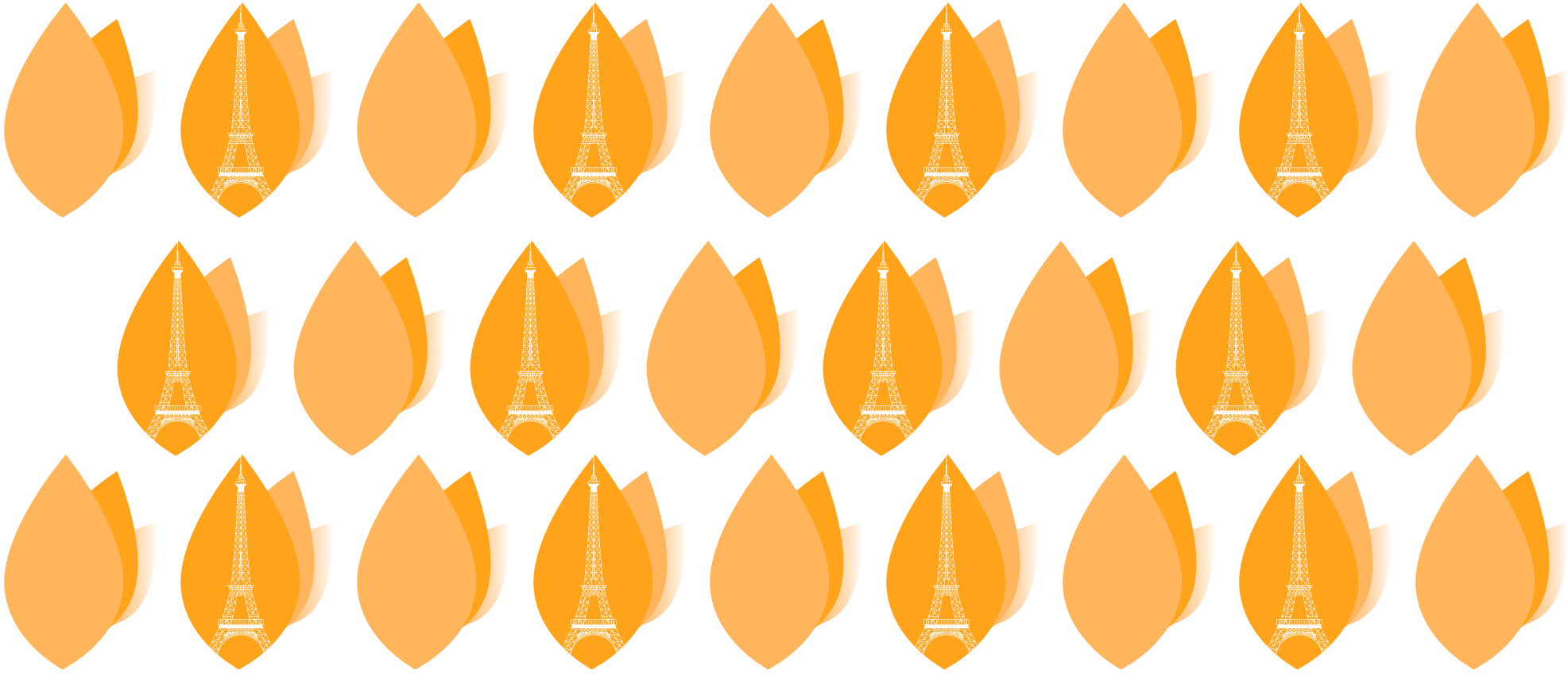
The 2015 Climate Survey

Leadership on Climate Change: COP21 & Beyond

A GlobeScan/SustainAbility Survey



In partnership with THE CLIMATE GROUP

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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 sixty 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 publish around five reports 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

In December 2015, the governments of more than 190 nations will convene at the UN Climate Change Conference (COP21) in Paris to negotiate a new international agreement to reduce global greenhouse gas emissions. Following scant progress in Copenhagen (COP15) in 2009, and in light of increasingly stark evidence of ongoing climate disruption, the window of opportunity for the international community to act is rapidly closing, and the stakes for the Paris summit are high.

We asked global experts representing business, government, NGOs and academia to share their expectations for the COP21 meeting and provide insights about the role of various actors and climate strategies post-2015. While the overwhelming majority believe COP21 will produce a new international agreement, fewer than one-third are confident that it will have binding powers. These results reflect measured expectations for the meeting, likely a result of past disappointments, but also an overall poor track record of most institutions on climate change, which respondents noted in the survey.

Experts agree that successful implementation of the COP21 treaty will depend on active participation of many actors. However, they insist the role of two institutions in particular – national governments and the private sector – will be critical. While state leaders have become accustomed to being in the hot seat, the post-Paris period is likely to demand much stronger commitment and bolder action from business.

Asked to evaluate the recent record of companies on climate change, experts identify Unilever as the frontrunner, mainly because of commitment from senior leadership and ambitious targets. Other recognized leaders are technology companies such as Tesla, Google and General Electric, and consumer giants IKEA and Walmart. For companies, renewable energy investments and development of new technologies and solutions are seen as the primary marks of leadership. The companies will have to resort to a wide range of strategies to meaningfully participate in the implementation of the COP21 framework, but our survey shows that increasing the use of alternative energy and reducing supply chain emissions will be key.

Introduction (contd.)

As the post-Paris framework is finalized, governments will need to revisit a range of policies to achieve further reductions in emissions. Experts indicate that economic instruments (ahead of regulatory measures, behavioral approaches and other strategies) continue to be the most effective approach to contain global warming. Abolishing fossil-fuel subsidies is the most powerful economic instrument in the hands of policymakers, respondents believe.

The perceived role of diplomacy and cooperation is also very important and will continue to grow, our survey shows. While the UN has played a leading role rallying governments to consolidate their efforts ahead of COP21, the successful implementation of future frameworks will likely depend on a much more widely shared effort to focus less on opposing interests and competition, and more on the collective commitment and determination to address issues in a real and substantive way.

