

ANMD-MRS34-338 · Sustainable Tourism Technologies

Eco-Certification Verification Software

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Eco-certification verification software digitises the audit, evidence and assurance workflow behind sustainable-tourism certification — replacing paper trails with verifiable, continuous data so green claims can be substantiated. This decision-grade study sizes the global market two ways — value and units (subscriptions / properties certified) — across system type, audit-tool type and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond paperwork, eco-certification verification software delivers credible, auditable sustainability claims and interoperable standards, strengthening the anti-greenwashing story.

Mapped Sustainable Development Goals:

SDG 12 Responsible Consumption	SDG 17 Partnerships for Goals	SDG 11 Sustainable Cities	SDG 13 Climate Action	SDG 15 Life on Land
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Measurable sustainability outcomes assessed:

- Credible, auditable substantiation of sustainability claims
- Continuous MRV replacing point-in-time, paper-based audits
- Interoperability across certification schemes and booking platforms
- Standard fragmentation and conflict-of-interest as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, CSRD, the EU Taxonomy and GSTC, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	5 SDGs Mapped

MARKET OVERVIEW

From paper audits to continuous, verifiable assurance — where every green claim is backed by traceable data.

The eco-certification verification software market is moving from paper audits to continuous, verifiable assurance. Demand is driven by anti-greenwashing and green-claims regulation, booking-platform sustainability filters and GSTC-alignment pressure, supported by MRV, SaaS and data-verification maturity. The market is read two ways — value and units — and forecast under four scenarios, each region reported separately.

- Europe is the anti-greenwashing leader — Germany, France and the UK, on green-claims rules and platform requirements
- North America is assurance-driven, with hotel-group ESG and audit credibility in the United States and Canada
- System type and application segment the value — across certification-management, audit & compliance and data-verification tools
- Continuous, verifiable assurance is the differentiator — traceable data outperforms point-in-time audits

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Europe	Anti-greenwashing leader	Germany, France, UK — green-claims rules, platform requirements
North America	Assurance-driven	United States, Canada — hotel-group ESG, audit credibility
Asia Pacific	Emerging	Australia, Singapore — certification for market access
Latin America	Emerging	Costa Rica, Mexico — eco-destination certification
Africa	Frontier	Kenya, South Africa — eco-tourism certification schemes
Middle East	Frontier	UAE, Saudi Arabia — tourism-strategy certification

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • Anti-greenwashing & green-claims regulation • Booking-platform sustainability filters • GSTC-alignment & standard pressure • Hotel-group ESG & audit credibility • MRV, SaaS & data-verification maturity 	<ul style="list-style-type: none"> • Standard fragmentation & comparability • Data-verification cost & burden • Auditor capacity & assurance depth • Adoption beyond large operators • Trust and conflict-of-interest concerns

SEGMENTATION SNAPSHOT

By System Type	Certification-management platforms · audit & compliance tools · sustainability-data verification
By Audit Tool	Self-assessment · evidence-management · third-party audit · continuous-MRV
By Application	Certification bodies · operators / hotels · destinations
By End User	Certifiers · hospitality · DMOs · booking platforms
By Business Model	Subscription / SaaS · per-certification · managed-service · licensing
By Deployment Scale	Single-property · portfolio · destination / scheme-wide

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Eco-Certification Verification Software
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
- › Chapter 17. Middle East Market Intelligence
- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans certification and assurance-software vendors, platform specialists and integrated system providers. Deal activity — certification-platform partnerships, audit-body integrations and booking-platform alliances — signals a market organising around credible, interoperable verification.

Representative players profiled in the full report:

Global Sustainable Tourism Council · EarthCheck Pty Ltd · Foundation for Environmental Education (Green Key) · BeCause ApS · Bureau Veritas SA · and 20+ further profiled players across the value chain.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a decision-ready investment verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global eco-certification verification software market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do the economics of eco-certification verification software change returns versus incumbent approaches?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › **Triangulated sizing** — every market read across two ways — value and units (subscriptions / properties certified) so the views reconcile rather than conflict.
- › **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, decision-ready investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, certification-tech vendors, certification bodies, hospitality operators, DMOs, booking platforms, research institutions, policymakers, and corporate strategy and ESG teams. This report supports investors, operators, developers, manufacturers, lenders and policymakers — alongside strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.