

ESG Data Convergence Initiative

EDCI Overview for General Partners

As of November 2026

EDCI



Table of Contents

1. Overview of EDCI

2. EDCI membership value proposition

3. EDCI membership options for GPs

4. How to get involved



Context | What is the EDCI?

Read more here

What | A global initiative to advance sustainability data across the private markets - encompassing private equity, infrastructure and private credit

- The private markets historically had a fragmented approach to reporting sustainability data
- EDCI aims to drive convergence around meaningful sustainability metrics and build a critical mass of useful, performance-based and comparable sustainability data
- Led by the industry for the industry and supported by ILPA & BCG with ambition to deepen understanding of linkages between sustainability and commercial value

Outputs | Metrics, validated data, benchmarks, insights on key trends

- Aligned around a core set of sustainability metrics, which are collected at the portfolio company level and validated, aggregated and benchmarked by BCG
- Metrics evolve and are refined based on member decisions (e.g. added cybersecurity for 2026, added Artificial Intelligence for 2027)
- Functionality includes the ability for GPs to flexibly and securely share data with LPs
- Enables analysis of portfolio company performance relative to a like-for-like private peer set
- Unlock insights into trends and opportunities for sustainability in private markets

Opportunity | Growing participation across private markets

- Since its formal launch in October 2021, over 400 GPs and LPs have joined the initiative, representing over $40T in AUM and ~10,000 underlying portfolio companies
- All EDCI members can benefit from a compelling value proposition encompassing data validation, benchmarking, strategic insights, working groups, member events, and more

EDCI engagement | The EDCI has brought together 400+ committed firms with ~$40T of AUM

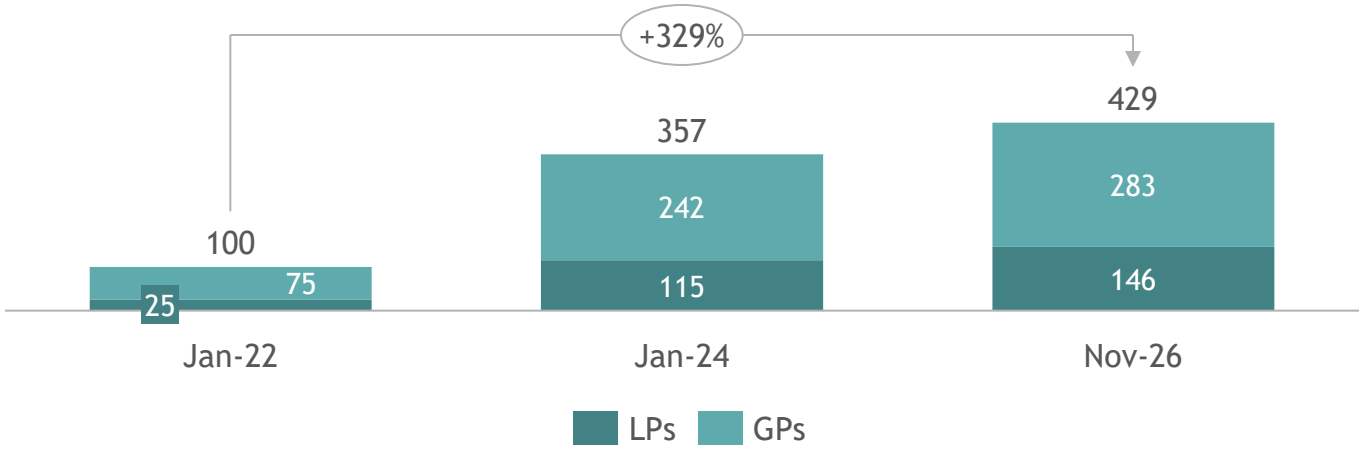
400+
Committed GPs and LPs

3
Alternative asset classes covered

~$40T
AuM

430+
Interested firms

EDCI membership as of November 2026



> *EDCI **simplified the data collection process** because metrics have already been thoroughly thought through by the collective EDCI membership*
>
> —EDCI GP Member

