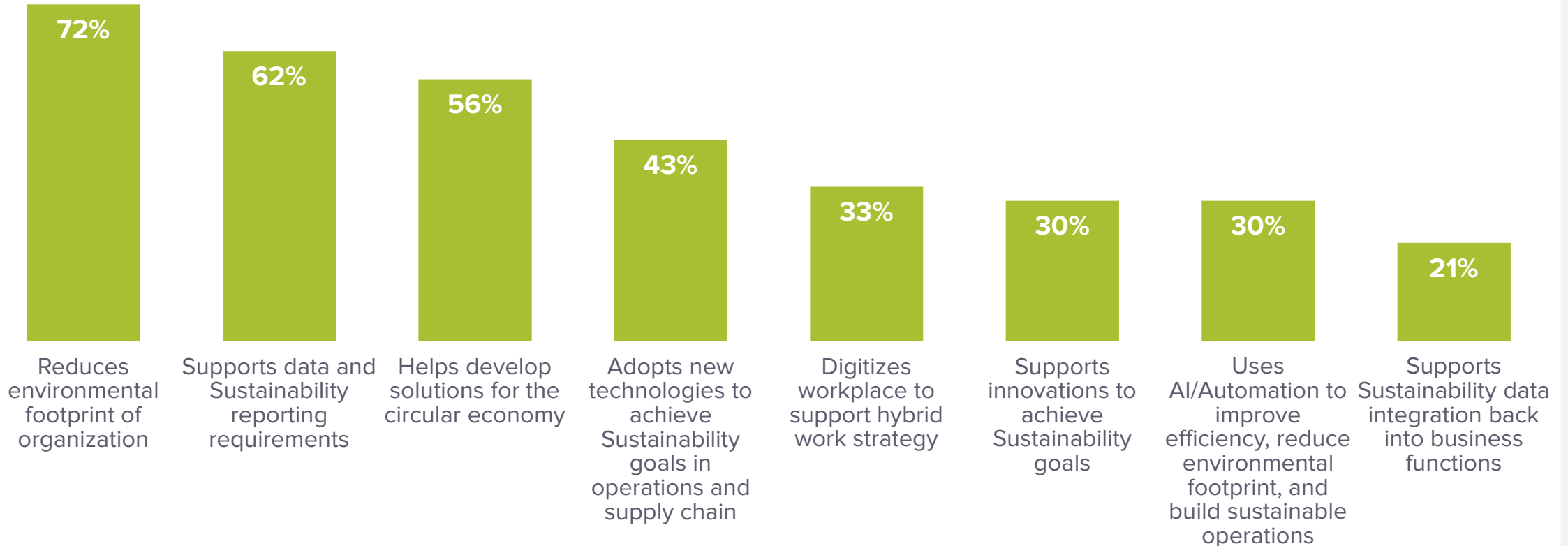
The Extent of Use of IT to Achieve Sustainability Goals



IT's Role in Achieving Sustainability Goals

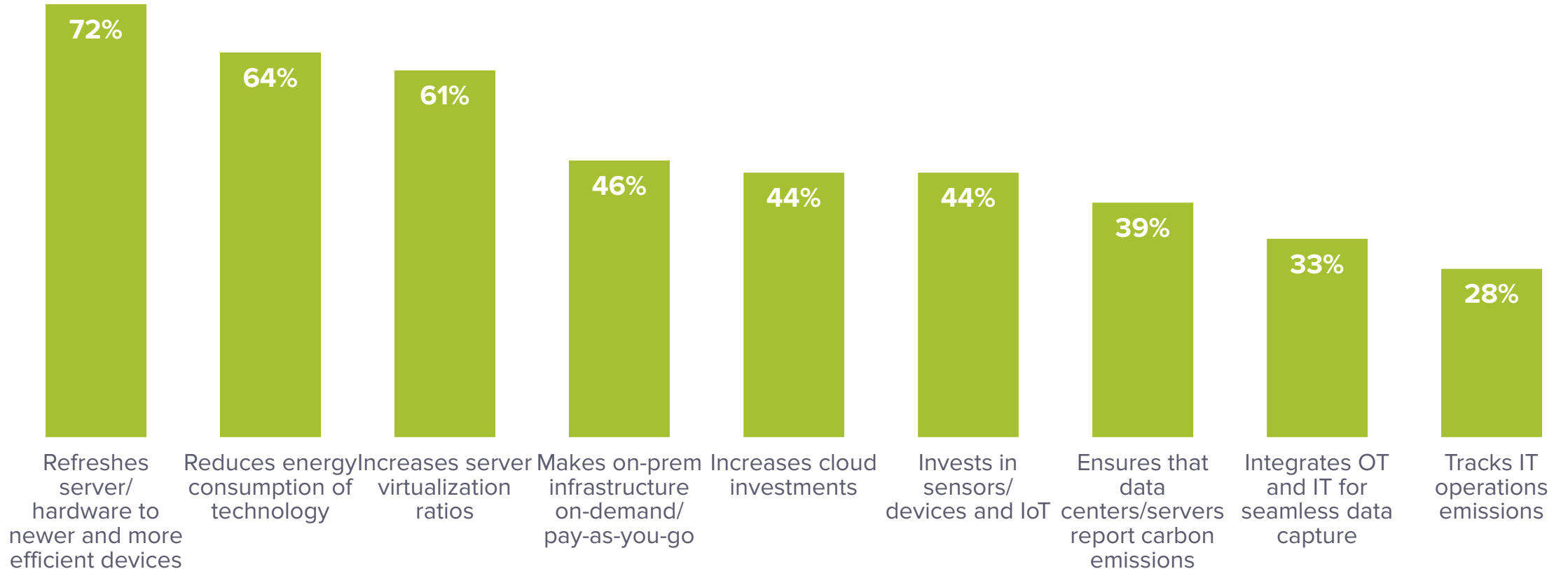


Role of Technology in Supporting Sustainability





Technology Team's Steps to Reduce 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



39%

We use data to track key Sustainability metrics for reporting



10%

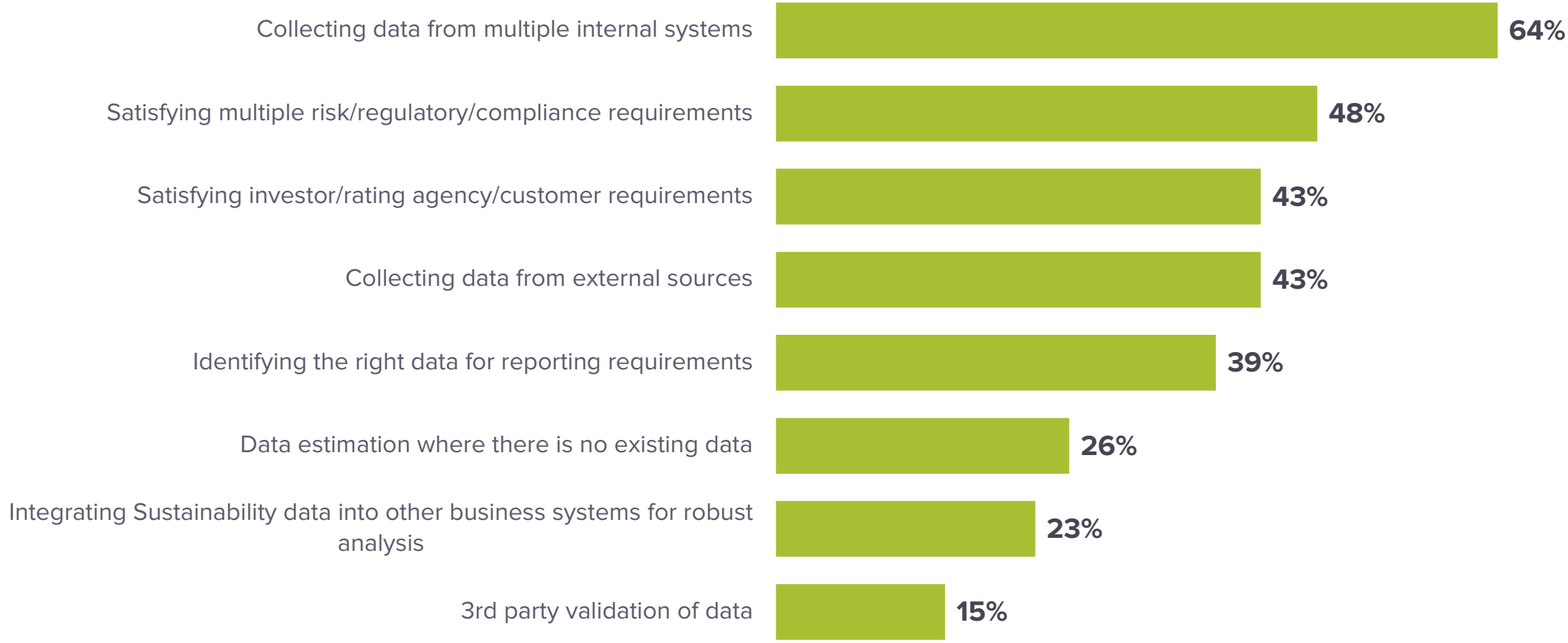
We use data to track, analyze, and optimize our Sustainability performance across business applications



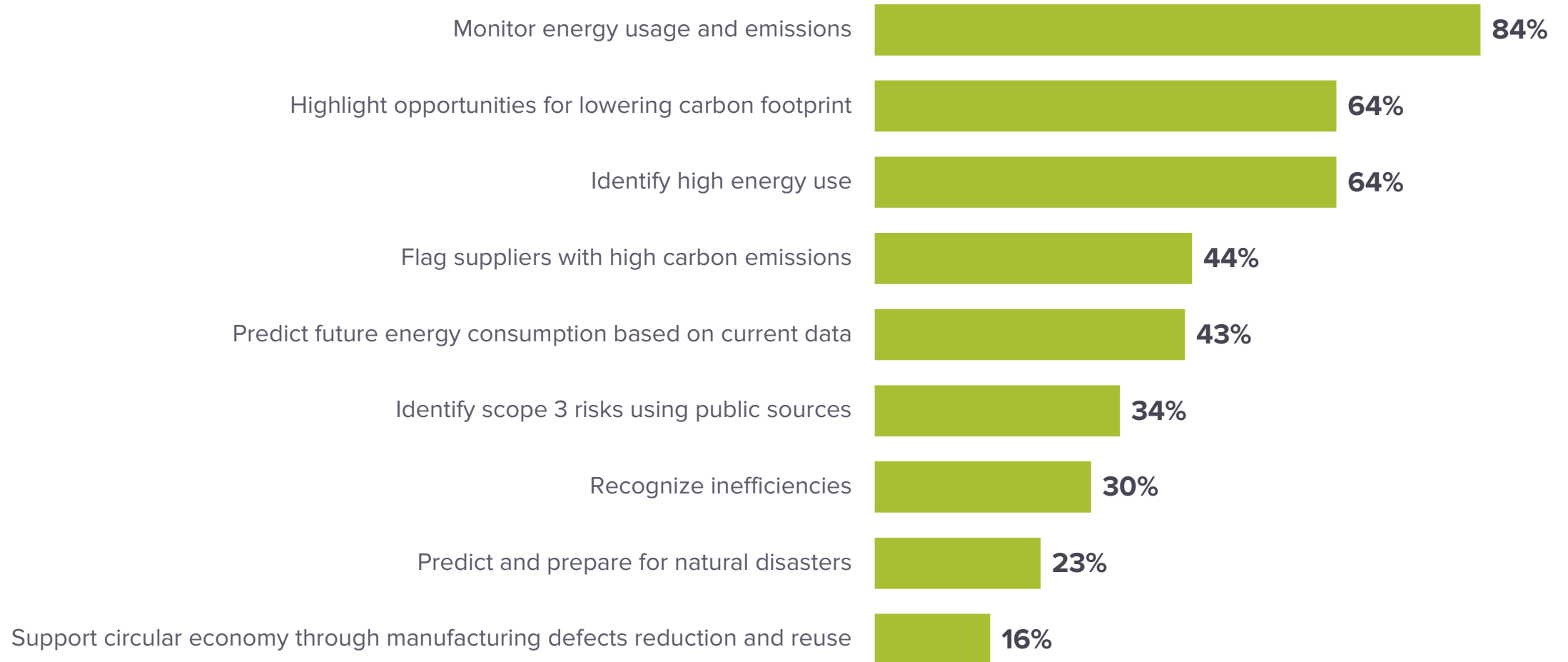
17%

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

Challenges of Supporting Sustainability Data Needs

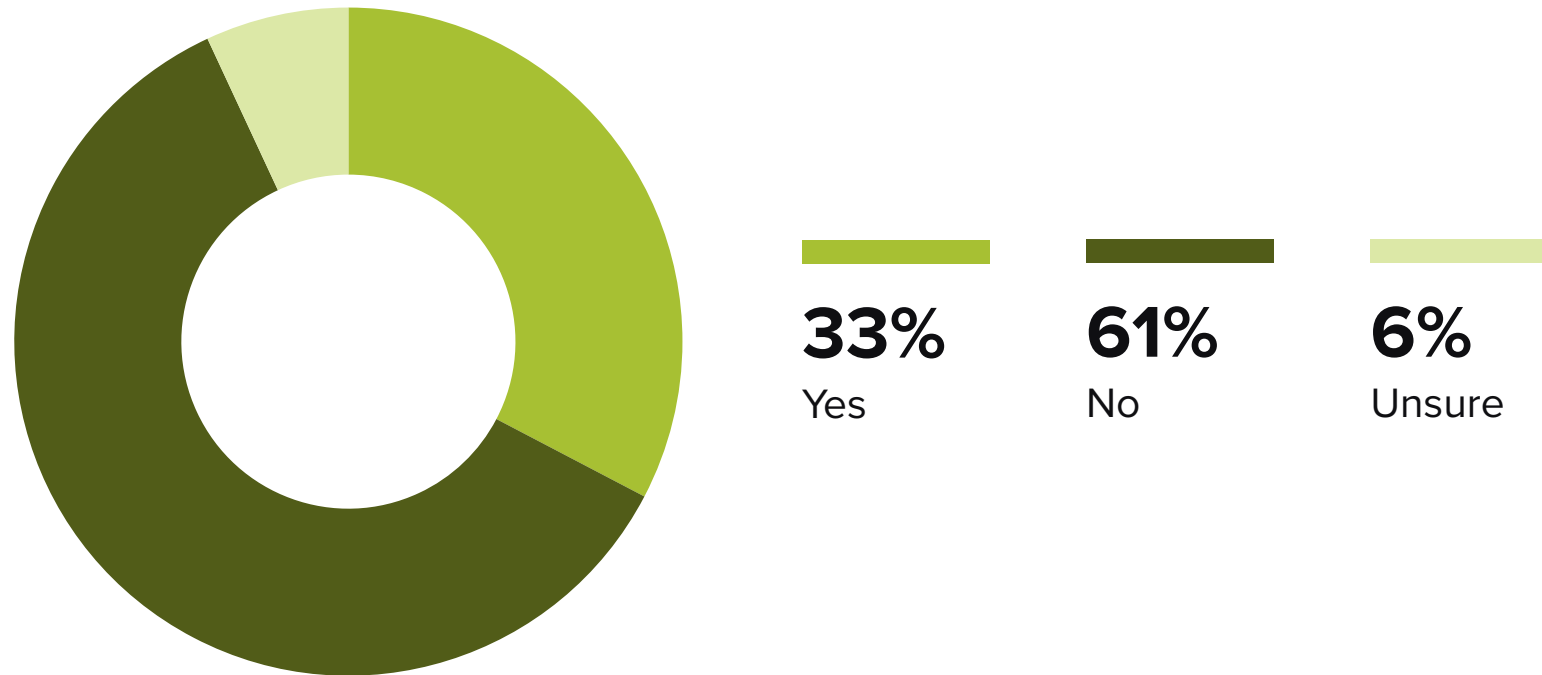


The Use of AI for Environmental Footprint Management



Environmental Impact of AI

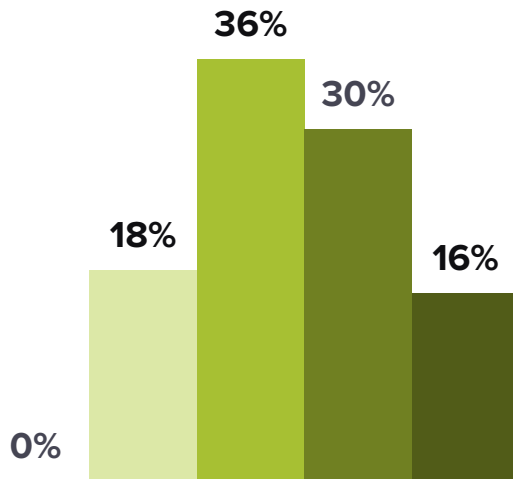
Is Impact Considered?



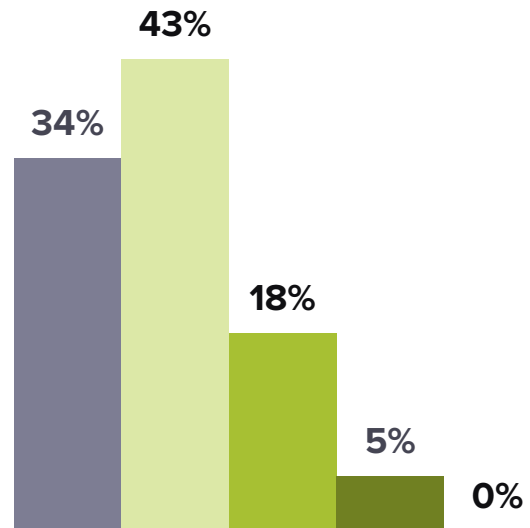
Perception on the Impact of AI

ecosystem.io

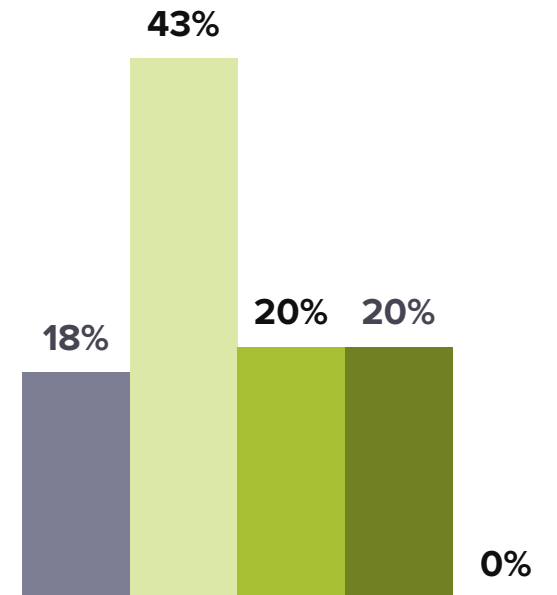
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions



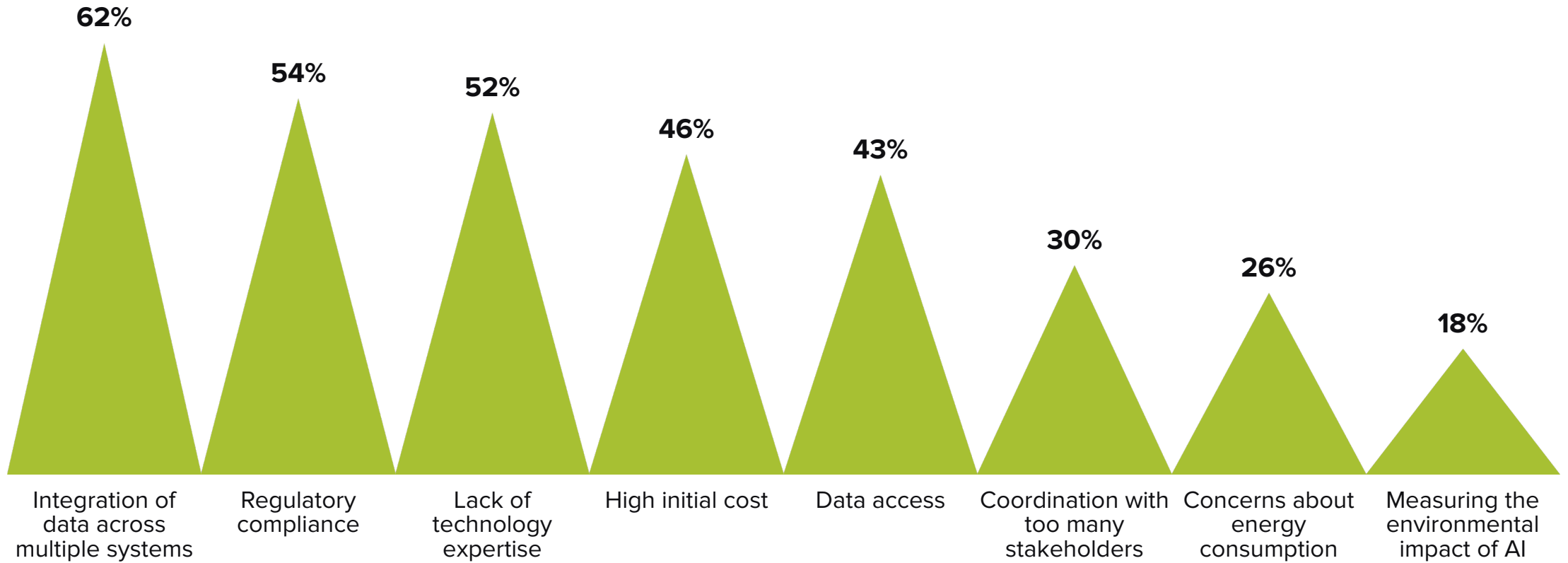
Impact of AI on the cost of Sustainability initiatives



