Market Guide for Supplier Sustainability Applications

Published 19 April 2021 - ID G00735969 - 22 min read

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Initiatives: Sourcing and Procurement; Procurement and Strategic Sourcing Applications

Supplier sustainability applications help enterprises assess and monitor their suppliers’ responsible sourcing performance to reduce their risk exposure and drive improvements. This research helps chief procurement officers to assess key capabilities and representative vendors of these applications.

Overview

Key Findings

- Adoption of supplier sustainability applications to enable responsible sourcing is not yet mainstream but is accelerating. Companies facing increased pressure from stakeholders to account for ESG issues from the supply chain are deploying these to automate, augment and scale their responsible sourcing programs.

- The vendor landscape for supplier sustainability insights is extremely fragmented, with vendors having varying capabilities and different focus areas. Some vendors focus on a wide range of regulatory compliance issues, while others are specialized on single issues such as conflict minerals, workforce conditions and Scope 3 greenhouse gas emissions, among others.

- As interest in supply chain sustainability increases, vendors from adjacent markets are positioning themselves as providing supplier sustainability applications, but they fail to support basic capabilities natively and depend on a third party as a data source for supplier sustainability.

- Poor supplier experience driven by survey fatigue and lack of improvement insights can limit supplier adoption of a sustainability application. There is an inherent tension between vendors offering standardized assessments that can drive supplier adoption versus fully customizable surveys that can adapt to specific company needs.

Recommendations

Application leaders responsible for strategic sourcing applications and chief procurement officers looking to advance their responsible sourcing strategy using technology should:

- Assess and monitor supplier compliance with your responsible sourcing requirements by using a supplier sustainability application. Technology can help scale the responsible sourcing program
Market Definition
Supplier sustainability applications enable organizations to collect and assess supplier performance on responsible sourcing requirements covering environmental, social and governance (ESG) issues. They provide organizations the ability to respond to a critical question: How sustainable are my suppliers?

The concept of supplier sustainability can have different meanings for different organizations. For some, sustainability means supplier compliance with multiple ESG issues in accordance to local/global regulations. For others, sustainability might extend to issues beyond compliance such as greenhouse gas (GHG) emissions reduction or deforestation (see The Journey to Responsible Sourcing: Key Elements to Consider). This Market Guide outlines the key capabilities and representative vendors that can support multiple ESG issues in their applications. Other specialty, issue-focused vendors are outside of the scope of this research.

Market Description
Gartner survey data shows that 75% of participating organizations report having a formalized responsible sourcing program in place. Unfortunately, some organizations limit the scope of their responsible sourcing strategy to creating a supplier code of conduct that outlines expectations of suppliers, failing to assess and verify supplier adherence to these expectations. Supplier sustainability applications are used by organizations looking to scale their responsible sourcing initiatives by enabling the collection and analysis of data that can help assess supplier performance against expectations.

These applications focus on a variety of ESG issues, with some enabling the assessment of multiple issues in the same application (multi-issue) while others are issue-specific. Regardless of the issues covered, vendors’ applications in this market possess the following core capabilities (see Figure 1):

- **Data Collection**: Applications in this market allow organizations to request responsible sourcing information from any supplier in their supply base. As opposed to ESG ratings from providers that deliver a comprehensive assessment of a static, predetermined list of public organizations, supplier sustainability solutions allow companies to collect information from any type of supplier, both public and private. Data collection is commonly performed via supplier self-assessment surveys and across the supply base and, in some cases, beyond Tier 1 suppliers.

- Create a shortlist of vendors to consider by defining the specific responsible sourcing issues you’re looking to address with the supply base and self-assessing your organization’s capabilities to support this initiative. Less mature organizations should prioritize vendors that can provide them with materiality guidance and offer data validation capabilities.

- Increase the rate of adoption and ROI of a potential application by assessing the value and impact it may have on your suppliers. Prioritize applications that emphasize a positive supplier experience such as those that reduce the reporting burden by allowing responses to be shared across multiple organizations or by helping suppliers develop their capabilities.
includes the ability for suppliers to submit supporting documentation required by the buying organization.

