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Digital platforms: Wrestling with the sustainability design challenges

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Abstract

During an executive meeting, the senior vice president of a large technology firm discussed recent sustainability developments with the managing director of a global implementation firm. They concluded that sustainability is gaining traction and significantly impacts data collection, analysis, and reporting. They agreed to jointly invest in developing a sustainability module to integrate into the technology firm's digital platform. By reaching out to a client interested in becoming a "launching customer," they established a digital platform ecosystem and created the sustainability module. This case outlines the real design challenges faced by the ecosystem partners. Seven (7) design challenges have been identified, ranging from selecting and importing data tracking metrics against goals and targets to creating a dashboard. Three environmentoriented features (e.g., decarbonization, travel emissions, energy consumption) were launched as a minimum viable product and rolled out to the client. This teaching case consists of two parts: the first part introduces the concept of sustainability, digital platform ecosystems, a case description, and the design framework, while the second part discusses the seven identified design challenges.

Keywords

Design challenges, digital platform, sustainability, ecosystem, minimum viable product, features

London, August 2021

"Sustainability directives are urging our clients to report on their sustainability goals. We know that data is crucial for sustainability reporting. However, companies lack the manpower to collect and analyze this data. We must collaborate to find a solution," said the Senior Vice President of a large technology firm to the managing director of a global implementation partner. Both experienced C-level executives discussed the impact of sustainability on their clients, the administrative burden of data collection, and the benefits of digital innovations that could facilitate these developments. They brainstormed extending the existing digital platform of the large technology firm by designing a dedicated sustainability module. The digital platform resembles an Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) system, consisting of various modules used in a business-to-business environment. The sustainability module may offer several features by automating the collection, analysis, and reporting of sustainability goals and related KPIs.

Both executives committed to investing significantly in developing this sustainability module, both financially and in kind. "We lack the knowledge to translate sustainability legislation into platform features and need a launching customer," said the managing director of the implementation partner. "I will reach out to one of our European clients to see if they are interested in participating." If that works, we can consolidate all the relevant knowledge and expertise to design, build, and implement the module. The Senior Vice President of the large technology firm added, "We provide the digital platform, as the implementation partner, you design and implement the sustainability module, and the client offers insights on sustainability directives, business processes, and requirements."

Considering the digital platform's technology, a large technology firm, along with its implementation partner and a Swiss professional services client, opted to create a Minimum Viable Product (MVP) for the sustainability module as an initial step. This case study highlights the real

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design challenges encountered by the sustainability module within the context of a digital platform ecosystem (DPE). This teaching case is divided into two sections. Part A covers sustainability, DPE, an overview of the case, and the design framework, while Part B outlines seven design challenges.

Part A: Sustainability and digital platform ecosystems

Sustainability encompasses a set of criteria that investors use to evaluate a company's performance and sustainability. Sustainability guidelines can help investors identify how environmental, social, and governance issues may present risks to a business and influence investment decisions. Sustainability guidelines are backed by standards and taxonomies related to climate change, resource scarcity, human rights, labor standards, corporate ethics, executive compensation, board diversity, and more (Aich et al., 2021). Sustainability reporting is crucial for meeting the expectations of regulators, investors, customers, partners, and other stakeholders who want to understand how a business works toward building secure and socially responsible firms. According to a 2022 study by KPMG, 59% of CEOs feel pressured to enhance sustainability transparency.

Given the significance of sustainability (Tona and Asatiani, 2023) and its related directives, firms require digital solutions to report their sustainability outcomes, such as greenhouse gas emissions, hiring practices for employees with disabilities, and remuneration policies. It has been proposed that digital platforms (DP) could facilitate the data exchange among various retrieval systems used by different parties, including business partners and suppliers (Plugge et al., 2024; Weiss et al., 2021). A digital platform is a software solution that assists firms in managing their sustainability initiatives and reporting their sustainability performance to stakeholders (Ketter et al., 2020). These platforms generally feature data collection and analysis tools, stakeholder engagement, and reporting templates. They often utilize digital technologies such as AI, machine learning, and data analytics to help firms measure and monitor their sustainability performance across various metrics, including carbon emissions, employee diversity, and social impact (Widyawati, 2020).

