

The 2015

Sustainability Leaders

A GlobeScan/SustainAbility Survey



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About the GlobeScan / SustainAbility Surveys

The GlobeScan / SustainAbility Surveys offer a unique, collaborative platform that uses research-driven insights, including targeted surveys of the most influential thought leaders in the sustainability arena from over eighty countries, to explore the biggest sustainability challenges.

The thousands of stakeholders surveyed include leading sustainable development experts and practitioners from five sectors:

- Corporate
- Government (including multi-lateral institutions)
- NGOs
- Institutional (e.g., academics)
- Service (e.g., consultants, media)

The GlobeScan / SustainAbility Surveys are in field around four times each year, and provide a regularly updated expert perspective on a range of timely topics.

You can download all the latest surveys from the [GlobeScan](#) or [SustainAbility](#) websites.



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Introduction

More than two decades ago, government leaders, scientists, NGOs and other change makers gathered in Rio de Janeiro for a historic summit that would set the direction of sustainable development (SD) for years to come. Since the Earth Summit, progress on climate change and sustainability has been uneven, and, many will argue, disappointing. As the date of the United Nations climate change conference in Paris approaches, the global community is facing another seminal year, building hopes that the December summit will mark the beginning of a new chapter with ambitious goals and more decisive action.

For this survey, we asked expert stakeholders representing business, government, NGOs and academia across 82 countries to evaluate the progress that various institutions have made since 1992 and reflect on their expectations for the next 20 years. We were not surprised to see in the results the continuation of remarkable achievement by non-state actors, including especially NGOs, which remain in a league of their own. We were also unsurprised by the extremely poor performance of national governments, according to expert stakeholders.

What did surprise us was that stakeholders' expectations for leadership are gradually becoming more balanced across a range of actors. No doubt, this shift is a result of frustration with the poor long-term achievement by state actors. But it is also a reflection of an increasingly complex global landscape with a multitude of actors expected to collaborate on solutions to systemic challenges. In this context, the perceived improvement in the performance of the United Nations is encouraging,

and this leadership will be put to the test later this year when decision-makers gather in Paris.

As usual, in this survey we asked stakeholders about who they consider to be the corporate leaders in the area of sustainability. Consistent with the past four years, Unilever's global reputation among corporations is judged by experts to be unparalleled, with the leadership gap this year widening even further. This is a remarkable achievement by the company, especially since past leaders have tended to falter or be supplanted by others within a few years of claiming the top of the ranking.

This year we also asked about which NGO and national leaders are standing out from the pack, and why. Among NGOs, the World Wildlife Fund (WWF) and Greenpeace emerge as global top-performers and their perceived ability to engage a range of stakeholders once again underscores the critical importance of collaboration for SD progress.

When it comes to national governments, Germany and Nordic countries are believed to outperform other countries on the global stage, but Costa Rica and China are also emerging as strong challengers to European dominance in the SD sphere.

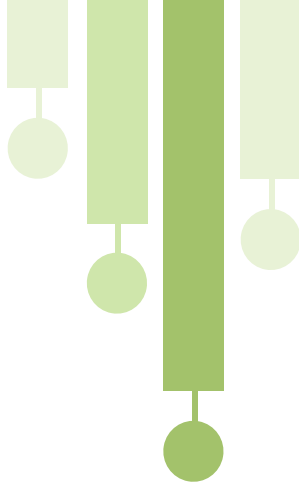
Regardless of whether talking about corporations, NGOs or governments, survey respondents were clear: values are paramount to leadership. Without vision and commitment, progress will remain out of reach. We hope that this report will inspire new thinking, bold action and fresh collective effort.



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Survey Methodology



<i>Demographics</i>	Government	NGO	Academic / Research	Corporate	Service / Media	Other	Total
Africa / Middle East	7	10	17	10	10	4	58
Asia	10	11	26	18	17	2	84
Europe	11	41	88	82	68	18	308
Latin America / Caribbean	11	9	20	23	16	5	84
North America	20	30	58	64	59	8	239
Oceania	5	1	17	9	5	6	43
Total	64	102	226	206	175	43	816

- 816 qualified sustainability experts completed the online questionnaire from March 17 to April 7, 2015.
- Respondents were drawn from: corporate, government, non-governmental, academic/research, service/media, and other organizations.
- Experts surveyed span 82 countries in Asia, Africa / Middle East, Europe, North America, Latin America / Caribbean, Australia / New Zealand, and comprise a highly experienced respondent pool:
 - 69 percent have more than ten years of experience working on sustainability issues.
 - 24 percent have five to ten years of experience.
 - 7 percent have three to four years of experience.
 - Respondents with less than three years of sustainability experience have been excluded from the results.

Key Findings

- Non-state actors continue the trend of significantly outperforming all other organizations on their SD leadership record. The contribution of NGOs since the 1992 Earth Summit in Rio is ranked highest by polled experts, followed by social entrepreneurs, academic institutions and social change movements.
- The leadership of national governments since 1992 is ranked lowest and is viewed negatively by close to two-thirds of respondents. The United Nations is the only actor who receives higher scores compared to three years ago when experts were last asked the same question.
- While national governments continue to face the most pressure to lead on SD issues, since 2012 expectations have become more balanced across a range of actors. Expectations for governments to lead have decreased, with other actors—e.g. the private sector, NGOs, the United Nations — now expected to more evenly share the responsibility.
- Perceptions of performance and expectations for leadership remain deeply misaligned. The discrepancy is most pronounced for state actors, who are expected to be at the helm of driving the agenda but whose perceived performance is very poor. In contrast, NGOs are not expected to lead but their perceived contribution is stellar.
- In terms of corporate sustainability leadership, for the fifth year in a row Unilever tops the rankings of corporate sustainability leaders with the leadership gap widening each

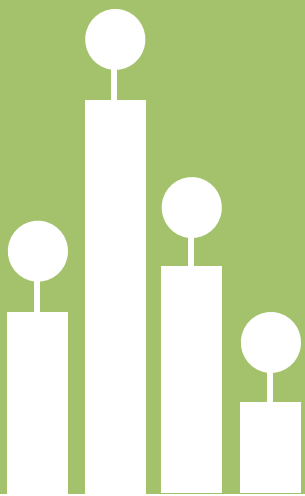
year. The company holds its top position in all regions of the world with the exception of Latin America and Oceania, where Natura and Interface, respectively, are considered by experts to have the best reputation.