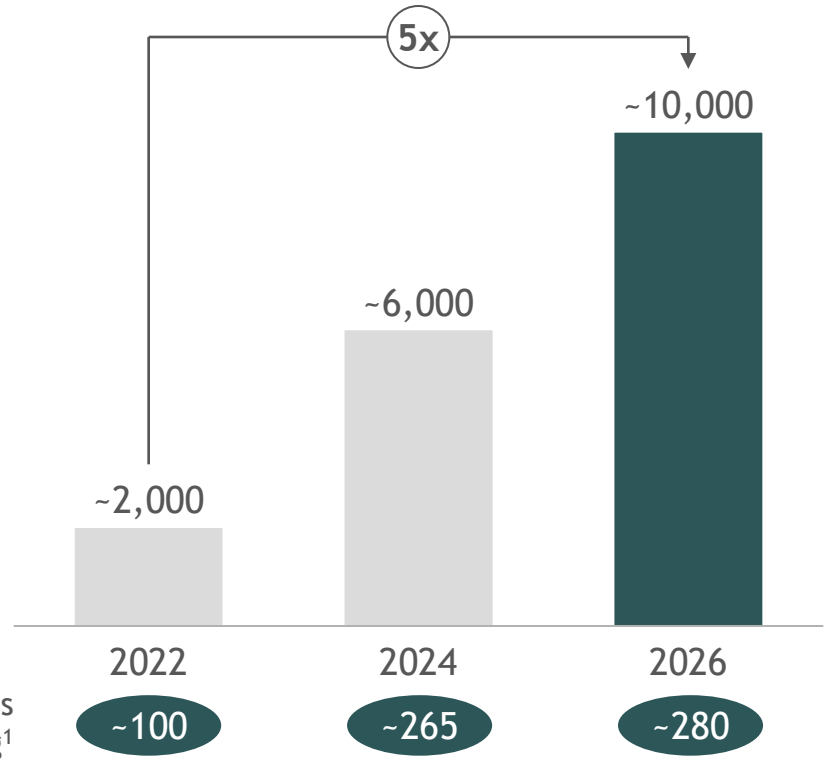
> *I think it is **the best executed benchmark process in the industry** and created a great basis to work from.*
>
> —EDCI GP Member

> *The **EDCI allows us for the first time to collect, analyze and aggregate ESG data** from across our portfolio in an effective manner.*
>
> —EDCI LP Member

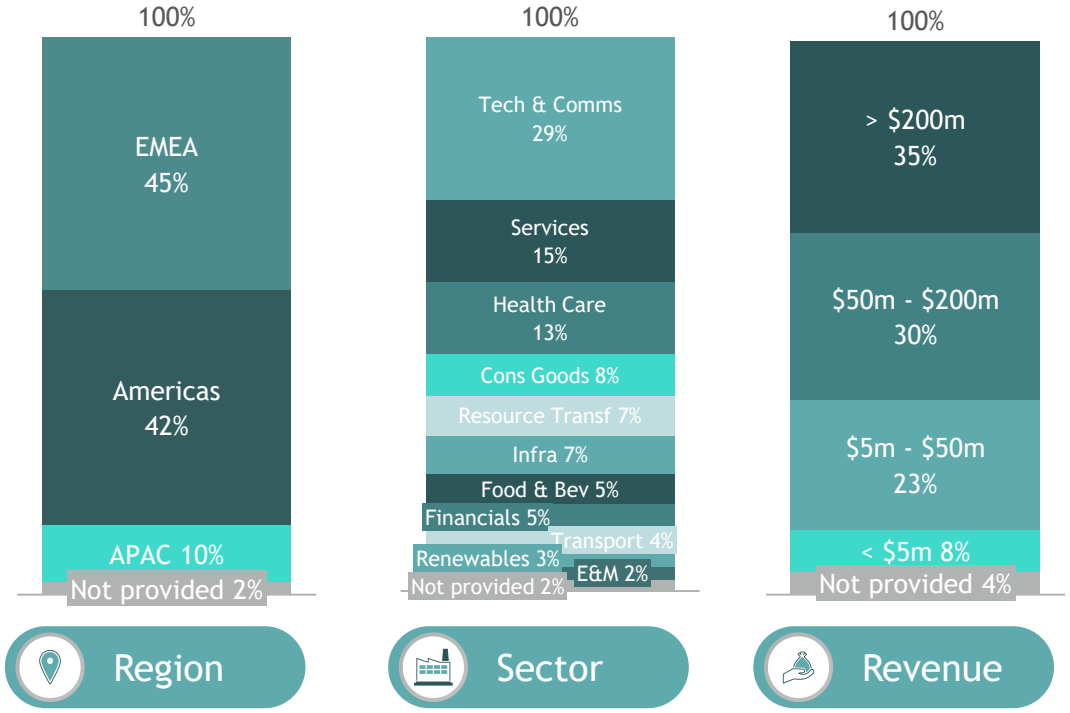
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Benchmark composition | The EDCI benchmark participation continues to expand with strong growth in the number of GPs and portfolio companies participating