A digital platform ecosystem (DPE) comprises a technology firm, an implementation partner, and a client. Implementation partners are external firms that join the DPE to create complementary products for clients. For example, an implementation partner might develop additional applications by partnering with the Microsoft Power Platform (MPP). In this case, the implementation partner would use MPP-based Dynamics 365 (a cloud-based suite of business applications) to integrate components of CRM with productivity applications (power apps) and artificial intelligence tools, providing integration solutions for clients known as Industry Solution Accelerators (Vieru et al., 2023). An industry report published by Deloitte (2022) suggests that designing a digital platform to support sustainability features requires various skills, industry best practices, and an understanding of an organization's specific needs and goals. So far, research on digital platforms has not revealed much direct design knowledge (De Reuver et al., 2018).

Case description

The case study is set in an international context involving three parties: (1) *a large technology firm*, (2) *an implementation partner*, and (3) *a client*. *The large technology firm* is a globally operating company headquartered in the United States that provides digital solutions. It offers platform solutions comparable to ERP and CRM solutions through modular components. Examples of these modules include Information Technology, Operational Technology, Risk Management, Portfolio Management, Governance and Compliance, and Human Resources. However, the large technology firm lacks essential sustainability knowledge regarding legislation, indicators, and reporting.

The implementation partner is a technology consulting firm with experience in various technology-related domains, such as programming configurations. It specializes in designing and developing low-code platform features. The firm operates globally and comprises several digital teams across different geographical regions (e.g., Europe, Asia, and the United States). This partner possesses in-depth knowledge of sustainability, including reporting and performance-related topics.

Finally, *the client* is a professional services firm in Switzerland that has been focused on achieving sustainability goals for over 10 years. The client is motivated to enhance its annual performance and contribute to a cleaner planet. By engaging the client, all parties contributed relevant business and sustainability knowledge and experience during the design and development stage process.

The large technology firm and the implementation partner reached an agreement that the implementation partner would design and develop the platform module and its associated sustainability features within the large technology firm's framework. At the end of 2021, the client specified the initial set of requirements and subsequently conferred with the implementation partner. By early 2022, two teams—one focusing on research and the other on design & development—had been established, and the client, along with the implementation partner and the large technology firm, discussed initial Critical Design Issues (CDIs) at the expert level.

Research, design, and development team representatives utilized design artifacts (such as the roadmap and user stories) to detail three environmentally focused features further. They then planned additional sustainability features over time. Utilizing an agile approach through sprints, they designed and tested use cases to gain insights into the platform's impact during feature development. The implementation partner launched the first set of Minimum Viable Product (MVP) features in March 2023, which include three environmentally focused functionalities: 1. decarbonization, 2. travel emissions, and 3. energy consumption. The client's objective is to report their sustainability metrics to customers in sectors such as banking and insurance, retail, manufacturing, and construction, aiming to become a role model for sustainability in Switzerland. This initiative will enhance their market position as a sustainable firm.

During the design phase, the research, design, and development teams faced several challenges related to expertise and organization. From the perspective of expertise, sustainability subject matter experts, who possess in-depth knowledge of pertinent legislation, indicators, and performance metrics from the implementation partner, are considered limited resources because acquiring dedicated sustainability knowledge takes significant time. Some subject matter experts were assigned to other projects during the design phase, adversely affecting the team's design & development capabilities and leading to increased lead times.

Representatives from the research, design, and development teams agreed to reallocate subject matter experts across various projects, enabling the implementation partner to balance these teams better. Since team members from the implementation partner are located in multiple countries (Switzerland, the United Kingdom, the United States, and India), they encountered coordination challenges at the onset of the design and development process. However, by instituting daily stand-up meetings and retrospective sessions, operational performance improved, reducing the time spent on coordination tasks. Within the client organization, team representatives discussed their availability while managing design and development tasks alongside their regular operational responsibilities. The client's executive management approved the allocation of internal budget hours for these representatives to delegate their daily work to colleagues.

Design framework

The research, design, and development teams chose to execute three design phases: (1) planning, (2) high-level design, and (3) detailed design (prototyping). These teams included representatives from the client, the implementation partner, and a major technology company. Working simultaneously, they focused on creating the sustainability features. In the first phase (planning), the teams assessed the initial set of requirements that informed the high-level design. Additionally, they established a design and development process consisting of seven steps (refer to Figure 1). A project plan was created to detail milestones, deliverables, scheduling, and the required subject matter experts.

