



# Global Expert Perspectives on the State of Sustainable Development

June 15, 2012  
Rio de Janeiro



GLOBESCAN





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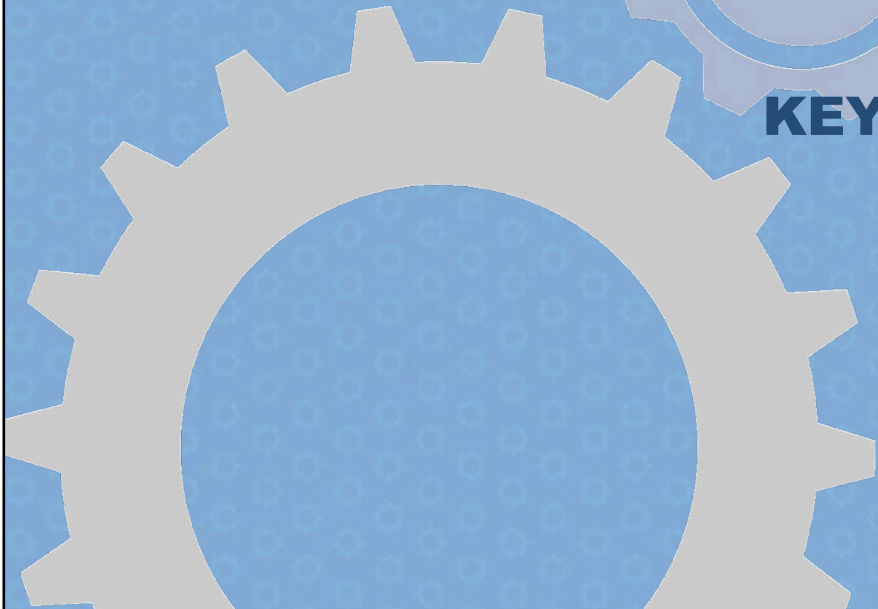
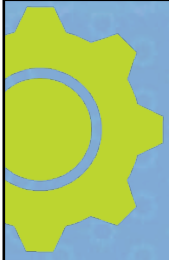




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## **KEY FINDINGS**



## Key Findings (1)

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### **Progress To-Date**

- Experts think that the world has made some progress on economic and environmental challenges, but that we have lost ground on creating healthier and more equitable societies—a clear reminder that the sustainable development extends well beyond environmental issues.

### **Global Institutions, Nations and Obstacles to Progress**

- Scandinavian countries and Germany are seen as leaders on sustainable development. The USA, India, and China—the world’s current and future economic powerhouses—are seen as laggards.
- Lack of political will is identified as the most significant barrier to progress. Vested interests and related factors are also important.
- NGOs and social entrepreneurs receive the best performance ratings for contributing to sustainable development. National governments receive the worst.

### **Leadership**

- The private sector’s performance to-date on the transition toward sustainable development is considered to be poor by experts in all sectors (except by those in the private sector itself), as well as in all regions.
- In spite of poor private sector performance, experts would like to see more leadership from it, but not without a vital role for government. While governments are believed to have broadly failed on sustainability challenges thus far, experts appear to anticipate little progress on SD in the absence of good government leadership. Companies must act as government influencers, facilitators and implementers.



## Key Findings (2)

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### **The Road Ahead**

- Three-quarters of experts predict that there will have to be major catastrophes before national governments will address important global issues. A solid majority endorse a new approach to global governance on sustainable development. They also call for substantial change to the current economic system in order for sustainable development to progress.
- Specifically, the highest priority issues are ensuring access to water, creating equitable societies, improving resource efficiency, climate change mitigation, and food security.
- Creating more equitable societies and reducing GHG emissions are considered among the most difficult challenges.
- Experts believe that only two actions, improving resource efficiency and citizen participation in SD governance, are both relatively easy and of high priority, underscoring the severity of the issues with which the SD community is grappling. When it comes to climate change, adaptation could be the most pragmatic approach.
- Economic instruments and citizen engagement and mobilization are expected to play major roles in advancing the sustainable development agenda. Experts also see high potential in multi-sectoral collaborations and citizen movements.