The EDCI benchmark has scaled ~5x since 2022, with 2026 participation reaching ~10k companies



The benchmark PortCos broadly represent a wide range of regions, sectors, and company sizes



1. Participating GPs are those EDCI member GPs who submitted portfolio company data to the EDCI benchmark in the given year
Note: Numbers shown on charts might not add up to exactly 100% due to rounding
Source: EDCI private market benchmark, September 2026; BCG analysis

EDCI metrics | The EDCI now includes nine metrics across sustainability topics



GHG emissions	Decarbonization	Renewable energy	Work-related injuries	Net new hires	Diversity	Employee engagement	Cybersecurity	Artificial Intelligence
Scope 1	Decarbonization strategy	% Renewable energy use	Injuries	New hires (organic and total)	% women on board	Employee survey (Y/N)	Cybersecurity testing	AI policy (non-core)
Scope 2	Short-term targets		Fatalities	Turnover	% under-represented groups (non-core)	Employee survey response (non-core)		
Scope 3 (non-core)	Long-term net zero ambition		Days lost due to injury		% women in c-suite	Employee satisfaction (non-core)		

Environmental — Social — Governance

New metrics added for 2026

EDCI



Table of Contents

1. Overview of EDCI

2. EDCI membership value proposition

3. EDCI membership options for GPs

4. How to get involved

Value proposition | The initiative is focused on addressing meaningful sustainability data pain points for the private markets



Value for GPs

- Enhanced data quality and a streamlined process for data sharing with key stakeholders
- Clear view of benchmarked performance versus peers
- Deeper understanding of key trends in sustainable value creation
- Increased attractiveness to LPs

What EDCI provides

- Member-led sustainability reporting – metrics are evolved by the private markets, for the private markets
- Structured validation for consistent, comparable data
- Community collaboration via working groups and events

Value for LPs

- Simplified reporting that supports broader sustainability goals
- Greater transparency and visibility across allocations
- Confidence that all data has been through rigorous validation checks
- Improved engagement with GPs on sustainability topics

Data validation | Every member GP benefits from having their data validated by the EDCI to ensure consistent, high-quality data

What | A robust validation process to ensure data accuracy

Have your sustainability data validated by BCG Expand through a structured process that improves accuracy and ensures consistency across member data

Why | Receive validated data that can be shared with stakeholders

Receive a validated dataset ready to share with LPs, improving transparency and streamlining the data-sharing process

The process has enabled validation of data at scale

400K+	280	~5K	~20K
Validated data points from ~10,000 PortCos	GPs with individual dialogues to refine and validate submissions	Iterative validation emails sent last year	Identified data points for review in collaboration with GPs

> *The data validation is a clear value-add from the initiative, giving us real confidence in the data*
>
> — EDCI LP member

> *Validation is extremely important and was able to catch things that no one else was able to. It was a surprisingly rigorous process that gives much more credence to the data*
>
> — EDCI GP member

> *The EDCI validation provides an additional layer of confidence around the data we are collecting as an industry, which enables us to move towards using the data to drive impact rather than data collection for collection's sake*
>
> — EDCI GP member

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Data sharing | All GPs are able to respond to LP data requests and share validated data through a secure, centralized system

What | Securely send data to member LPs via the portal

- GPs can centrally and securely share comparable, validated data with member LPs while remaining in full control of their data

Why | Streamlined data sharing between GPs and LPs

- Address pain points for GPs and LPs by streamlining the exchange of validated data

The process has enabled streamlined GP to LP data sharing

~1,400	~90%	~90%
Data requests sent to GPs in 2025	Of requests approved	Of approved requests include PortCo names

> *It's a no brainer; given the time savings available it's really helpful to use the EDCI data sharing functionality.*
> — EDCI GP member

> *We have seen a 5x increase in the amount of data being shared with us. The new functionality has given us scalable access to comparable, validated information*
> — EDCI LP member

> *We prefer to receive the data through the portal, as it addresses a major pain point and is far more efficient than managing the process offline*
> — EDCI LP member

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Benchmarking| Like-for-like benchmarks show how your portfolio companies compare against private market peers