During the second design iteration, the research and design & development teams established design principles tailored to the digital platform, guiding the structure of the platform module. They drafted a high-level design process and outlined the necessary steps, ultimately producing a project plan, roadmap, and module mock-ups. A preliminary architecture for the module was also created to direct its features' detailed design and development.

Concurrently, the research team addressed design challenges by organizing workshops and interviewing stakeholders. This resulted in developing several use cases and scenarios based on five personas, each linked to various process steps. In the third design iteration, representatives from the research team of the implementation partner and a large technology firm evaluated the boundaries and integration issues of the platform module.

Their findings offered valuable insights for the design & development team, enabling them to formulate architectural guidelines that informed the detailed platform module architecture. Meanwhile, the design & development team transformed mock-ups into actual features of the module. The research team then refined the use cases and scenarios and assessed the module features through a user acceptance test involving platform user representatives specifically.

The design & development team improved the architecture and broadened the original MVP version as the next phase. Again, both the implementation partner and client representatives performed a user acceptance test to assess sustainability functionality from technical and user angles. Consequently, an MVP prototype was made available for client use. Additionally, a demo version of the MVP prototype was developed for all DPE participants to investigate possible feature options.

Part B: Design challenges

The design step "Set goals and targets" highlights a significant challenge in determining the scope and implementation strategy due to the extensive nature of sustainability. Regarding the platform module, implementation partner architects considered which features should be prioritized and their influence on the sustainability scope. They then evaluated the implementation strategies for the platform module features by weighing the advantages and disadvantages of the Big Bang versus incremental approaches. A representative from the research team encapsulated the discussion by stating:

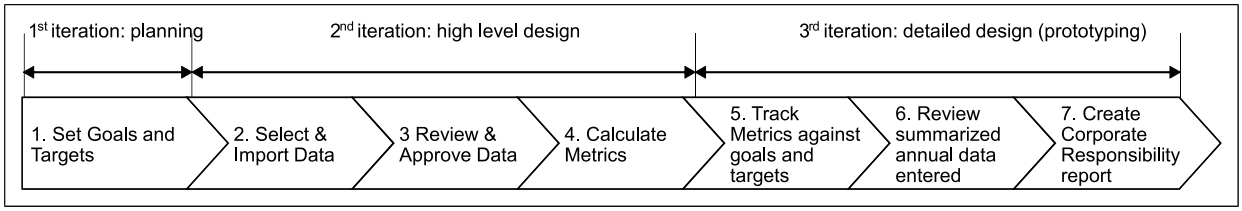

Figure 1. Design process steps.

> "We have multiple options, such as introducing a first set of features corresponding to sustainability domains, or we apply a waved approach by implementing a limited number of sustainability features simultaneously. We must decide as each option has serious design and development consequences."

To tackle this challenge, the implementation partner held a week-long ideation session involving representatives from all DPE stakeholders. The primary objectives of this session were to define the implementation scope by outlining available options and to carry out an impact analysis of the platform modules. The representatives agreed to prioritize implementing a few features for design and development, as launching all features simultaneously (Big Bang) was unfeasible due to limited resources. Consequently, the research and design & development teams opted for a phased approach, bundling a select group of sustainability features for sequential design, development, and implementation. Activities and milestones identified through this phased approach were then detailed in a roadmap.

The second design challenge relates to design step 2, "Select & import data." Experts from the design & development team encountered issues accessing data sources and evaluating data quality. In practice, obtaining data sets from various internal and external sources was difficult, as third parties, including energy suppliers, were reluctant to share their data. Once the data sets were received, team members realized that the data quality was insufficient, requiring significant cleaning of the raw and unstructured data. One representative from the design & development team mentioned:

> "Collecting data is key; for instance, if we want to measure X tons of plastic waste, we need data from energy suppliers, waste companies, and travel agencies. Next, we had discussions about who owns the data, who has the mandate to release the data, what the quality of the data is, and so on. But above all, suppliers must be willing to collaborate and share their data, which is a real struggle."

In response to this challenge, the design & development team established a master data management model that provides insights into the required data quality for each data point. The team identified the quality level necessary to prepare and calculate metrics by cleaning and testing data sets. With this master data management model in place, the design & development team could effectively address this challenge.