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

Key Challenges in Integrating AI for Sustainability Initiatives

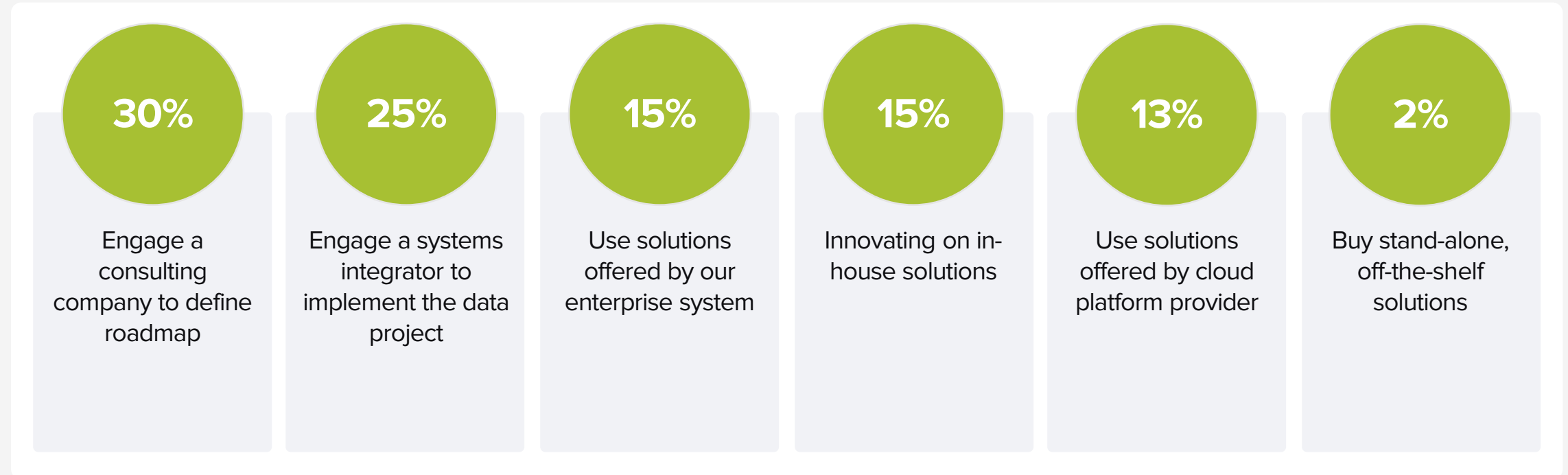
ecosystem.io



N = 61

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

Building Sustainability Technology Capabilities



N = 61

Q: How is your organization building Sustainability reporting capabilities?

The Netherlands





Study Demographics



Function

24



IT/Digital

6



Sustainability/
ESG/CSR

5



Management

5



Human Resources

5



Risk & Compliance

4



Product
Development &
Research

4



Legal

3



Operations/
Logistics/
Procurement/
Production

3



Finance

3



Marketing/
Communications/
Corporate Affairs

Industry

24

Financial
Services

11

Manufacturing

9

Retail

4

Hospitality

4

Media &
Telecom

3

Energy
& Utilities

3

Construction &
Real Estate

3

Transport and
Logistics

2

Primary
Industries

Organization Size (No. of Emp.)



15

201 - 499



11

500 - 999



23

1,000 -
4,999



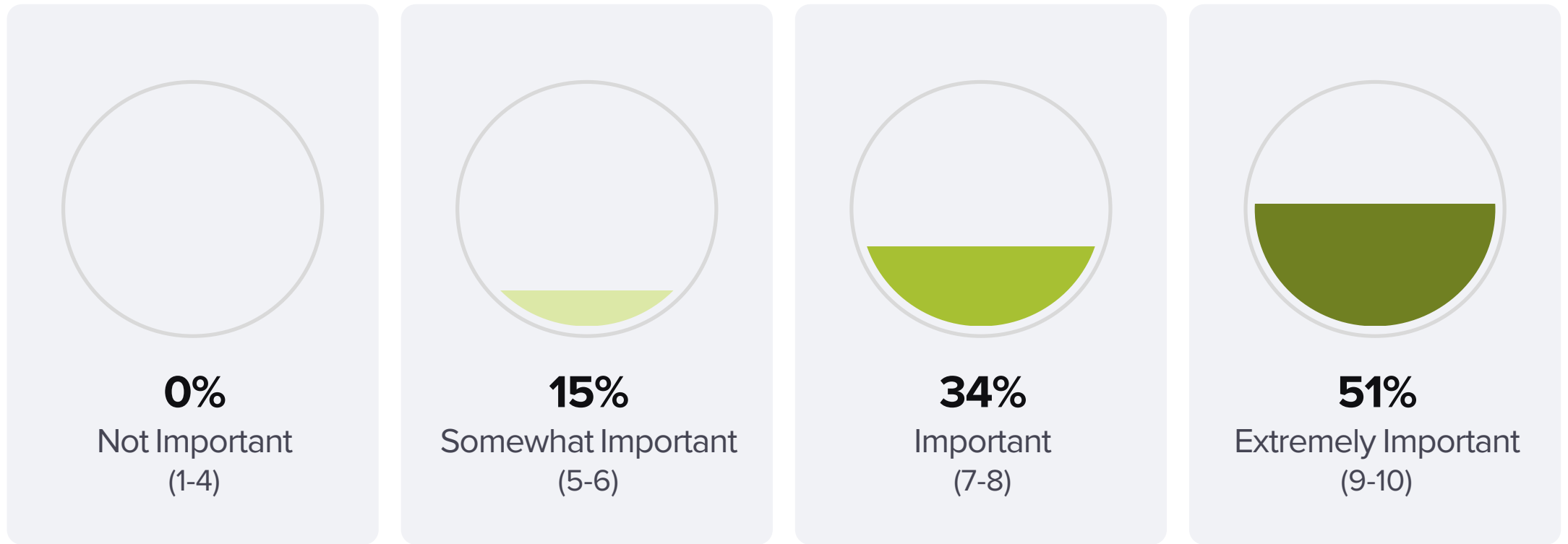
13

More than
5,000

Strategy & Perception



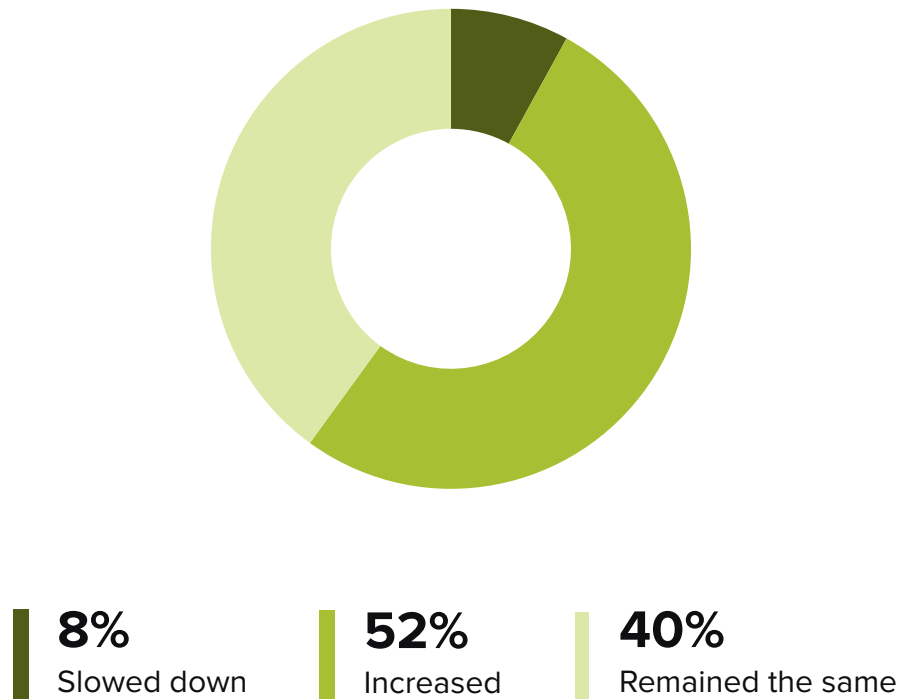
The Importance of Sustainability in the Organization



Pace of Sustainability Efforts



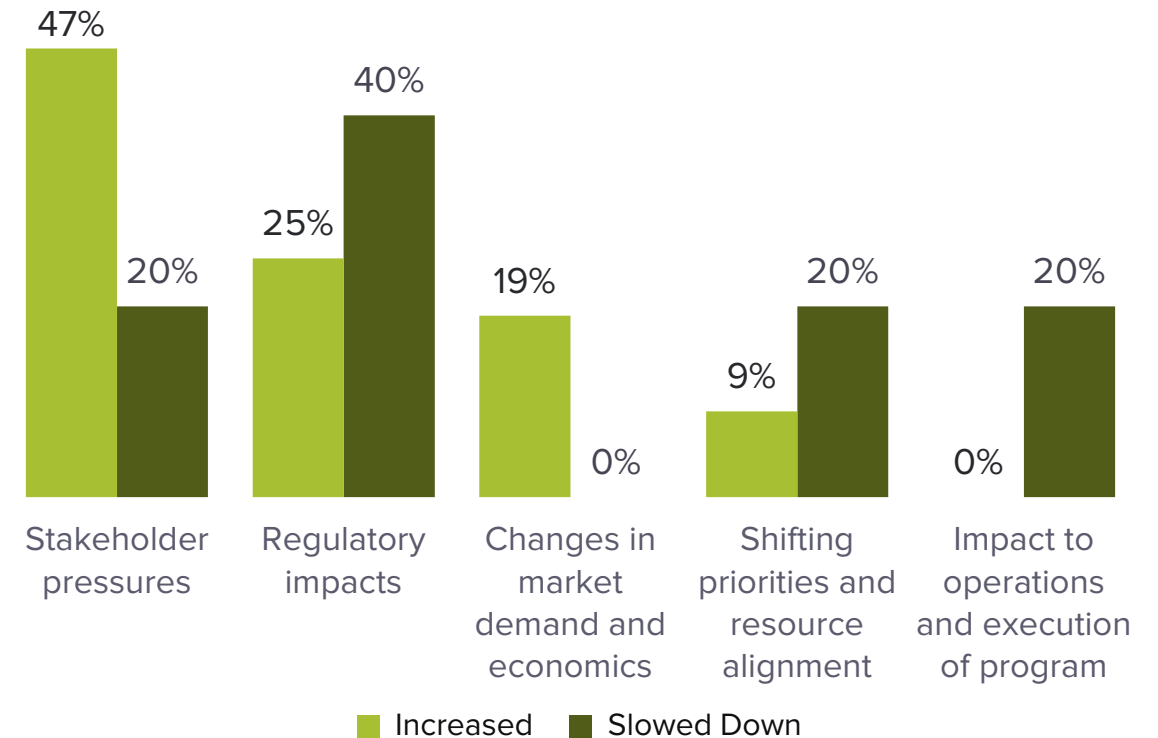
CHANGE FROM LAST YEAR



N = 62

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

REASONS FOR CHANGE



N = 37

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



34%

Sustainability is a strategic aspiration

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



40%

Sustainability is operationally embedded

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



13%

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 asset.

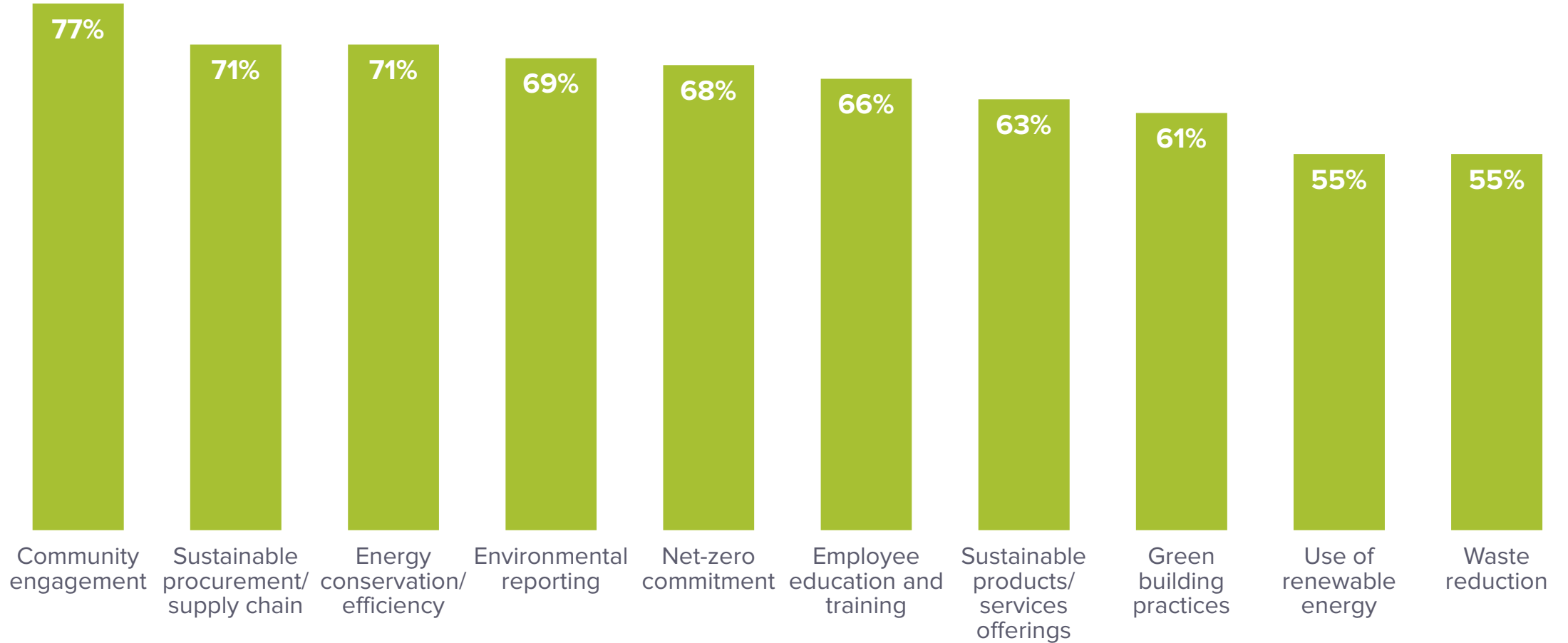
Business value of sustainability data is well-understood, and initiatives are fully integrated into strategic planning and decision-making processes

N = 62

Modeled based on responses to multiple questions

Top Environmental Measures Undertaken

ecosystem.io



Most Impactful Environmental Measures

ecosystem.io

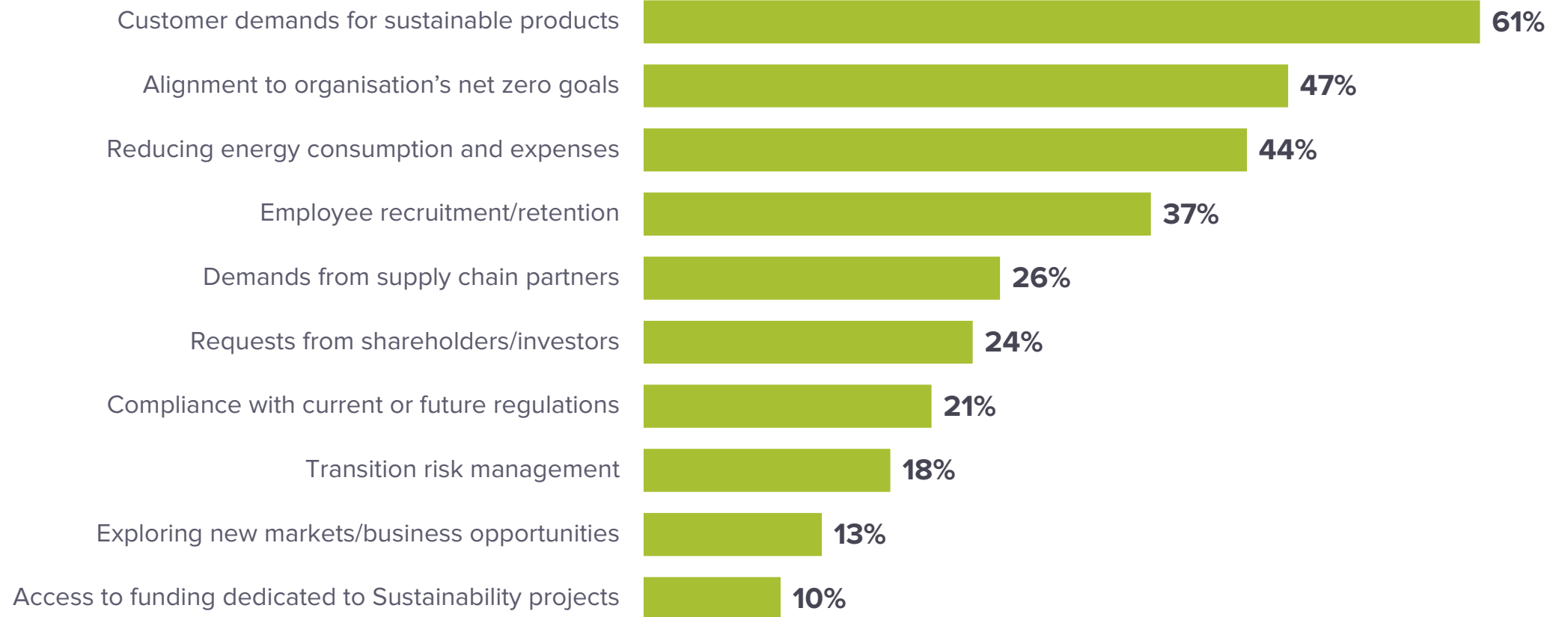




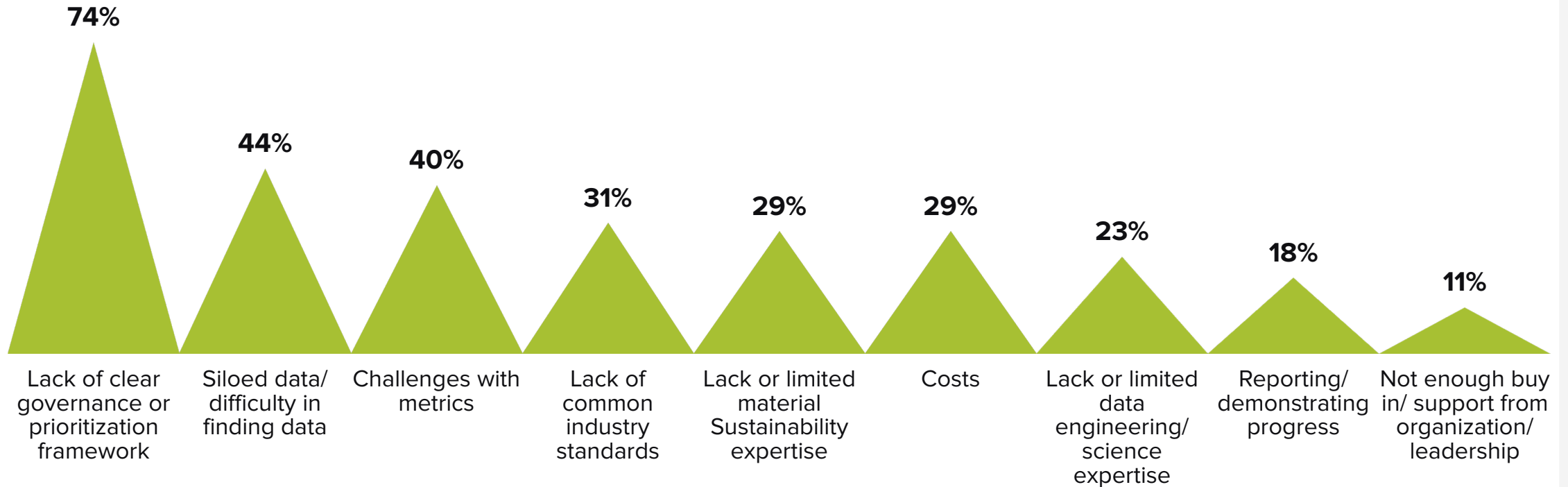
Top Stakeholders Advocating for Sustainability



