



IDC MarketScape

# IDC MarketScape: Worldwide Carbon Accounting and Management Applications 2026 Vendor Assessment

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**THIS EXCERPT FEATURES SWEEP AS A LEADER  
IDC MARKETSCAPE FIGURE**

**FIGURE 1**

**IDC MarketScape worldwide carbon accounting and management applications vendor assessment**



Source: IDC, 2026

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

## ABOUT THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Carbon Accounting and Management Applications 2026 Vendor Assessment (Doc # US54117126).

## IDC OPINION

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Carbon management has moved from a niche sustainability activity to a core enterprise capability, driven by escalating regulatory requirements, heightened stakeholder scrutiny, and growing recognition of the operational and financial value of decarbonization. What began primarily as an exercise in emissions accounting and disclosure is evolving into a more integrated discipline that spans compliance, risk management, operational efficiency, and strategic planning. As organizations confront overlapping regulatory mandates, expanding emissions scopes, and increasing expectations for demonstrable progress, carbon management platforms are becoming foundational systems of record and decision support.

The regulatory environment remains a powerful catalyst shaping the current state of carbon management. While voluntary disclosure frameworks such as CDP and TCFD established early norms, recent legislation has materially altered the expectations placed on organizations. The European Union's Corporate Sustainability Reporting Directive (CSRD), California's climate disclosure laws, and emerging requirements in other jurisdictions signal a shift toward mandatory, standardized, and auditable reporting. These regulations introduce more prescriptive definitions, calculation methodologies, and assurance requirements, significantly reducing flexibility in how organizations report emissions. At the same time, regulatory fragmentation across regions adds complexity for multinational organizations, requiring harmonized yet jurisdiction-specific reporting approaches.

Regulatory change is also expanding the scope and depth of required disclosures. Initial compliance efforts have focused on establishing reliable Scope 1 and Scope 2 inventories, but attention is rapidly turning toward Scope 3 emissions, which often represent the majority of an organization's carbon footprint. Scope 3 data collection introduces challenges related to data availability, supplier engagement, estimation methodologies, and data quality assurance. Regulators are increasingly tolerant of estimates in early reporting periods, but expectations for accuracy, consistency, and auditability are rising. In parallel, emerging concepts such as avoided emissions and product-level footprints, while not yet uniformly regulated, are gaining traction and further complicating the carbon accounting landscape.

The additional dimension of complexity is being introduced with the expansion from corporate-level footprints to product carbon footprint (PCF) analysis. Organizations are facing growing demand from a variety of stakeholders to quantify emissions at the product, service, or SKU level. Product-level emissions data is becoming critical for supporting eco-design initiatives, complying with emerging product-related regulations such as digital product passports and carbon border mechanisms, and enabling credible customer disclosures. Unlike corporate inventories, PCF analysis requires more detailed activity data, tighter integration with life-cycle assessment (LCA) methodologies, and closer alignment with operational systems such as enterprise resource planning (ERP), PLM, and manufacturing execution systems. As organizations adopt PCF capabilities, carbon management platforms must support traceability, allocation logic, and consistent methodology across corporate and product views, ensuring that granular product insights reconcile with enterprisewide emissions reporting. This shift toward finer-grained carbon data further underscores the evolution of carbon management from high-level reporting to embedded, decision-oriented analysis that informs product strategy, pricing, and competitiveness.

Alongside regulatory pressure, organizational priorities are shifting from an emphasis on disclosure toward measurable action and outcomes. Many organizations have already established baseline inventories and made public net-zero or emissions reduction commitments. As a result, the focus is moving beyond "can we report?" to "can we deliver?" Stakeholders are increasingly scrutinizing not only reported emissions but also the credibility of transition plans, interim targets, and capital allocation decisions. This evolution is reinforced by regulations such as CSRD, which require disclosure of decarbonization strategies, progress against targets, and the assumptions underpinning future emissions trajectories.

This shift toward action is reshaping requirements for carbon management capabilities. Reporting-centric tools are no longer sufficient on their own; organizations require platforms that support scenario analysis, marginal abatement cost modeling, and integration with operational and financial systems. Decision-makers need to understand the emissions impact of specific interventions, actions like energy efficiency projects, renewable energy procurement, process redesign, or supplier substitution and evaluate trade-offs between cost, feasibility, and carbon reduction potential. As a result, carbon data is increasingly being connected to capital planning, procurement, and enterprise performance management processes.