What | Like-for-like benchmarks for every metric

Harnessing advanced regression analysis across 400k+ validated data points and ~10,000 companies, EDCI creates like-for-like benchmarks - for each metric and company submitted

Why | Understand company performance relative to peers

Effectively contextualize company and portfolio performance by comparing outcomes to a like-for-like peer set, moving beyond broad industry averages to more meaningful comparisons

Benchmarking unlocks new performance insights

Identify gaps and prioritize efforts

Identify outliers (both above and below the benchmark) to recognize and celebrate progress while highlighting opportunities for further value creation

Strengthen portfolio oversight

Monitor performance over the hold period to assess the effectiveness of sustainability initiatives, identify best-practices, and pinpoint companies requiring additional support



> *The EDCI benchmark is the best available in the private markets*
> **- EDCI GP Member**

> *EDCI benchmarking outputs have offered valuable insight into how our portfolio companies perform relative to their peers*
> **- EDCI GP Member**

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Sustainable Value Creation Insights | A core element of the EDCI's mission is advancing our understanding of sustainable value creation in private markets

Sustainability in Private Markets, 2026



BCG's fourth annual report provides an overview of how sustainability is increasingly being linked to measurable value creation, alongside insights on the rapid growth in Artificial Intelligence and the challenges and opportunities this poses

Member Insights Compendium



EDCI members access an exclusive version of BCG's insights report, providing 200+ pages on key trends across all initiative metrics

Commercial Outcomes Compendium



The EDCI's Commercial Outcomes Working Group (in partnership with NYU Stern) is focused on developing methodologies and insights on how driving progress on EDCI metrics links to sustainable value creation

Members can participate in the working group and receive a copy of the insights developed by this group

Member testimonials| The initiative is creating significant value for GPs and LPs alike

We've been able to use the EDCI benchmarks in a number of ways to help portfolio companies drive improvements, including **enabling us to identify opportunities for value creation** across the portfolio

- Carletta Ooton, Head of Responsible and Sustainable Operations, Apollo Global Management



The EDCI platform has been very helpful to **efficiently collect data** and **enable more effective engagement** on key sustainability topics with our GPs

- Maaike Van der Schoot, Head of Responsible Investment, Carlyle AlpInvest



We have found the **uniform data collection, "single source of truth" and industry benchmarking to be highly valuable** to both us as a GP in reviewing our businesses, but also for the PortCos themselves as they have welcomed receiving the benchmarking data

- Mark Lewis, Managing Director, Lime Rock New Energy



Having the additional check on our data through the data validation process is helpful for our own internal checks and balances; **the EDCI helps us build better quality data over time.**

- Sarah Pang, Head of ESG & Sustainability, Affinity Equity Partners



EDCI helps us to have **more targeted engagements with GP networks** and helps to focus the discussion on the most meaningful metrics.

- Thibaud Roulin, Investment Manager Private Equity, Pictet



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Table of Contents

1. Overview of EDCI

2. EDCI membership value proposition

3. EDCI membership options for GPs

4. How to get involved

Membership Context |

Two membership levels, designed around how you want to engage with the EDCI



A trusted peer community

A community of GPs and LPs driving convergence around meaningful sustainability metrics for the private markets

400+
GP and LP members



A choice of membership levels

Membership is designed to allow you to opt in for your desired level of features and engagement

2 levels
to choose from



Free 1-year trial

For all new joiners to the initiative, the fee for the Essentials membership is waived for the first year

1
Year free trial



Accessible membership

Membership pricing is tiered by AUM (and includes a discount for developing countries) to ensure it is accessible to investors across the private markets

5
AUM tiers

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EDCI Essentials | All GP members benefit from a range of important features

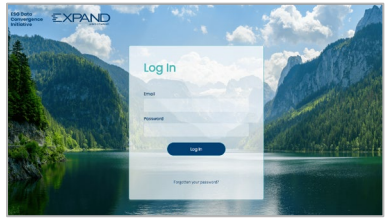
EDCI Essential | EDCI Analytics

EDCI membership benefits



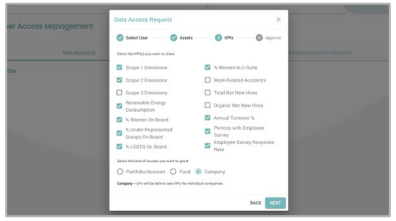
- Be listed as a member of the EDCI
- Participate in working groups, member events, and shape the future of sustainability reporting for the private markets