Main Drivers of Sustainability



Main Challenges of Adopting Sustainability



N = 62

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

How Governments Can Support Adoption of Sustainability



Execution



People, Governance, & Narrative

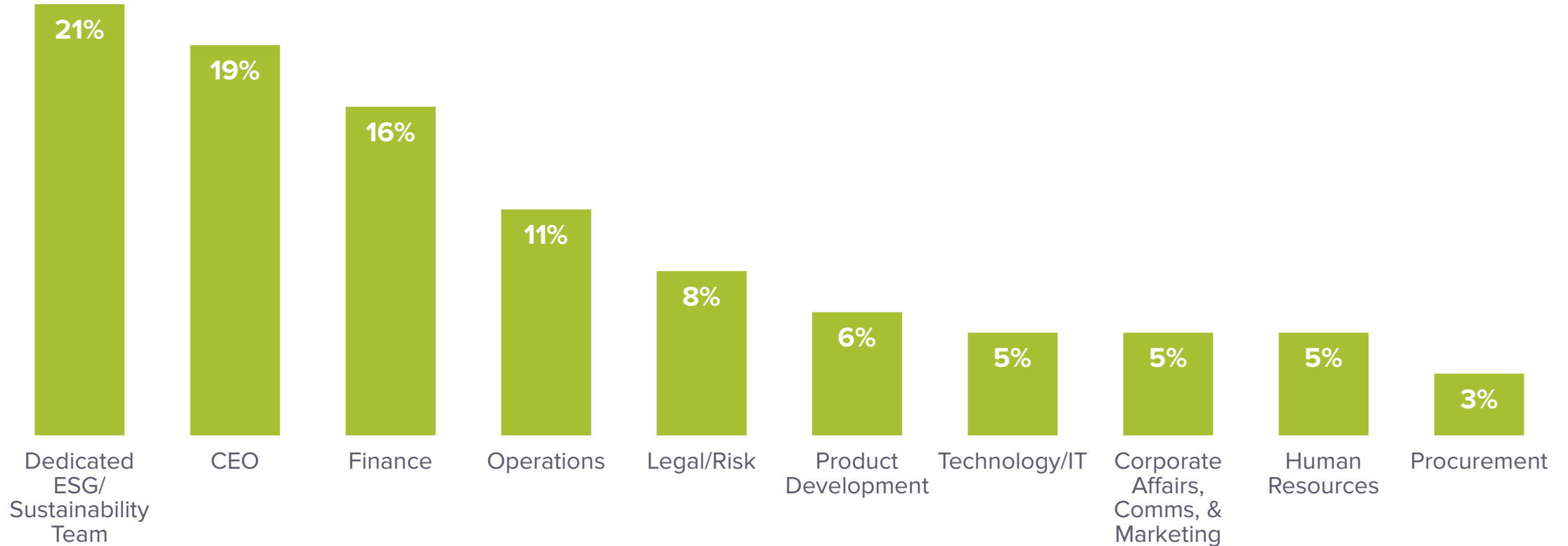




Sustainability Leadership



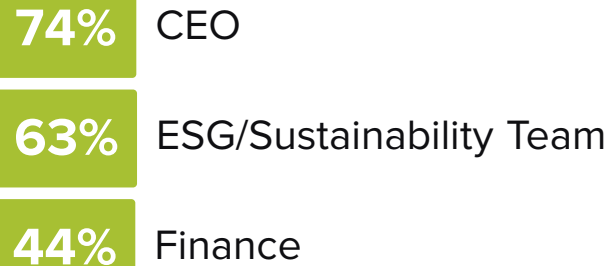
ecosystem.io



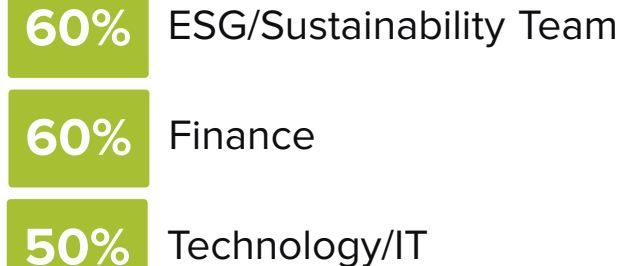
Role of Key Stakeholders



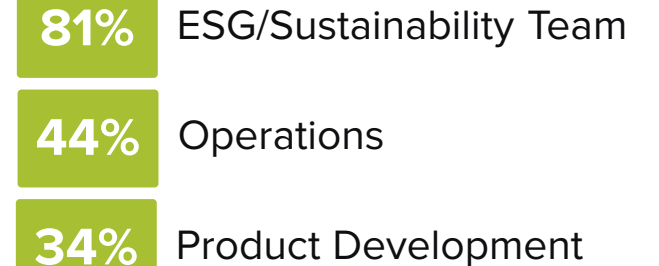
Defining The Vision



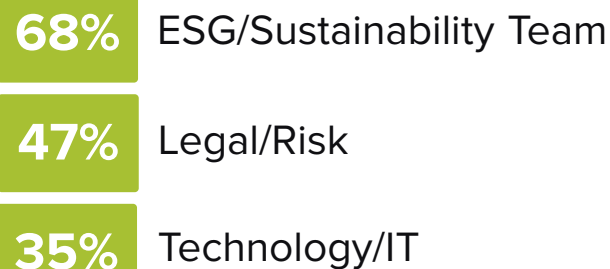
Delivering Sustainability Outcomes



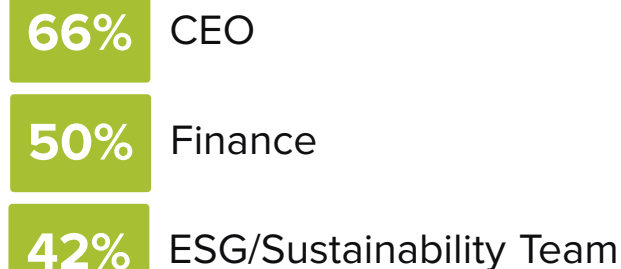
Providing the Data



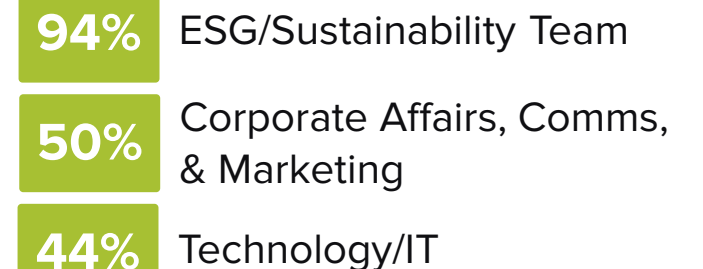
Managing the Data



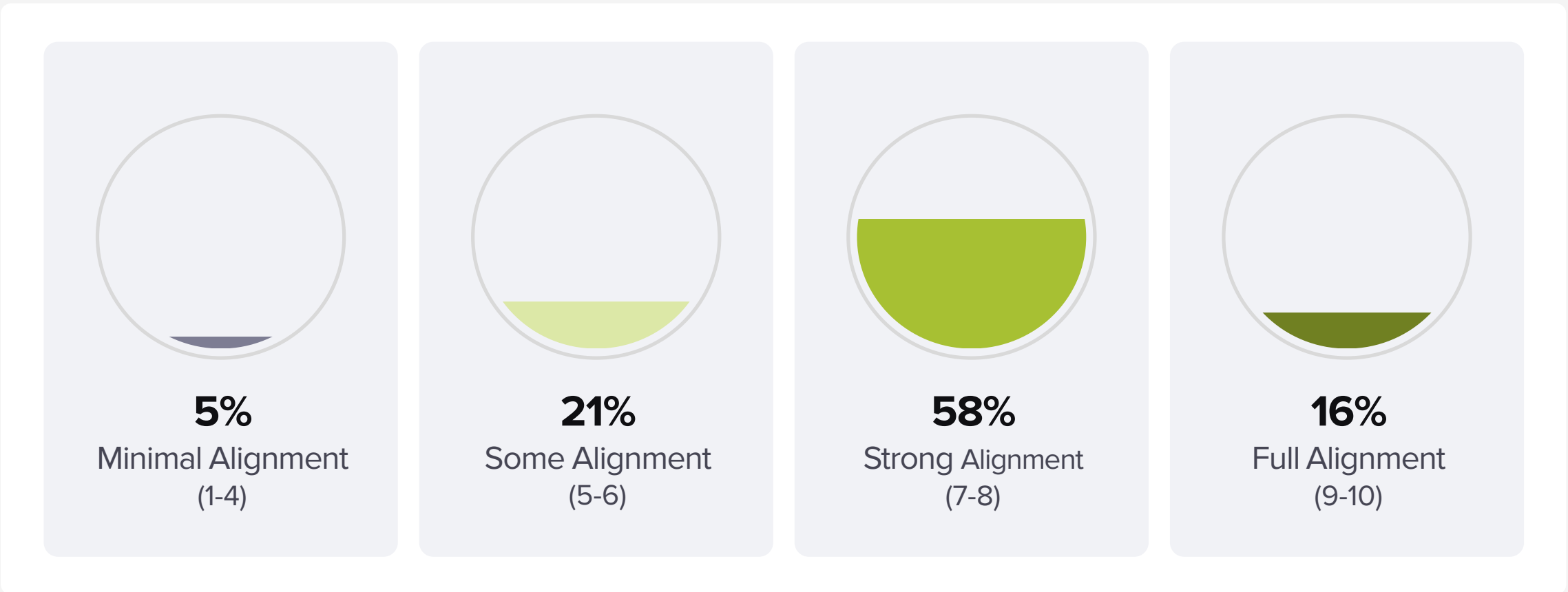
Deciding the Metrics



Reporting



Alignment Between Sustainability Team & Finance



Maturity of Employee Involvement in Sustainability



6% 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



52% Emerging Sustainability Engagement

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



23% KPI-Driven Sustainability

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

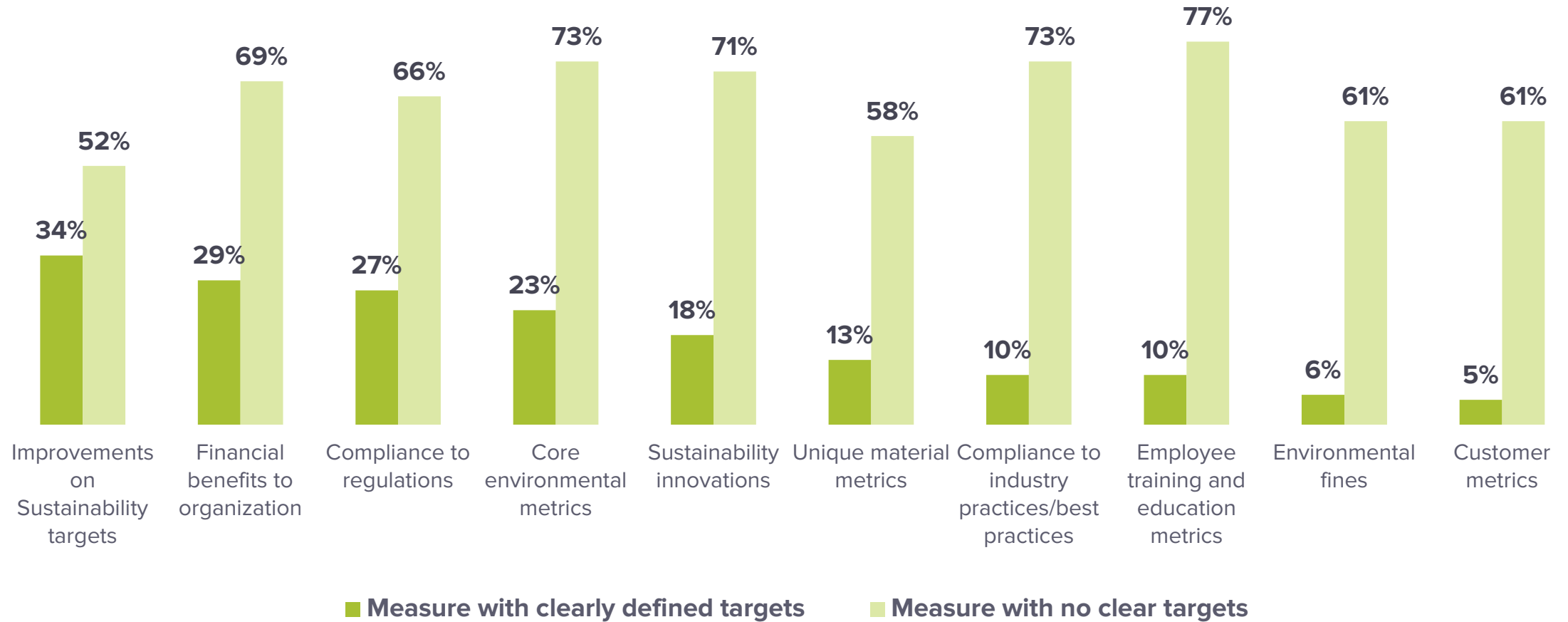


3% Sustainability as a Strategic Imperative