The linkage between decarbonization and financial and operational efficiency is becoming more explicit. While compliance and risk mitigation remain important drivers, organizations are recognizing that emissions reductions often align with cost savings, resilience, and productivity improvements. Energy efficiency initiatives can lower operating expenses and reduce exposure to energy price volatility. Supply chain optimization can simultaneously

reduce emissions, improve reliability, and mitigate geopolitical or climate-related disruptions. Carbon pricing mechanisms, whether internal or regulatory, further reinforce the financial rationale for proactive decarbonization by translating emissions into tangible cost signals.

In this context, technology plays a critical enabling role. Modern carbon management platforms are evolving to support automated data ingestion, standardized calculation engines, audit trails, and alignment with multiple regulatory frameworks. At the same time, advanced analytics, scenario modeling, and AI-enabled insights are being layered on top of foundational accounting capabilities to support decarbonization planning and execution. The value proposition of these platforms is shifting from administrative efficiency toward strategic enablement, helping organizations navigate regulatory complexity while identifying opportunities to reduce emissions in ways that support broader business objectives.

## **IDC MARKETSCOPE VENDOR INCLUSION CRITERIA**

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The vendor inclusion list for this document includes on-premises, SaaS, and cloud-enabled carbon management applications. In addition, vendors must have a commercially available carbon management offering that is productized as either a standalone application or packaged in a broader platform. Carbon management software includes purpose-specific software that enables data collection, emission footprint calculations, voluntary and mandatory report creation, and decarbonization strategy and analytics.

All vendors actively participated in the research, with multiple customer references being contacted and interviewed for each provider. Discussions with references included the systems utilized and their perception of the vendor and software in terms of implementation, technical support, level of value delivered versus price paid, ease of integration, user interface (UI), innovation, product road map, and perceptions of pricing model/terms. In addition, references provided details on the manner in which the solution was being used in their organization, as well as areas for vendor improvement.

## **ADVICE FOR TECHNOLOGY BUYERS**

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Selecting a carbon management solution is a strategic decision that extends well beyond feature comparison, requiring organizations to carefully align technology choices with their specific priorities, maturity, and operating context. Factors such as regulatory exposure, emissions profile, decarbonization ambition, and internal resourcing all influence what constitutes an appropriate solution. At the same time, organizations must consider how a carbon management platform will fit within the existing technology stack, integrate with core enterprise systems, and scale over time as reporting requirements and business needs evolve. Rightsizing the solution by balancing near-term compliance needs with longer-term decision support and operational integration is essential to avoiding both underpowered tools and unnecessarily complex implementations. Given this backdrop, the following

recommendations highlight key considerations organizations should evaluate when navigating a vendor-dense and dynamic carbon management software market:

- **Assess data integration and quality management:** Effective carbon management depends on comprehensive and reliable data that draws from multiple internal and external sources. Organizations should evaluate how well a platform integrates with ERP, energy management, procurement, and supply chain systems to automate data ingestion and reduce manual entry. Equally important are data validation and audit trail functionalities to ensure transparency and accuracy, particularly as reporting becomes subject to third-party assurance. Solutions that can manage both structured and unstructured data, support standardized emission factor libraries, and provide traceability from source data to reported values will offer the rigor required for regulatory-grade reporting.
- **Prioritize vendors that will promote regulatory compliance:** Organizations should seek carbon management solutions designed to stay current with an evolving and fragmented regulatory landscape. As carbon disclosure requirements continue to develop, including the CSRD, CBAM, and regional mandates such as California's climate laws, solutions must offer flexibility to adapt to new frameworks without requiring extensive reconfiguration. Vendors that demonstrate active participation in standards development and maintain dynamic regulatory update capabilities will be better positioned to support compliance continuity. The ability to map data and methodologies to multiple frameworks simultaneously will help multinational organizations streamline reporting across jurisdictions.
- **Evaluate granularity and product-level analysis features:** As carbon management extends from corporate to product-level footprints, organizations should prioritize solutions capable of handling both aggregate and granular analyses within a unified framework. Platforms that can model product carbon footprints alongside enterprisewide emissions will be increasingly valuable. This capability supports compliance with emerging regulations such as digital product passports and carbon border adjustment mechanisms while enabling design-for-sustainability and supply chain optimization. The ability to reconcile PCF data with corporate totals ensures consistency and avoids fragmented reporting.
- **Consider decarbonization strategy support:** Beyond compliance, organizations are seeking to use carbon data to inform strategic and operational decisions. Platforms with advanced analytics, scenario modeling, and abatement cost curve capabilities enable organizations to evaluate different decarbonization pathways and understand their financial and operational implications. Integration with enterprise planning and financial systems allows sustainability actions to be modeled in tandem with business performance metrics. This shift from retrospective reporting to forward-looking decision support distinguishes solutions that can deliver measurable business value and help organizations operationalize decarbonization strategies.