- **Data Analysis**: Applications in this market enable organizations to analyze supplier data collected using different criteria to uncover areas of improvement. Organizations can visualize and filter supplier data by spend category, geography, ESG issue and overall performance, among others. These applications also present an overall "supplier score" that companies can use to guide decision making. Vendors’ approaches to generating these supplier scores vary. Some have a predefined scoring methodology that cannot be altered; others offer full flexibility as to how the score is composed or a combination of both.

- **Domain Expertise**: Applications in this market provide organizations with domain expertise and relevant ESG content to collect supplier information using recognized standards. Once organizations select the issues they want to address, these applications provide standard questionnaires that organizations can then send to the supply base to collect information on these issues. While not a core capability, some vendors in this market also provide materiality guidance for companies that are unsure about what issues they should focus on, which is helpful for organizations that are getting started with responsible sourcing.
Only vendors that offer these three core capabilities natively and support multiple ESG issues are included in this Market Guide. Additional clarification is as follows:

- Spreadsheets like Microsoft Excel can support data analysis, but not data collection; they also do not provide domain expertise in ESG content.

- Online survey tools like SurveyMonkey can enable data collection and analysis, but they depend on the end user to provide the list of questions and supporting documentation to ask of the supply base.

- ESG ratings databases, like those provided by MSCI, Sustainalytics or CSRHub, provide domain expertise by presenting comprehensive information on company sustainability performance, but this applies to a predetermined list of companies and therefore doesn’t support supplier data collection.

**Market Direction**

Supplier sustainability applications are relatively new. While some vendors have had an offering for a couple of decades, the majority of the applications currently in the market were launched in recent years.
As stakeholder pressure for greater supply chain visibility and control increases, and companies join the “purpose-driven” movement to create a positive social and environmental impact, Gartner expects to see increased offerings of supplier sustainability applications.

Vendors in this market all provide comparable functionality in data collection and analysis. To set themselves apart, vendors in this market are developing a combination of differentiating capabilities that will attract buying organizations with varying maturity and resource availability (see Figure 2).

**Figure 2: Core and Differentiating Capabilities**

<table>
<thead>
<tr>
<th>Core Capabilities</th>
<th>Data Collection</th>
<th>Data Analysis</th>
<th>Domain Expertise</th>
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<tbody>
<tr>
<td>Differentiating Capabilities</td>
<td>Data Validation</td>
<td>Ongoing Monitoring</td>
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<td>Supply Chain Mapping</td>
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Clear trends are emerging in this market, both in terms of functionality and content offered. In terms of functionality, product roadmaps reveal how the majority of these vendors are planning to invest in bidirectional API integration with other procurement legacy systems and develop stronger capabilities to support buyer-supplier collaboration within their platforms. In terms of content, the majority of these vendors are focusing on expanding their compliance-based approach and developing new capabilities to support other ESG issues such as GHG Scope 3 emissions data collection and reporting (see Note 3). In addition, the majority of these vendors are planning to develop e-learning capabilities for both buyers and suppliers.

**Market Analysis**

The supplier sustainability applications market consists of both point solutions and suites with complementary capabilities. Different product modules can often be purchased separately, depending on the scope of the ESG issues covered, the level of due diligence and the flexibility needed by buying
organizations. Some vendors offer modules that support internal sustainability management (within the company's operations) in addition to modules that support responsible sourcing initiatives.

Adoption of these applications is still limited but it's expected to grow. Nearly half of the representative vendors in the market have released their current applications in the past five years, which are mainly used by midsize and larger organizations (greater than $500 million in revenue) with complex supply chains across multiple industries. Figure 3 provides market highlights of supplier sustainability applications based on self-reported survey data provided by the representative vendors in this market.

**Figure 3: Market Highlights of Supplier Sustainability Applications Data Analysis**

- **Product Launch Date**: Nearly half of representative vendors launched in the previous five years (2016 to 2021)
- **Average Contract Length**: 36 months (three years)
- **Pricing Model**: The most common is enterprise license, based on program scope (issues covered or number of suppliers) and depth (due diligence)
- **Licensing Fee Responsibility**: Buyers pay for licensing fees with most vendors. Some vendors also charge suppliers a reduced fee.
- **Ideal Target Customers**: Companies with global, complex supply chains and greater than $500 million in revenue
- **Industry Focus**: Most are industry-agnostic. Top three industries served are manufacturing, consumer goods and retail.
- **Customer Base Range**: Customer base ranges from 20 to 100,000+
- **Vendor Size Range**: Number of employees ranges from 21 to 695