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

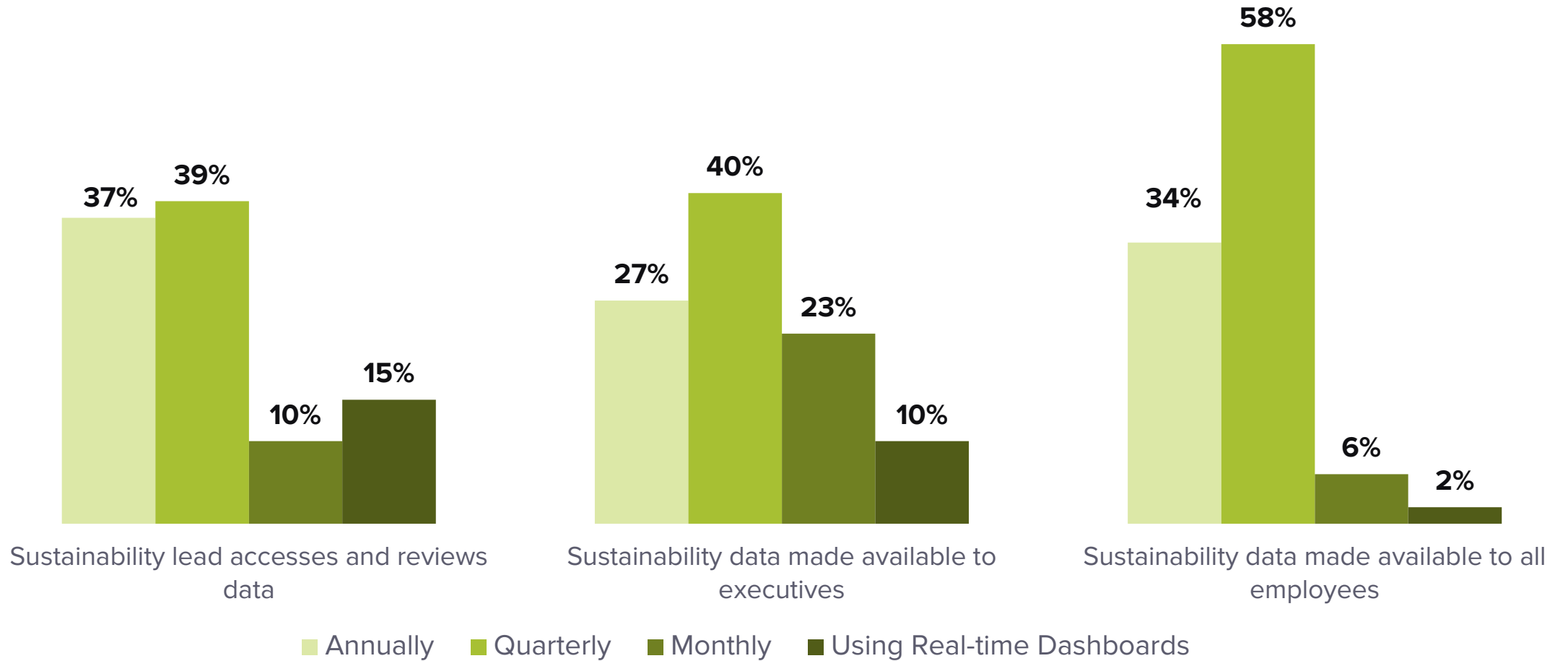
Metrics Used to Measure Sustainability

ecosystem.io



Sustainability Data Access and Sharing

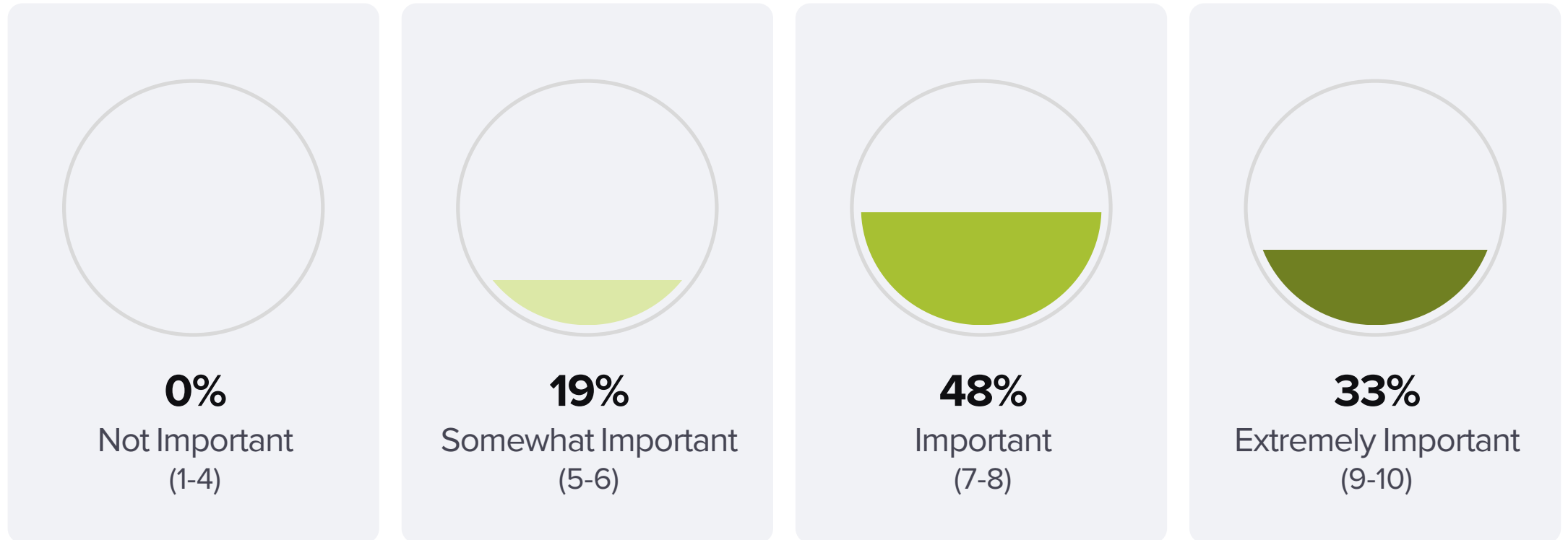
ecosystem.io



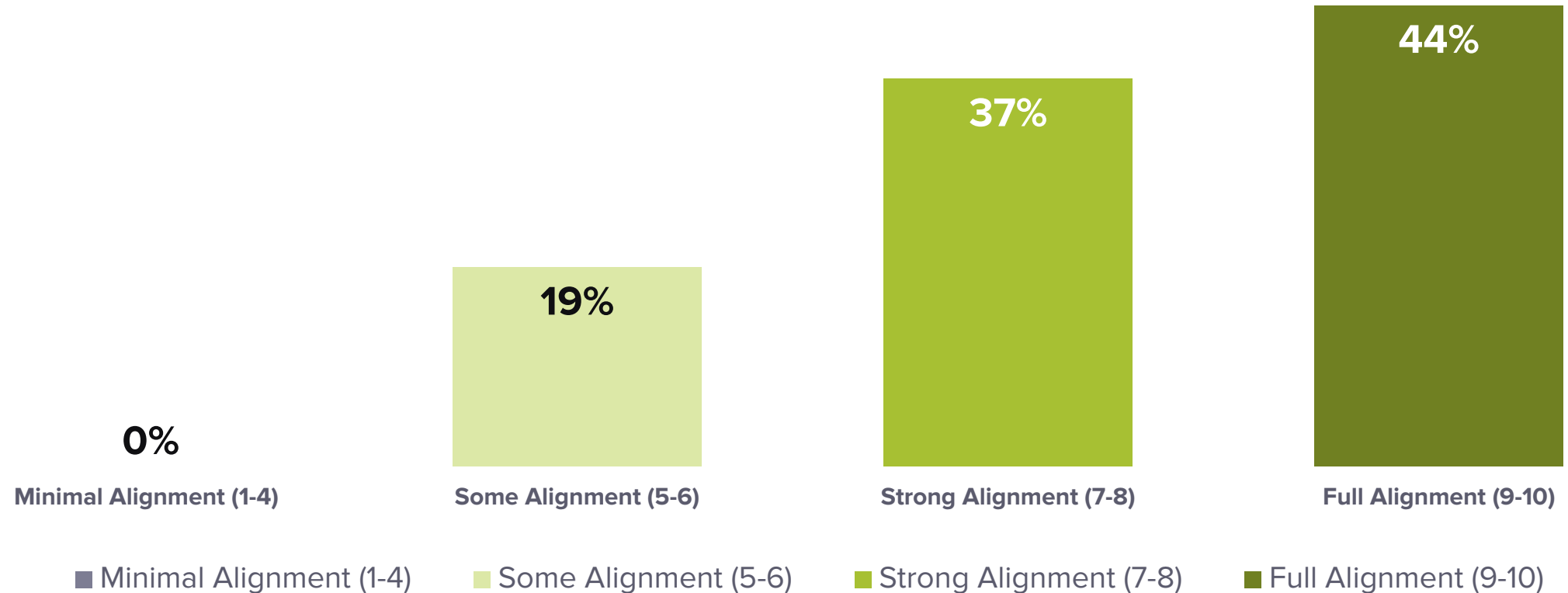
Technology



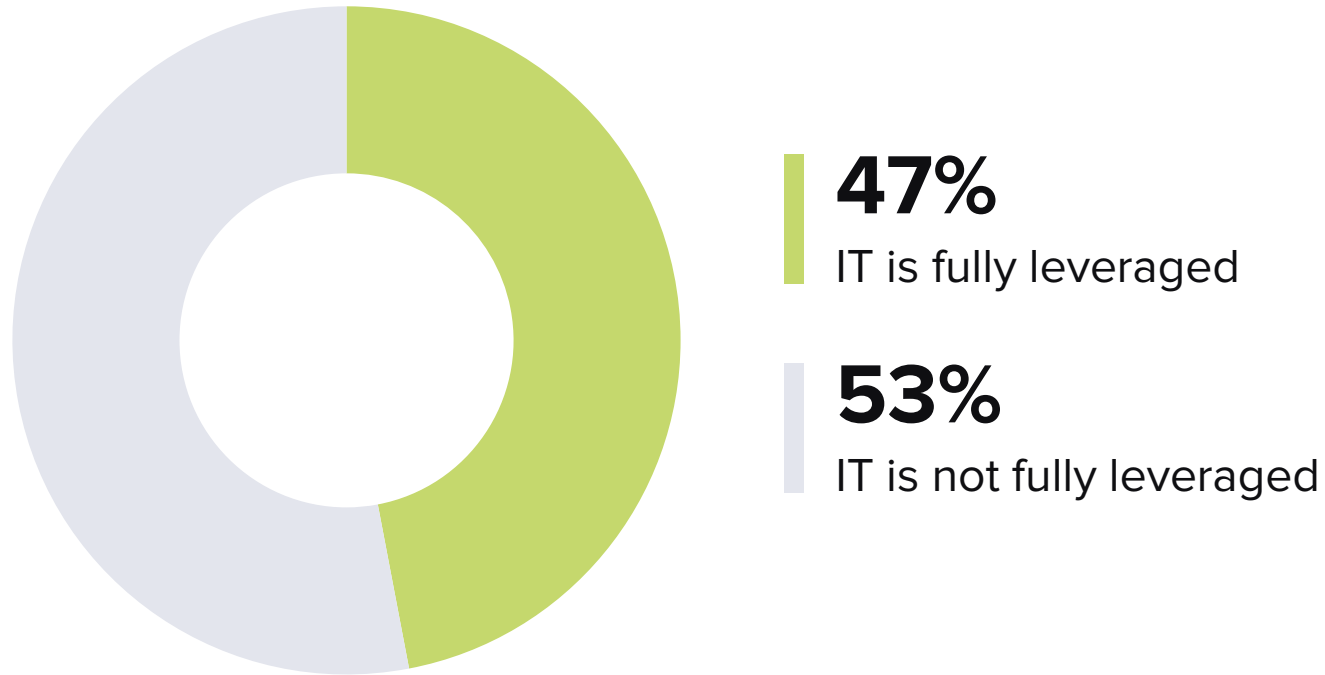
Importance of Technology in Achieving Sustainability Goals



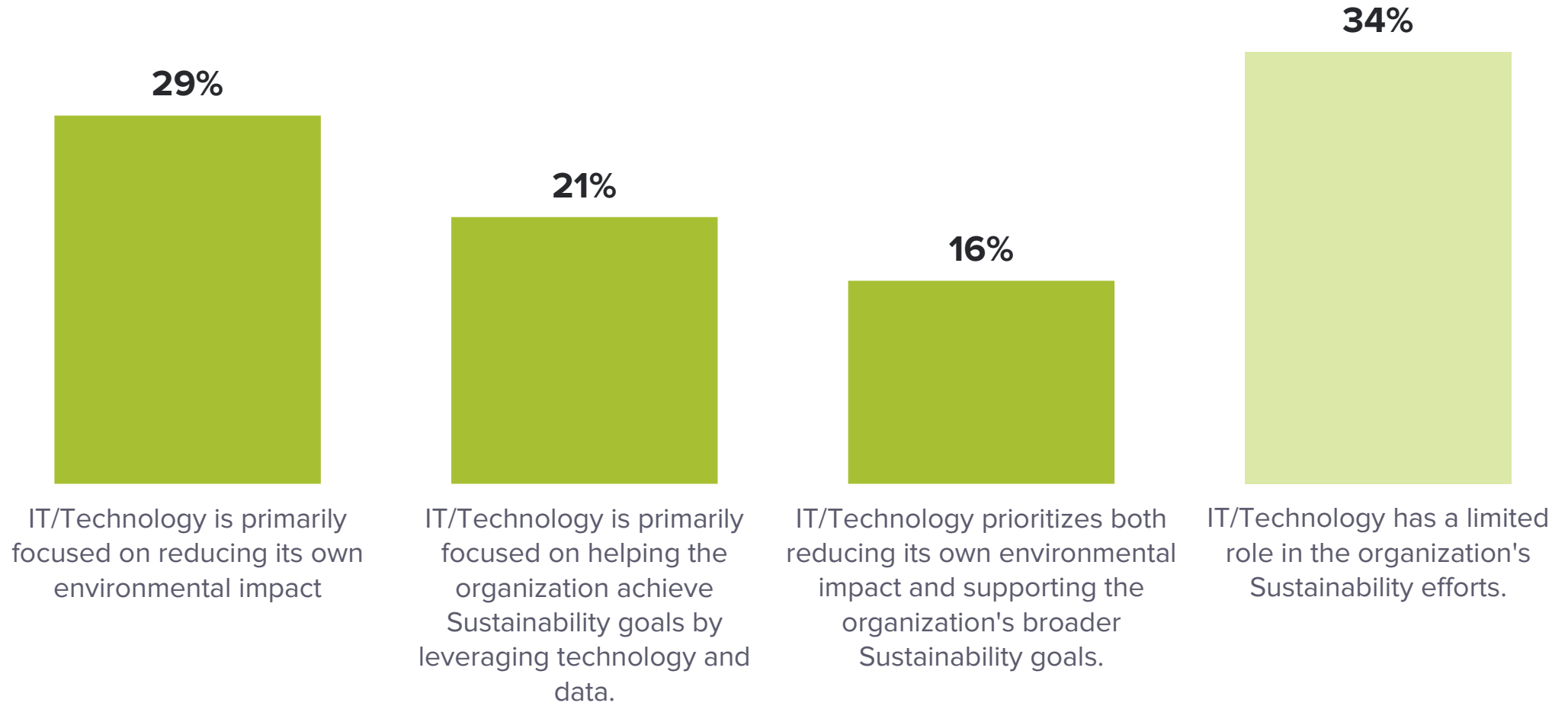
Alignment Between Sustainability Teams & Technology



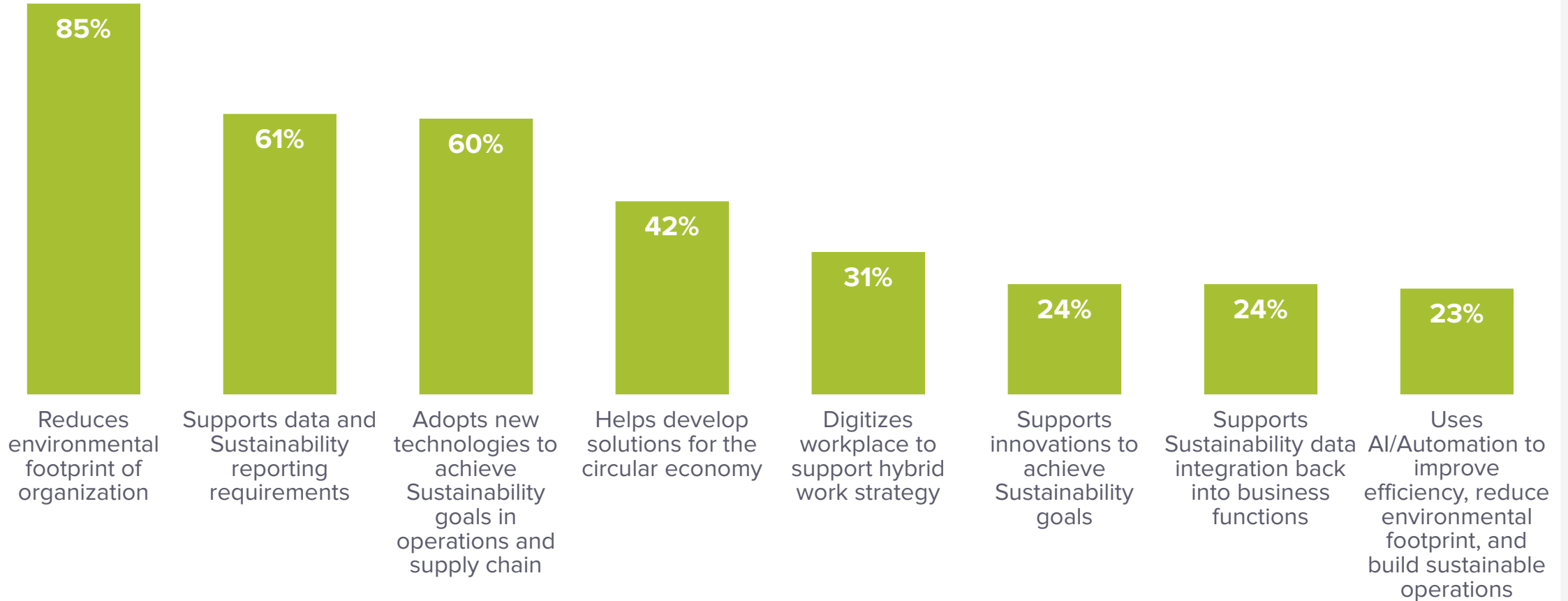
The Extent of Use of IT to Achieve Sustainability Goals



IT's Role in Achieving Sustainability Goals



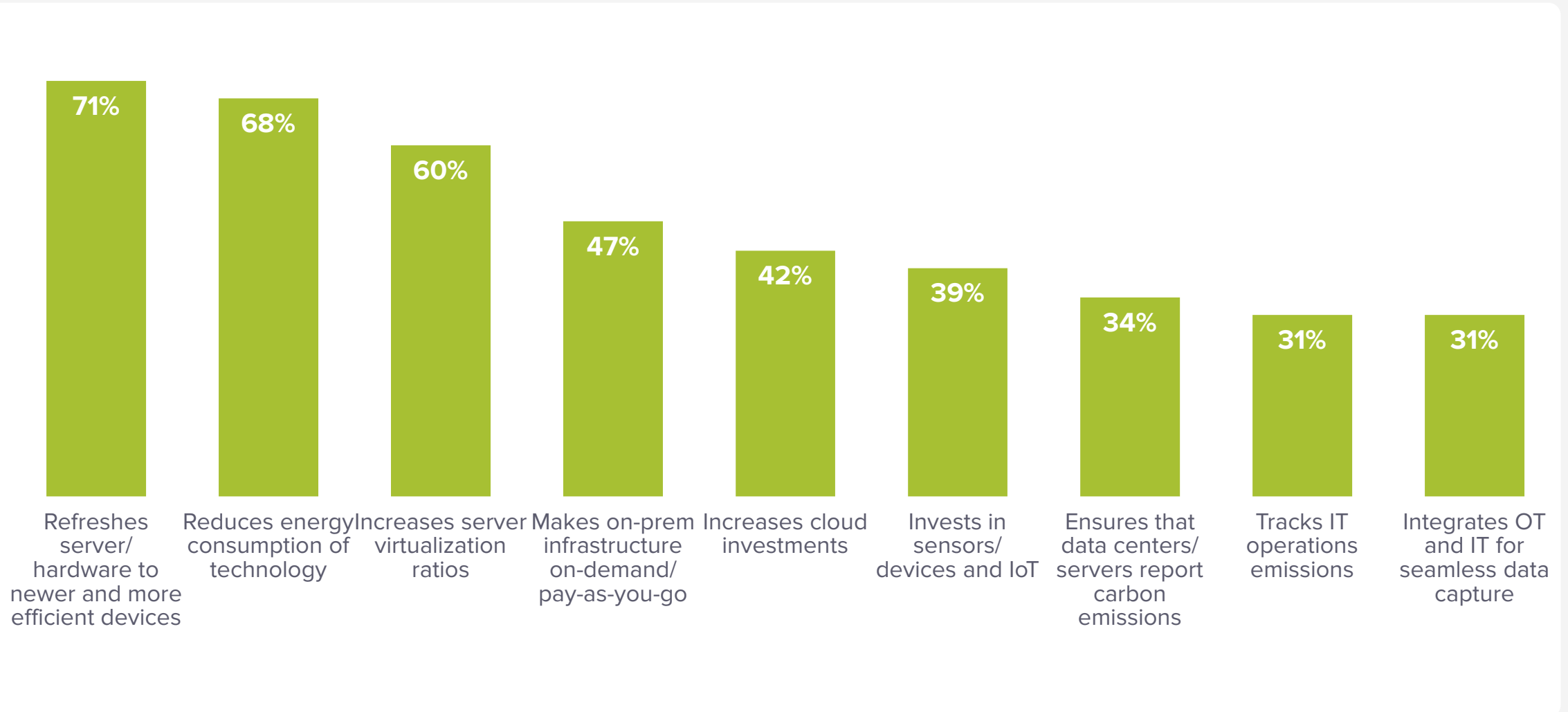
Role of Technology in Supporting Sustainability





Technology Team's Steps to Reduce Carbon Footprint

ecosystem.io



Data-Driven Sustainability: Leveraging Insights for Impact



0%

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



27%

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



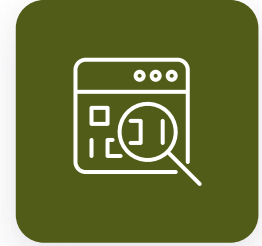
50%

We use data to track key Sustainability metrics for reporting



18%

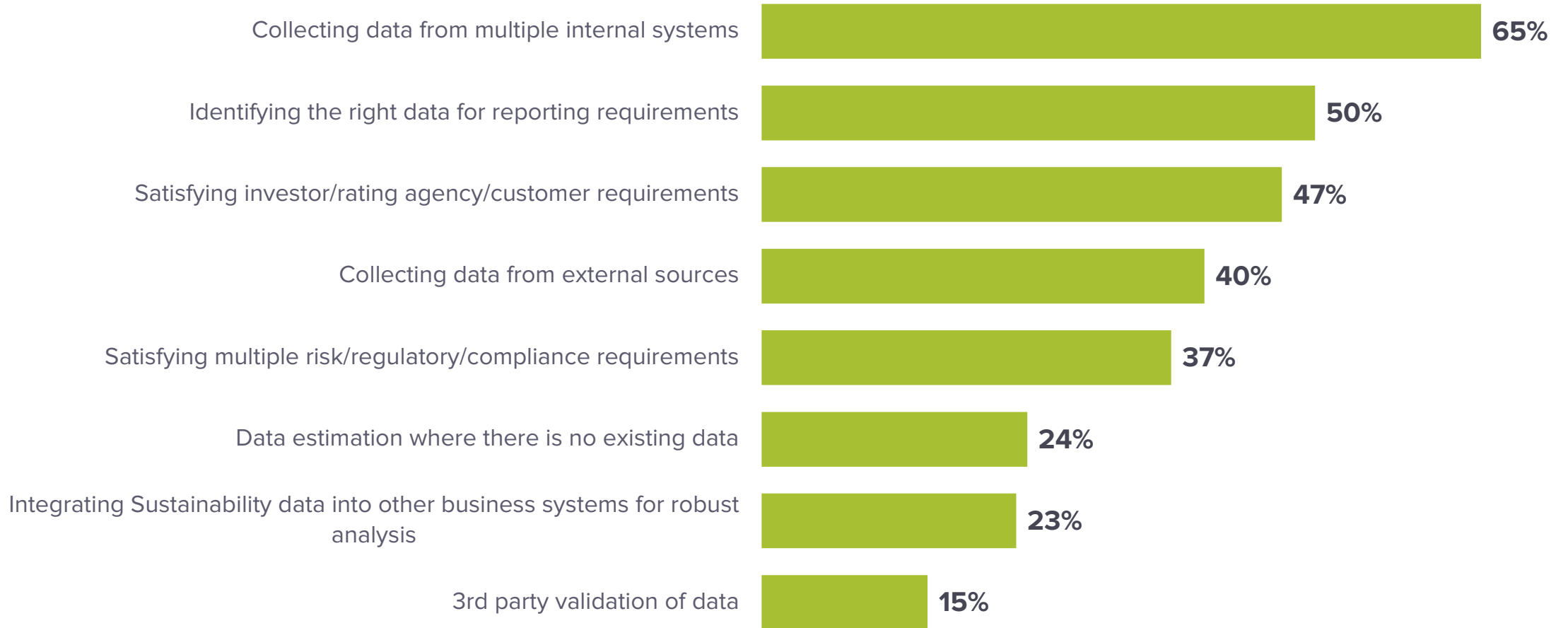
We use data to track, analyze, and optimize our Sustainability performance across business applications



