

Sustainability Emerging Providers Buyers Guide

Software Provider and Product Assessment

EXECUTIVE
SUMMARY

***ISG** Research



Sustainability Emerging Providers

Environmental sustainability has become a central business concern after decades of rising awareness about environmental health and the external costs imposed on society by enterprise activity. Organizations increasingly recognize that the use of resources such as air and water generates impacts not captured in traditional financial accounting. Stakeholders now expect companies to measure and disclose these impacts, creating rising demand for software that supports the collection, management and reporting of environmental data. Sustainability reporting software remains a relatively new category, developed to help enterprises gather and analyze this information and provide transparent disclosures.

ISG Research defines sustainability, in the context of enterprise software, as the legally required disclosure of defined environmental impacts such as greenhouse gas emissions, resource use and waste generated by enterprises operating in jurisdictions where such disclosures are mandated. These disclosures are governed by formal regulations designed to ensure environmental data is reported consistently and transparently, and in ways that are comparable and auditable. Sustainability also includes the management of environmental risks, the enterprise's strategies to mitigate those risks and the concept of double materiality, which encompasses both how environmental factors affect the enterprise and how the enterprise affects the environment.

By the 2000s, some organizations had begun to self-report sustainability information, though methods varied and lacked standardization. To improve rigor and comparability, non-governmental organizations established reporting frameworks, and in parallel, governments introduced regulations requiring the use of established standards developed by groups such as the Global Reporting Initiative, the Task Force on Climate-related Financial Disclosures and the International Sustainability Standards Board. These frameworks aim to ensure that sustainability data is accurate, auditable and decision-useful for external stakeholders.

This ISG Buyers Guide focuses on environmental sustainability rather than the full spectrum of environmental, social and governance topics. Environmental reporting remains the most complex of the three. Enterprises often lack clearly defined data inputs and consistent measurement methods, making environmental data the most difficult to acquire, manage and analyze. ISG Research asserts that through 2027, one-half of enterprises will have insufficient data and software to adequately measure their environmental, social and governance metrics to inform governance strategy, risk management and performance targets.

Sustainability Management

Market Assertion

Through 2027, one-half of enterprises will have insufficient data and software to adequately measure their environmental, social and governance metrics to inform governance strategy, risk management and performance targets.

Robert Kugel, CFA
Executive Director, Business Research

ISG Research



Mandated compliance drives much of the demand for sustainability reporting, but there are commercial and brand-oriented motivations as well. Consumer preferences increasingly favor environmentally responsible companies, affecting both individual purchasing decisions and enterprise procurement. Organizations that demonstrate stewardship may gain a reputational advantage and strengthen customer trust. Sustainability reporting, therefore, supports regulatory compliance and contributes to a company's overall competitive position.

Explicit measurement and monitoring of carbon emissions, resource usage and waste management can also reveal operational inefficiencies and opportunities for cost reduction. In many cases, environmental metrics provide a complementary lens on business operations,

“

Conservation and improved resource efficiency often correlate with higher profitability.

uncovering process improvements that might not be evident through financial data alone. Conservation and improved resource efficiency often correlate with higher profitability, making sustainability insights relevant not only for compliance but for enterprise performance management.

Demand for sustainability reporting also reflects demographic and regional differences. Interest in environmental impacts has been higher in Europe for

more than a decade, and younger generations generally express stronger expectations that organizations should address environmental concerns. These differences influence how providers position software and inform investment decisions for enterprises in consumer-facing industries.

Regulatory requirements for sustainability reporting continue to evolve. The European Union's Corporate Sustainability Reporting Directive currently represents the most consequential mandate, but similar requirements have been implemented in the U.K., Canada, Australia, New Zealand, Singapore, Hong Kong and Mexico. In the United States, a proposed federal reporting mandate was withdrawn, though California has enacted its own requirements, which remain subject to legal challenge. As regulatory environments shift, enterprises must be able to respond to differing expectations across jurisdictions.

A significant challenge for organizations is the fragmentation of reporting frameworks and measurement requirements across global jurisdictions. This creates complexity for enterprises operating in multiple regions that need to harmonize reporting practices while maintaining compliance with local laws. As regulations become more detailed, enterprises face rising costs and operational burdens associated with manual reporting processes.

Software investment has accelerated as enterprises seek to reduce compliance risk and cost while preparing for more stringent requirements. Sustainability software automates data collection and reporting, supports real-time performance monitoring and facilitates audit-ready disclosures. These platforms also enable carbon management across Scopes 1, 2 and 3, and support sustainability risk analysis within supply chains. Advanced capabilities include AI-



driven forecasting, benchmarking and goal setting. When evaluating these platforms, buyers should consider how well the software integrates with enterprise data systems, adapts to evolving regulatory frameworks and supports long-term operational needs.