- WWF and Greenpeace alternate in the top position in NGO leadership rankings across different regions of the world. Experts believe that the ability to effectively engage a range of stakeholders and drive collaborations is the defining attribute of a leading NGO.
- Country leadership rankings are dominated by Germany and Nordic governments, with Costa Rica being the highest-ranked country outside of Europe. China’s status as an emerging leader on SD is confirmed by its No. 8 position on the global list and reputation being most prominent in the eyes of experts from Asia and Oceania.
- While the ability to engage and collaborate drives the reputation of NGOs, polled experts primarily measure the leadership performance of governments and companies by how well their values align with sustainable development. Close to a quarter of respondents also now believe that corporate leadership requires integration of sustainability into the core business model. For governments, effective action on energy and climate change is viewed as the second most-important quality of a sustainable development leader.





*Institutional Leaders on Sustainability &
Progress Since the 1992 Earth Summit in Rio*



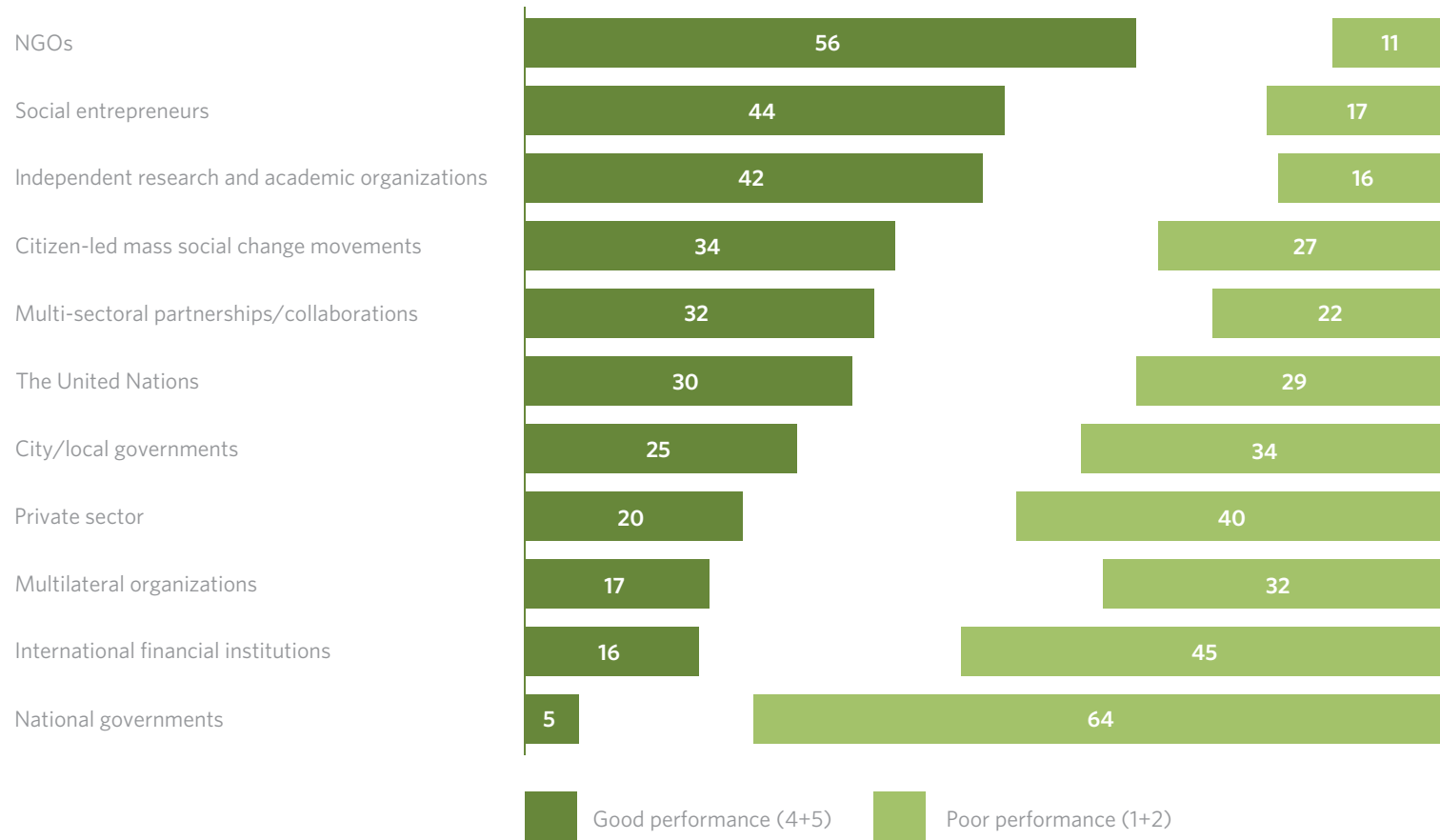
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Advancing Sustainable Development Since Rio: Non-State Actors Set the Bar for Excellence

Non-governmental actors have played a leading role in advancing the sustainable development agenda since the 1992 Earth Summit in Rio. Polled experts believe that NGOs have outperformed all other organizations by a wide margin. They are closely followed by social entrepreneurs, academic institutions and social change movements. Only a small fraction of respondents positively view the contribution of national governments, who ranked the worst on the list of 11 types of organizations. The performance of the private sector is also ranked relatively low.

“Excellent” vs “Poor”



Question

How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio?

Please use the 5-point scale provided (where 1 is “poor” and 5 is “excellent”).