Further Information

- COP21 Website
- United Nations Framework Convention on Climate Change (UNFCCC)
- United Nations Environment Programme (UNEP)
- Climate Action

Survey methodology

Demographics	Government	NGO	Academic / Research	Corporate	Service / Media	Other	Total
Africa / Middle East	8	8	12	6	10	1	45
Asia	5	17	20	15	10	0	67
Europe	18	30	63	56	67	10	244
Latin America / Caribbean	9	9	20	10	14	0	62
North America	12	18	50	36	35	9	160
Oceania	7	0	9	8	15	6	45
Total	**59**	**82**	**174**	**131**	**151**	**27**	**624**

- 624 qualified sustainability experts completed the online questionnaire from September 15th to October 10th, 2015.
- Respondents were drawn from: corporate, government, non-governmental, academic/research, service/media, and other organizations.
- Experts surveyed span 69 countries in Africa / Middle East, Asia, Europe, Latin America / Caribbean, North America, and Oceania, and comprise a highly-experienced respondent pool:
    - 74 percent have more than ten years of experience working on sustainability issues
    - 22 percent have five to ten years of experience
    - 4 percent have three to four years of experience
    - Respondents with less than 3 years of sustainability experience have been excluded from the results.

Note to Readers

All figures in the charts and tables in this report are expressed in percentages, unless otherwise noted. Total percentages may not add to 100 because of rounding.

Key findings

- A majority of respondents (92%) expect that the COP21 summit will result in a new global agreement to limit emissions. However, 60% of experts believe that the agreement will not have binding powers. Only 4% of polled experts think that the international community will reach an agreement that would contain global warming under 2°C.
- Scientific institutions and civil society organizations are seen as having made the largest contribution to advancing solutions on climate change in recent years, with more than half of all respondents viewing their record positively. The UN's achievements are also viewed favorably, but respondents are critical of other institutions, especially national governments and the private sector.
- Assuming an agreement is reached, close to 90% of all respondents believe that the future contribution of national governments and business will be key to its implementation. However, gaps between recent performance and future expectations mean that both institutions will have to significantly step up their efforts.
- Among international corporations, Unilever is regarded as having made the largest contribution to advancing solutions to climate change in the last five years. More than 20% of respondents named the company as the top corporate achiever. Tesla, IKEA, Google, General Electric and Walmart are also recognized as leaders.
- Investments in renewable energy and technological innovation are the most frequently cited reasons for naming specific companies as leaders. Increasing the use of renewable energy and reducing emissions in the supply chain are seen as the most effective approach for companies to respond to climate change post-COP21.
- Economic instruments continue to be seen as the most effective approach in providing solutions to climate change on the global scale, followed by regulatory measures, but experts also note the increasing role of diplomacy and international cooperation. Meanwhile, the relative importance of new science and technology is gradually diminishing.
- More than 80% of respondents say the removal of subsidies for the fossil fuel industry and taxes on greenhouse gas emissions are the two most effective economic instruments available.
- Renewable energy – particularly solar – generation and storage are seen as the most promising technologies for reducing climate change after 2015.

Expectations for COP21

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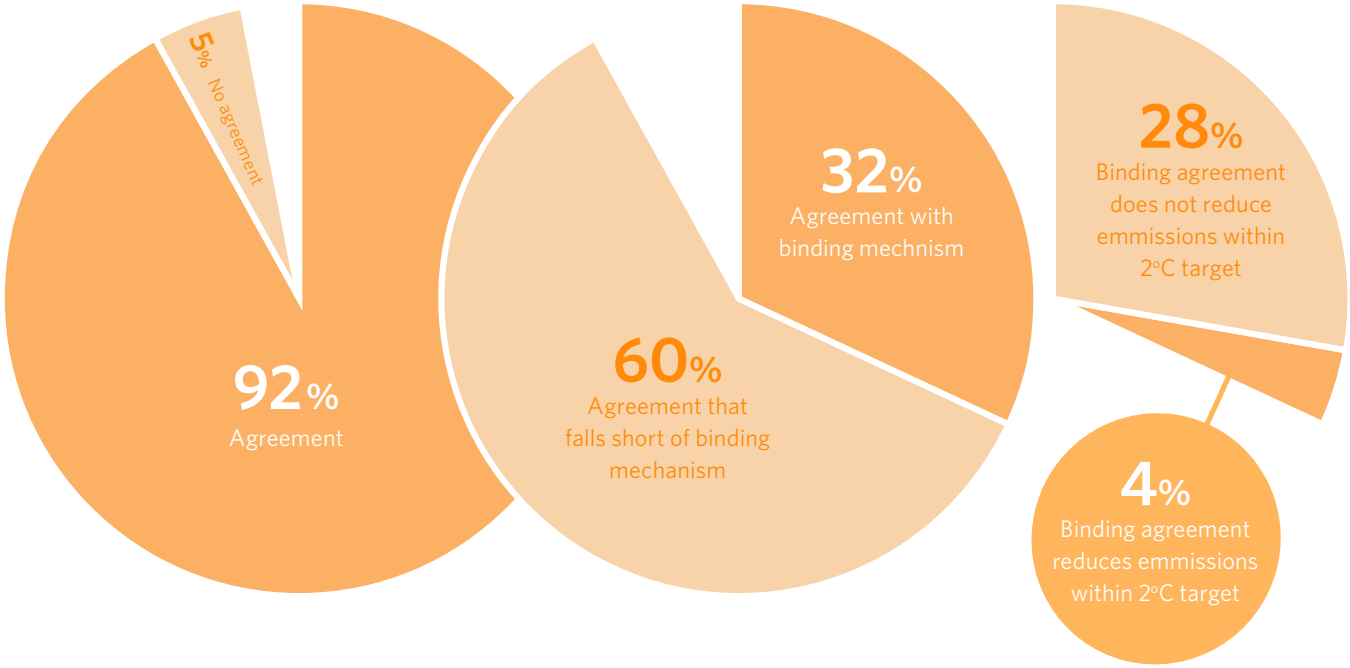
Experts predict COP21 will result in a treaty, but differ on how much force it will have.



A significant majority of experts are confident that the UN Conference on Climate Change will result in a global agreement. However, only a third (32%) believe it will have binding powers. Confidence in the ability of governments to agree on a framework that would reduce emissions in line with the 2°C target is even lower, at only 4%—a sign of reserved expectations for the Paris meeting, but also a realization that the global community is running out of time to contain global warming.

Question

Which one of the following, if any, do you think will be the most likely outcome of the COP21 meeting?