Precision remains an ongoing challenge. Unlike financial accounting, sustainability measurement does not rely on double-entry standards with defined rules for reconciling data. Environmental metrics often require estimation and modeling, and materiality thresholds can vary across industries and regulatory regimes. Many enterprises manage sustainability planning, compliance and incentives within operational teams while relying on finance

“

Achieving accuracy in environmental reporting requires meaningful investment in management effort, data governance and system design.

functions for reporting and analysis. Achieving accuracy in environmental reporting requires meaningful investment in management effort, data governance and system design.

To meet rising requirements, ISG Research strongly recommends the adoption of sustainability software, particularly for large enterprises, publicly listed organizations and multinational businesses operating in jurisdictions with mandatory environmental disclosure. Existing systems may be insufficient. Software investment should aim to reduce compliance costs and risks while supporting strategic decision-making and helping organizations achieve long-term sustainability and financial performance targets.

The 2025 ISG Buyers Guide™ for Sustainability emphasizes end-to-end support for environmental data collection, automation of reporting across multiple frameworks and real-time audit readiness through digital assurance features. Integration capabilities are essential, enabling connectivity with enterprise systems that serve as systems of record for sustainability data. The framework supports comprehensive Scopes 1–3 emissions tracking and alignment with global standards while adapting to regulatory changes. It prioritizes supplier data acquisition, sustainability in sourcing and purchasing and advanced analytical capabilities for forecasting and balancing sustainability objectives with profitability. It also incorporates reporting features that support double materiality assessments and production of machine-readable reports, including inline extensible business reporting language. Artificial intelligence capabilities, including generative AI and agentic AI, enhance productivity and improve the reliability of sustainability forecasting, analysis and reporting.

Emerging providers are those that do not meet the minimum revenue threshold for inclusion in the main Buyers Guide. These providers offer some or most of the capabilities available from larger competitors and may deliver features, functions or user experiences that better suit specific enterprise needs. They may also provide a lower total cost of implementation and ownership. This research assessed the following 12 providers: Datamaran, EcoOnline, Greenly, Green Project, Lucanet, Novata, Novisto, Plan A, Pulsora, Sweep, Watershed and Worldly.



Buyers Guide Overview

ISG Research has conducted market research for over two decades across vertical industries, business applications, AI and IT. We have designed the ISG Buyers Guide™ to provide a balanced perspective of software providers and products that is rooted in an understanding of business and IT requirements. Utilization of our research methodology and decades of



ISG Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business and IT requirements.

experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research provide a comprehensive approach to rating software providers and rank their ability to meet specific product and customer experience requirements.

The 2025 ISG Buyers Guide™ for Sustainability Emerging Providers is the distillation of continuous market and product research. It is an assessment of how well software providers' offerings address enterprises' requirements for sustainability software. The Value Index methodology is structured to support a request for information (RFI) for a request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. The ISG Buyers Guide evaluates customer experience and the product experience in its capability and platform.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. It can ensure the best long-term relationship and value achieved from a resource and financial investment. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of sustainability software can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its potential. In addition, this approach can reduce the project's development and deployment time and eliminate the risk of relying on opinions or historical biases.

ISG Research believes that an objective review of existing and potential new software providers and products is a critical strategy for the adoption and implementation of sustainability software. An enterprise's review should include an analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating sustainability software and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



Key Takeaways

Environmental sustainability software has become essential as enterprises manage rising reporting requirements and increasing expectations for transparent disclosure of environmental impacts. Fragmented regulations and inconsistent data inputs make measurement and reporting complex, driving demand for platforms that centralize environmental data and support audit-ready compliance. These systems help organizations reduce operational burden while improving the accuracy and consistency of environmental metrics. As requirements evolve across jurisdictions, enterprises need solutions that integrate with existing data environments and support reliable, comparable reporting.

Software Provider Summary

The ISG Buyers Guide™ for Sustainability Emerging Providers evaluates 12 software providers offering products that support environmental data collection, management and reporting across capability and platform requirements. The research ranked the top three overall leaders as Pulsora, Watershed and Sweep. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. Greenly, Pulsora, Sweep and Watershed were rated as Exemplary, with Green Project and Lucanet rated as Innovative. EcoOnline and Novata were rated as Assurance, and Datamaran, Novisto, Plan A and Worldly were rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (55%) and Platform (25%), including adaptability, manageability, reliability and usability. Watershed, Pulsora and Green Project achieved the highest performance as Leaders in this category, supported by broad sustainability capability coverage spanning data collection, analytics and disclosure reporting, and strong platform foundations offering adaptability, manageability, reliability and usability. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Greenly, EcoOnline and Sweep were the Leaders in this category, showing strong customer advocacy and clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should approach sustainability software as a strategic investment that aligns environmental disclosure requirements with operational decision-making needs. Buyers should prioritize platforms that unify comprehensive data management, integration capabilities and audit-ready reporting to keep pace with evolving regulations. Software that incorporates advanced analytics and AI to strengthen forecasting and scenario evaluation will better support long-term planning. Organizations should also assess provider alignment to enterprise governance practices to ensure sustainable adoption and measurable outcomes.