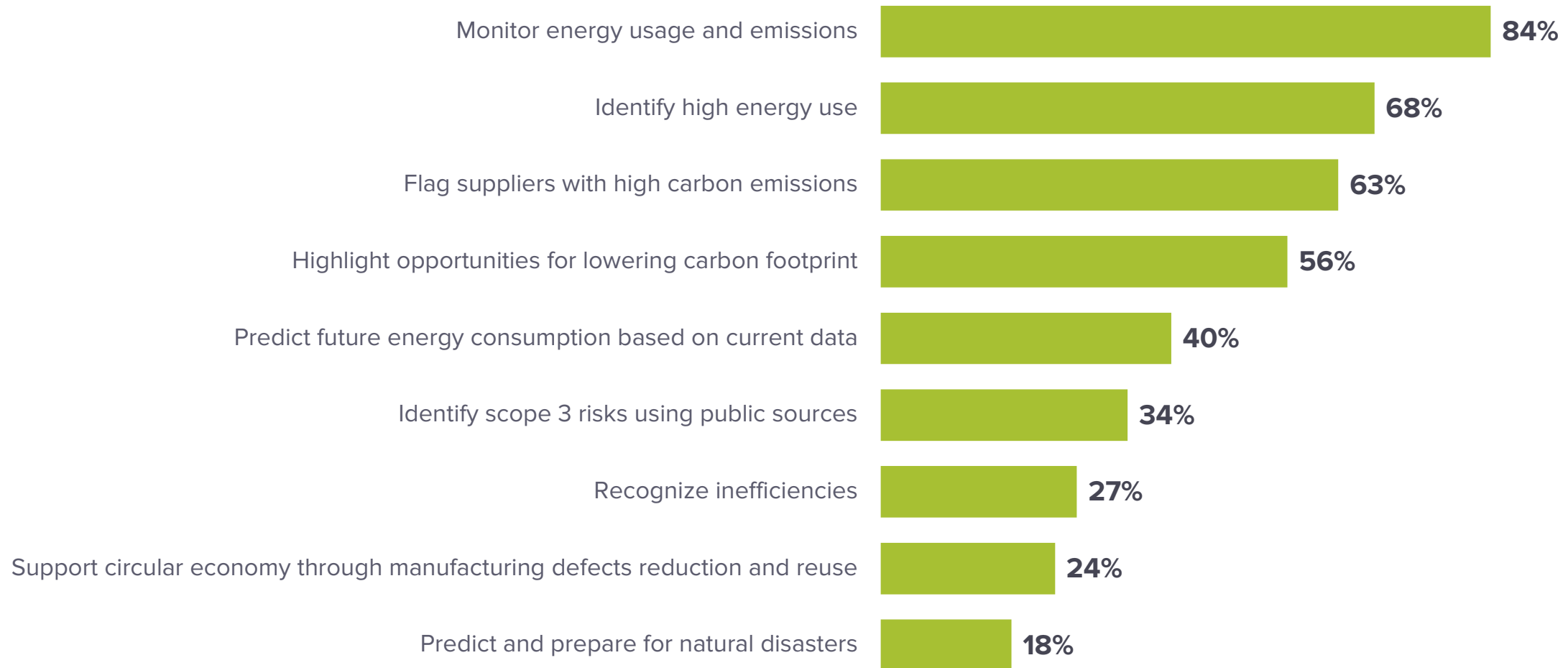
5%

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

Challenges of Supporting Sustainability Data Needs



The Use of AI for Environmental Footprint Management

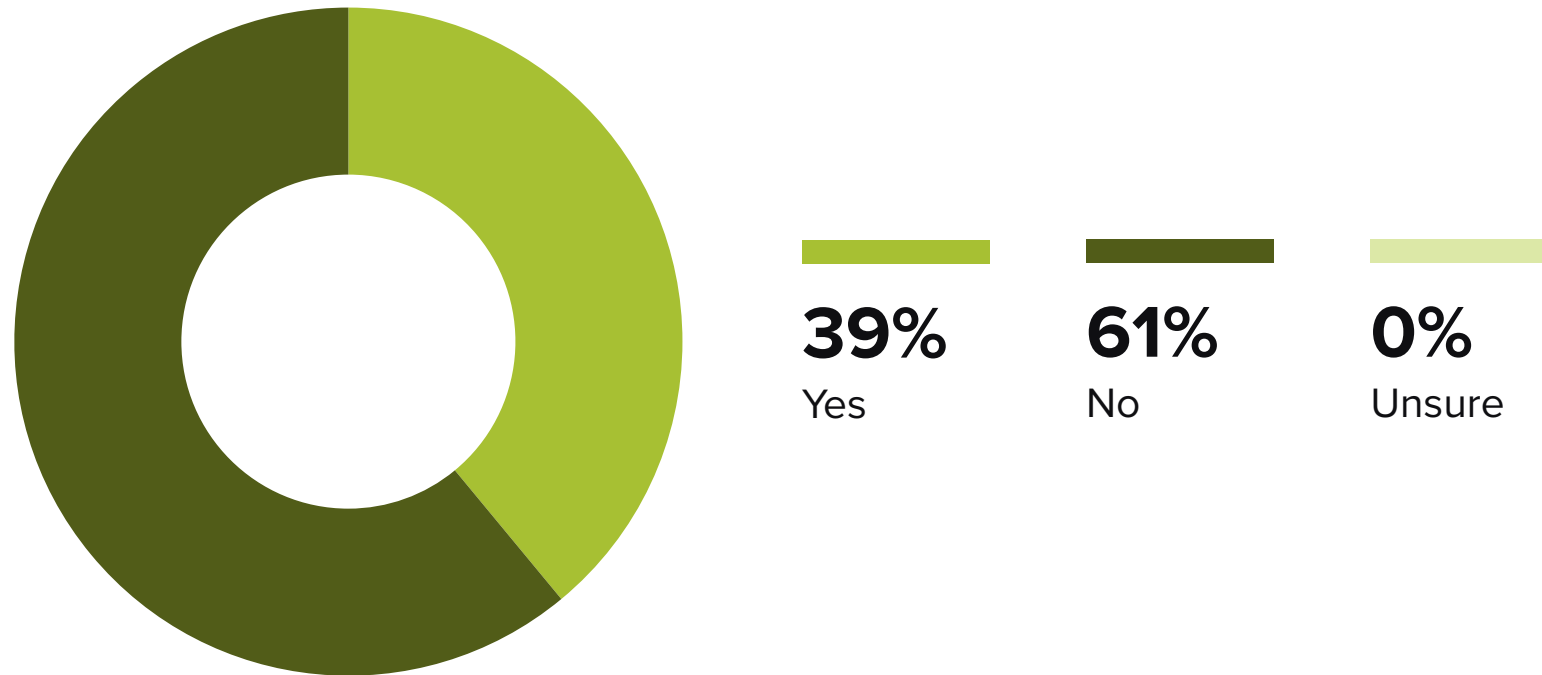


N = 62

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

Environmental Impact of AI

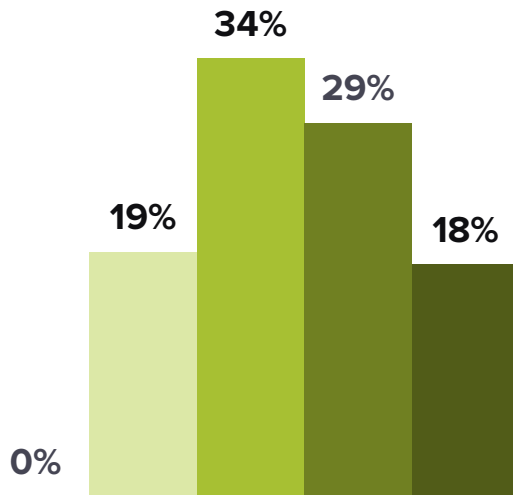
Is Impact Considered?



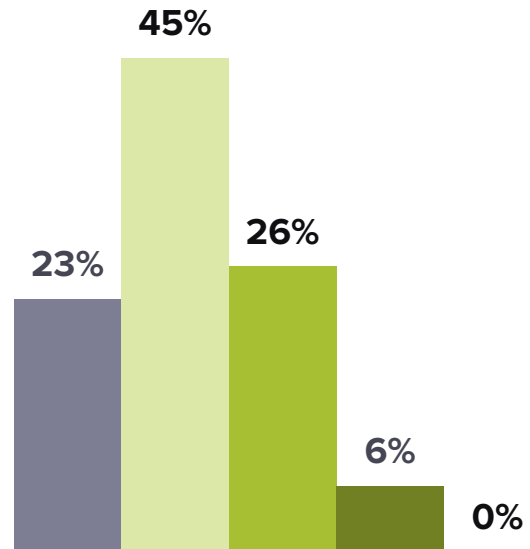
Perception on the Impact of AI

ecosystem.io

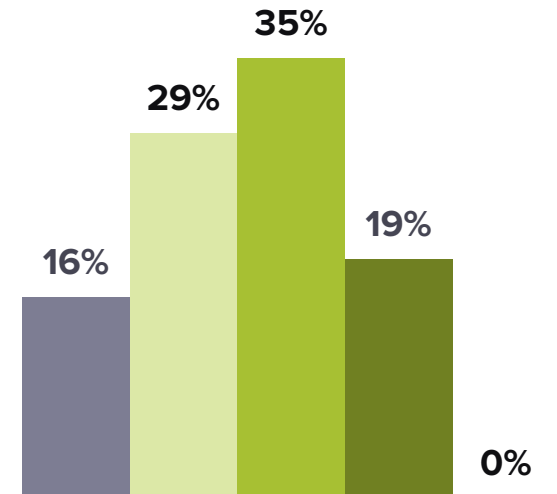
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions

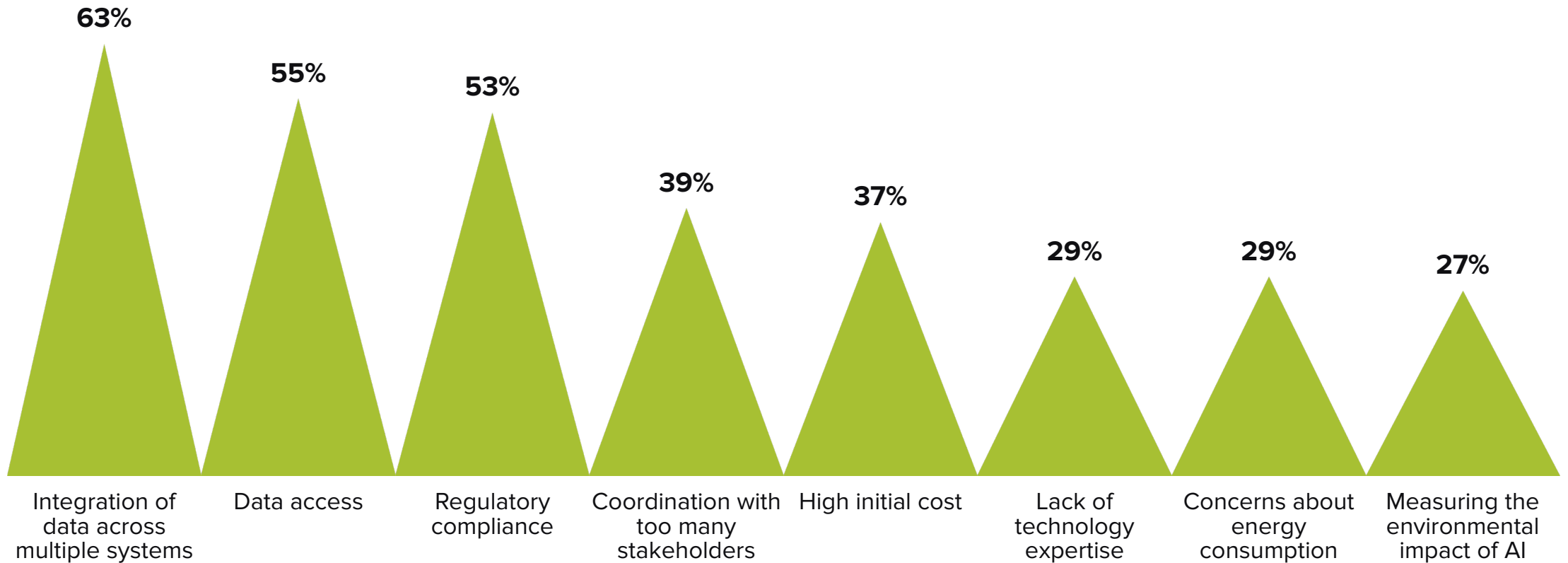


Impact of AI on the cost of Sustainability initiatives



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

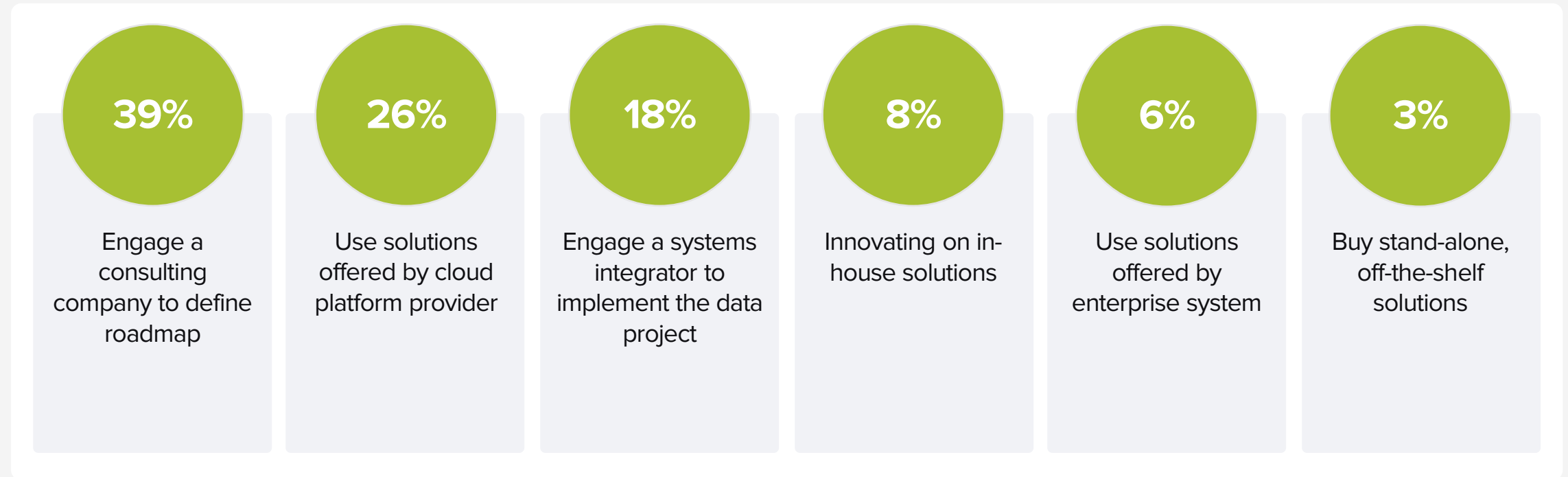
Key Challenges in Integrating AI for Sustainability Initiatives



N = 62

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

Building Sustainability Technology Capabilities



N = 62

Q: How is your organization building Sustainability reporting capabilities?

Luxembourg



Study Demographics - Luxembourg



Function

18



IT/Digital

10



Sustainability/ ESG/CSR

8



Product Development
& Research

8



Risk & Compliance

7



Management

6



Legal

2



Human Resources

2



Finance

1



Marketing/
Communications/
Corporate Affairs

Industry

29

Financial
Services

17

Manufacturing

6

Hospitality

3

Retail

3

Transport and
Logistics

2

Construction &
Real Estate

1

Primary
Industries

1

Media &
Telecom

Organization Size (No. of Emp.)



23

201 - 499



15

500 - 999



19

1,000 -
4,999



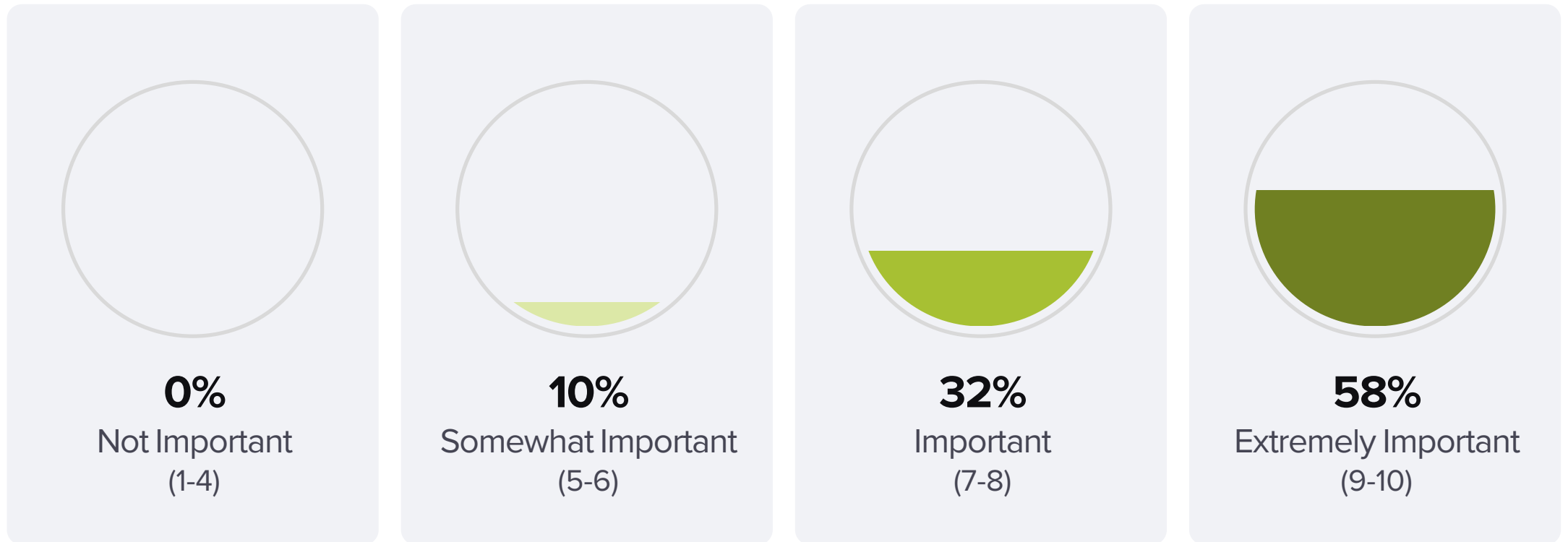
5

More than
5,000

Strategy & Perception



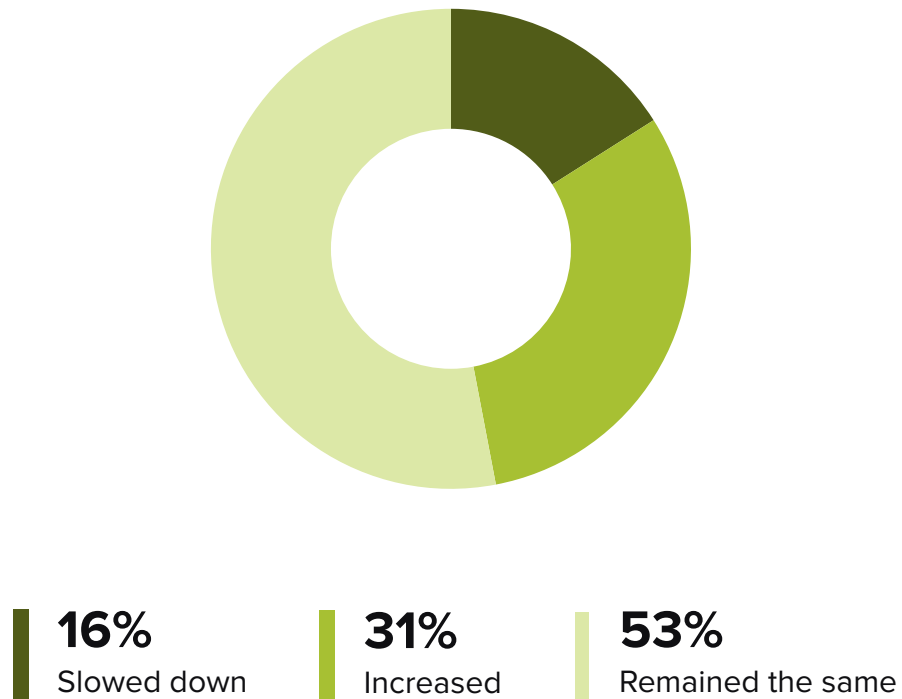
The Importance of Sustainability in the Organization



Pace of Sustainability Efforts



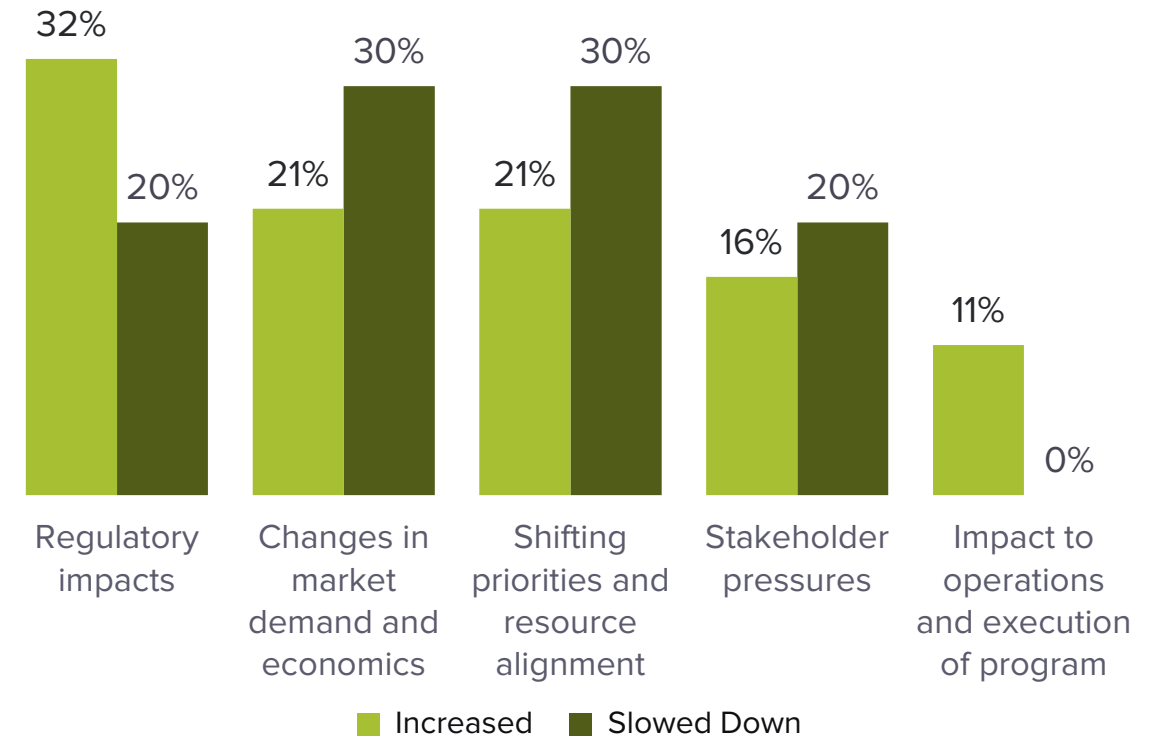
CHANGE FROM LAST YEAR



N = 62

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

REASONS FOR CHANGE



N = 29

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



23%

Sustainability is a strategic aspiration

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



50%

Sustainability is operationally embedded

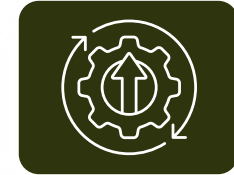
Goals and initiatives are incorporated into existing operational review and reporting processes, but impact is not fully measured or quantified



15%

Sustainability is data-driven Strategy

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



6%

Sustainability is a strategic asset.