Robust data validation support from Expand team



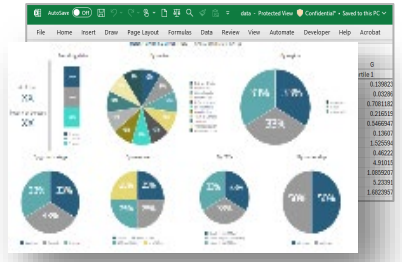
- Support from the BCG Expand team to validate sustainability data through a structured approach that enhances accuracy

Respond to LP data requests



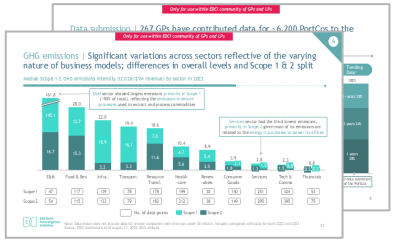
- Ability to securely respond to data requests from Data Sharing LPs
- No ability to proactively share data with LP members

Self-serve benchmarking capabilities



- Members receive full self-serve access to the EDCI benchmark, enabling independent analysis and data visualization
- Granular filtering across 76 industries and all countries[1]

Annual EDCI Insights deck



- Detailed BCG report on trends and insights about EDCI metrics, and how they connect to commercial value creation

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1. At least 10 data points must be available to return a benchmark result

EDCI Analytics | Value-added features include tailored benchmark analysis and a suite of visualization tools

Analytics: All Essential features plus…

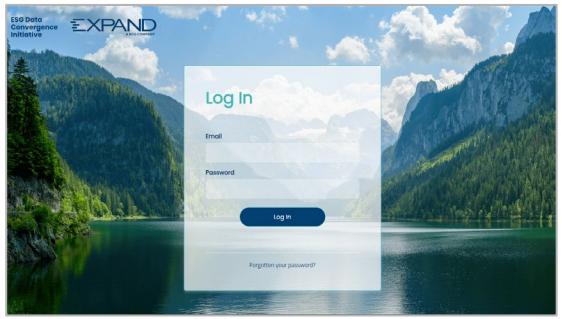
EDCI Essential | EDCI Analytics

Heatmaps & tailored benchmarks

CompanyID	Sector	Region	Emissions					
			Scope 1 GHG emissions (tCO2e per $1m revenue)		Scope 2 GHG emissions (tCO2e per $1m revenue)		Scope 3 GHG emissions (tCO2 per $1m revenue	
			BM	GP	BM	GP	BM	GP
Portco 1	Financials	EMEA	-3%	+16%	-4%	-1%	+7%	
Portco 2	Services	EMEA	+9%	+375%	-2%	+40%	+9%	+62.0
Portco 3	Services	EMEA	+9%	+57%	-2%	-4.4%	+9%	+.
Portco 5	Health Care	EMEA			-3%	+40%	+15%	+.
Portco 6	Health Care	EMEA	+9%	+7%	-3%	+5.4%	+15%	+.

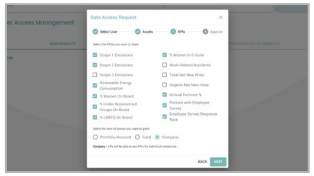
- **Heatmap view** of portfolio companies or funds against tailored benchmarks allowing you to **instantly determine outliers**
- Visualize **benchmark trends** over time to understand performance evolution
- One-pagers summarizing company, fund, or portfolio-level performance in **one digestible sheet primed for engagement**
- **NZIF and PMDR** hypotheses

Fast-tracked validation



- Have fast-tracked data validation support from BCG Expand to ensure **rapid data validation**
- Dedicated help-desk support with **response within 48-hours** year-round

Proactive data sharing



Proactively and securely share validated data with LPs in fully customizable way

Tech platform visualization

HARVEST BY DASSETI
novata
Watershed

Enable visualization of the EDCI benchmarks alongside broader financial and sustainability data in EDCI partner software solutions

Due diligence tool



Instantly generate tailored benchmarks to analyze prospective new investments' performance