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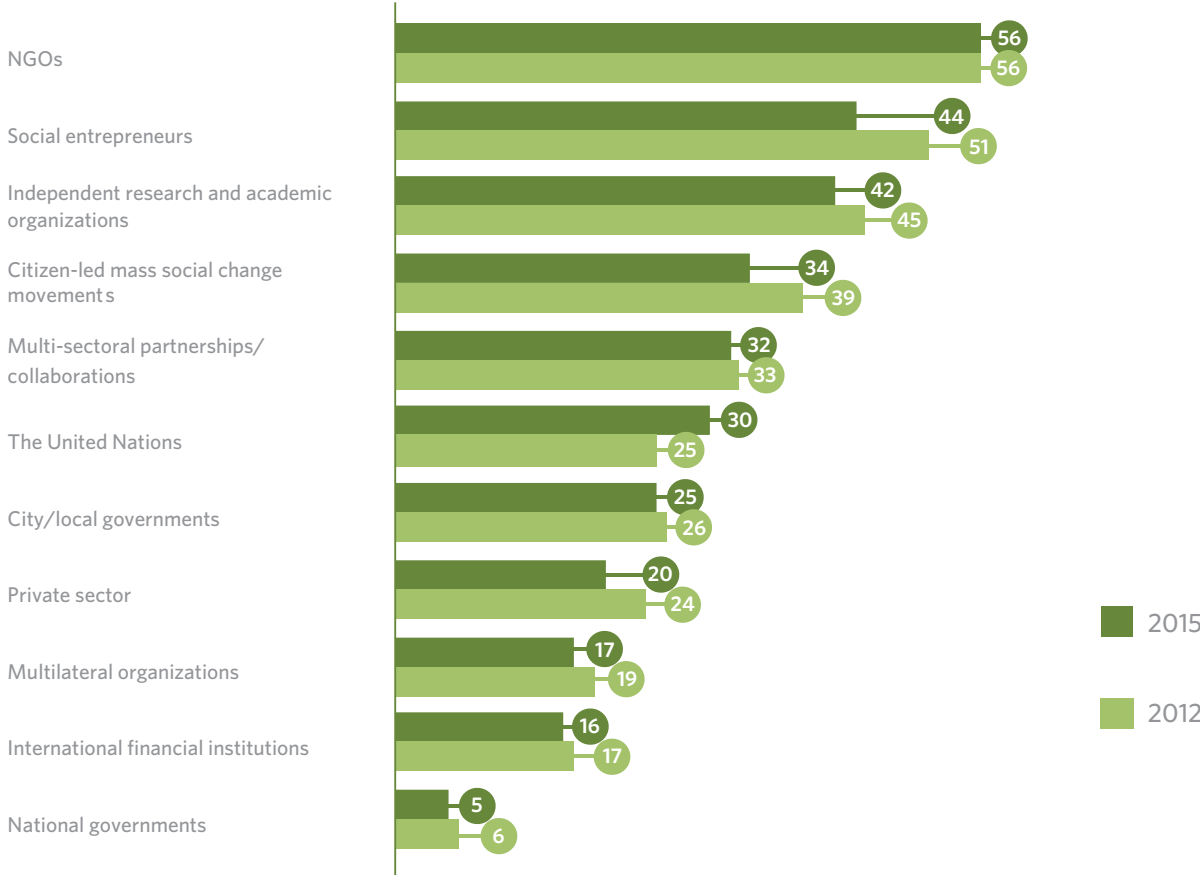
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Leadership Since 2012: Only the United Nations Makes Gains on Perceived Contribution to SD



Compared to 2012, experts' view of the performance of most institutions has slackened somewhat. One exception is the United Nations, which is considered to be performing better. The perceived performance of NGOs remains the same.

"Good performance" (4+5)



Question

How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio?

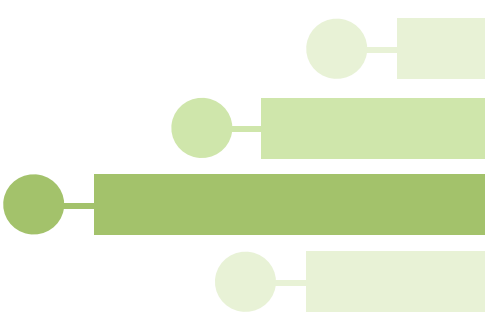
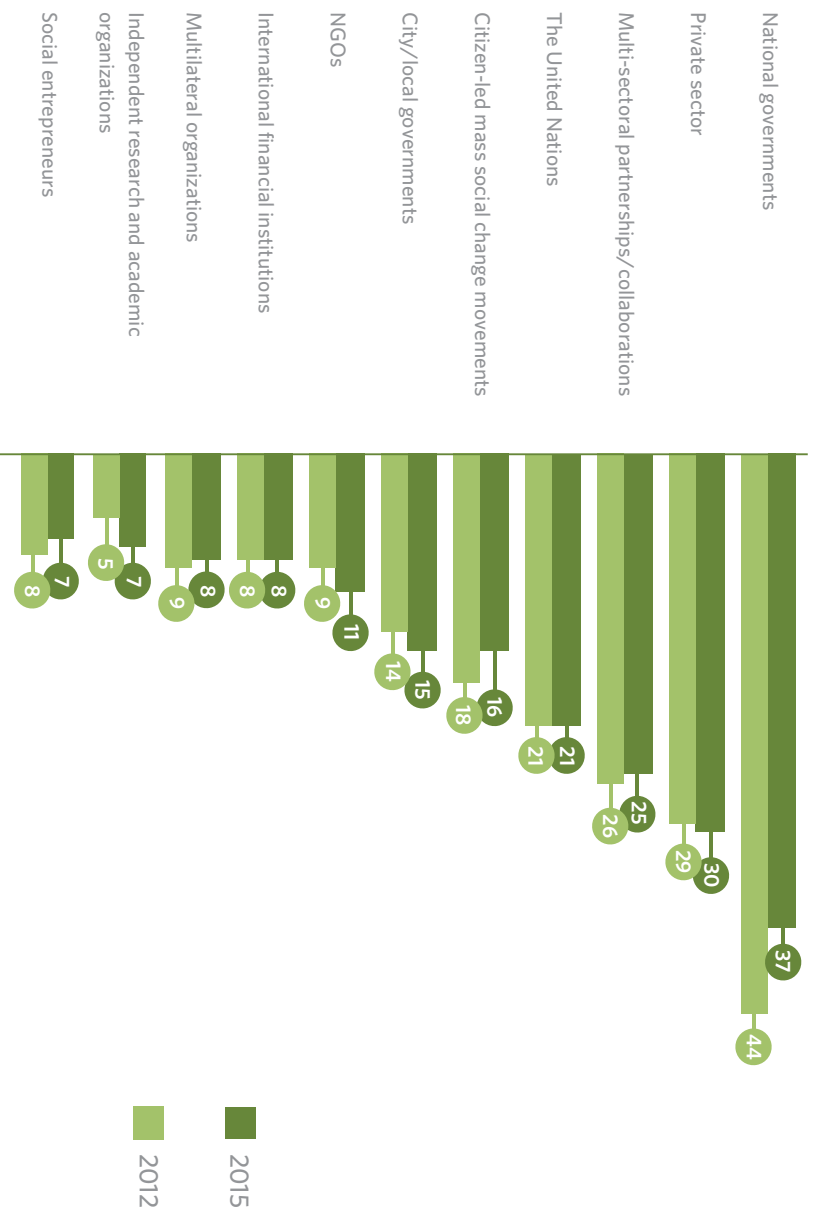
Please use the 5-point scale provided (where 1 is "poor" and 5 is "excellent").

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Spearheading the Sustainable Development Agenda: Governments, Companies Facing High – but Slightly More Balanced – Expectations

National governments continue to face the most pressure to lead on sustainable development issues. However, since 2012, expectations have become more balanced across a range of actors. Expectations for governments to lead have decreased, with other actors – e.g. the private sector, NGOs, the United Nations – now expected to more evenly share the responsibility.