In addressing process step 3, "Review and approve data," we identified a design issue with the analysis of sustainability data. An example arose during the examination of energy consumption data, where it became unclear how to analyze supplier information and what actions should be taken to determine who needs to approve the data. The design & development team created three high-level process flows to support carbon dioxide emissions (decarbonization), travel emissions, and energy consumption. However, additional design tasks extended the development timelines due to the involvement of multiple DPE actors. One of the designers argued:

> "Designing sustainability processes is critical to defining process steps first to collect, analyze and report sustainability data towards clients and government. Technology will definitely help; however, we must sketch out which tasks should be fulfilled, including detailed information on the type of data and its quality."

The design & development team created detailed process descriptions for the three sustainability features within the scope to overcome this challenge. These process descriptions included multiple steps for collecting, reviewing, and approving internal and external data. Client representatives provided insight on how future sustainability business processes should integrate with existing information systems processes that support compliance and security.

In process step 4, "Calculate metrics," we encountered a challenge in calculating metrics without a blueprint. The lack of explicit calculation metrics norms led to confusion, particularly regarding emission calculations that were not as accurate as anticipated. This resulted in additional time spent gathering "spend" data, which had to be collected manually, causing further misunderstanding of the data. Since sustainability is a broad field encompassing various themes, there may not be any blueprints to guide calculating sustainability metrics. One designer argued:

> "We have a serious issue with defining the degree of transparency of employee data (e.g., type of transport, locations) as calculation norms are missing. This will create an accounting issue as data has to be requested from multiple travel systems, such as Uber, Amex Global, and SBB."

To address this challenge, the implementation partner created a dictionary to standardize sustainability data. Through numerous iterations, the design & development team crafted a calculation model (see Figure 2) and a dictionary to normalize sustainability data. This calculation model was specifically designed to comply with governmental regulations in the Swiss market. Subsequently, local guidelines were translated into a dictionary encompassing direct (Scope 1) and indirect (Scope 2 and 3) calculations. When clear regulatory guidelines were lacking, the research team established assumptions to compensate for the data gap.

When addressing process step 5, "Track Metrics Against Goals and Targets," the research team encountered challenges holistically tracking metrics. Since the implementation partner intends to design and develop multiple sustainability features over time, representatives from the research team concluded that there is a disconnect between their current focus (e.g., wave 1 features) and the platform module's ultimate state that embodies environment, social, and governance features. The design & development team introduced a metrics process flow incorporating the necessary steps to track metrics against goals and targets (see Figure 3). One of the research team members specified:

> "We started by applying a holistic view to define all relevant factors just to avoid a situation in which we miss some important goals and KPIs. As a next step, we excluded information irrelevant to the features defined in wave 1. A process flow demonstrating the tasks helped us identify how it all fits together. We struggled a bit as we had to redo some design and development tasks because we had already started implementing platform module tasks."

To address this challenge, the research team concluded that they needed to develop a compliance framework, process flow, and accompanying financial framework that could be used to track actual metrics and related goals and targets. All DPE actors contributed relevant information to establish the components of the compliance framework. Additionally, a financial model was derived from this framework to create tangible insights for inclusion in sustainability disclosure reports.

The research team suggested that the complementor was best suited to keep the compliance framework, process flow, and financial model updated, as future regulations may change over time. In addressing process step 6, "Review summarized annual data entered," the design & development team encountered a challenge due to the client's insufficient governance agreements. According to the design