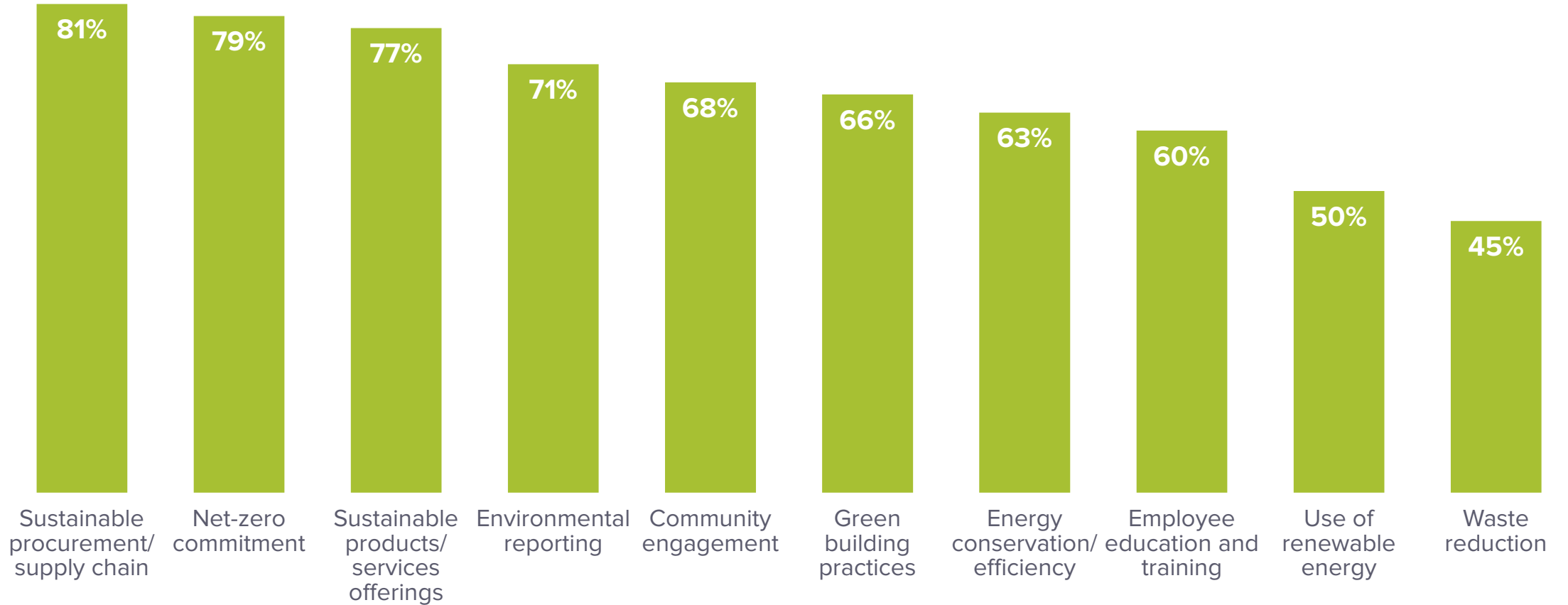
Business value of sustainability data is well-understood, and initiatives are fully integrated into strategic planning and decision-making processes