Prompted, Total Mentions



Question

In your opinion, who should lead the sustainable development agenda over the next twenty years?

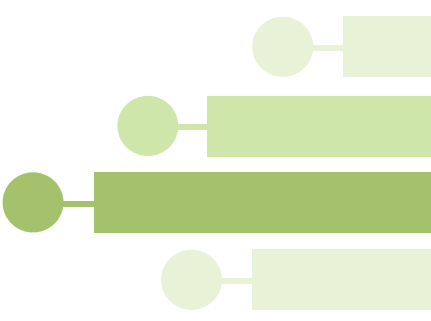
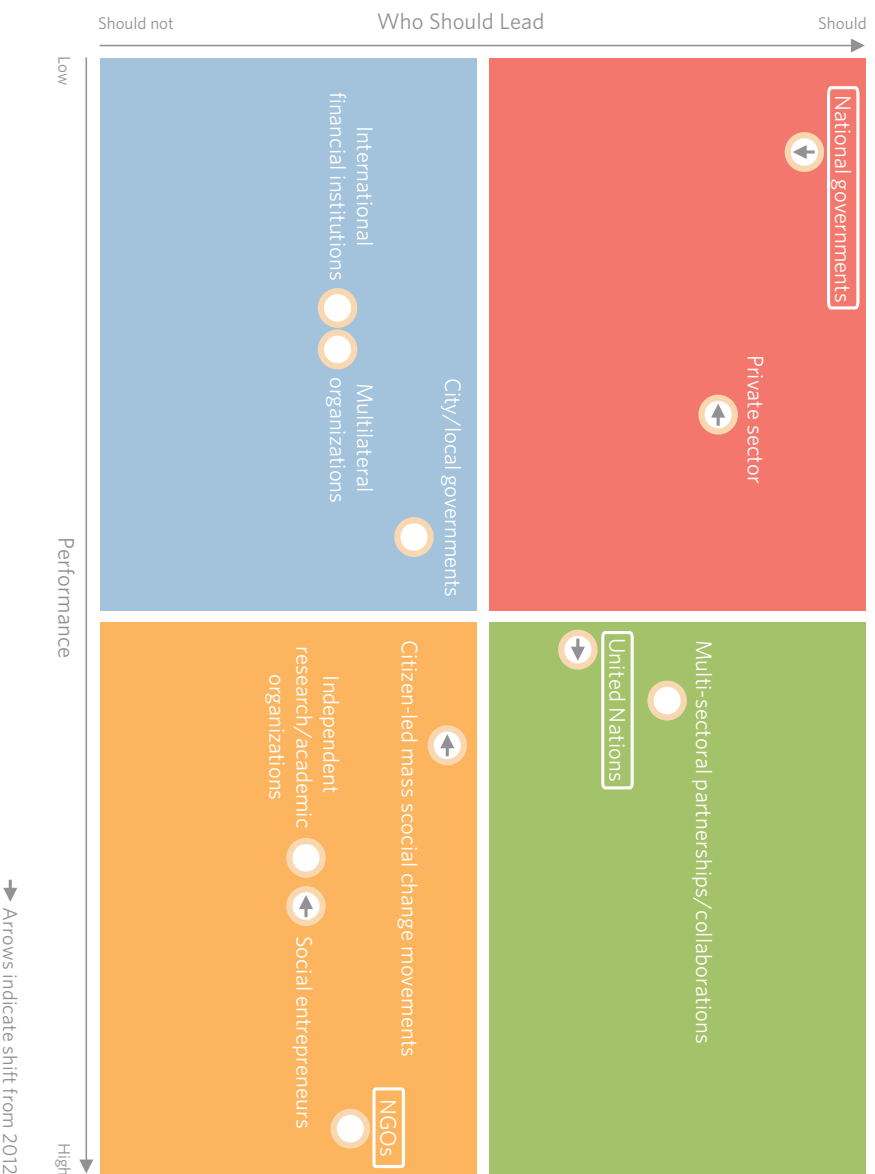
Please select the **two** most suited from the following list.

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Expectations and Performance Record at Odds for Governments, NGOs

Perceptions of performance and potential for leadership remain misaligned. Both national governments and the private sector are expected to be spearheading the sustainable development agenda, but their performance continues to be viewed as poor. Conversely, while NGOs, social entrepreneurs and academics are not expected to be the core drivers of progress on sustainable development, their performance is rated very high by experts. In contrast to 2012, when the UN was viewed by experts as an organization that should lead but at the same time was thought to be performing poorly relative to other actors, new results now place the UN among those best positioned to lead the agenda.



Question

How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio?

Please use the 5-point scale provided (where 1 is "poor" and 5 is "excellent").

In your opinion, who should lead the sustainable development agenda over the next twenty years?

Please select the **two** most suited from the following list.

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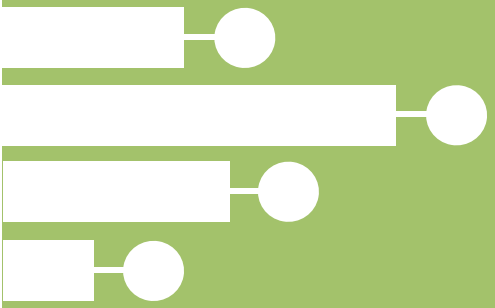
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Corporate Leaders on Sustainability