See video demo here

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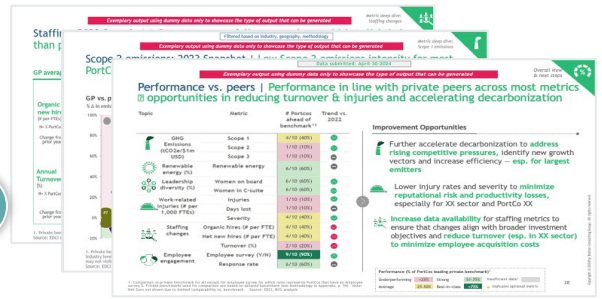
1. BCG to conduct analysis to identify most like-for-like peer-set for each portfolio company and aggregate to a like-for-like portfolio

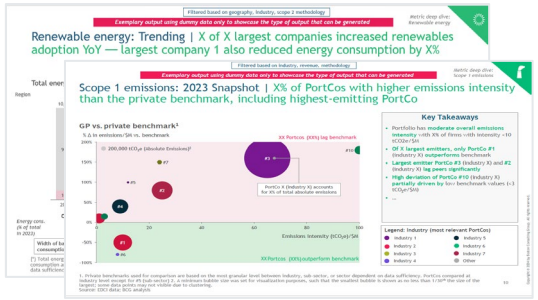
EDCI Analytics – Debrief | Analytics members can also add a custom BCG-led debrief to identify sustainability-driven value creation opportunities

EDCI Essential | EDCI Analytics

Analytics members have the opport-unity to add on …

Tailored EDCI debrief session with the BCG team





- Dedicated session with BCG's experts to unpack sustainability performance and discuss value creation opportunities
- Deep-dive analyses of snapshot and trending performance across PortCos, for each individual metric
- Portfolio-wide scorecard to visualize GP's strengths and opportunities for value creation

GPs find considerable value in debriefs, gaining clarity on performance drivers and strategic opportunities across the portfolio

> *The debriefs are valuable for providing metric-by-metric insights. They help us understand how we compare to peers, validate our areas of focus moving forward, and offer great supporting data for setting future objectives.*

> *This debrief contains really great analysis. Lots of focus will be put into PortCos that are lagging to further drive greater engagement.*

> *Thank you for the rigorous analysis; this will be very helpful as we meet with our portfolio company management teams!*

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Membership model | Rate card for 2027 by tier

2027 rate card for GPs

General Partners	Essential	Analytics	Debrief
Tier 1 (>$100B)	$18K	$36K	$10K
Tier 2 ($20-100B)	$12K	$24K	
Tier 3 ($5-20B)	$9K	$18K	
Tier 4 ($1-5B)	$6K	$12K	
Tier 5 (<$1B)	$3K	$6K	

Debriefs with the BCG team are available to Analytics members for an additional charge (per debrief)

Given the benchmark's limited coverage in developing countries (including Latin America, Africa, and developing Asia), members with a majority of their portfolio companies in these regions will receive a 50% discount

Joining for the first time?

First-year members are offered a complimentary year of the Essentials membership



Table of Contents

1. Overview of EDCI

2. EDCI membership value proposition

3. EDCI membership options for GPs

4. How to get involved

The initiative is open to any GP or LP who wants to join and supports the EDCI's principles



To learn more about the initiative, please visit our website



To join the initiative, click here



If you have any questions, please reach out to us at *info@esgdc.org*

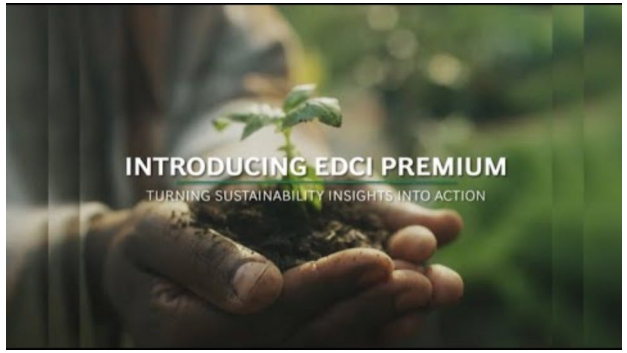
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Watch our videos to learn more about the EDCI's features and functionalities

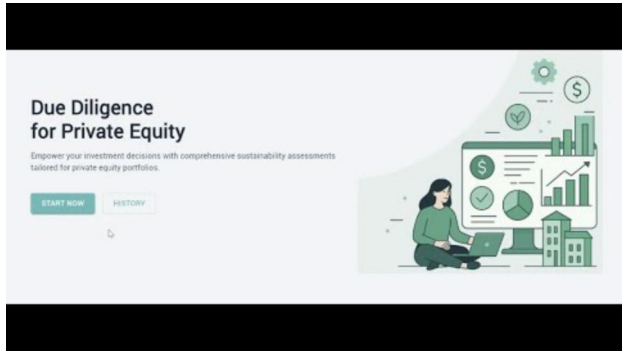
Harnessing Data to Drive Sustainable Value Creation in Private Equity