How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to assess existing approaches and software providers or establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes in the most efficient manner.

1. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business and IT needs.
Defining the business and IT requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: capability and platform with support for adaptability, manageability, reliability and usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the software provider and products properly.
Apply a weighting the evaluation categories in the evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

Using the ISG Buyers Guide and process provides enterprises a clear, structured approach to making smarter software and business investment decisions. It ensures alignment between strategy, people, processes and technology while reducing risk, saving time and improving outcomes. The ISG approach promotes data-driven decision-making and collaboration, helping choose the right software providers for maximum value and return on investment.



The Findings

The software providers and products evaluated in the research provide product and customer experiences, but not everything offered is equally valuable to every enterprise or is needed to operate in business processes and use cases. Moreover, the existence of too many capabilities in products may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities in the product is important, and where they match your enterprise's requirements.


An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes to TCO and ROI expectations. It is equally important that this commitment to customer success is clearly demonstrated throughout the provider's website, buying process and customer journey.

Overall Scoring of Software Providers Across Categories

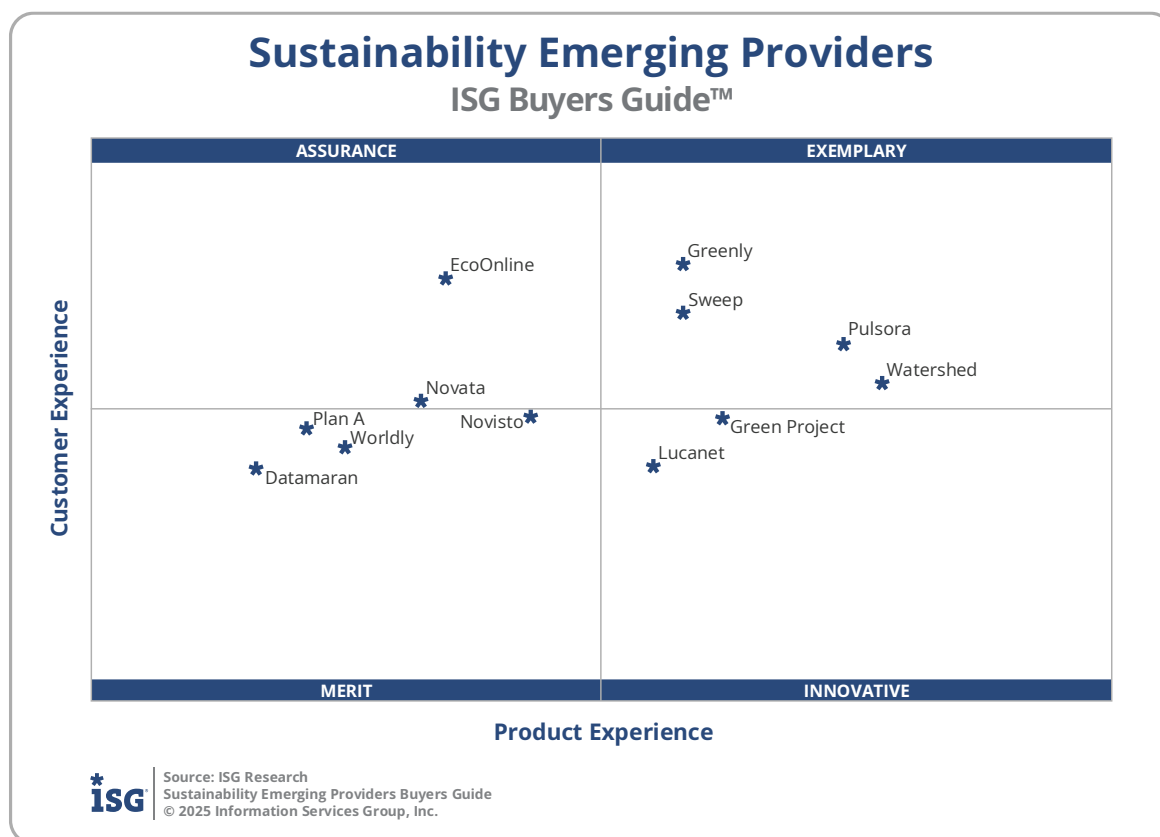
The research finds Pulsora atop the list, followed by Watershed and Sweep. Providers that place in the top three of a category earn the designation of Leader. Watershed has done so in four categories, Pulsora and Sweep in three, Greenly and Green Project in two and EcoOnline in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have above median weighted performance to the axis in aggregate of the two product categories place farther to the right, while the performance and weighting for the Customer Experience category determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Sustainability Emerging Providers			
Overall			
Providers	Grade	Performance	
Pulsora	B	Leader	65.2%
Watershed	B	Leader	63.2%
Sweep	B-	Leader	57.2%
Green Project	B-		56.6%
Greenly	C++		55.2%
Lucanet	C++		54.1%
Novisto	C++		51.9%
EcoOnline	C++		50.9%
Novata	C+		49.5%
Plan A	C+		49.0%
Worldly	C+		48.6%
Datamaran	C+		47.3%