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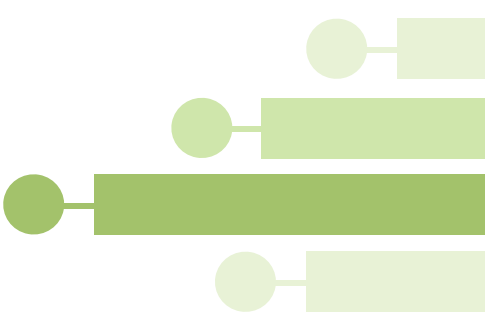
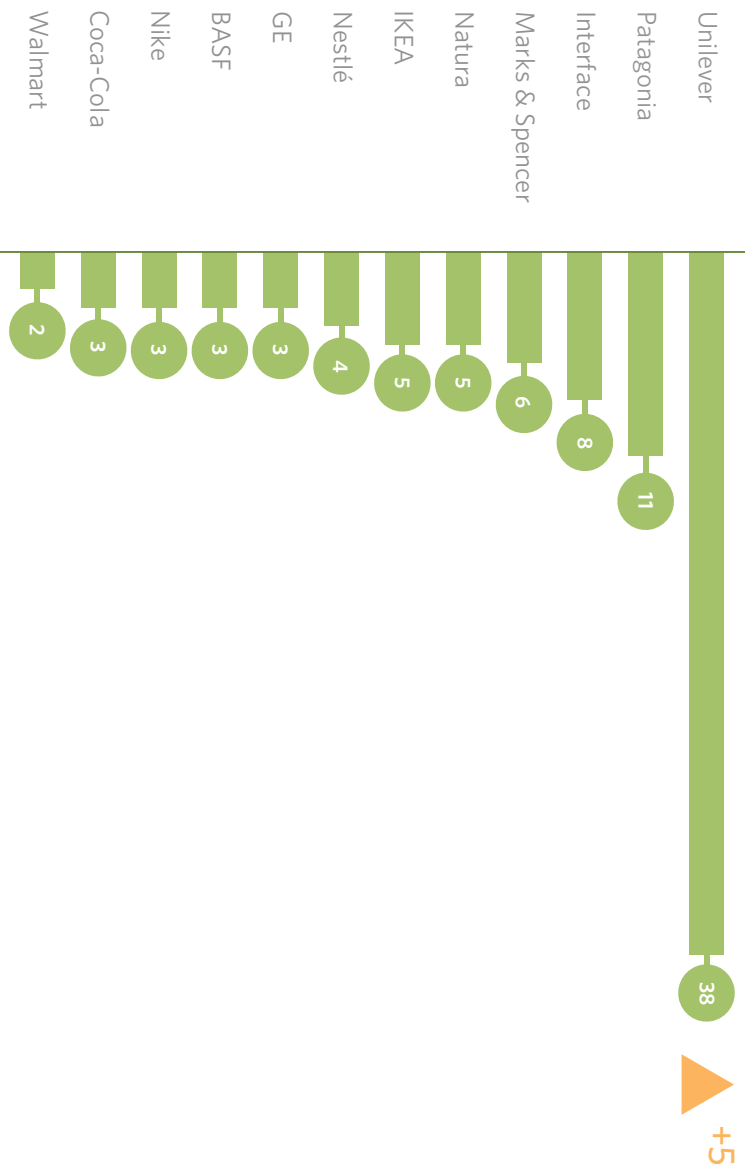
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Unilever Widens Leadership Gap, Leaves Competitors Behind

After dominating our corporate sustainability leadership ranking for more than five years, Unilever has further improved its position and is now ahead of competitors by 27 percentage points. Patagonia, the only other company to be mentioned by more than 10 percent of experts, remains in second place.

% of Experts



Question

What specific companies do you think are leaders in integrating sustainability into their business strategy?

Please enter a maximum of 3 companies in the spaces provided.

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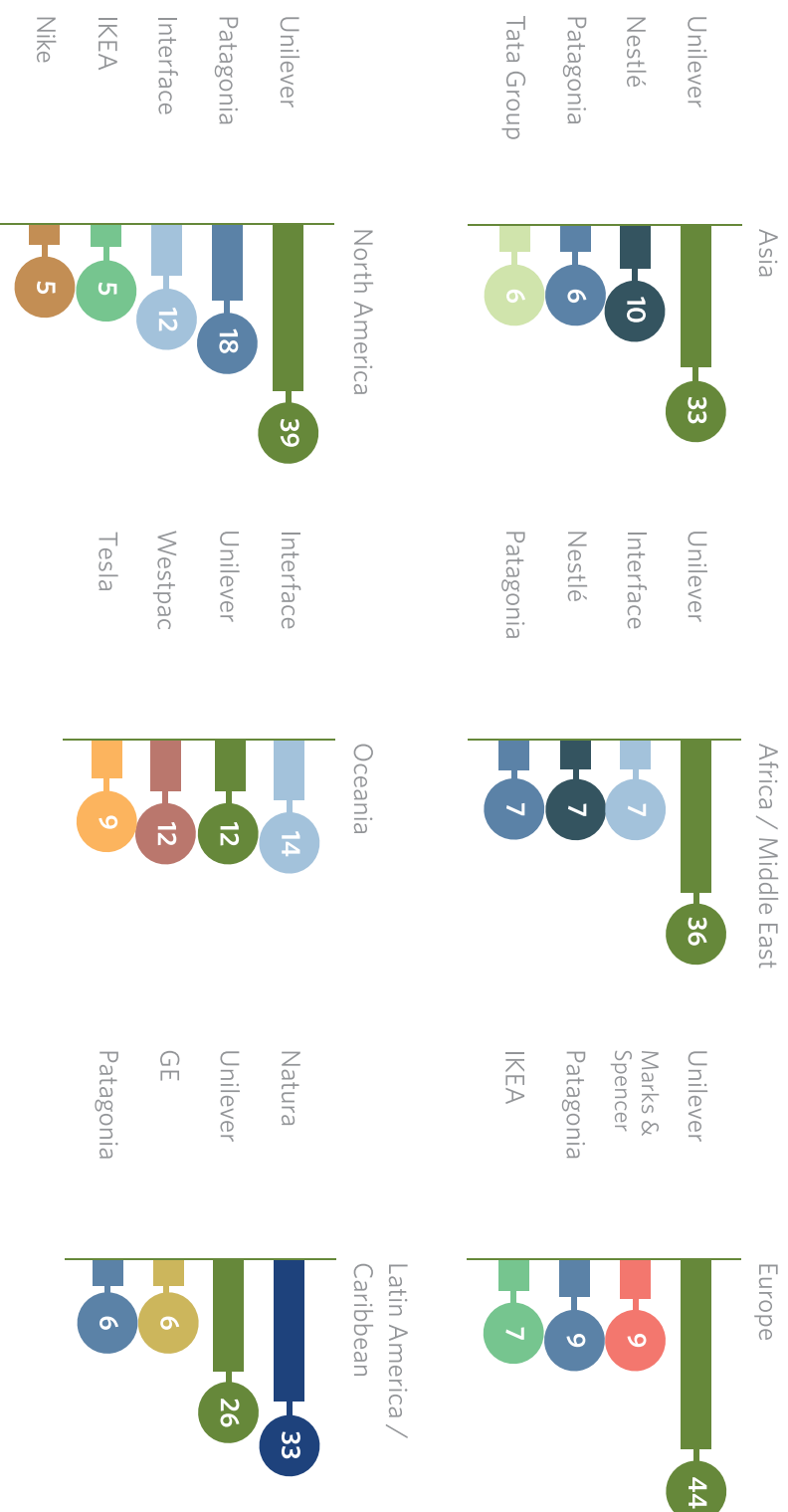
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Corporate Leadership Patterns Consistent Across Regions

We continue to see consolidation around a few leadership companies across the regions. Unilever is in a leadership position throughout much of the world, with the leadership margin being the largest in Europe. However, Natura is perceived as the undisputed sustainability leader among Latin American experts, mentioned by one-third, and Interface leads in Oceania.