Institutional Leadership Ahead of and Beyond COP21

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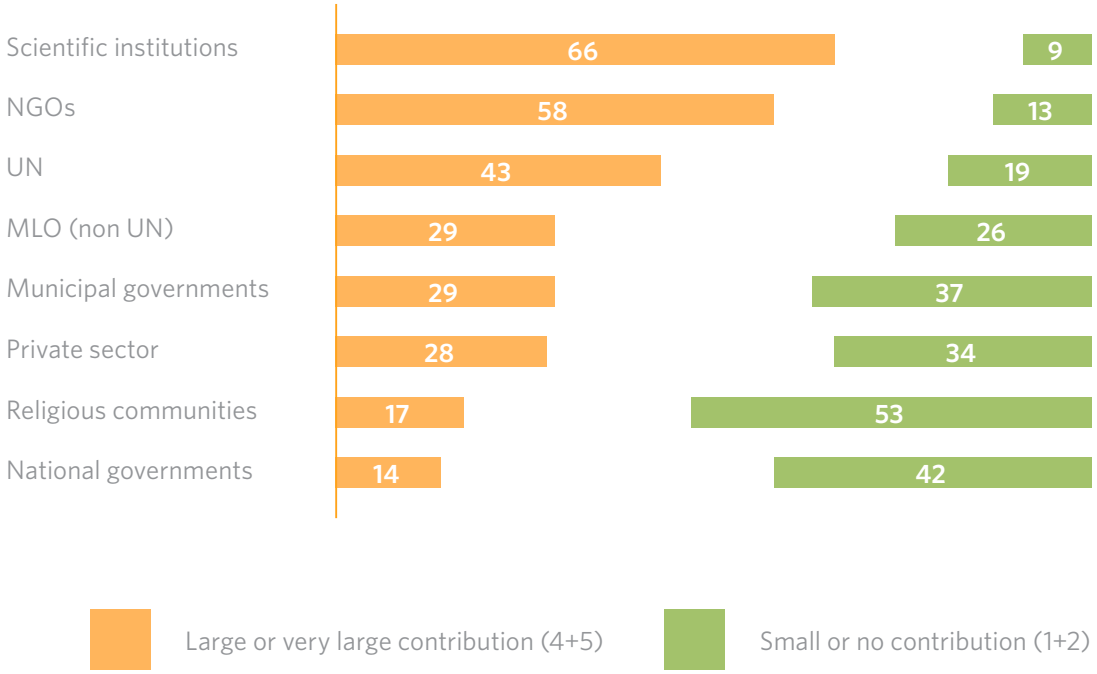
Scientists and NGOs are seen as leaders in advancing solutions to climate change.

Scientific institutions and NGOs are widely regarded as making the largest contributions to advance solutions to climate change. The UN's recent record is also viewed favorably, with close to half of all experts giving it high marks. However, respondents are reserved about the achievements of other institutions, especially national governments, who rank last. In contrast, municipal governments are increasingly gaining recognition for their efforts to tackle climate change.

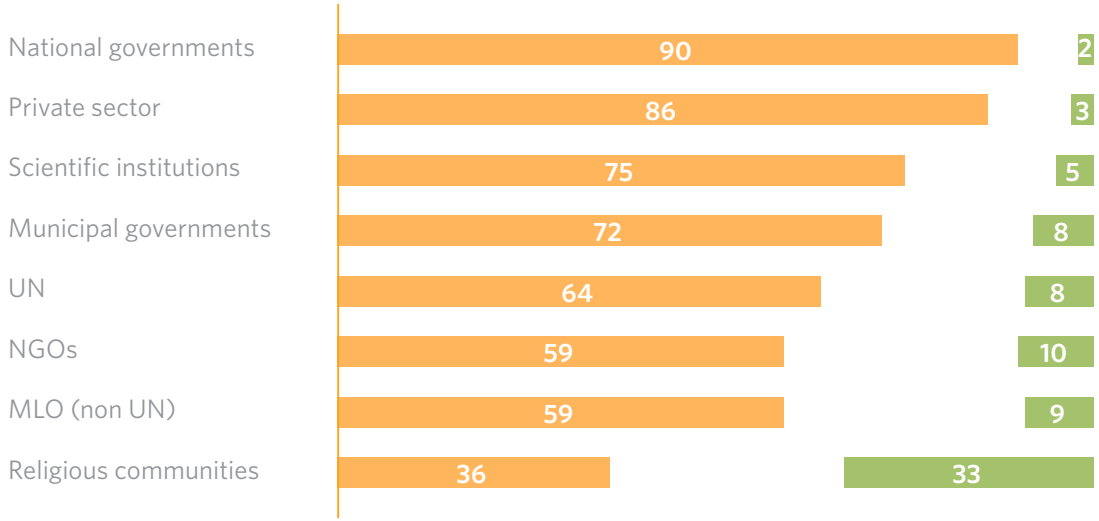


Question

Thinking of the past five years, please rate the overall contribution that each of the following types of organizations has made to advancing solutions to climate change.

Private sector faces high expectations for its role after COP21.

Assuming an agreement is reached, close to 90% of all respondents believe that the contributions of national governments and business will be absolutely key to its success. While high expectations for governments are not surprising, this survey indicates that businesses will also be expected to play a very significant role. Municipal governments are also seen as important for the successful implementation of the COP21 agreement.



Important or very important (4+5)

Not very important or not important at all (1+2)