Source: Gartner
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**Standard Versus Customized Assessments**

Vendors in this market have different philosophies when it comes to helping organizations define what supplier sustainability means. Some vendors take a prescriptive approach and have established a list of
parameters they use to assess the supply base, which cannot be customized. This can be a good thing for companies that are getting started with responsible sourcing, but it can be a limiting factor for those that want to focus on or prioritize specific issues based on stakeholder expectations. Other vendors take a fully flexible approach, where they allow organizations to pick from a menu of potential ESG issues in order to assess their suppliers. This enables organizations to decide what and how supplier sustainability is assessed; however, it creates a challenge for companies unsure of what to focus on. Also, it impairs suppliers’ ability to reuse data submissions with multiple customers. As assessment customization increases, the reporting burden on the supplier grows.

Top-Down Versus Bottom-Up Approach: Collecting Employee Workplace Experience Data

Supplier sustainability applications in this market take a management systems approach to collecting data about the supplier's performance, typically looking at evidence such as certifications. However, this approach misses the workplace experiences of supply chain employees as they focus on information obtained directly from the supplier. There are other applications that can help collect, aggregate and analyze worker voice data directly. These applications can either feed information into some of the supplier sustainability applications featured in this research or function as stand-alone tools. For example, the worker voice platform Ulula can be connected into SupplyShift's solution featured in this research, enabling a more holistic view of supplier performance. Vendors featured in this market are focused on information obtained directly from the supplier; therefore, vendors with platforms that collect data directly from the workforce are outside the scope of this research.

Representative Vendors

Market Introduction

The representative vendors included in this Market Guide all actively market and sell at least one supplier sustainability application. They all offer the core capabilities listed in Figure 1 natively (i.e., not through partners). For example, vendors that depend on a third party to collect and analyze supplier ESG issues are not included here (see Table 1).
Table 1: Representative Vendors in Supplier Sustainability Applications

Enlarged table in Appendix

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Source: Gartner (April 2021)

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Vendor Profiles

Achilles

Product Names: Achilles Essential, Achilles Professional, Achilles Enterprise

Achilles is headquartered in Abingdon, U.K. The first production version of its application was released in 2018. This application is SaaS-based and available as single-tenant provisioned via private cloud and integration with public cloud for some of its services. Achilles offers three versions of its application; each offers varying degrees of assessment customization and functionality. Suppliers are assigned an “Achilles Score” that is shareable across multiple customers and includes a combination of
sustainability, human rights, health and safety, governance, and finance factors. Buying organizations can also add custom surveys to complement their supplier sustainability assessment. Achilles has a dedicated team of more than 250 analysts and auditors in charge of supplier data validation.

Achilles’ application is industry-agnostic. Top three industries served are energy, construction and mining. The vendor offers an enterprise solution, and licensing fees are paid by both buyers and suppliers.

Additional products offered include CarbonReduce, Labour Practices Audit, Responsible Sourcing Audit Services, Conflict Minerals services and GDPR Audit services.

Assent Compliance

Product Names: Assent Compliance Platform (ACP), Corporate Social Responsibility Suite

Assent Compliance is headquartered in Ottawa, Canada. The first production version of its application was released in 2010. This application is SaaS-based and available in single-tenant cloud deployments. Assent offers a suite of solutions for conflict minerals, human rights, anti-bribery, anti-corruption and sustainability, which can be purchased separately or combined to provide a platform solution. It provides buyer guidance on issue materiality as part of their initial engagement. Suppliers can submit information once and reuse across multiple customers. A dedicated team of supply chain experts supports supplier data validation and a team of regulatory experts helps advise clients on program best practice. Suppliers receive feedback on how to improve their performance directly on the application and get access to the Assent University, which offers additional resources and best practices they can implement. Assent offers ongoing supplier monitoring using sentiment analysis of social media as well as other sources like TV, radio and U.S. sanction lists.

Assent Compliance’s application is industry-agnostic. Top three industries served are electronics, manufacturing and industrial equipment. Licensing fees are paid by the buyer.

Additional products offered include Product Compliance Suite and Vendor Management Suite. Assent also offers add-on services for conflict mineral reporting.