% of Experts, by Region



Question

What specific companies do you think are leaders in integrating sustainability into their business strategy?

Please enter a maximum of 3 companies in the spaces provided.

The 2015

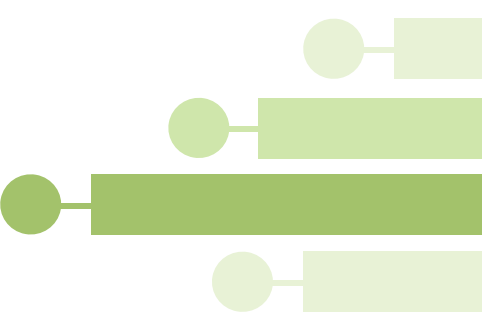
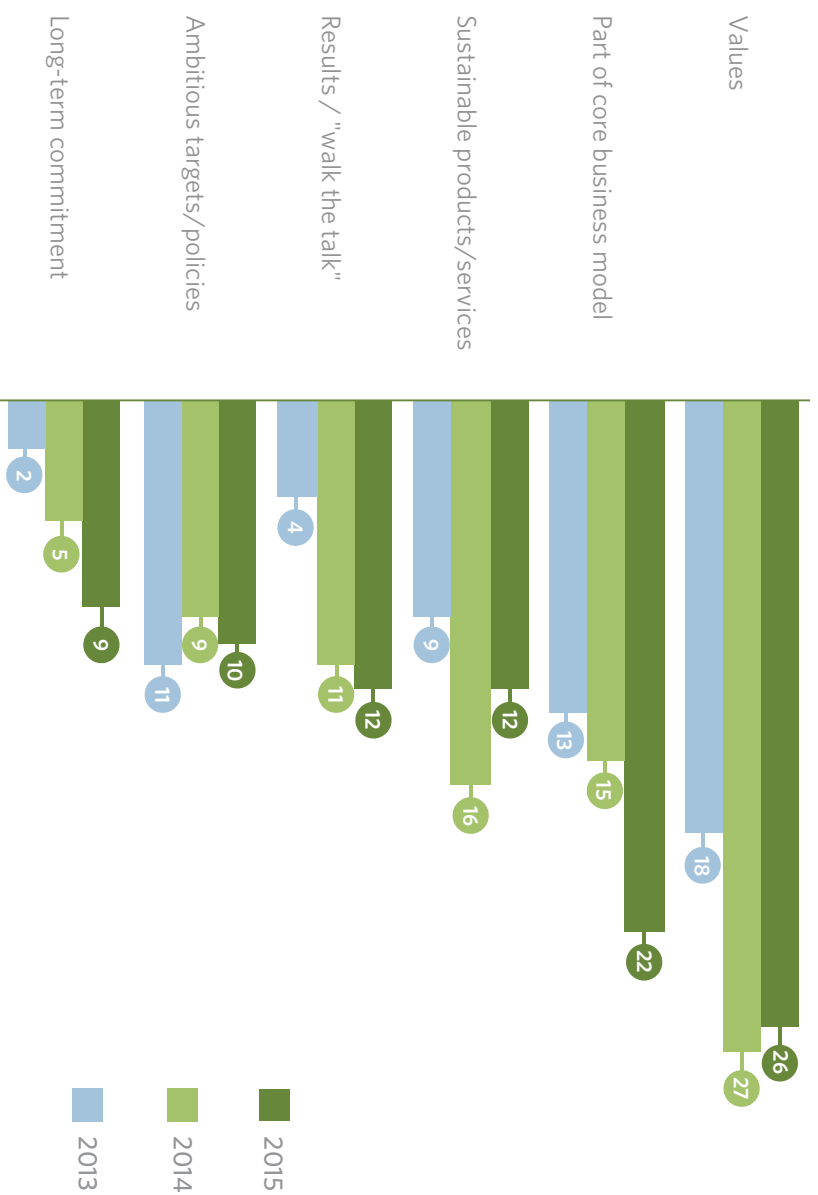
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Values, Business Model Drive Corporate Reputation

Integrated sustainability values, including the beliefs of executive leadership, are seen as a key marker of corporate leadership. However, an increasing number of experts maintain that corporate leadership in sustainable development is mainly driven by making sustainability part of company's core business model.

% of Experts



Question

Why do you think [INSERT COMPANY #1 FROM Q3] is a leader in sustainable development?

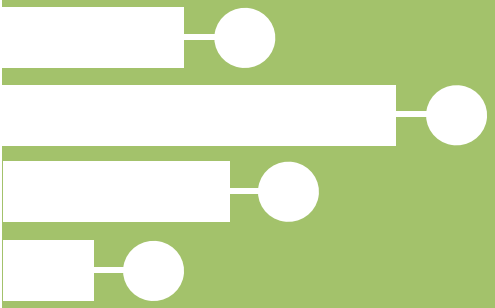
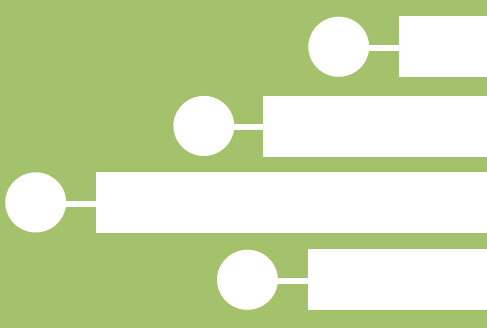
Please enter up to two responses in the spaces provided.

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NGO Leaders on Sustainability