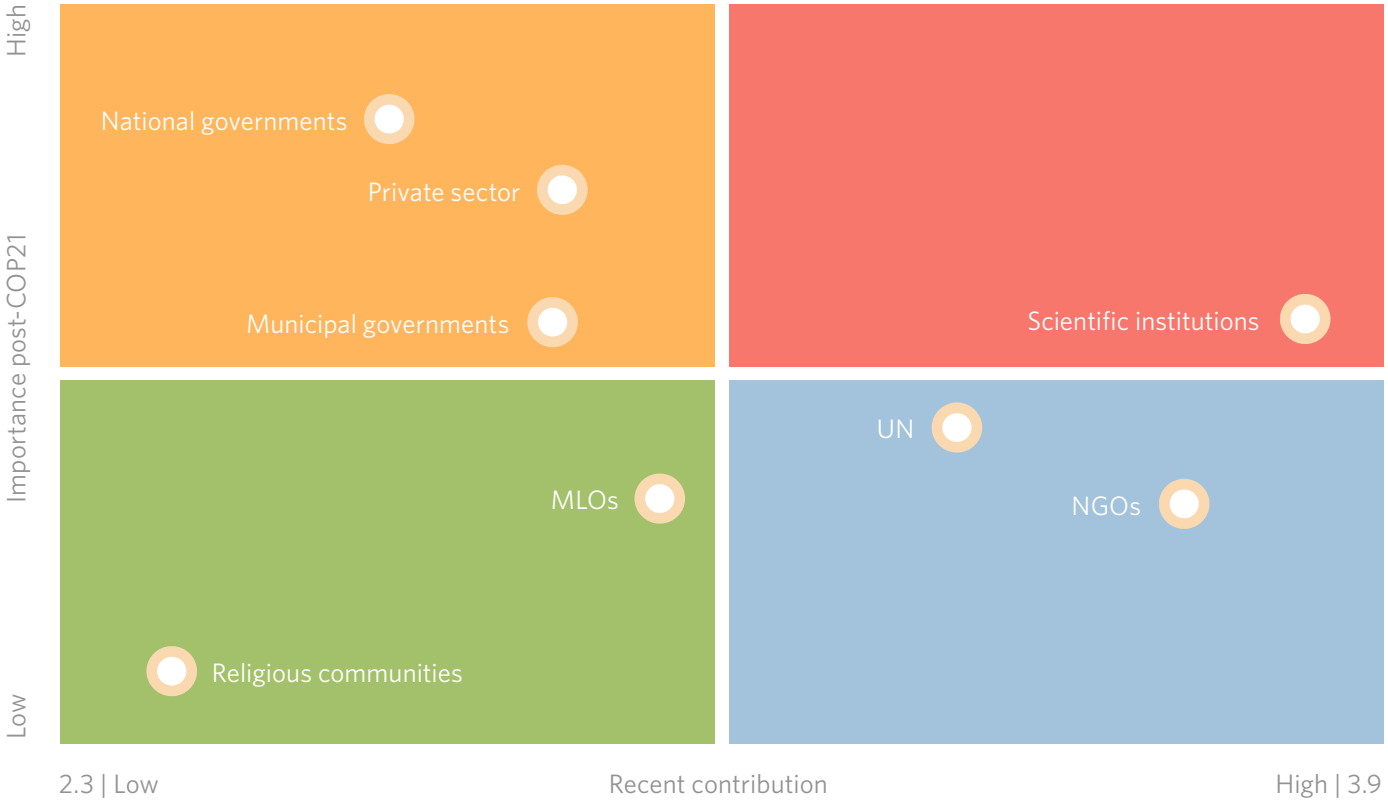
Question

Assuming an agreement is reached at COP 21, how important will the role of each of the following organizations be to the effective implementation of the post-Paris climate change framework?

Governments and business will face pressure to step up performance post-2015.

Four institutions – national and municipal governments, business and science organizations – are believed to be key to successful implementation of the Paris framework. The gap between recent achievements and future expectations is especially large for national governments and the private sector, suggesting the need for both to significantly step up their performance in the years to come.

Importance vs Contribution of Institutions: All Respondents, 2015



Question

1. Thinking of the past five years, please rate the overall contribution that each of the following types of organizations has made to advancing solutions to climate change.
2. Assuming an agreement is reached at COP 21, how important will the role of each of the following organizations be to the effective implementation of the post-Paris climate change framework?

Corporate Leadership on Climate Change

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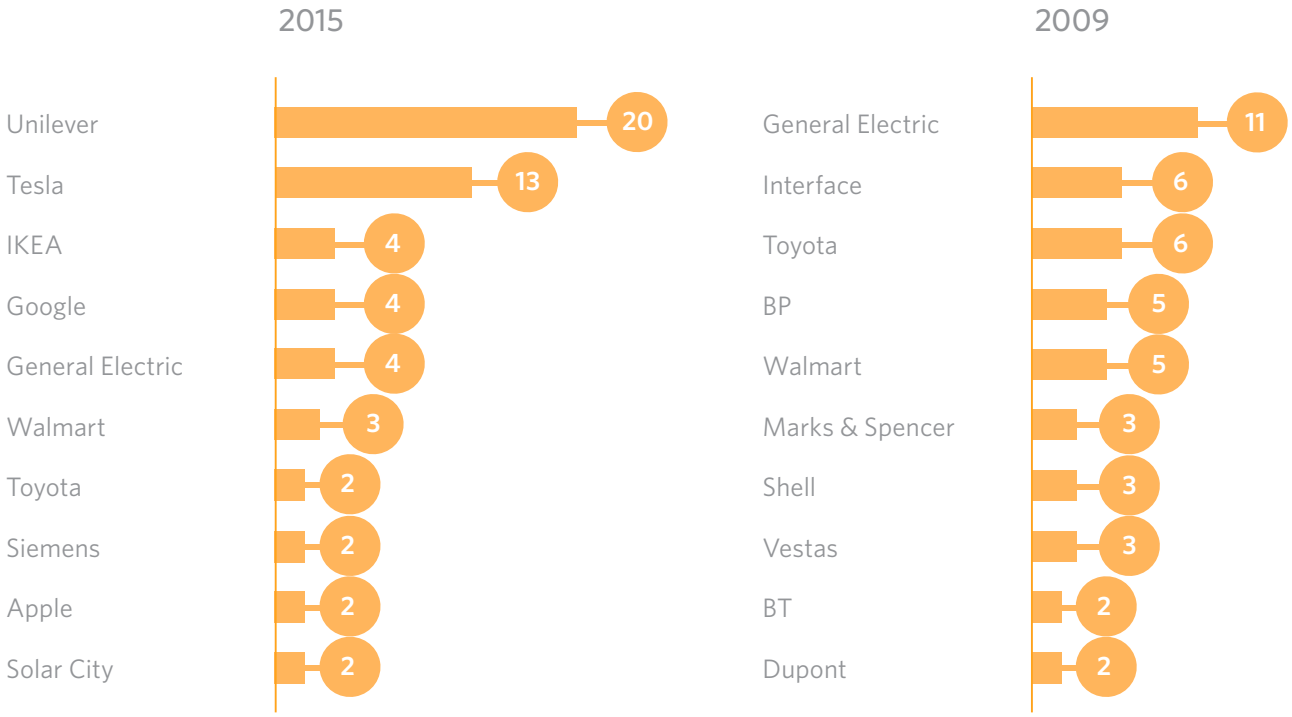
Consumer and technology companies dominate the landscape of corporate leadership.