How EDCI is Creating Value for PE Investors

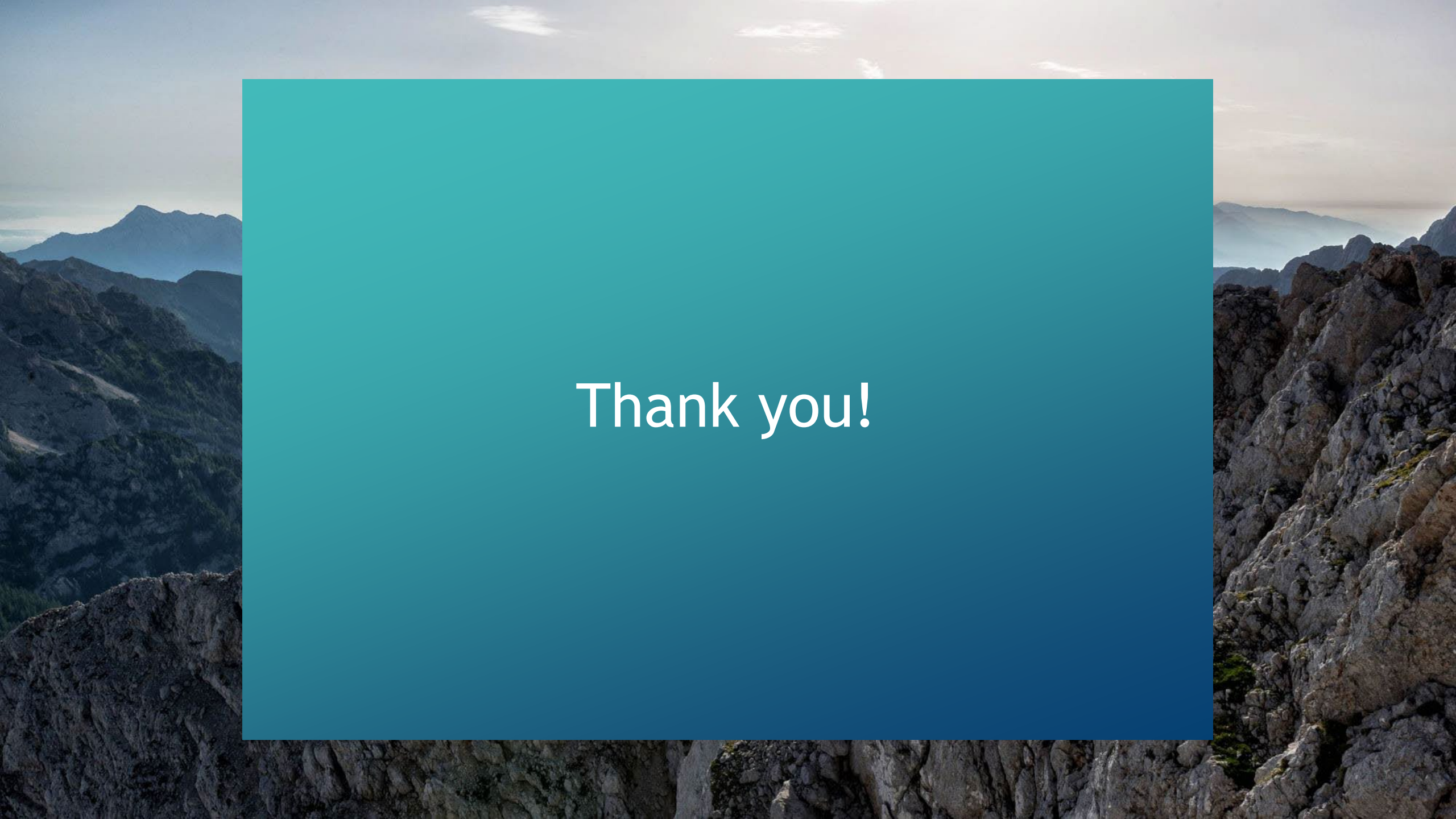


Diligence Tool Demo



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Click here to see all videos


Thank you!