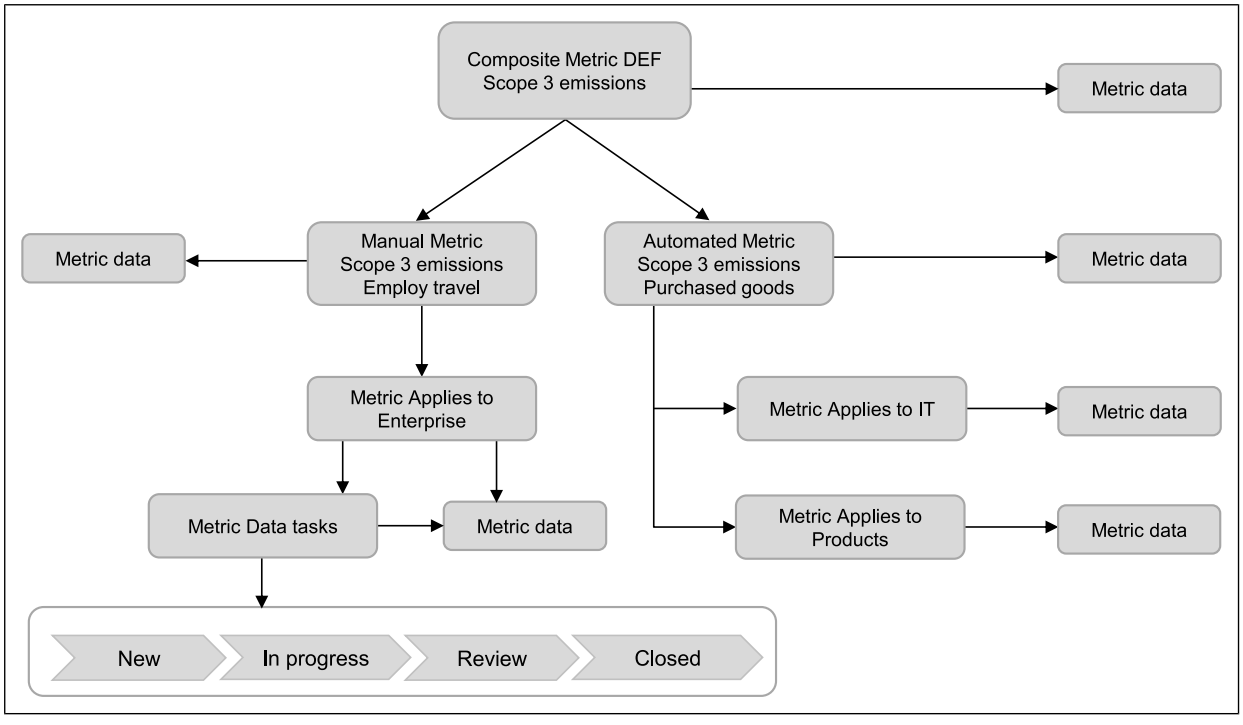

Figure 2. Example of a preliminary calculation model.

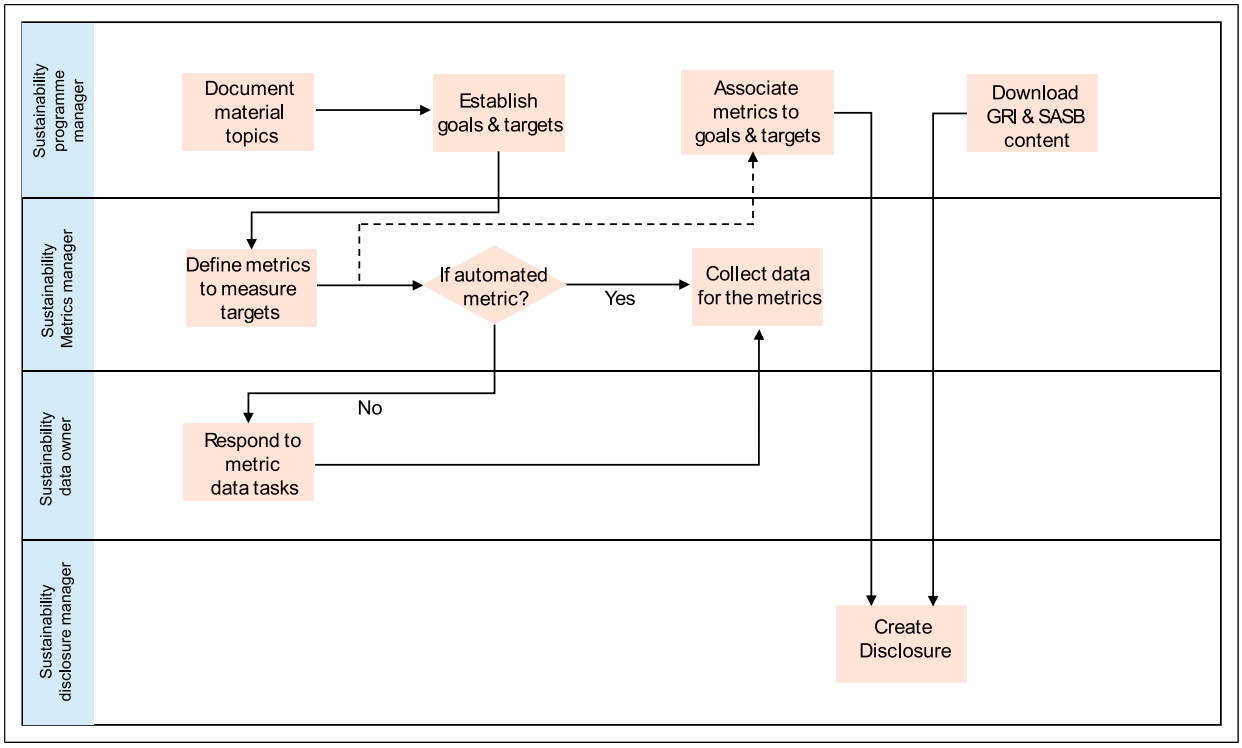

Figure 3. Example of the metrics process flow.