Among companies, Unilever is seen as having made the largest contribution to advancing solutions to climate change in the last five years. In general, consumer and technology companies dominate the list of corporate leaders. The corporate leadership landscape has significantly shifted since 2009, when General Electric was seen as the leader and two oil and gas companies – BP and Shell – were included in the list.



Question

Please name up to two companies that you think have made the biggest contribution to advancing solutions to climate change in the past five years.

Why specific companies are seen as leaders on climate change.

IKEA

- Investing in renewable energy around 1 billion euros.
- They have committed a tremendous amount of money to address climate change.
- Integrated low carbon strategy and delivering on ambitious commitments.
- Energy independence by 2020 (wind/solar).

Unilever

- Sustainability program and "green" factories.
- Clear mechanisms to limit carbon emissions.
- They look closely at all elements of their value chain.
- Commitment to published targets
- CEO has made bold statements and actions; other CEOs are just doing lip service

Google

- Reducing its own footprint.
- Building solar farms to generate electricity.
- Pro-active on emission reductions.
- Created a tool to view climate change around the globe.

TESLA

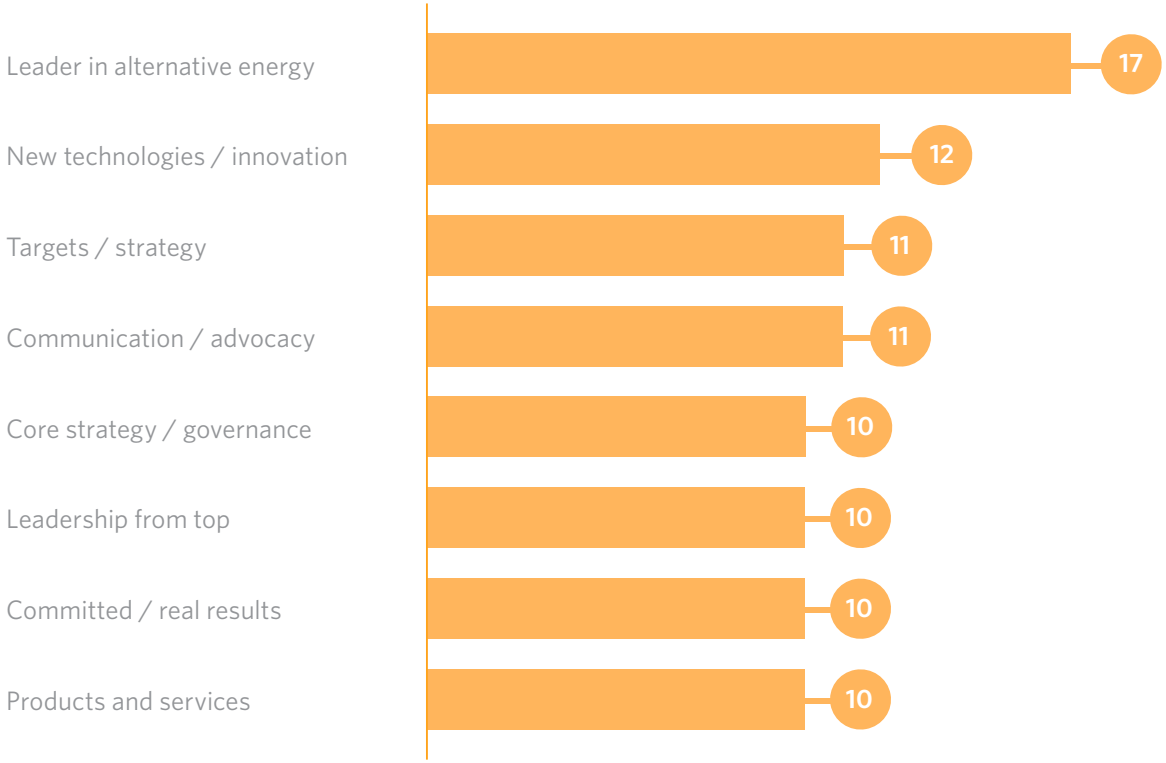
- Commitment to developing new renewable energy technologies.
- Winning market share and making other manufacturers invest heavily in electric cars.
- Electric cars that the masses actually want to buy.
- Combining good design with low emissions.
- Vision of its Founder and President.

GE

- Showing that mitigating climate change is a profitable business opportunity.
- Role in climate change advocacy.
- Global influence.
- Stringent targets.
- R&D investments.

Renewables and technology solutions are key factors in corporate leadership.

A wide range of reasons were given for the perceived climate change leadership of individual companies. The chart below lists the most frequently cited factors, with investments in renewable energy and technological innovation featured most prominently, reflecting a strong belief that by undertaking such initiatives, companies are addressing the issue in a real and substantive way.