Benchmark ESG

Product Name: Benchmark Stewardship

Benchmark ESG (formerly Gensuite) is headquartered in Cincinnati, Ohio, U.S. The first production version of its application was released in 2006. This application is SaaS-based and available in single-tenant and multitenant cloud deployments. The vendor has three product suites with multiple applications that can support internal compliance for a range of topics such as safety, environment, product stewardship, supplier risk and others. All applications can be purchased separately or as a unified platform. Relevant to supplier sustainability, its Responsible Sourcing solution helps organizations assess suppliers using standardized assessments, also providing the flexibility for
customized assessments on different ESG topics such as conflict minerals and modern slavery. The vendor offers continuous monitoring of regulatory changes and provides companies with insights on the impact on their supply chain derived by these changes.

Benchmark ESG is industry-agnostic. Top three industries served are manufacturing, consumer goods and life sciences. Licensing fees are paid by the buyer.

Additional product suites offered include Benchmark Risk+Compliance and Benchmark Sustainability.

**EcoVadis**

**Product Name: EcoVadis Ratings**

EcoVadis is headquartered in Paris, France. The first production version of its application was released in 2007. This application is SaaS-based and available in multitenant cloud deployments. The solution is part of a broader EcoVadis Sustainability Intelligence Suite. Suppliers are evaluated using a standard assessment that covers 21 factors for environmental, labor, human rights, ethics and sustainability areas. Based on their performance, suppliers receive an EcoVadis Ratings and EcoVadis Scorecard that can be shared with multiple customers. Their automated EcoVadis IQ Solution (bundled option) provides guidance to buyers, helping them identify and prioritize suppliers based on potential ESG risks. Suppliers receive feedback on how to improve their performance score directly on the application, which also enables corrective action management. EcoVadis has a dedicated team of more than 150 analysts in charge of supplier data validation and rating methodology.

EcoVadis’ application is industry-agnostic. Top three industries served are chemicals, consumer goods and manufacturing. Licensing fees are paid by both buyers and suppliers.

Additional products offered include EcoVadis Spotlight (audit management) and EcoVadis Carbon Action Module (Scope 3 GHG emissions).

**Greenstone**

**Product Name: SupplierPortal**

Greenstone is headquartered in London, U.K. The first production version of its SupplierPortal application was released in 2013. Greenstone’s application provides standardized supplier assessments on a broad range of ESG topics, also providing the flexibility for customized assessments. Standard assessments include environmental, labor, human rights, ethics, Scope 3 GHG emissions, information security and others. Platform functionality includes audit and risk management, as well as compliance reporting.

*Greenstone declined requests to provide detailed information on its product functionality. Gartner's analysis is based on information provided on the company's website.*

**IntegrityNext**
Product Name: IntegrityNext

IntegrityNext is headquartered in Munich, Germany. The first production version of its application was released in 2017. This application is SaaS-based and available in multitenant cloud deployments. IntegrityNext provides standard assessments for 22 different issues, ranging from ESG issues such as environmental, human rights, labor, diversity and carbon footprint to topics such as cybersecurity and GDPR, among others. Suppliers can submit information once and reuse across multiple customers. Ongoing supplier monitoring is provided using sentiment analysis via its social media analytics engine. Organizations can create GRI-certified reports with a click of a button.

IntegrityNext’s application is industry-agnostic. Top three industries served are high-tech manufacturing, life sciences and financial services. Licensing fees are paid by the buyer.

iPoint

Product Names: iPoint Conflict Minerals, iPoint Supply Chain Survey

iPoint is headquartered in Reutlingen, Germany. The first production version of its application was released in 2012. Its SaaS-based suite of applications — the iPoint Suite — is available in multitenant cloud deployments. All applications can be purchased separately and support product compliance, sustainability and responsible sourcing. Relevant to supplier sustainability, the iPoint Conflict Minerals solution helps companies collect, analyze and report conflict minerals information. A separate solution, iPoint Supply Chain Survey, can be used to create customized supplier surveys on any ESG issue as defined by the buying organization. For standard assessments, suppliers can submit information once and reuse across multiple customers.

iPoint’s application is industry-agnostic. Top three industries served are automotive, industrial manufacturing and life sciences. Licensing fees are paid by the buyer.