## Key Findings (3)

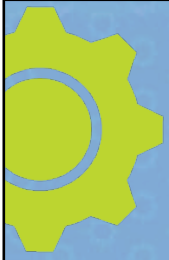
*Global Expert Opinion*

### **The Green Economy and Rio+20**

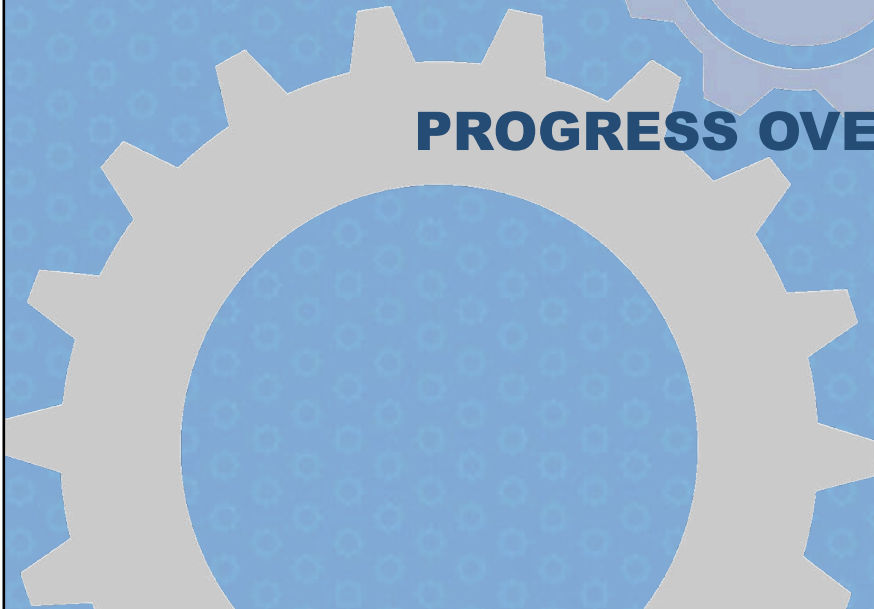
- Experts want a lot from Rio+20, especially a renewed political commitment to sustainable development and more support for developing countries.
- Experts think a green economy would create a better future for later generations, protect the environment, and make consumption more sustainable, but they have some concern that it could hurt short-term economic growth.

### **Private Sector's Role**

- Experts think that the best ways for the private sector to advance the transition to sustainable development are through technological development and innovation, and notably, collaboration with governments to develop effective regulations. Another area of collaboration could be in helping to develop effective economic instruments, since their use is strongly endorsed as effective.
- Experts are convinced that NGOs can be more effective on sustainable development by collaborating with business than by confronting it. Companies should increasingly engage with NGOs to determine how they can best advance the agenda together.



**PROGRESS OVER PAST TWO DECADES**





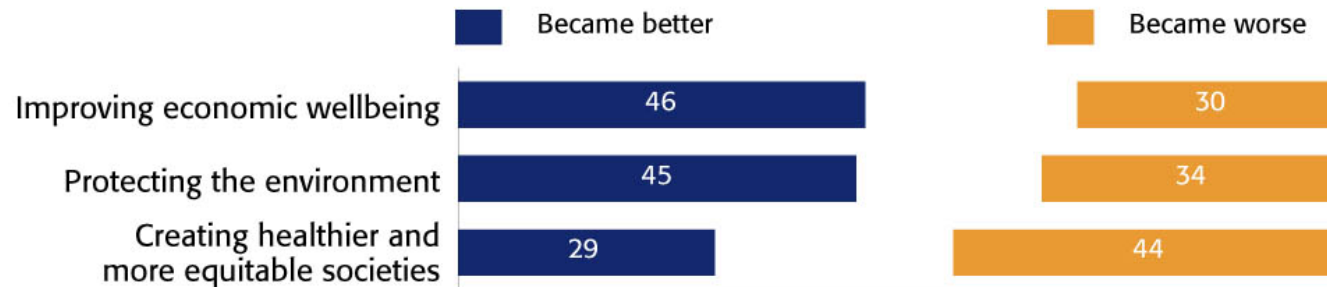


# Experts think the world has made some progress on economic and environmental challenges, but has lost ground on creating healthier and more equitable societies...