N = 62

Modeled based on responses to multiple questions

Top Environmental Measures Undertaken

ecosystem.io





Most Impactful Environmental Measures

ecosystem.io





Top Stakeholders Advocating for Sustainability

ecosystem.io

63%



Customers

50%



Investors/
shareholders

47%



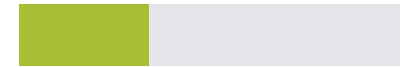
Employees

42%



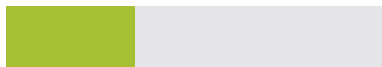
Supply chain
partners

34%



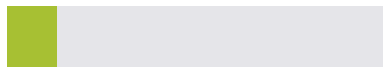
Government/
Regulators

34%



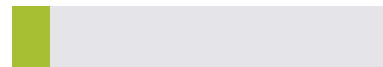
Bank/ Credit
providers

13%



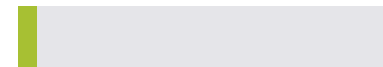
Insurers

10%



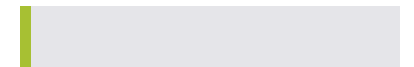
Rating agencies

5%



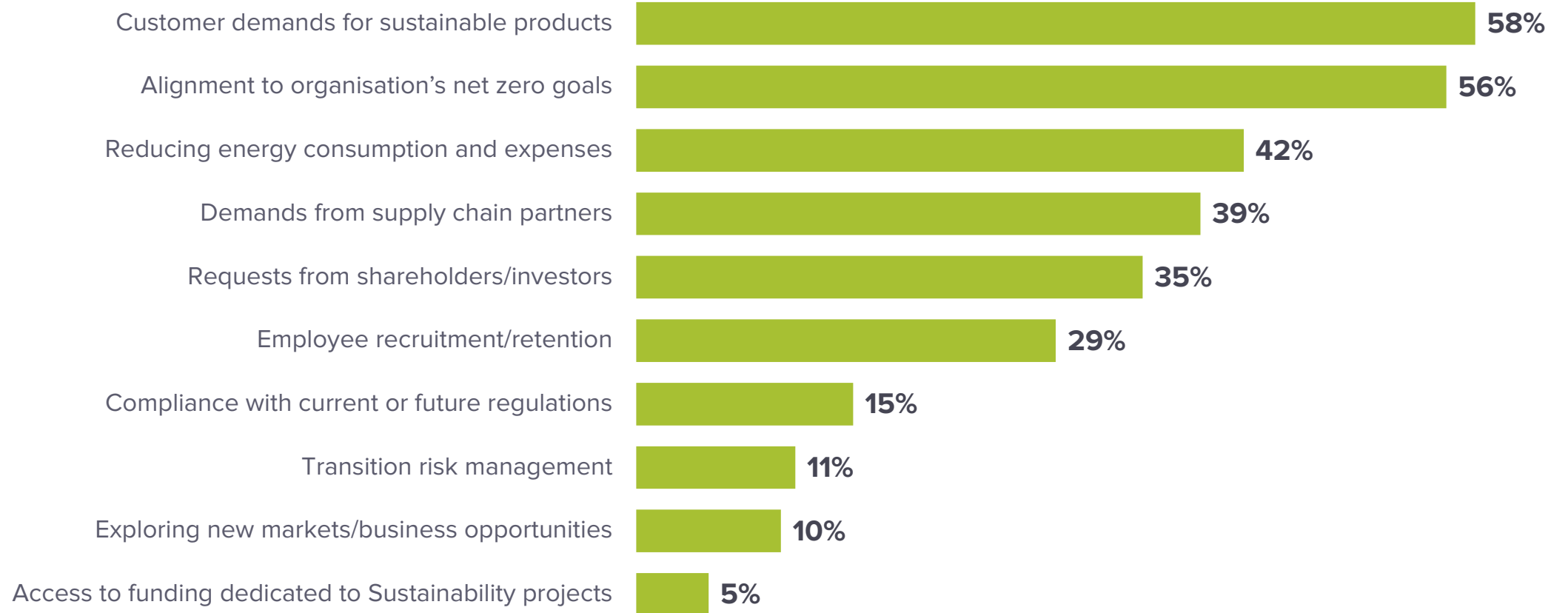
Communities

3%

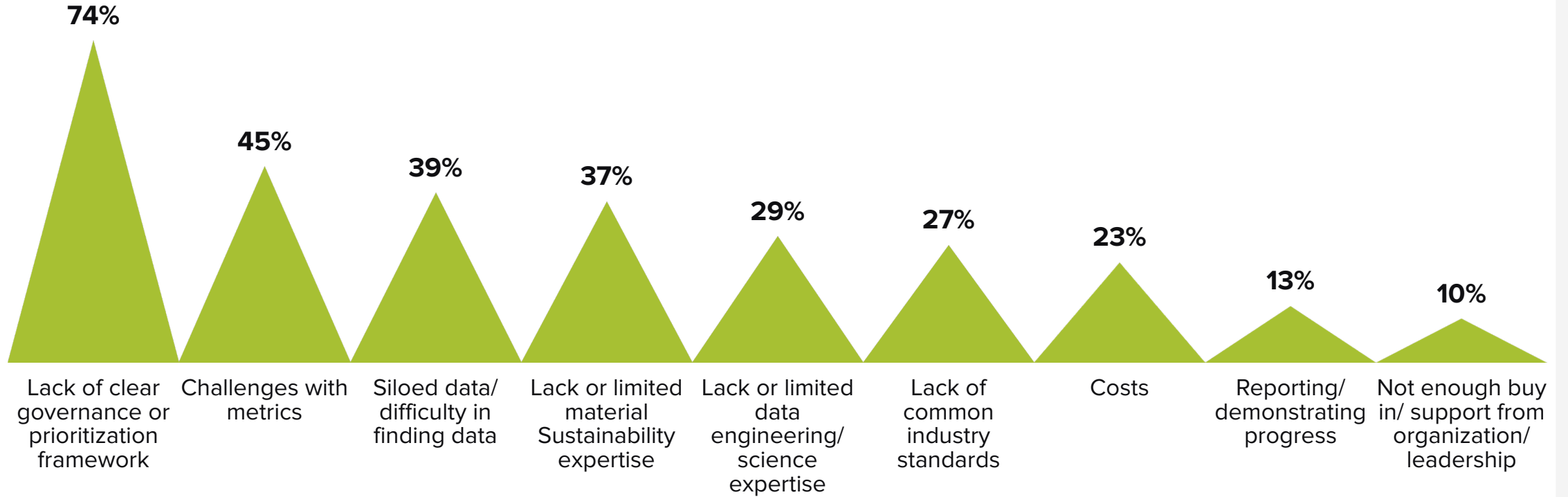


Non-profit
organizations

Main Drivers of Sustainability



Main Challenges of Adopting Sustainability



N = 62

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

How Governments Can Support Adoption of Sustainability



Execution



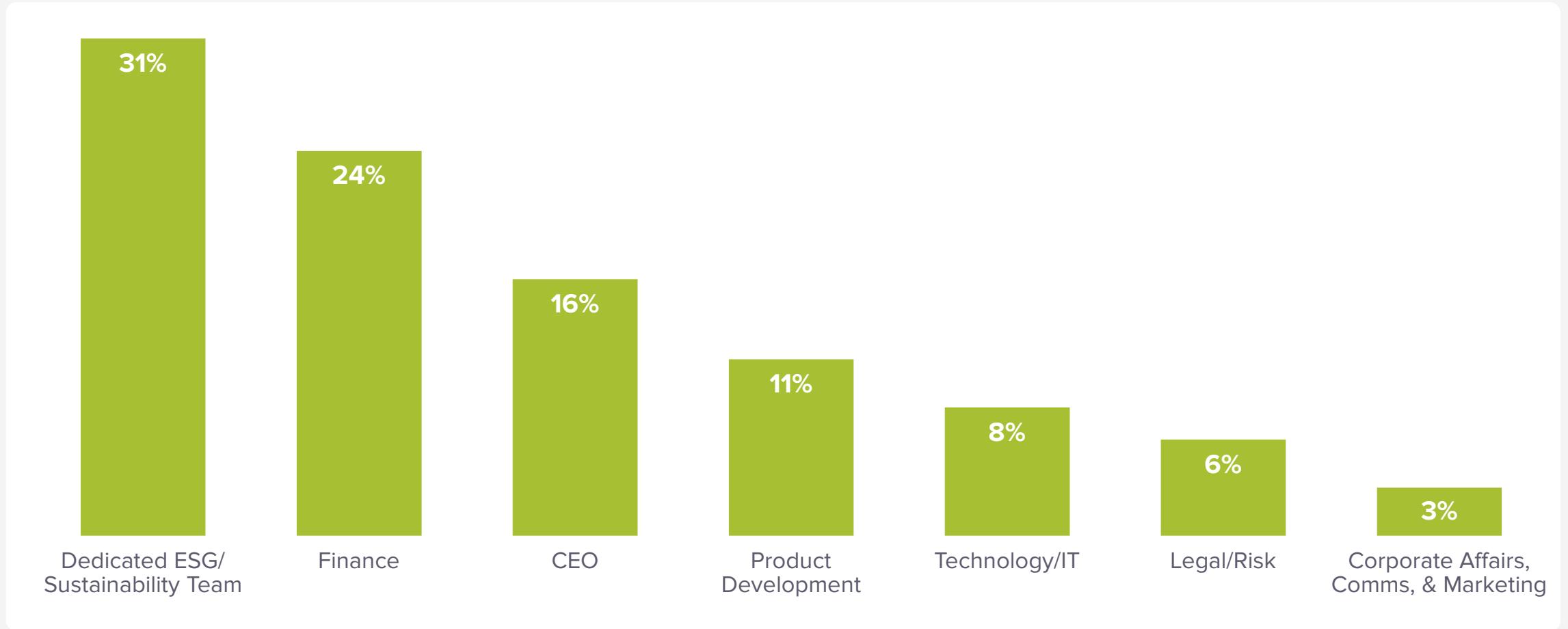
People, Governance, & Narrative





Sustainability Leadership

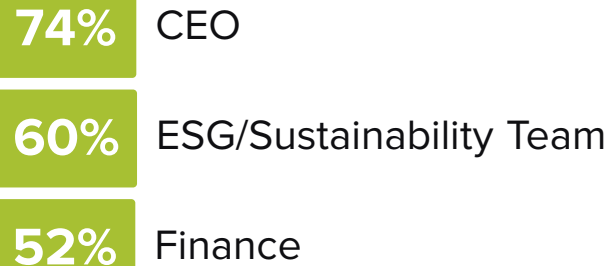
ecosystem.io



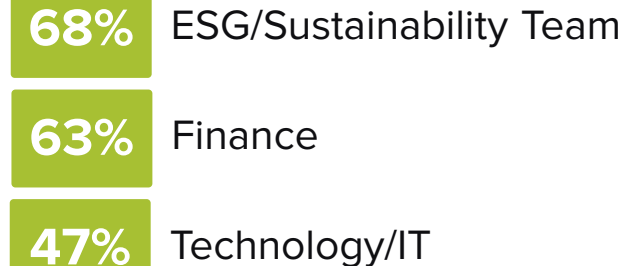
Role of Key Stakeholders



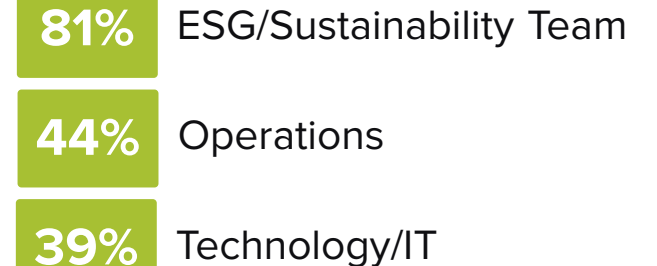
Defining The Vision



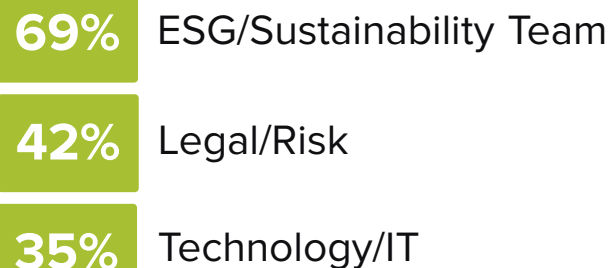
Delivering Sustainability Outcomes



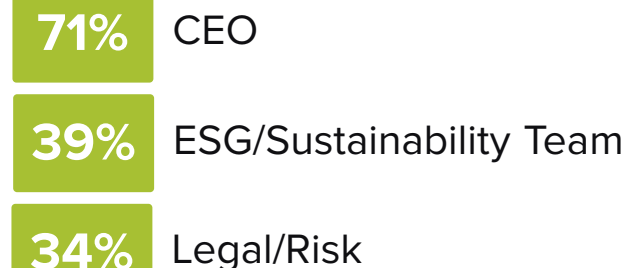
Providing the Data



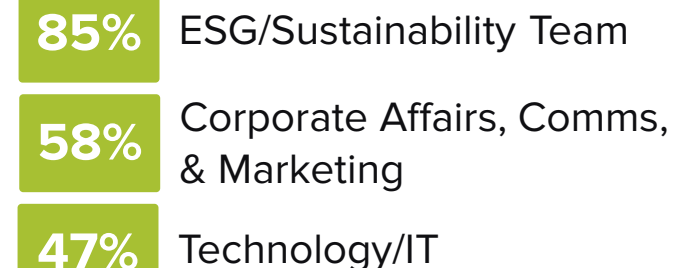
Managing the Data



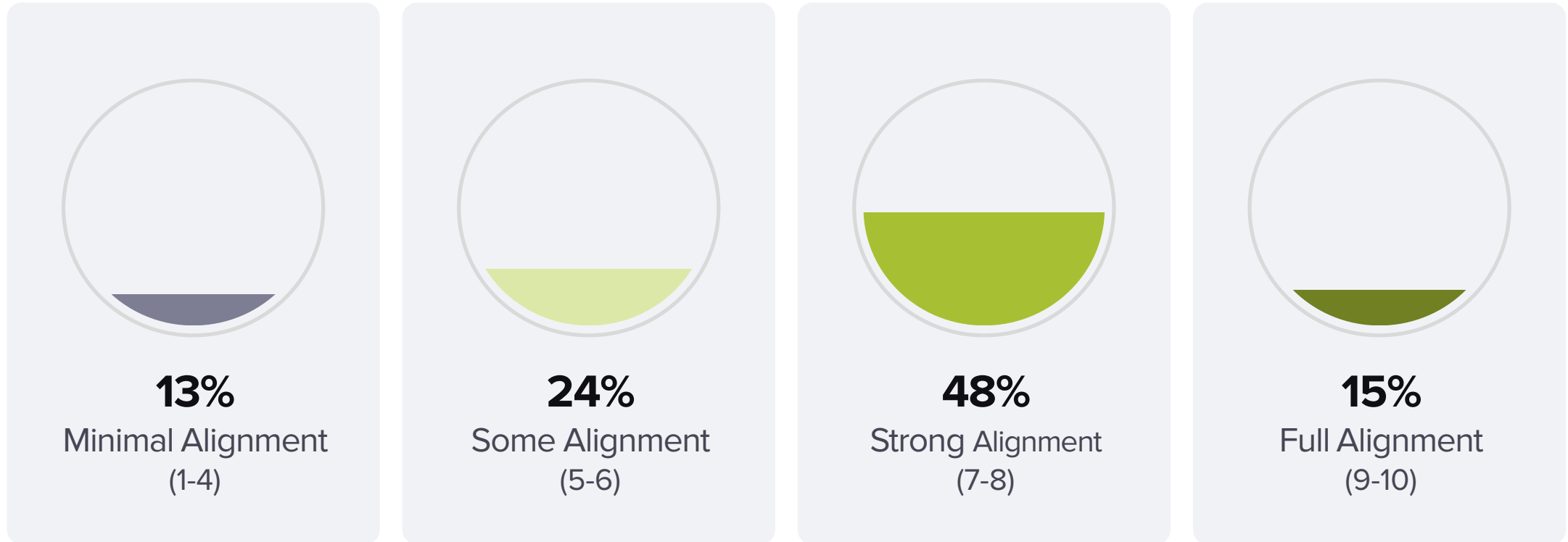
Deciding the Metrics



Reporting



Alignment Between Sustainability Team & Finance



Maturity of Employee Involvement in Sustainability



8% Limited Sustainability Awareness

Employees have a limited understanding of sustainability goals and objectives



11% Basic Sustainability Awareness

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



40% Emerging Sustainability Engagement

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



29% KPI-Driven Sustainability

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

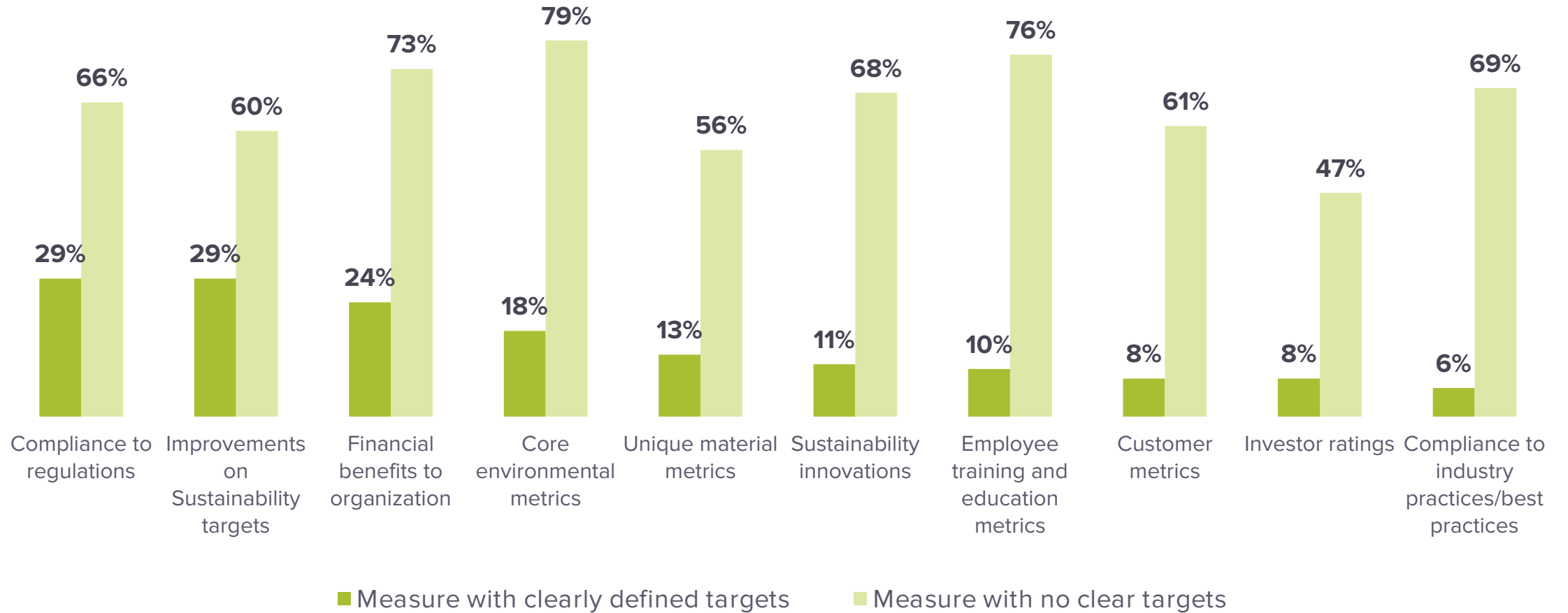


12% Sustainability as a Strategic Imperative

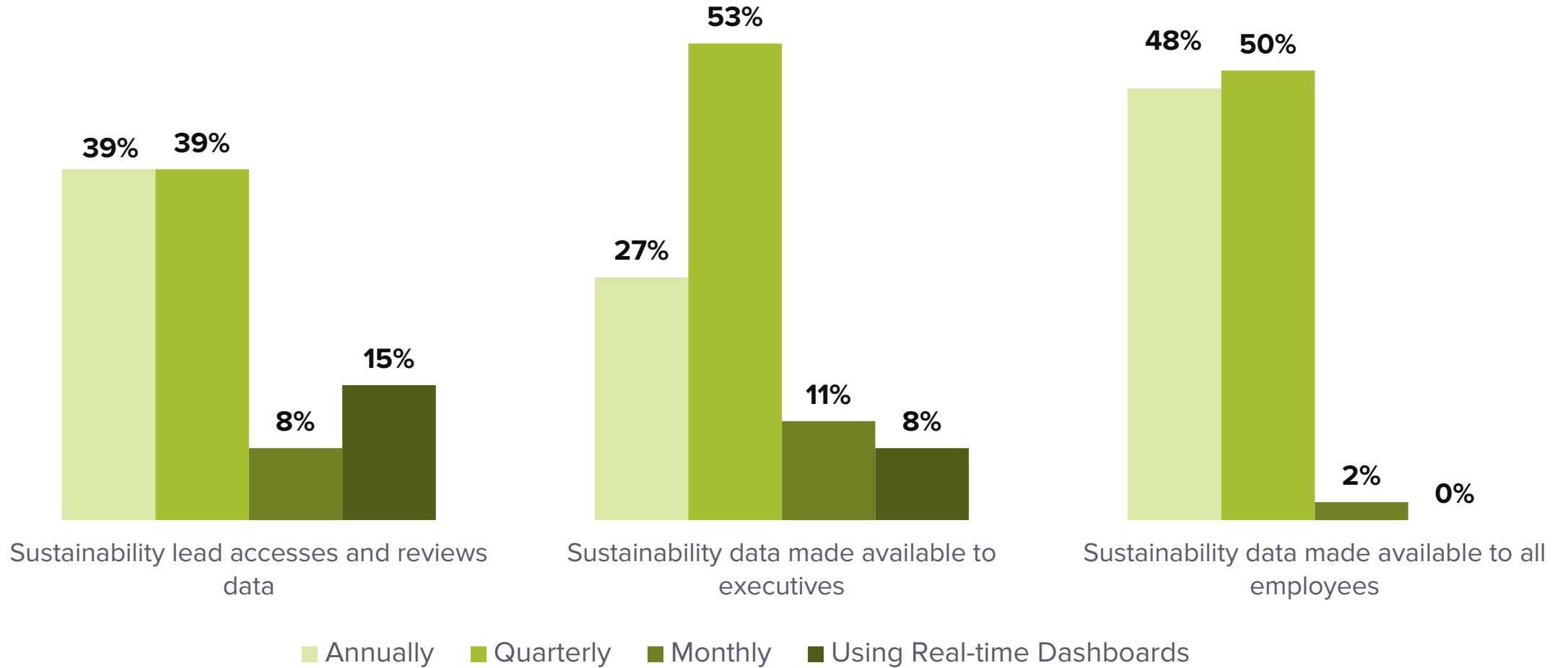
Sustainability performance is tied to executive and key employee compensation, reinforcing its role as a strategic priority.

Metrics Used to Measure Sustainability

ecosystem.io



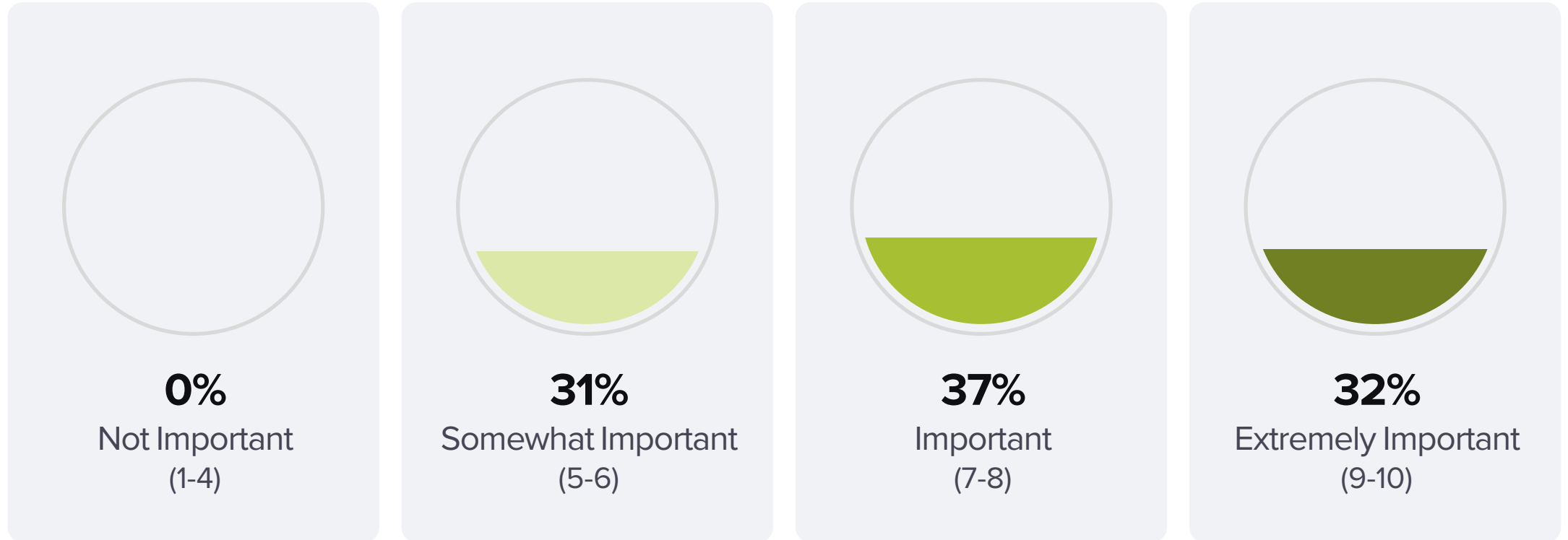
Sustainability Data Access and Sharing



Technology

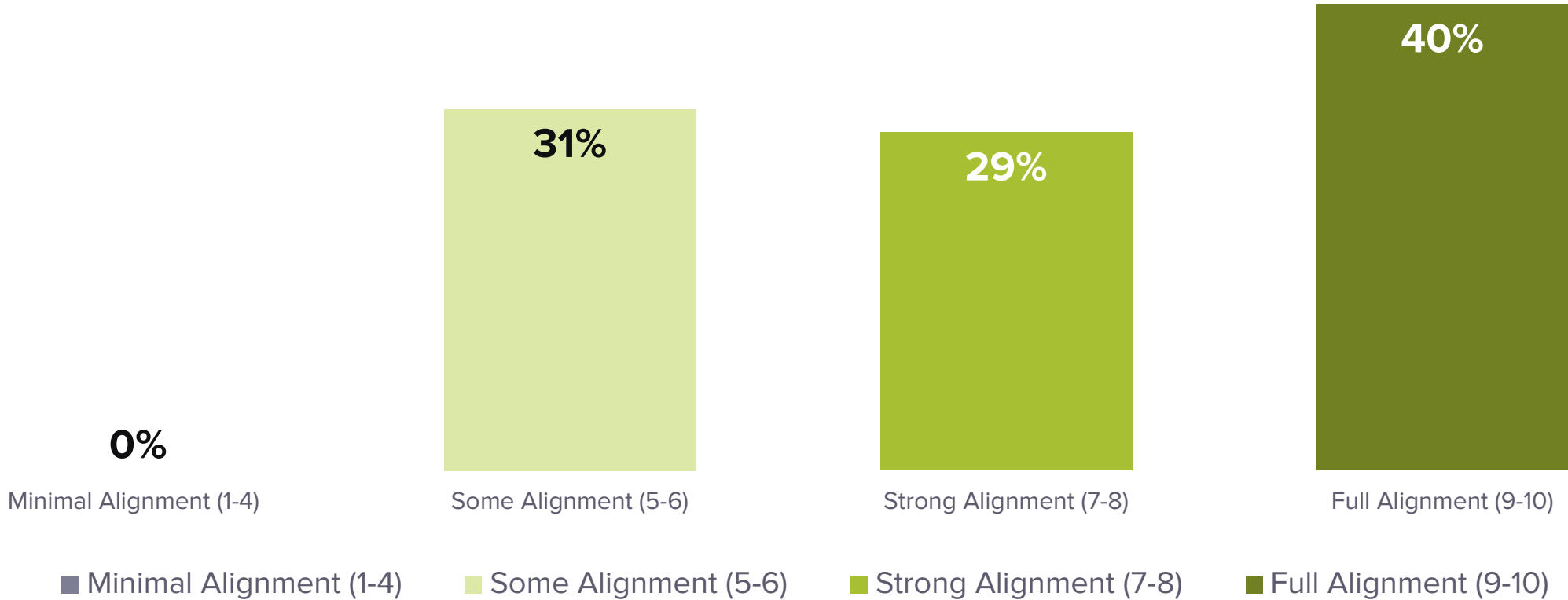


Importance of Technology in Achieving Sustainability Goals

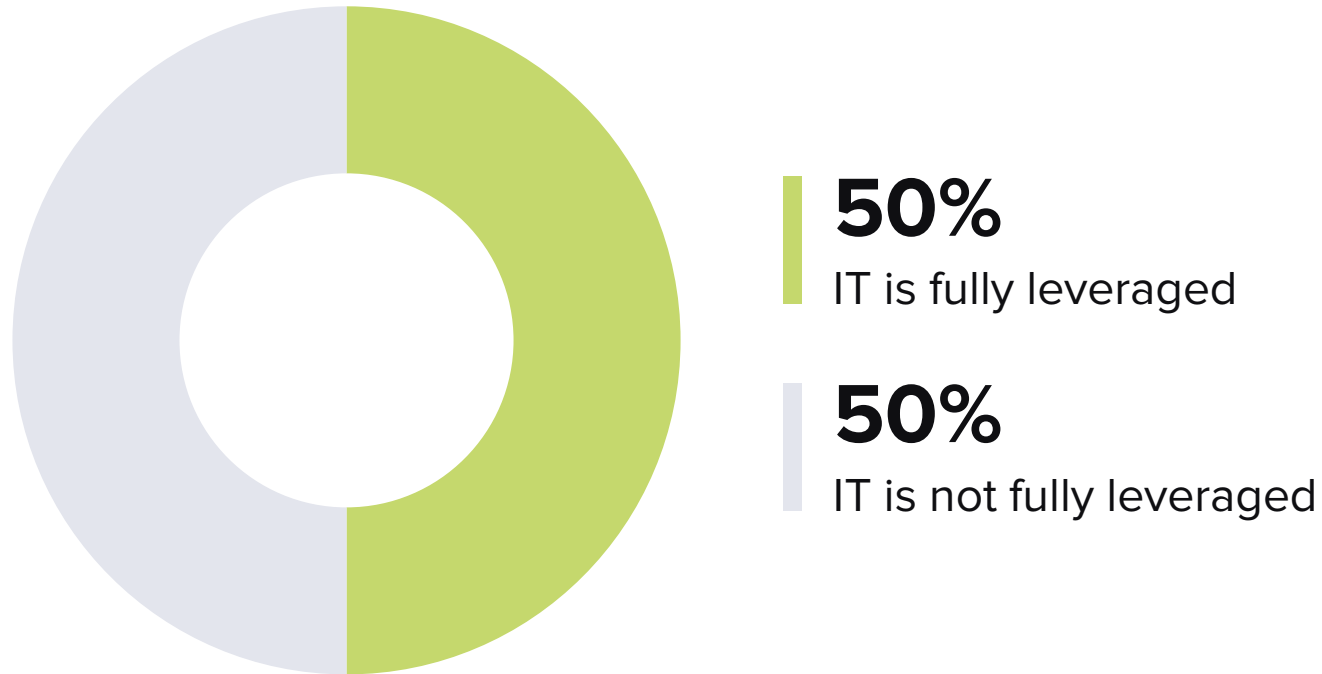




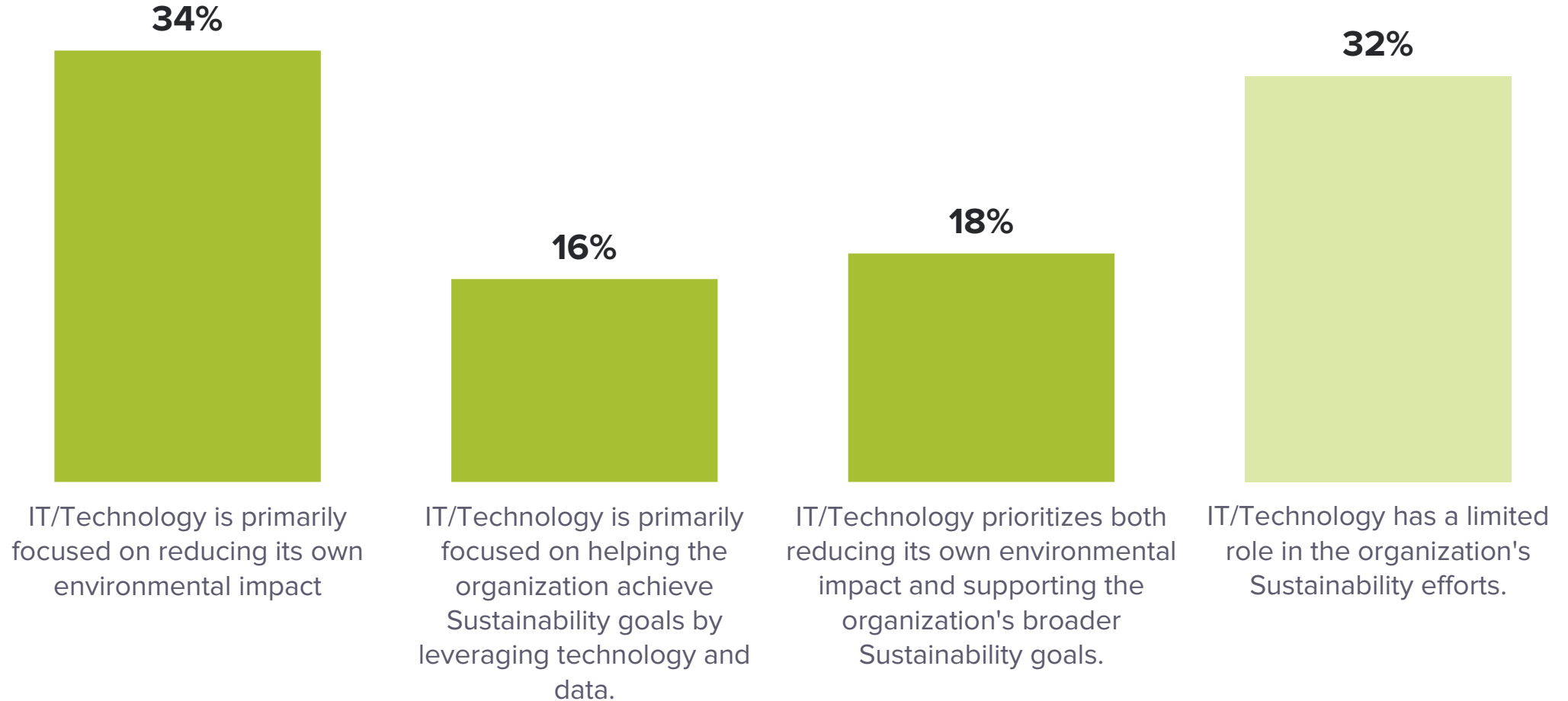
Alignment Between Sustainability Teams & Technology



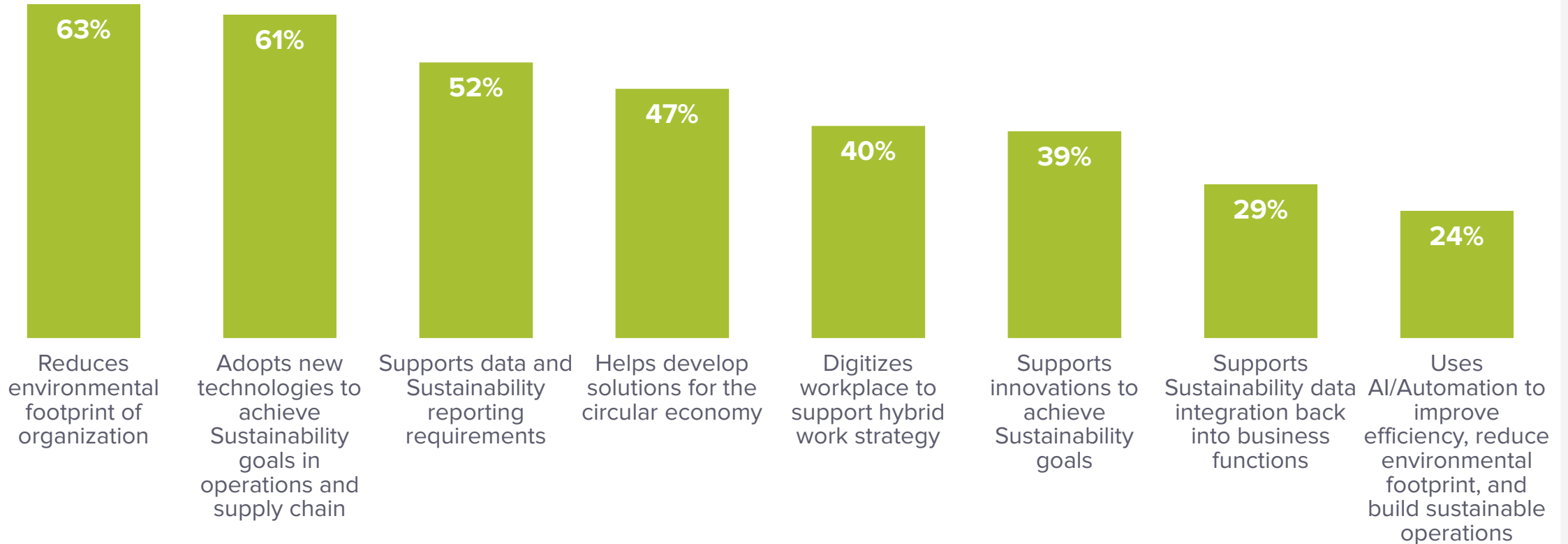
The Extent of Use of IT to Achieve Sustainability Goals