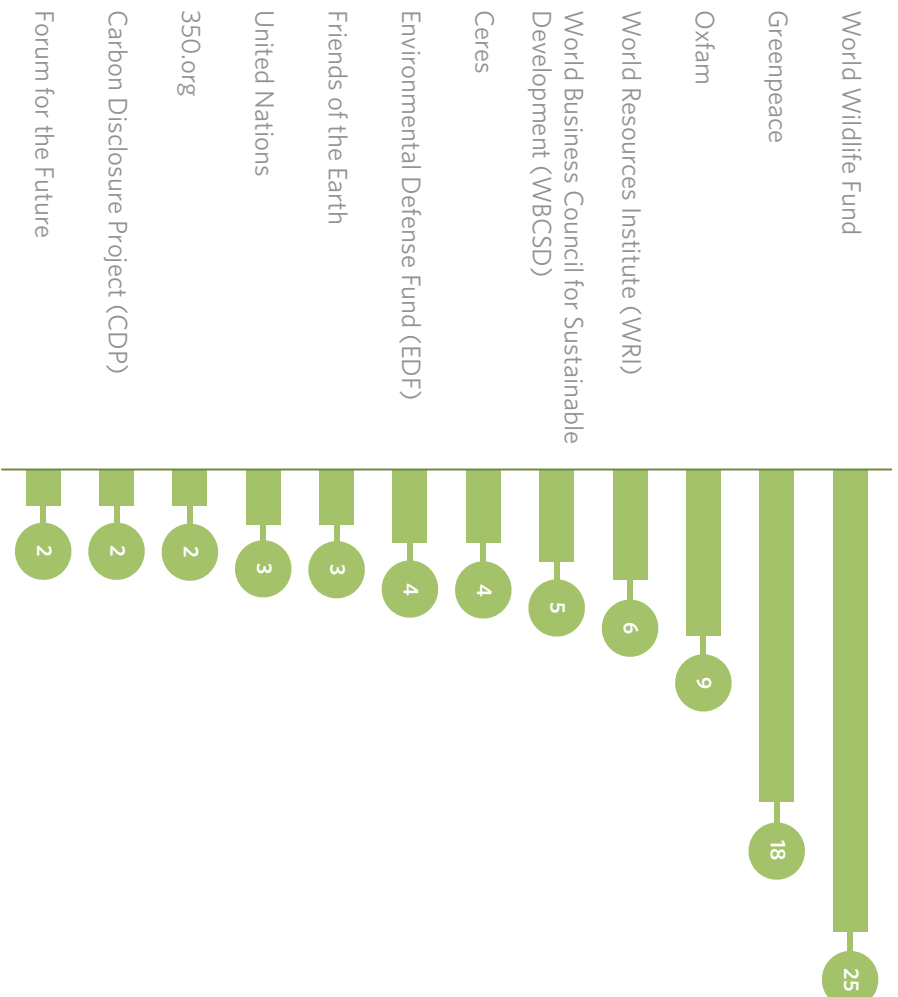
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World Wildlife Fund Leads Rankings of Non-Governmental Actors

Only a few NGOs stand out as SD leaders in the eyes of experts. One quarter of experts globally mention World Wildlife Fund as a leader in advancing sustainable development, making it a strong presence among NGOs in this space. Greenpeace also stands far ahead of the pack.

% of Experts



Question

What specific NGOs do you think are leaders in advancing sustainable development?

Please enter a maximum of 3 NGOs in the spaces provided.

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WWF, Greenpeace Maintain Leadership Position Across Regions

Experts across the different regions mainly agree on which NGOs are leaders on sustainability, with mostly the same organizations appearing in the top tier. WWF and Greenpeace dominate the space in all regions, with the exception of Greenpeace receiving notably fewer mentions among North American experts. WWF enjoys the strongest reputation among European and Latin American / Caribbean respondents, while the leadership of Greenpeace is most prominent in Oceania.

% of Experts, by Region



Question

What specific NGOs do you think are leaders in advancing sustainable development?

Please enter a maximum of 3 NGOs in the spaces provided.

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Engagement and Collaboration Efforts Drive NGO Leadership

Experts believe that the ability to effectively engage a range of stakeholders and drive collaborative initiatives is the main quality distinguishing NGO leaders, highlighting the growing importance of partnerships in sustainable development. This is closely followed by an organization's ability to exert influence, and the effectiveness and impact of its programs, which was the second most-frequently mentioned attribute of an NGO leader.

% of Experts



Question

Why do you think [INSERT NGO#1 FROM Q5] is a leader in sustainable development?

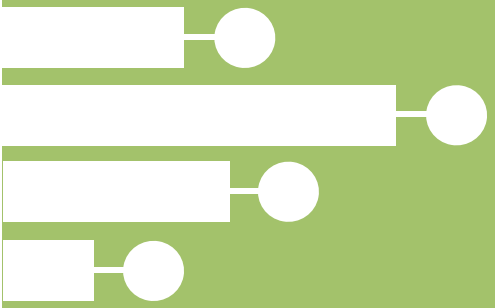
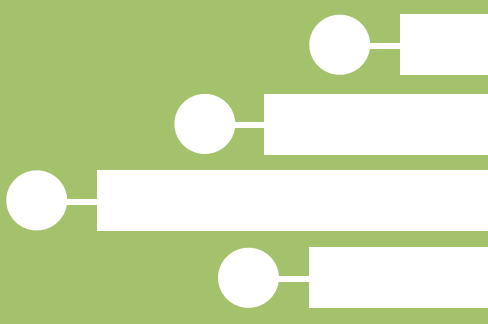
Please enter up to two responses in the spaces provided.

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National Government Leaders on Sustainability



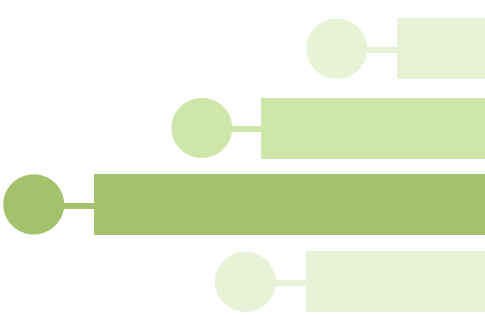
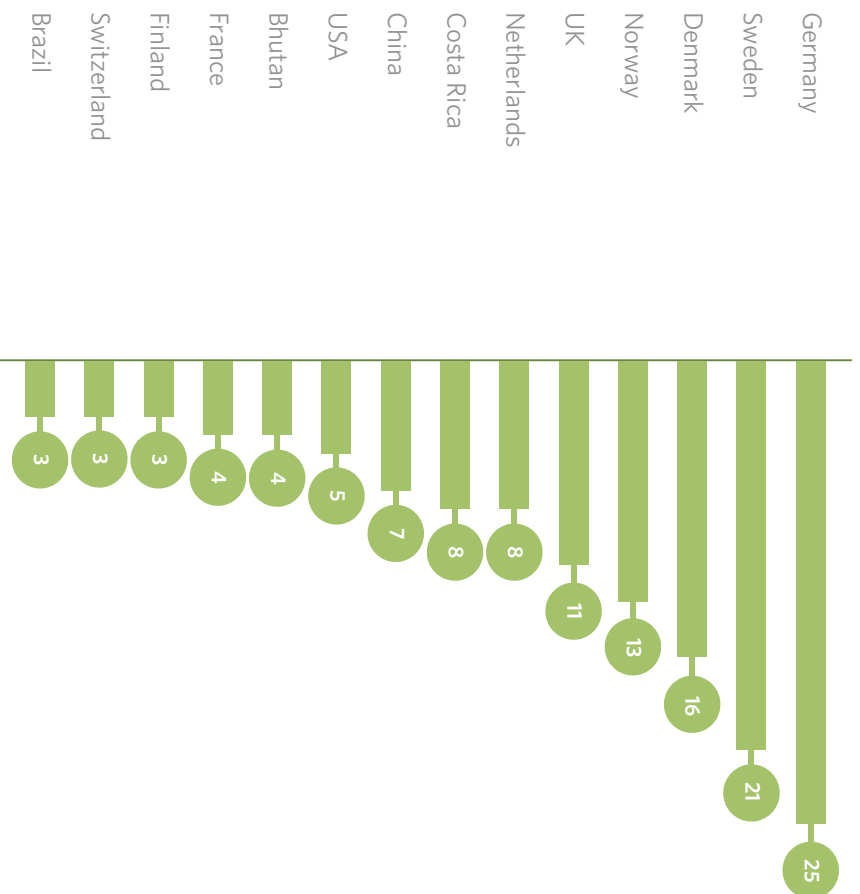
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Germany, Scandinavian Governments Dominate Country Rankings