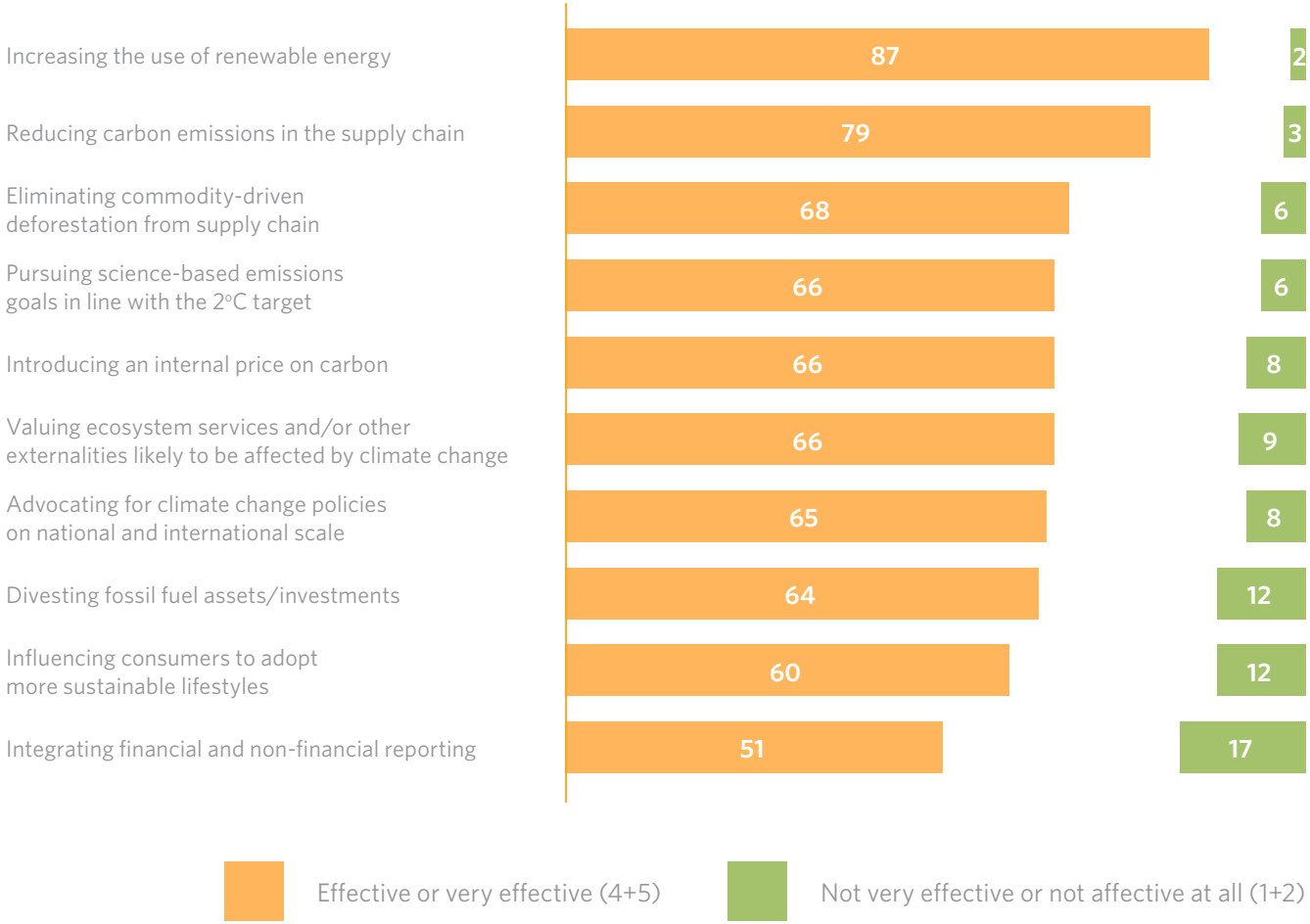


Question

Why do you think (...) is a leader in addressing climate change? - Total Mentions.

Renewable energy and supply chain initiatives will be most effective strategies after COP21.

Increasing the use of renewable energy and reducing carbon emissions in the supply chain are seen as the most effective approaches for companies to respond to climate change. However, other strategies receive nearly the same recognition, suggesting the private sector is expected to pursue a wide range of initiatives to implement the post-Paris framework.



Question

How effective or ineffective do you think each of the following instruments and strategies will be for companies to take action on climate change and advance the implementation of a post-Paris framework?

Instruments & Strategies for Effective Climate Change Action

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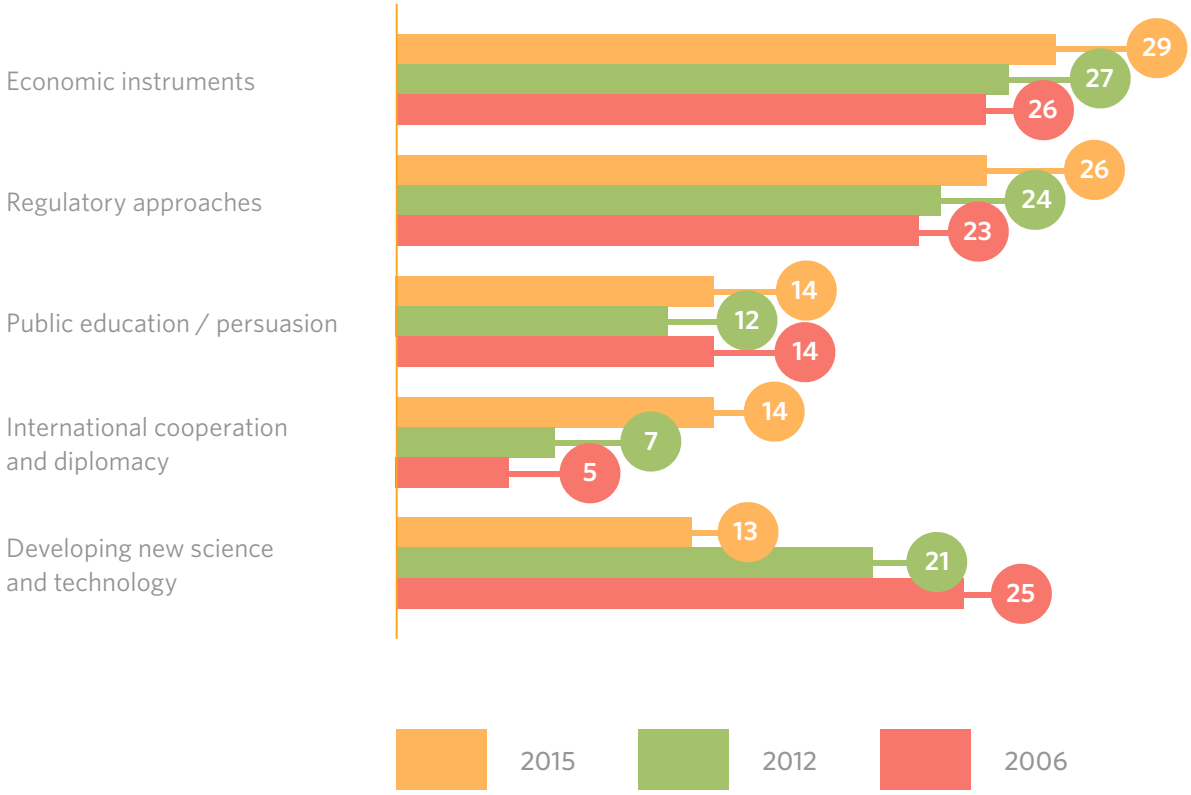
Economic instruments remain key to global progress on climate change.

Economic instruments continue to be seen as the most effective approach to provide solutions to climate change on the global scale. Their perceived importance has risen in the last decade, along with that of regulatory instruments. Experts also note the increasing role of diplomacy and international cooperation. Meanwhile, the relative importance of new science and technology is gradually diminishing.