- **Examine vendor longevity and market stability:** Given the turbulence of the sustainability software market, which has been characterized by rapid innovation, consolidation, and new entrants, vendor stability should be a critical consideration. Organizations should assess a vendor's financial health, customer base, regional presence, long-term product road map, and investment in research and development.

## VENDOR SUMMARY PROFILES

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

### Sweep

Sweep is positioned in the Leaders category in the 2026 IDC MarketScape for worldwide carbon accounting and management applications.

Quick facts about Sweep include:

- **Solution name:** Sustainability Intelligence Platform
- **Solution launch date:** 2021
- **Employees:** 190
- **Target customer size:** Primarily large enterprise (\$1+ billion)
- **Market presence:** North America 25%, Europe 69%, APAC 4%, and ROW 2%
- **Industry focus:** Financial services, manufacturing and materials, retail, services, and technology
- **Delivery:** Public cloud hosted on AWS
- **Pricing model:** Tiered subscription model
- **Implementation and consulting partner ecosystem:** Accenture, Agendi, Axionable, BearingPoint, Bouygues C2S, Capgemini, Carbon Cutter, Deloitte, Ecoact, ERM, EY, Fifty-Five, KPMG, Nexio Projects, Onepoint, PwC, Quantis, RESET Carbon, VPWhite, and WSP
- **Certifications:** SOC II, ISO 27001, GDPR, EU AI ACT, and U.S. Data Privacy
- **Internal Sustainability Management:** Sustainability performance tied to KPIs, bonus, and executive pay

Sweep is a sustainability management SaaS platform founded in 2020. Originally launched as a carbon management solution, Sweep has evolved into a comprehensive system for managing environmental and social sustainability performance. The platform enables

organizations to understand their sustainability performance, meet increasing disclosure requirements, and implement data-driven sustainability strategies.

The product is built around three key pillars: Track, Disclose, and Act. Track focuses on data management, which is Sweep's core strength. The platform offers a solid, scalable, and configurable data management system that centralizes data, avoiding the need for multiple products and data transfers. This unified data layer is an important feature, stemming from Sweep's roots in business intelligence (BI). Disclose covers reporting and compliance with sustainability frameworks like the Greenhouse Gas Protocol, CSRD, and ISSB. The platform also provides customizable dashboards and investor reports, with preconfigured, science-backed reports that users can adapt to their needs. Act emphasizes driving change by enabling companies to set targets, forecast outcomes, track reductions, and collaborate across their value chains with suppliers and investments to achieve sustainability goals.

A key element of Sweep's vision is the integration of AI to enhance data quality, enable predictive analytics, and provide valuable insights. The platform's AI-driven interfaces are designed to increase participation in sustainability management, democratize access to sustainability efforts, and engage all stakeholders in collective action. Through flexibility, data precision, and user empowerment, Sweep ensures that organizations can manage their sustainability performance, aligning their operations with their sustainability goals and driving meaningful change.

## Strengths

- **Focus on skills-based AI:** Sweep's AI strategy centers on responsible, domain-specific intelligence tailored for sustainability and carbon management. By leveraging a robust data foundation built from the ground up, Sweep ensures trustworthy, granular business and supply chain data, enabling compliance and actionable insights. The platform's architecture supports skill-based AI, prioritizing fewer, highly capable agents that draw from diverse emission factor databases and proprietary intelligence. This data-centric approach allows for flexible, secure integration with enterprise systems, empowering users to operationalize carbon data, automate approvals, and simulate impact. Sweep's data foundation is the critical enabler for scalable, resilient, and compliant AI-driven sustainability outcomes.
- **Enterprise-grade data management core:** At its foundation, Sweep functions as a comprehensive data management platform, emphasizing data integrity through validated records and auditable traceability. The system accommodates multiple integration pathways — including native connectors, real-time APIs, SFTP, HTTPS, direct file uploads, and OCR — thereby minimizing reliance on manual data entry. Leveraging AI-driven automation to support a "load once use everywhere" the Sweep platform efficiently manages data mapping processes, promoting both precision and

adherence to reporting requirements. By automating the identification and normalization of disparate data formats, reconciling variant naming conventions to standardized schemas, and enforcing consistent categorization, Sweep significantly elevates the efficiency and reliability of data management operations.