of sustainability business processes, every process step requires a client role to review annual data. However, the necessary client representatives were absent. This led to intense discussions regarding formal governance roles and mandates. As one of the platform's user members remarked:

> "When defining roles regarding non-financial data, we noticed the absence of clear roles and responsibilities as sustainability goals are fragmented across our Swiss organization. Because we organized ourselves in traditional departments, this silo-based structure conflicts with the horizontal approach of sustainability business processes."

To address this challenge, client representatives initiated an internal discussion regarding the appointment of sustainability business process owners who have the authority to check and validate the annual data entered. The design & development team created five personas (see Figure 4) representing all seven process steps and corresponding tasks, facilitating the allocation of client representatives. To share insights, the client determined that the finance and accounting department should serve as an intermediary for other departments by disseminating relevant knowledge, guidelines, and experience.

During process step 7, "Create Corporate Responsibility report," the design & development team highlights a challenge related to aggregating sustainability elements into a report comprising multiple environmental components. This challenge reflects a discussion about the extent to which the technical design of the platform module should be customized. Additional design principles were developed using a standardized approach to automate future sustainability processes. As the digital platform is essentially a low-code platform, design & development team representatives quickly created dashboard mock-ups (see Figure 5) that were discussed with client representatives. Based on the refined mock-ups, the design & development team produced a final version of the automated dashboard, which was developed and implemented.

As one design & development team member stated: *"To finalize the automated dashboard, we developed multiple versions, which were discussed with Swiss representatives. We used roundtable sessions as feedback loops by showing automated dashboard versions step by step. Subsequently, we used these round tables to identify the perceived added value of dashboard functionality while exploring future sustainability features in parallel."*

The digital platform ecosystem dilemma

During a quarterly meeting in 2024, the Senior Vice President of the large technology firm and the managing director of the implementation partner discussed the progress and challenges of designing and implementing the

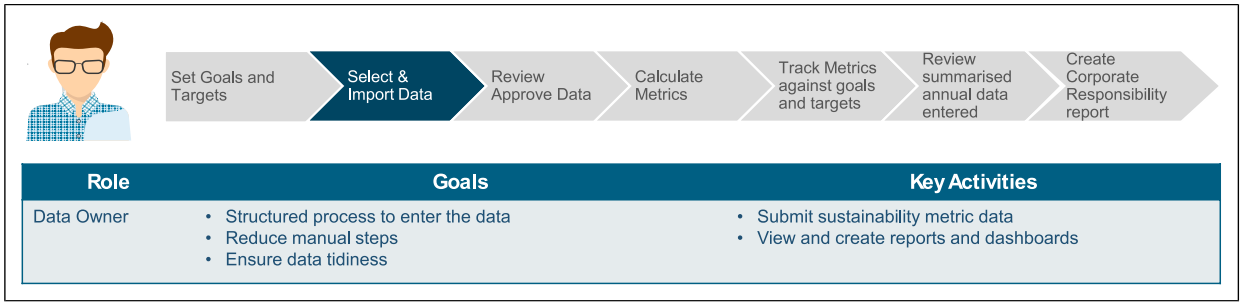

Figure 4. Example persona data owner.

sustainability module. So far, an MVP of the sustainability module has been launched and utilized by the Swiss client. But were these features sufficient? Although three Environmental features were introduced, the client urged both the implementation partner and the large technology firm to add more sustainability features to support their sustainability-related goals. The managing director of the implementation partner stated, "Our firm does not intend to invest in extending the sustainability module by designing and developing new features. At this time, our business case is negative; it's as simple as that," he said.

This situation posed a considerable challenge for the Senior Vice President of the large technology firm, who aimed to meet the client's expectations while lacking the comprehensive sustainability and technical expertise that the implementation partner had.