Sedex

Product Name: Sedex Advance

Sedex is headquartered in London, U.K. The first production version of its application was released in 2004. This application is SaaS-based and available in multitenant cloud deployments. Sedex is a global membership organization where both buyers and suppliers can become members. Its risk assessment tool provides guidance to buyers, helping them identify and prioritize suppliers based on potential ESG risks. A standard supplier self-assessment (SAQ) is used to assess suppliers along labor standards, health and safety, business ethics, and environmental issues, and buying organizations can add custom surveys to complement their supplier sustainability assessment. Members can then choose to conduct an in-person or virtual SMETA (Sedex Members Ethical Trade Audit) audit to verify supplier performance at the site level using a certified Sedex Affiliate Audit Company. Suppliers’ audit results can be shared across multiple customers. Supply chain mapping capabilities enable organizations to assess
performance of suppliers beyond Tier 1. Member organizations get access to an e-learning module that offers additional resources and best practices to help them improve their performance.

Sedex’s applications are industry-agnostic. Top industries served are food, agriculture, apparel and manufacturing. Membership fees are paid by both buyers and suppliers.

Source Intelligence

Product Name: Supply Chain Management Platform

Source Intelligence is headquartered in Carlsbad, California, U.S. Its application provides standardized assessments on multiple ESG issues such as conflict minerals (including mica and cobalt), modern slavery and palm oil. Companies can choose which issues to include in their supplier assessments and how an overall supplier sustainability score is calculated. Data validation is performed using artificial intelligence. It offers ongoing supplier monitoring using multiple channels such as online and printed news, social media, TV, radio, and U.S. sanction lists.

*Source Intelligence did not respond to requests to provide detailed information on its product functionality. Gartner’s analysis is based on information provided on the company’s website.*

SupplyShift

Product Name: SupplyShift

SupplyShift is headquartered in Santa Cruz, California, U.S. The first production version of its application was released in 2015. This application is SaaS-based and is implemented as a multitenant cloud environment. Its application enables organizations to use standard and customized assessments for multiple ESG issues including modern slavery, climate change and deforestation. Supply chain mapping capabilities enable organizations to assess performance of suppliers beyond Tier 1. Suppliers can submit information once and reuse across multiple customers. Suppliers also receive feedback on how to improve their performance directly on the application and can see how their performance compares to other similar suppliers in the network. SupplyShift’s solution powers the The Sustainability Insight System (THESIS) assessment, which is used by retail members of The Sustainability Consortium (TSC) to drive sustainability in the products of their suppliers.

SupplyShift’s application is industry-agnostic. Top industries served are consumer goods and retail. Licensing fees are paid by buyers, but the vendor also offers flexible plans where suppliers can cover the licensing costs.

Transparency-One

Product Name: Transparency-One

Transparency-One is headquartered in Boston, Massachusetts, U.S. The first production version of its application was released in 2016. This application is SaaS-based and available in multitenant cloud
deployments. Organizations can use standard and customized assessments to check supplier compliance with a wide range of ESG issues as well as certifications, audits and other industry standards. Transparency-One provides buyer guidance on material ESG issues to address based on their industry and products purchased. Buyers can target ESG requirements to suppliers based on the product, activity, country or other buyer-defined attributes. Suppliers can submit information once and reuse across multiple customers within the network. Supply chain mapping capabilities enable organizations to map and assess performance of their suppliers at any tier in the supply chain, both from a supplier and product/ingredient/commodity perspective. Using third-party data feeds, companies can map suppliers within their supply chain and identify risk exposure on topics like water stress, deforestation, forced labor and protected land areas. Transparency-One offers supplier engagement services for onboarding, training and data validation through a strategic partnership with SGS.

Transparency-One's application is industry-agnostic. Top three industries served are apparel, food and consumer goods. Licensing fees are typically split between buyers and suppliers, but the vendor also offers flexible plans.

Worldfavor

Product Name: Worldfavor Sustainable Sourcing

Worldfavor is headquartered in Stockholm, Sweden. The first production version of its application was released in 2016. This application is SaaS-based and available in multitenant cloud deployments. Worldfavor offers three plans for its application; each offers varying degrees of assessment customization, functionality and number of suppliers covered. Worldfavor provides buyers guidance on material ESG issues to address based on their industry and products purchased. The application provides standardized assessments on a broad range of ESG topics, also providing the flexibility for customized assessments. Suppliers can submit information once and reuse across multiple customers. It offers reporting capabilities that align to common sustainability frameworks such as GRI.