- **Mapping complex organizational hierarchies:** Sweep enables organizations to map intricate hierarchical structures within its platform, supporting multi-entity, multisite, and multi-subsidiary configurations. This granular mapping allows for precise allocation of emissions sources and responsibilities across business units. The platform's robust carbon footprinting tools aggregate, calculate, and visualize emissions data at every organizational level, facilitating accurate reporting, compliance, and targeted decarbonization strategies for even the most complex enterprises.
- **Enabling faster LCA creation:** Sweep demonstrates strong capabilities in managing life-cycle assessments by enabling organizations to embed LCA workflows directly within their Scope 3 emissions management processes. As one customer reported, by using Sweep, it developed advanced capabilities for Scope 3 inventory management and LCAs, enabling the simultaneous creation of Scope 3 inventories and standardized LCAs for product carbon footprints. The platform integrates emission factors from recognized databases, significantly reducing manual effort and data handling complexity. As a result, the customer cut the time required to run LCAs by half compared with prior approaches and achieved measurable cost savings by reducing reliance on external consultants for carbon footprint analysis.

## Challenges

A challenge identified by customers with the Sweep platform is limited configurability and self-service control, as many methodological and configuration changes require direct involvement from Sweep's development team. In practice, organizations often face heterogeneous data collection environments across business units and evolving data maturity, which necessitate ongoing adjustments to calculation logic and methodologies over time. The lack of robust tools for internal super users to independently manage these changes was identified by customers as a factor that reduced operational agility, even when changes are relatively infrequent. As a result, reliance on external support can constrain responsiveness to evolving business requirements and limit scalability as programs mature.

## APPENDIX

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### Reading an IDC MarketScape graph

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

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

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

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

## **IDC MarketScape methodology**

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

## **Market definition**

Carbon management software is an emerging product category arising to meet enterprise demand for purpose-specific solutions to support data collection, emission footprint calculations, voluntary and mandatory report creation, and decarbonization strategy and analytics. Carbon accounting and management platforms include those solutions that generate carbon data as well as those that derive calculations based on the data generated. Data generated includes both ratings or benchmarking data used to evaluate across organizations and data specific to an organization used to assess organizational performance on ESG criteria. Solutions support organizations in data collection, analytics, and reporting. Carbon management solutions also support an organization's decarbonization initiatives in identifying emission reduction opportunities, prioritizing projects, and project management. Carbon management solutions may be incorporated in larger platforms or exist as unique products.

Corporate carbon footprint solutions help organizations measure and report their comprehensive carbon emissions. These solutions provide a comprehensive view of an organization's overall carbon footprint, often including direct emissions (Scope 1), energy-

related indirect emissions (Scope 2), and emissions from their supply chain (Scope 3). Capabilities include data collection and integration, reporting and compliance, and visualization and analysis.

Product carbon footprint (PCF) solutions help organizations measure the carbon impact associated with a particular product. PCF tools help businesses calculate the total greenhouse gas emissions generated by a product throughout its entire life cycle, from raw material extraction to disposal, allowing them to identify areas for improvement and make more sustainable product decisions.

## LEARN MORE

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### Related research

- *IDC Market Glance: Asset Life-Cycle Management, 1Q26* (IDC #US53479826, March 2026)
- *IDC Survey: AI-Enabled Sustainability Software — Survey Insights into Data, Reporting, and Management Use Cases* (IDC #US54291626, February 2026)
- *Innovation Summit Insights: How Schneider Electric Is Aligning Efficiency, Resilience, and Decarbonization* (IDC #US54150725, January 2026)
- *Agentforce and Data 360, Salesforce's "Momentum Drivers"* (IDC #lcUS54054025, December 2025)
- *Schneider Electric's Advisory Services Announcement Adds More Expertise to Their Service Offering* (IDC #lcUS53912125, November 2025)

### Synopsis

This IDC study evaluates vendors in the rapidly evolving carbon management software market. Driven by regulatory mandates and stakeholder expectations, carbon management has become a core enterprise function, shifting from basic emissions reporting to integrated, decision-oriented platforms. The document highlights vendor strengths, challenges, and strategic differentiators, providing technology buyers with guidance on selecting solutions that align with compliance, operational integration, and decarbonization objectives.

"Carbon management is no longer a reporting exercise," said Amy Cravens, research manager, ESG and Sustainability Software at IDC. "It's the new foundation for enterprise strategy, risk, and value creation in a decarbonizing world."

## ABOUT IDC

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

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