Given the new challenges faced by both the client and the implementation partner, the Senior Vice President has decided to recruit you as a program manager to devise a strategy to enhance sustainability features and tackle the risks arising from insufficient sustainability and technical knowledge. Key requirements include a thorough understanding of sustainability legislation, standards, and EU taxonomy, and experience configuring low-code platforms and customizing APIs to collect supplier data. By presenting a robust plan to improve the sustainability module's value, client satisfaction can be achieved while keeping the implementation partner within the DPE.

Create a plan based on the following questions:

(1) Develop a strategy to scale the sustainability module by designing and implementing new features, considering various factors (e.g., increased features and clients, geography, regional and/or local legislation, and the necessary design and implementation experience).
(2) Outline a high-level strategy to enhance the digital platform's sustainability module by integrating it with other modules, such as Risk Management (ISM), to implement controls for sustainability metrics and Governance and Compliance to automate roles and responsibilities as part of the platform workflows.
(3) Which design principles, including interoperability and platform modularization, are relevant for exchanging sustainability data with other modules of the digital platform and external data sources (e.g., suppliers and business partners)?
(4) Given the fragmentation of knowledge and experiences among DPE partners, how can you address potential issues that may obstruct the further extension of digital platform features?
(5) What should the ecosystem approach be to maintain access to sustainability-specific knowledge and expertise? Could the implementation partner be incentivized to participate in the DPE by offering exclusive rights to provide the module to their clients? Or should the large technology firm internalize the knowledge, for example, by acquiring a sustainability firm or commissioning the development of the module?

You must submit a report of approximately 2000 words that thoroughly addresses each of the five (5) questions individually. If you include external information, such as from the public domain, clearly reference the source (use the APA norm for citation and references). We recommend you read the following articles before starting to write the report:

(1) De Reuver, M., Sørensen, C., and Basole, RC (2018). The digital platform: a research agenda. *Journal of Information Technology* 33(2): 124–135.
(2) Ghazawneh, A., and Henfridsson, O. (2013). Balancing platform control and external contribution in third-party development: the boundary resources model. *Information Systems Journal* 23(2): 173–192.
(3) Jacobides., M.G., Cennamo, C., and Gawer, A. (2024). Externalities and complementarities in platforms and ecosystems: From structural solutions to endogenous failures. *Research Policy*, 53(1): 104,906.
(4) Schreieck, M., Wiesche, M., and Krcmar, H. (2022). From Product Platform Ecosystem to