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## Progress over the Past Twenty Years

Sustainability Experts, 2012



TRP2012\_Q1

Note: On a scale from 1 to 5 where 5 indicates "became a lot better" and 1 indicates "became a lot worse," "became better" equals ratings of 4 plus 5, and "became worse" equals ratings of 1 plus 2.

The white space in this chart represents "Stayed about the same" and "DK/NA."

Experts in the corporate sector tend to be more bullish than others about progress generally. Experts in Asia and Latin America are quite positive about improvements made to economic wellbeing. Think-tanks and NGOs are especially critical of performance in meeting social challenges.

Compared to consumers across 17 countries, experts think that we have achieved more economic progress over the past two decades. Conversely, more experts think that social equity has worsened than think it has improved, whereas consumers perceive the opposite.

1. How would you rate society's progress globally in the **past twenty years** on the following challenges?

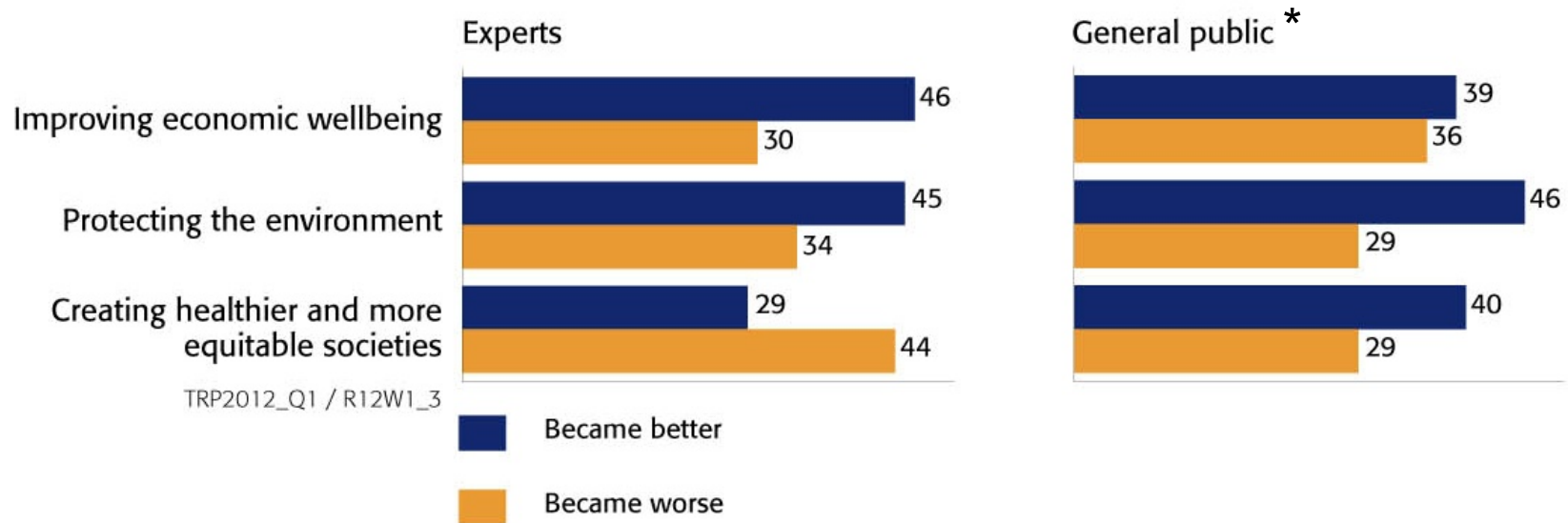


# The general public is much more impressed than experts with social progress

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## Progress over the Past Twenty Years

Sustainability Experts vs General Public



People in emerging markets, especially China, are more positive about progress made in creating healthier and more equitable societies as well as improving economic well being.