 Source: ISG Research
Sustainability Emerging Providers Buyers Guide
© 2025 Information Services Group, Inc.

The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. This representation of software providers' weighted performance in meeting the requirements in product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: Greenly, Pulsora, Sweep and Watershed.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The providers rated Innovative are: Green Project and Lucanet.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The providers rated Assurance are: EcoOnline and Novata.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Datamaran, Plan A, Novisto and Worldly.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.



Product Experience

The process of researching products to address an enterprise's needs should be comprehensive and evaluate specific capabilities and the underlying platform to the product experience. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future.

The research results in Product Experience are ranked at 80%, or four-fifths, using the underlying weighted performance. Importance was placed on the categories as follows: Capability (55%) and Platform (25%). Watershed, Pulsora and Green Project were designated Product Experience Leaders.

Sustainability Emerging Providers Product Experience

Providers	Grade	Performance
Watershed	B-	Leader 46.3%
Pulsora	B-	Leader 45.1%
Green Project	C++	Leader 41.6%
Greenly	C++	40.4%
Sweep	C++	40.4%
Lucanet	C+	39.5%
Novisto	C+	35.9%
EcoOnline	C	33.4%
Novata	C	32.7%
Worldly	C	30.4%
Plan A	C-	29.3%
Datamaran	C-	27.9%



Source: ISG Research
Sustainability Emerging Providers Buyers Guide
© 2025 Information Services Group, Inc.



Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. The ISG Buyers Guide examines a software provider's customer commitment, viability, customer success, sales and onboarding, product roadmap and services with partners and support. The customer experience category also investigates the TCO/ROI and how well a software provider demonstrates the product's overall value, cost and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience are ranked at 20%, or one-fifth of the 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

The software providers that evaluated the highest in the Customer Experience category are Greenly, EcoOnline and Sweep. These category leaders best communicate commitment and dedication to customer needs.

Software providers that did not perform well in this category were unable to provide or make sufficient information readily available to demonstrate success or articulate their commitment to customer experience. The use of a software provider requires continuous investment, so a holistic evaluation must include examination of how they support their customer experience.

Sustainability Emerging Providers

Customer Experience

Providers	Grade	Performance
Greenly	B++	Leader 15.1%
EcoOnline	B+	Leader 15.0%
Sweep	B+	Leader 14.6%
Pulsora	B+	14.4%
Watershed	B+	14.0%
Novata	B+	13.8%
Novisto	B	13.7%
Green Project	B	13.7%
Plan A	B	13.6%
Worldly	B	13.5%
Lucanet	B	13.3%
Datamaran	B	13.3%



Source: ISG Research
Sustainability Emerging Providers Buyers Guide
© 2025 Information Services Group, Inc.



Appendix: Software Provider Inclusion

For inclusion in the 2025 ISG Buyers Guide™ for Sustainability Emerging Providers, a software provider must be in good standing financially and ethically, have at least \$15 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents and have at least 25 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 12 months.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant sustainability products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.



Products Evaluated

Provider	Product Names	Version	Release Month/Year
Datamaran	Datamaran Suite	N/A	April 2025
EcoOnline	ESG Software	N/A	June 2025
Green Project	Emitwise	N/A	November 2025
Greenly	Climate Suite	N/A	June 2025
Lucanet	Lucanet ESG Reporting	25	May 2025
Novato	Novata Sustainability	N/A	November 2025
Novisto	Novisto ESG	N/A	November 2025
Plan A	Plan A	N/A	November 2025
Pulsora	Pulsora	N/A	July 2025
Sweep	Sweep Sustainability Platform	N/A	November 2025
Watershed	Watershed Platform	N/A	June 2025
Worldly	Worldly	N/A	September 2025



About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit research.isg-one.com.

About ISG

ISG (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.