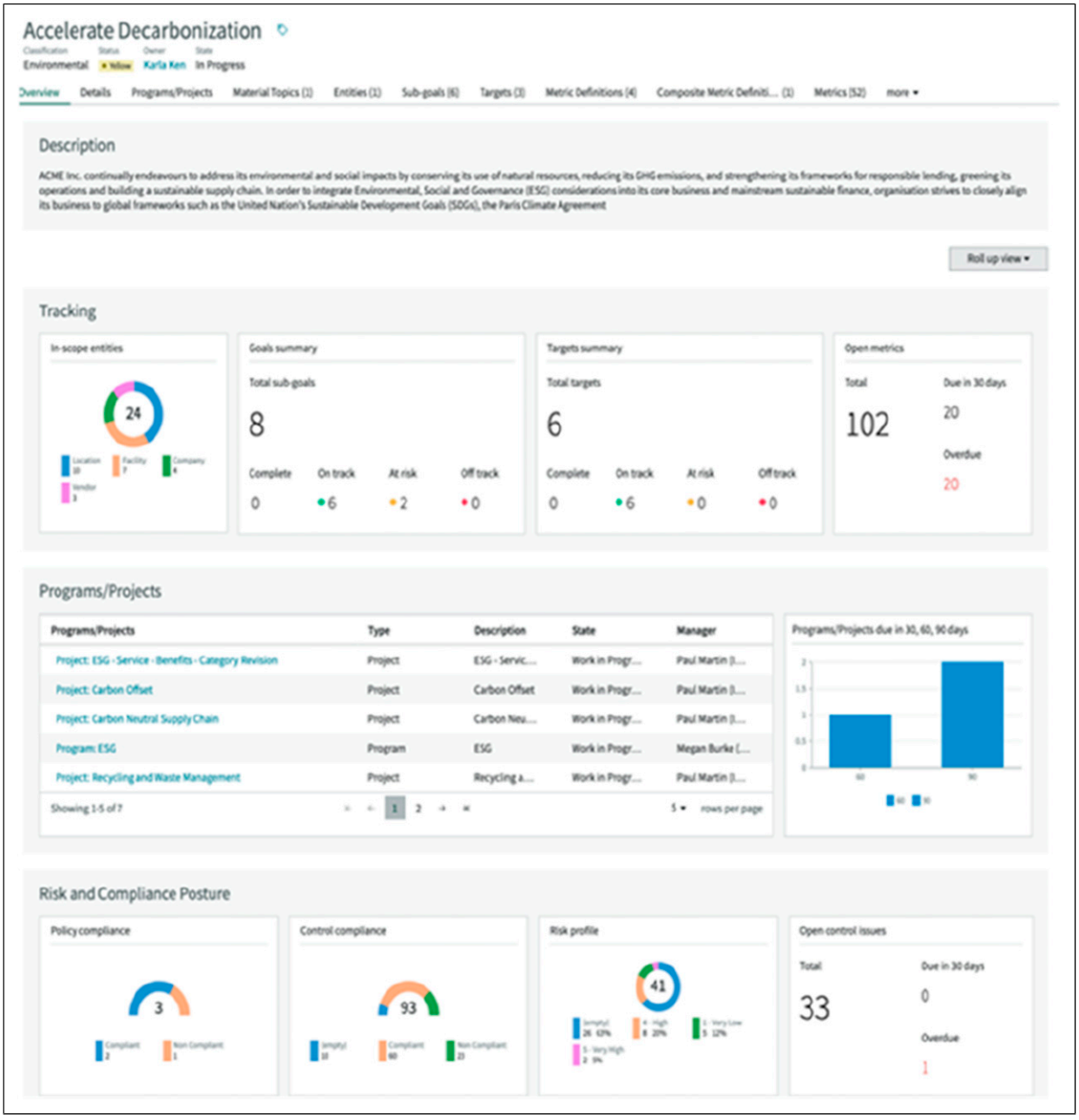

Figure 5. Example of the sustainability dashboard mock-up.

Innovation Platform Ecosystem: An Institutional Perspective on the Governance of Ecosystem Transformations, *Journal of the Association for Information Systems.*

Interview list

The Client: (1) Sustainability Program Manager, (2) Head of Sustainability, (3) Sustainability Senior Manager, (4) Sustainability Performance Manager.

The Implementation Partner: (5) Director of Platforms, (6) Manager of Sustainability Functionality, (7) Specialist in Sustainability Functionality, (8) Certified Master Platform Architect, (9) Platform Architect, (10) Platform Architect and EMEA Lead, (11) Global Expert in Sustainability, (12) Platform Developer, (13) Global Sustainability Head of Technology.

The Large Technology Firm: (14) Platform Architect, (15) Senior Manager of Platforms, (16) Senior Product Manager.

Author notes

This case study was conducted in an international setting (e.g., the UK, US, Australia, India, and Switzerland) from 2022 to 2025. We utilized two primary criteria for selecting our case study. First, we aimed to find a large technology firm and implementation partner willing to provide access to their subject matter experts to design a sustainability module as part of a digital platform. Second, we looked for a digital platform ecosystem featuring at least three parties collaboratively developing platform features. From December 2022 to February 2025, we had the unique opportunity to interview 16 experts representing a large technology firm, an implementation partner, and a client. The interviews lasted between 20 and 90 minutes. We followed a semi-structured protocol and gathered data from interviews, internal and external documents, video recordings, design artifacts, reports, and field notes.

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Mark de Reuver is a full professor of digital platforms at Delft University of Technology. He integrates research lines on digital platform design, platform-based business models and societally legitimate platforms. His current work focuses on digital platforms for the data economy and AI, with applications in healthcare, mobility and FinTech. He is Senior Editor at Electronic Markets and published 67 papers in journals including Journal of Information Technology and Information & Management. He received best paper awards from European Conference on Information Systems and Bled eConference.

Dragos Vieru is a full professor of information technology at TELUQ University in Canada. His research focuses on organizational change facilitated by digital transformation, ambidexterity, and innovation. He is also interested in the ethics of digital technologies, including artificial intelligence. He has published over 50 articles in scientific and professional journals, such as Information Systems Management, Journal of Knowledge Management, and the International Journal of Information Management, as well as in international conference proceedings. He has over 15 years of professional experience in IT project management in the public healthcare sector and is a certified LEGO® Serious Play Facilitator.