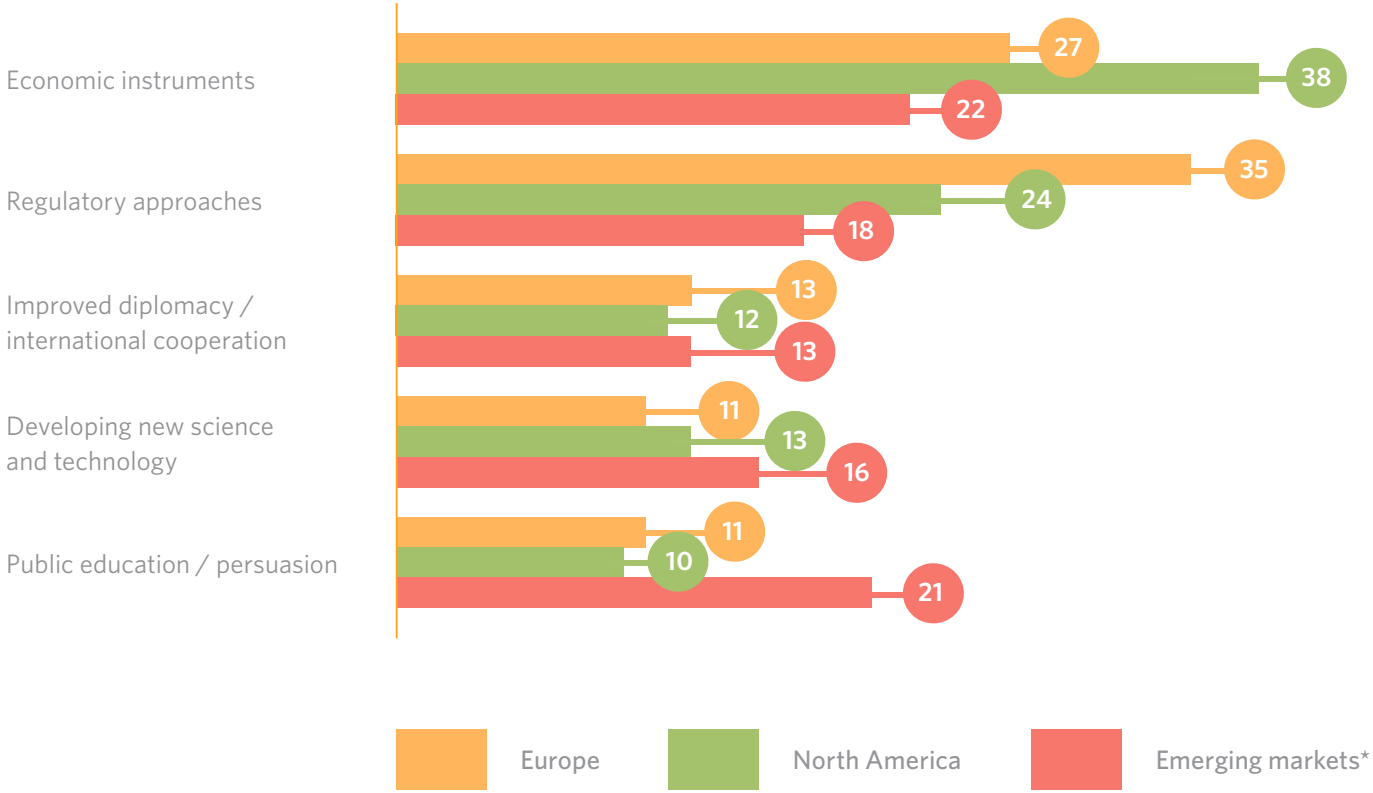


Question

Thinking of the post-Paris period (i.e., after 2015), how would you rank the following approaches in terms of their (likely) effectiveness in providing global solutions to climate change?

Views on most effective climate strategies differ across geographies.

European experts see regulatory approaches as the most effective strategy to address climate change at the macro level, while North American respondents give preference to economic instruments. Behavioral approaches such as public education are twice as popular in emerging nations as in the industrialized world.



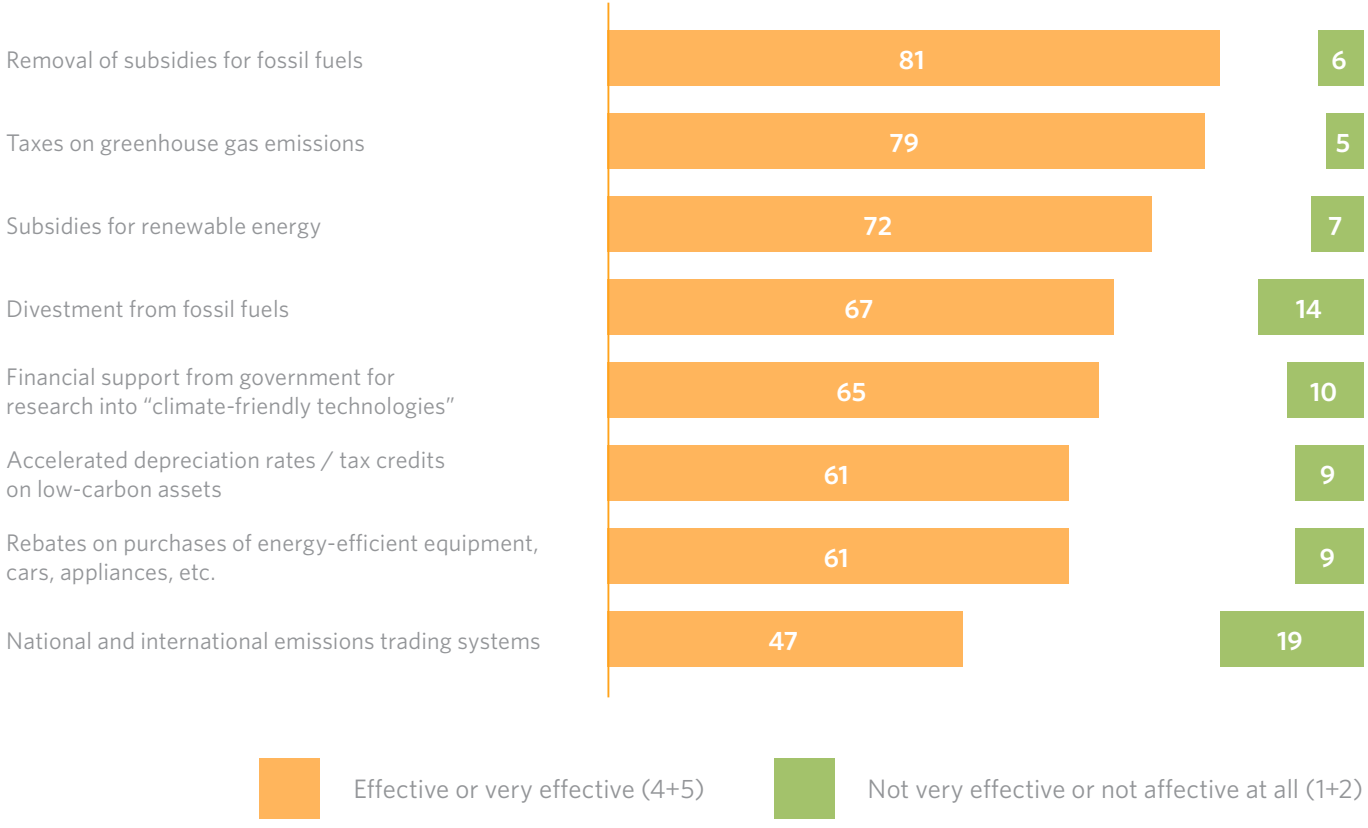
*Includes Asia, Africa / Middle East, and Latin America / Caribbean