Germany is viewed as a SD leader among national governments by one quarter of global experts, ahead of Nordic countries Sweden, Denmark, and Norway, and with the UK rounding out the top five. Costa Rica, almost alone among Latin American countries on experts' radar, stands out in the top tier of national governments leading on SD. China is the highest performing Asian country and appears among the top ten global country sustainability leaders.

% of Experts



Question

What specific national governments do you think are leaders in advancing sustainable development?

Please enter a maximum of 3 national governments in the spaces provided.

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Germany and Sweden's Leadership Consistent Across Geographies

Experts across all regions agree on either Germany or Sweden as leading national governments in the area of SD. Norway, Denmark, and the UK are also mentioned as leaders in nearly all regions. In Asia and Oceania, China is emerging as a new leader challenging the dominance of European countries.

% of Experts, by Region



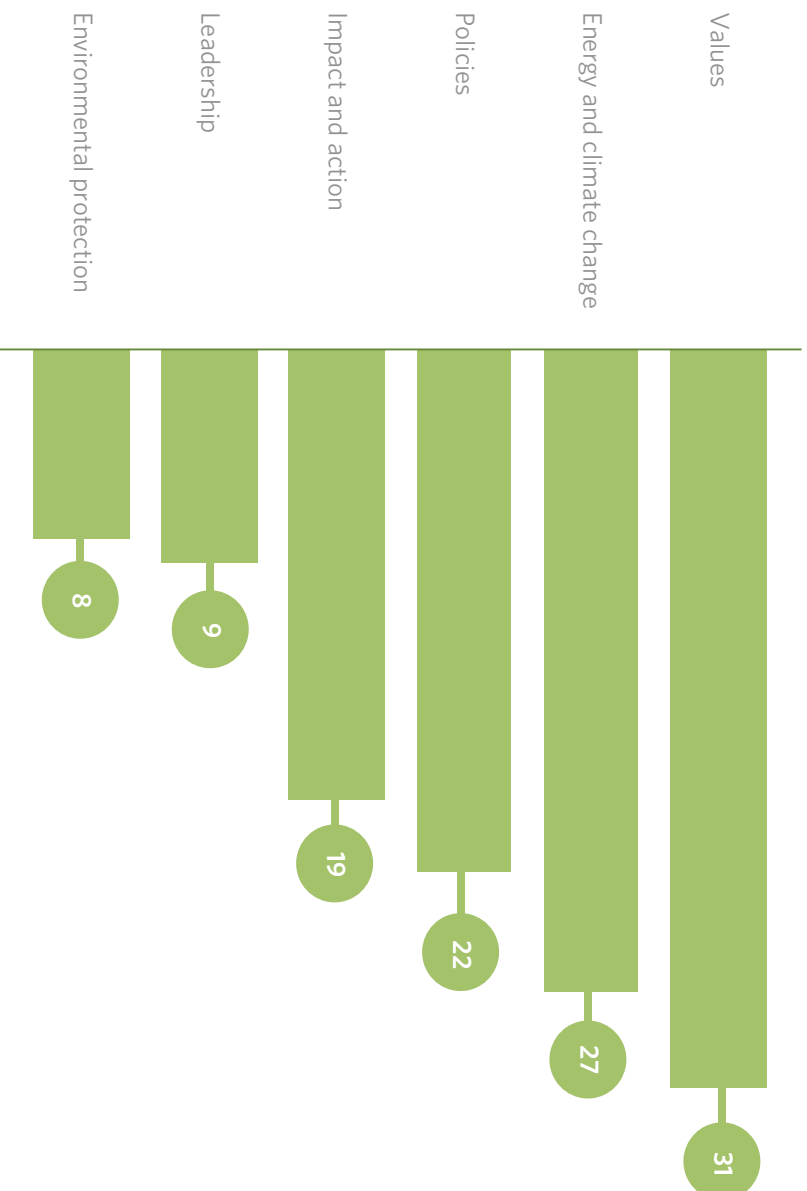
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 What specific national governments do you think are leaders in advancing sustainable development?
 Please enter a maximum of 3 national governments in the spaces provided.

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Values Seen by Experts to Drive SD Leadership among National Governments

A country's values, including its culture of support for SD both among leaders and the population, is considered by experts to be the main driver of perceived leadership among national governments. Experts also associate action on energy and climate change — especially aggressive goals around renewable energy — with SD leadership, followed by a country's policies being particularly ambitious, innovative, comprehensive, or strict. Being able to show results is also seen as a key factor of SD leadership among national governments.

% of Experts



Question

Why do you think
INSERT NATIONAL
GOVERNMENT#1 FROM
Q7J is a leader in sustainable
development?

Please enter up to two
responses in the spaces
provided.

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For Further Information, Contact:

For more information on The GlobeScan / SustainAbility Survey, contact:



*Eric Whan
Sustainability Director, GlobeScan
eric.whan@globescan.com*



*Tove Mahnquist
Research Manager, GlobeScan
tove.mahnquist@globescan.com*



*Chris Guenther
Research Director, SustainAbility
guenther@sustainability.com*



*Aiste Brackley
Research & Trends Manager, SustainAbility
brackley@sustainability.com*



GlobeScan Incorporated
Toronto: +1 416 962 0707
San Francisco: +1 415 874 3154
London: +44 20 7253 1450

www.globescan.com

SustainAbility, Ltd.
New York: +1 718 210 3630
San Francisco: +1 510 982 5003
London: +44 20 7269 6900

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