IT's Role in Achieving Sustainability Goals



Role of Technology in Supporting Sustainability

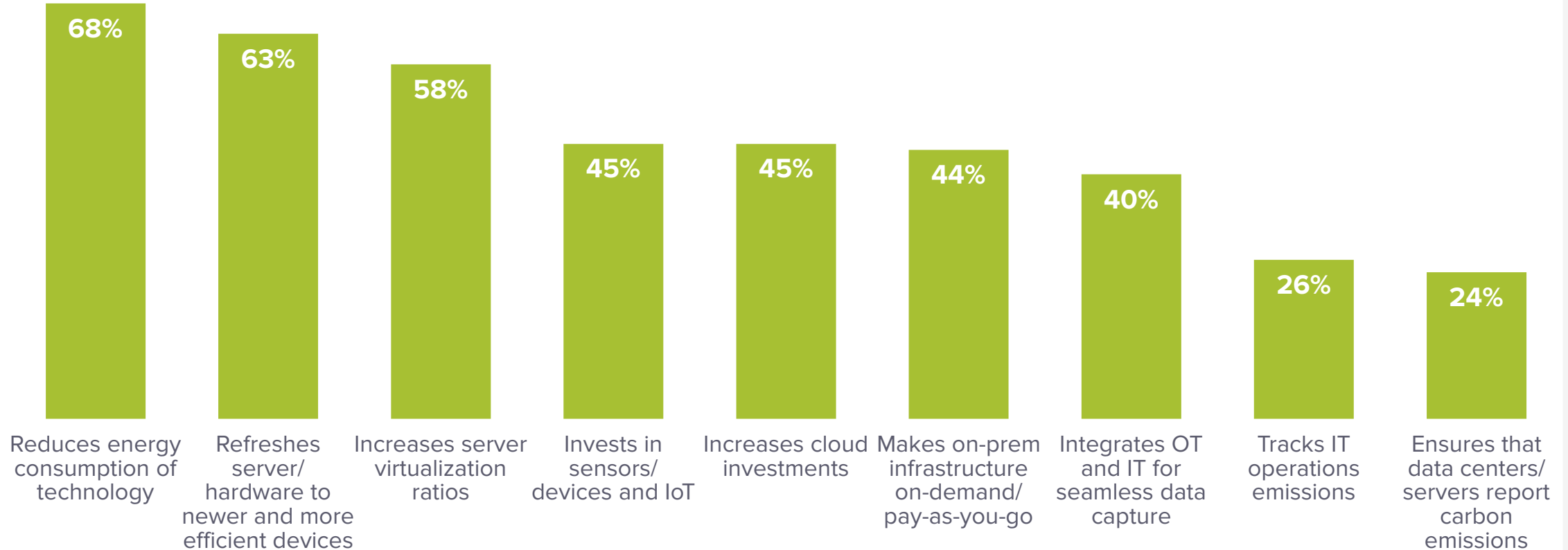




Technology Team's Steps to Reduce Carbon Footprint



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Data-Driven Sustainability: Leveraging Insights for Impact



0%

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



31%

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



21%

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

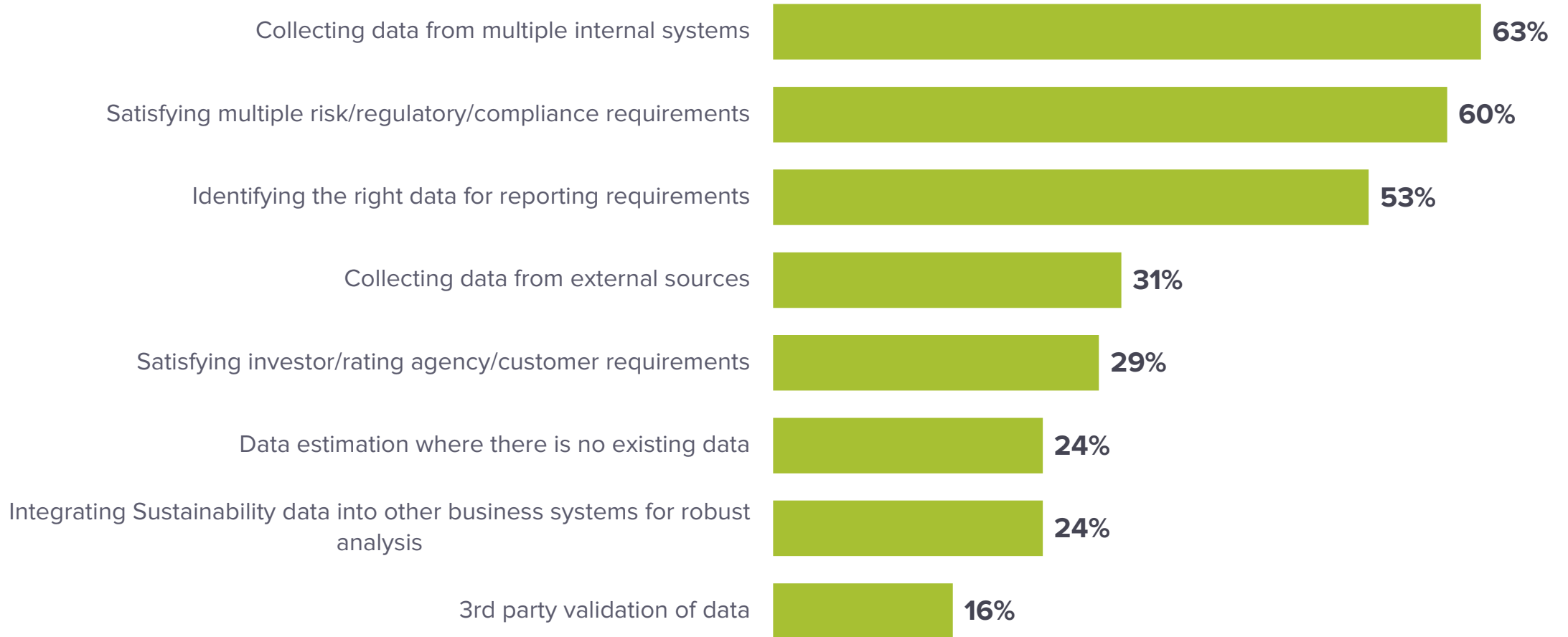


13%

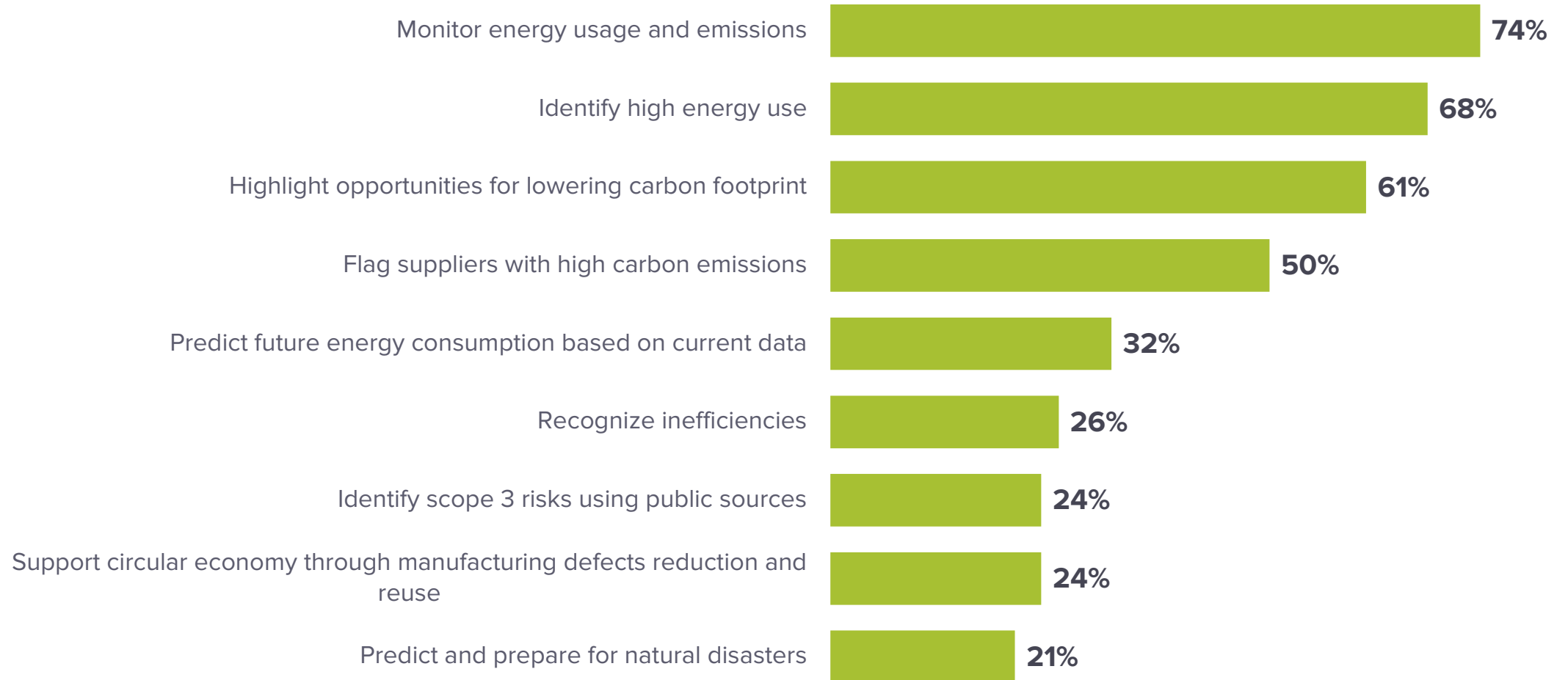
We use data from our Sustainability initiatives to guide the organization's transformation journey



Challenges of Supporting Sustainability Data Needs

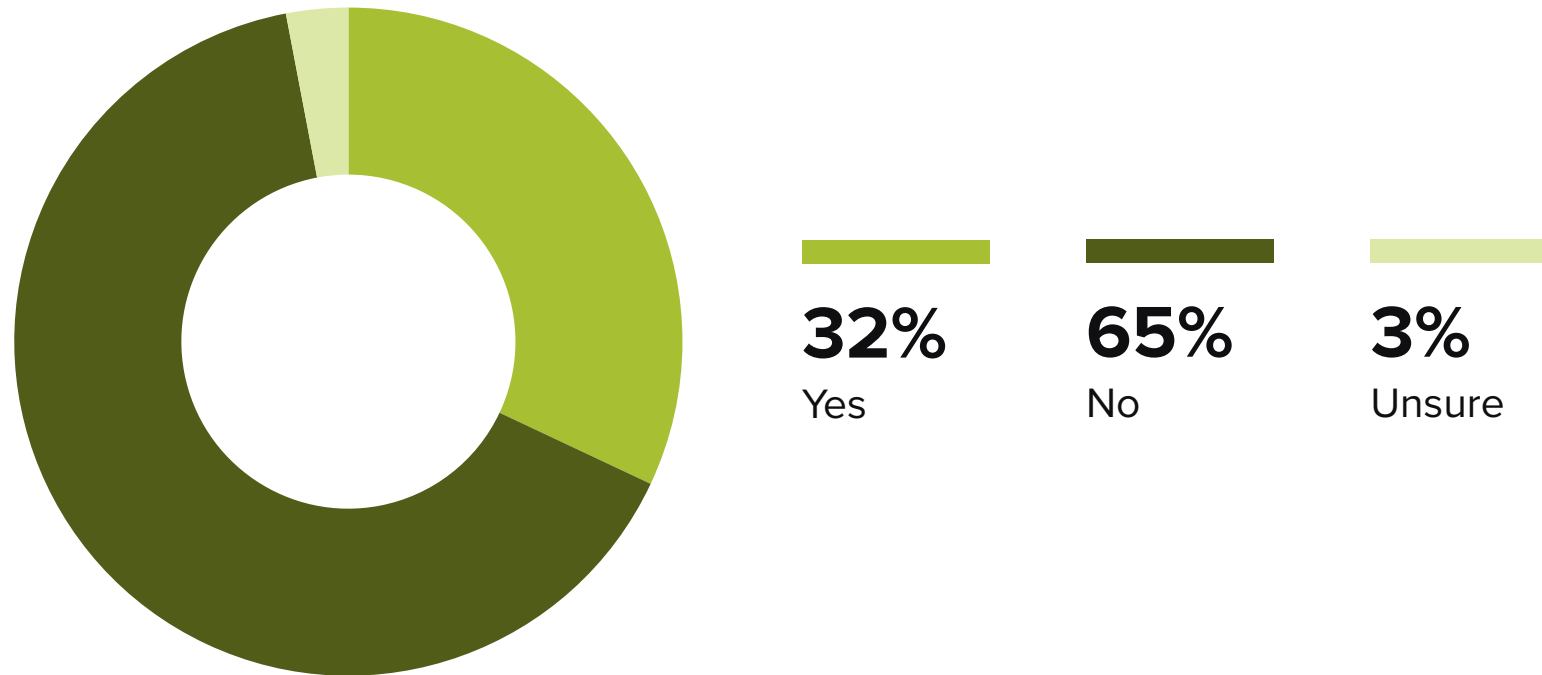


The Use of AI for Environmental Footprint Management



Environmental Impact of AI

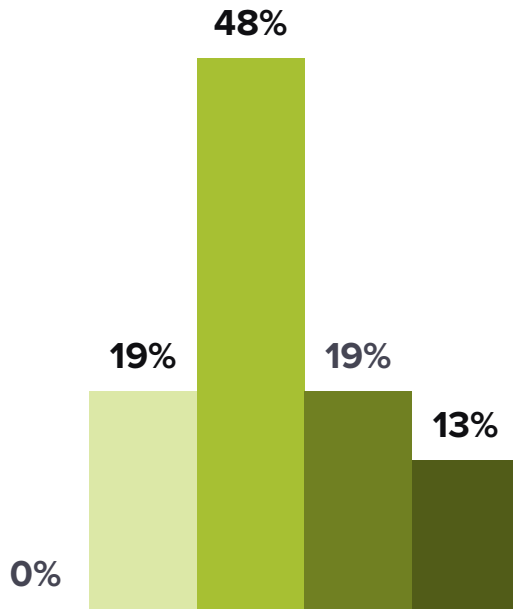
Is Impact Considered?



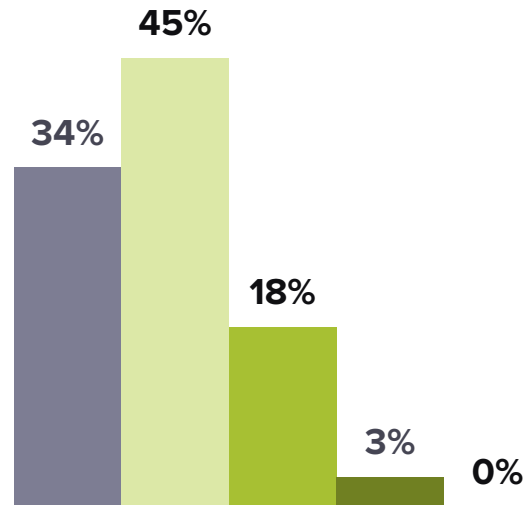
Perception on the Impact of AI

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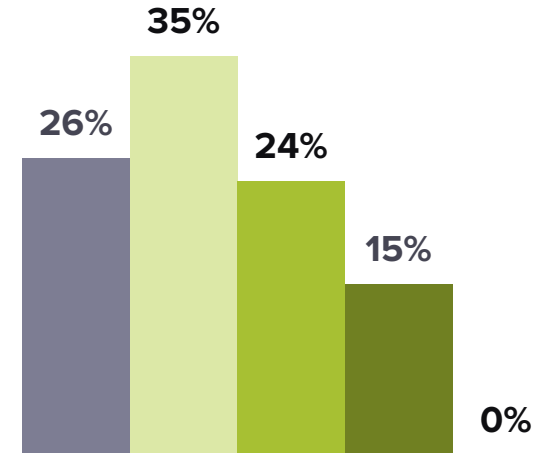
Impact of AI on achieving Sustainability goals



Impact of AI on organization's carbon emissions

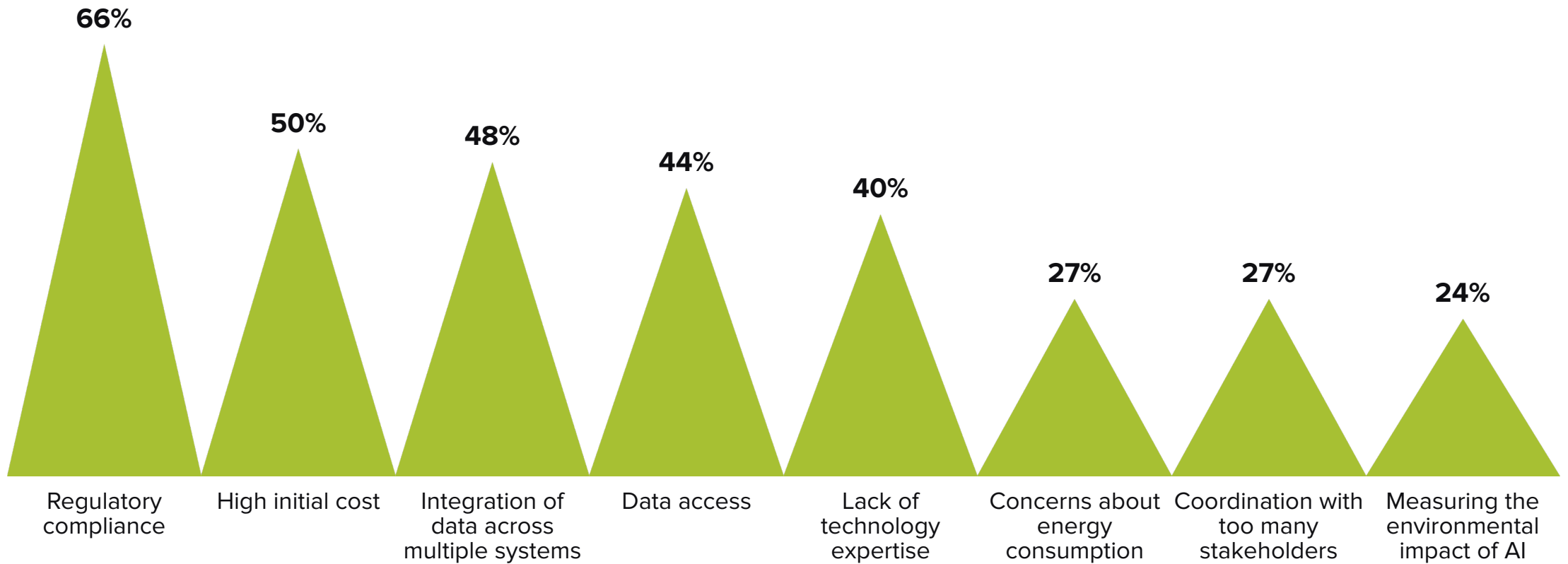


Impact of AI on the cost of Sustainability initiatives



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

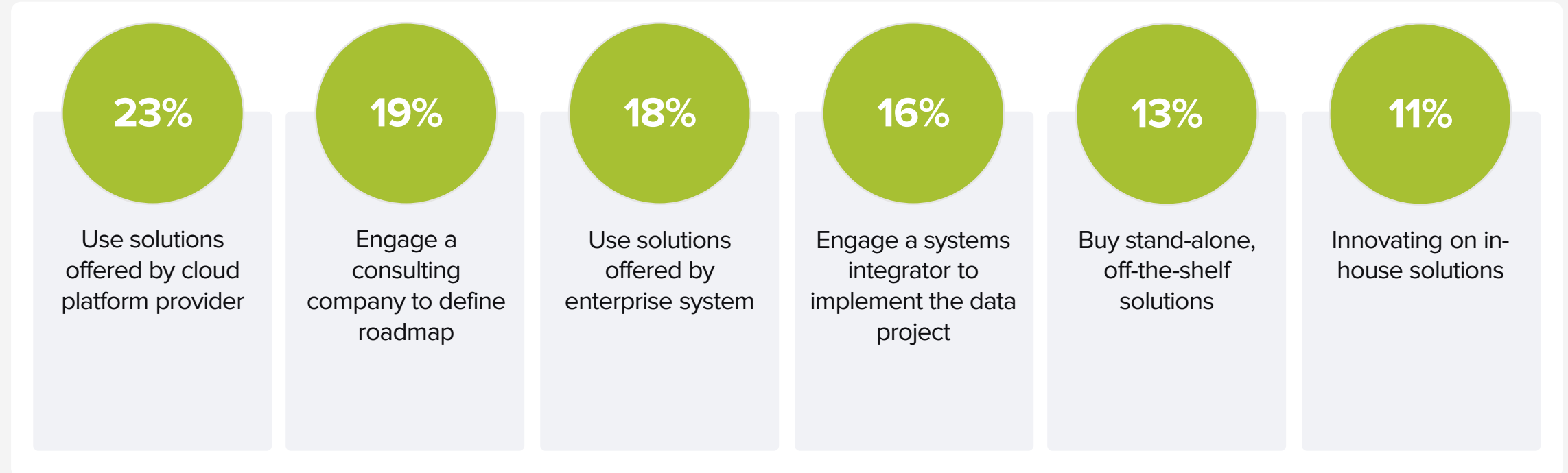
Key Challenges in Integrating AI for Sustainability Initiatives



N = 62

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

Building Sustainability Technology Capabilities



N = 62

Q: How is your organization building Sustainability reporting capabilities?



Thank You

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