Worldfavor's application is industry-agnostic. Top industries served are manufacturing, financial services, and food and beverage. Licensing fees are paid by the buyer.

Market Recommendations

Nearly all organizations — public and private, large and small — will benefit from a supplier sustainability application. Stakeholder expectations and regulatory changes will continue to evolve and force organizations to implement and scale their responsible sourcing initiatives. Publishing a code of conduct outlining supplier expectations is no longer enough. Organizations will have to prove the right level of due diligence is being taken to ensure supplier adherence to the code of conduct and proactively manage reputational risks. By deploying a supplier sustainability application, companies are able to scale their initiatives and impact.

Application leaders and chief procurement officers looking to adopt a supplier sustainability application should:
Self-assess your maturity and resources available for executing the responsible sourcing strategy. Prioritize vendors that possess differentiating capabilities that can help you overcome internal capability deficiencies.

Define the different use cases that the supplier sustainability solution will need to support. Choose a vendor that can support the current goals of issue-specific initiatives such as carbon emissions or deforestation.

Ensure vendors shortlisted highlight responsible sourcing as a unique value proposition and not as a secondary topic. As interest in supplier sustainability continues to grow, some vendors are positioning their solutions as responsible sourcing enablers but often rely on other providers to provide the functionality needed.

Prioritize vendors that highlight supplier experience management as part of their value proposition. Survey fatigue and a lack of value to the supplier organizations will affect supplier adoption of these applications.

Evidence

1. **2019 Gartner Procurement’s Value Contribution in Supply Chain Survey.** “Does your company have a formalized responsible or ethical sourcing program in place?” (n = 260)

Results presented are based on a Gartner study to understand the business outcomes that procurement is most focused on supporting, the primary levers it is using to achieve these business outcomes and the technology enablers required to operate these levers effectively. The primary research was conducted online from July through August 2019, among 264 respondents in North America, Latin America, Western Europe and Asia/Pacific.

Companies from retail, manufacturing, healthcare and natural resources were screened for having annual revenue of less than $1 billion. Respondents were required to be at a manager level or above, and should have primary involvement in and responsibility for the sourcing and procurement function in their organization. The study was developed collaboratively by Gartner analysts and the Research Data and Analytics team that follow supply operations.

Disclaimer: Results do not represent “global” findings or the market as a whole, but rather reflect the sentiment of the respondents and companies surveyed.

2. **How We’re Using Technology to Help End Deforestation**, Unilever.


4. **SupplyShift & Ulula Connect Worker Voice to Supply Chain Visibility**, SupplyShift.
Note 1

Representative Vendor Selection

Vendors included in this Market Guide are representative based on Gartner’s definition of the supplier sustainability market, and attributes of representative vendors include:

- Vendor sells at least one stand-alone supplier sustainability application.
- Vendor’s solution possesses the core capabilities of data collection, data analysis and domain expertise.
- Vendor offers a solution that can support supplier sustainability across multiple ESG issues.
- Gartner clients show interest in the vendor via searches on gartner.com and inquiries about that vendor for supplier sustainability.
- Vendor has 10 or more customers.

Note 2

Gartner’s Initial Market Coverage

This Market Guide provides Gartner’s initial coverage of the market and focuses on the market definition, rationale for the market and market dynamics.

Note 3

The Greenhouse Gas Protocol is the overall emissions accounting framework. Emissions are reported as three scopes, with freight activities accounted for as a Scope 3 upstream and downstream emission.

Recommended by the Authors

Define Sustainability and Leverage Materiality to Drive More Effective Strategy

Apply Digital Business to Sustainability

How to Incorporate Responsible Sourcing Criteria Into Bidding, Contract and Supplier Selection Processes

The Journey to Responsible Sourcing: Key Elements to Consider

How to Define Your Freight Transport Greenhouse Gas Emissions Reductions Strategy

3 Sustainability Trends Shaping Supply Chains in 2021
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Table 1: Representative Vendors in Supplier Sustainability Applications

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