Question

Thinking of the post-Paris period (i.e., after 2015), how would you rank the following approaches in terms of their (likely) effectiveness in providing global solutions to climate change?

Removal of fossil fuel subsidies and taxes on emissions are seen as the most effective economic instruments.

The removal of subsidies for fossil fuels and the introduction of taxes on greenhouse gas emissions are the two most effective economic instruments according to international experts. Subsidies for renewable energy, currently only a fraction of those provided to the fossil fuel industry, are also seen as an effective way to contain global warming. While a relatively recent approach that some regard as more of a moral stance than a fully-fledged economic instrument, divestment from fossil fuels is gaining prominence.

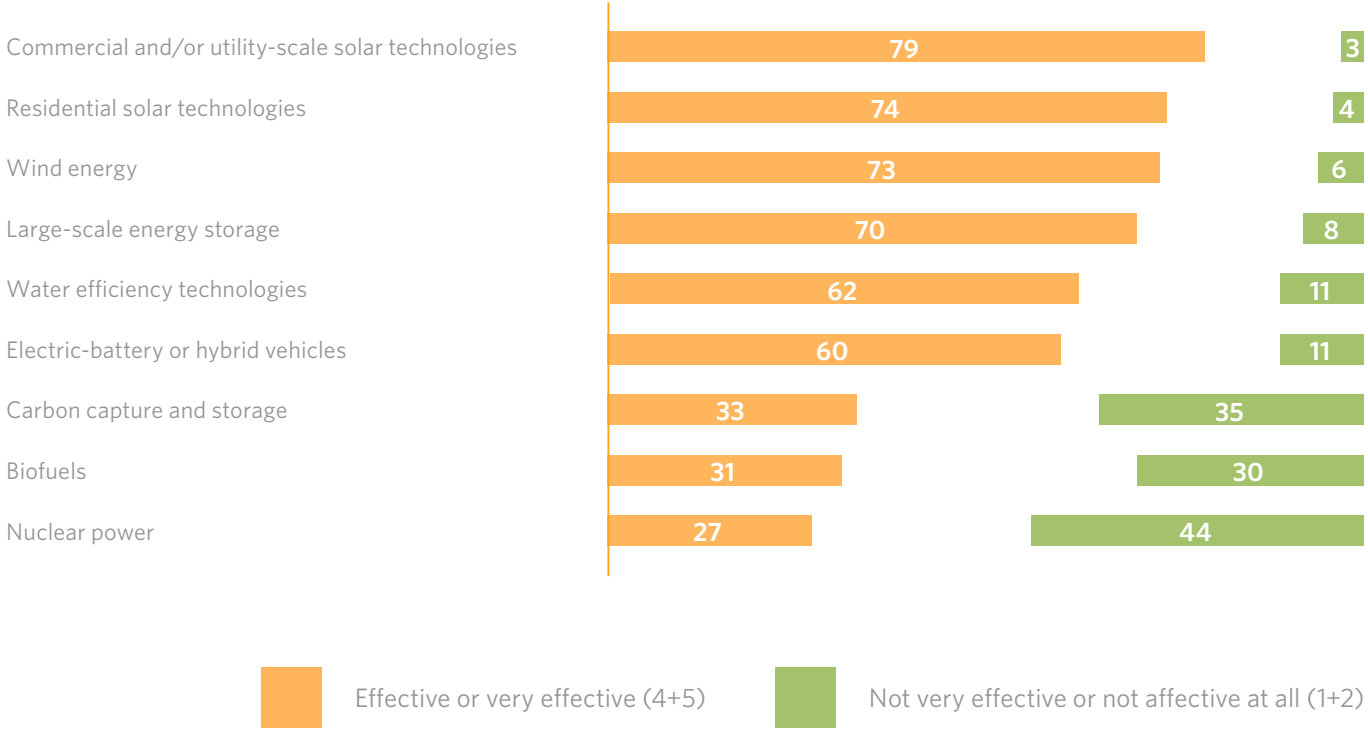


Question

How would you rate each of the following economic instruments in terms of its (likely) effectiveness to reduce climate change after 2015, if implemented?

Renewable energy and storage solutions dominate rankings of most promising technologies.

Renewable energy – particularly solar – generation and storage are seen as the most promising technologies for reducing climate change after 2015. In contrast, nuclear power, biofuels and carbon capture and storage are seen as having a role to play, but are not considered to be central.



Question

How would you rate each of the following technologies in terms of its (likely) effectiveness in reducing climate change after 2015?

Contact

For more information on the GobeScan / SustainAbility Survey, contact:

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

Alex Lewis
Senior Research Analyst, GlobeScan
alex.lewis@globescan.com

Chris Guenther
Research Director, SustainAbility
guenther@sustainability.com

Aiste Brackley
Research Manager, SustainAbility
brackley@sustainability.com

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

www.globescan.com

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

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