\* "General public " refers to the results of a GlobeScan-SustainAbility public opinion survey of nearly 25,000 people across 25 countries.

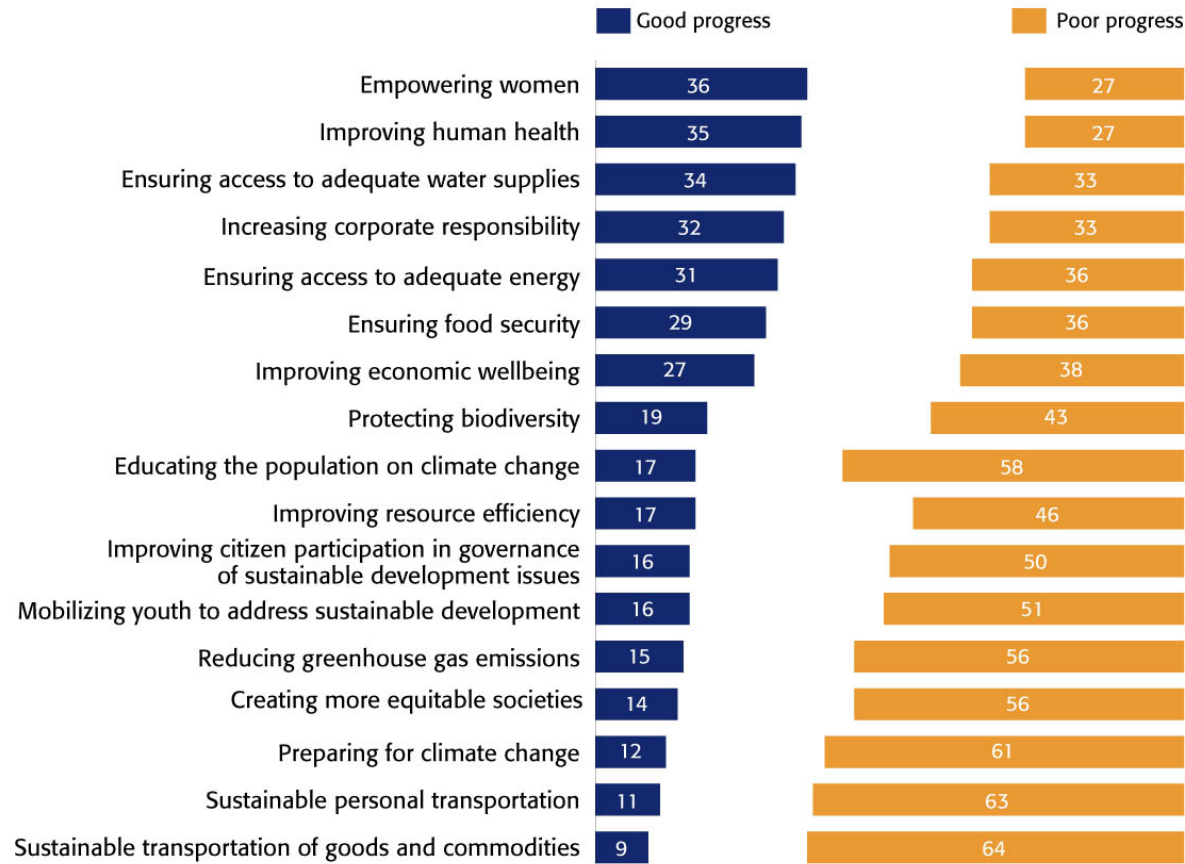


# Experts rate progress as poor in nearly all areas; empowering women, improving health, and ensuring access to water are modest exceptions

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## Progress over Twenty Years in Specific Areas

Sustainability Experts, 2012



TRP2012\_Q5

Assessments by experts on progress in 17 areas since the 1992 Earth Summit are dismal. Only in three areas do more experts judge progress in their country as good than judge it as poor. And even on these (empowering women, improving health, and ensuring access to water), experts are not enthusiastic.

On seven issues, among them climate change and transportation, a majority rate progress as poor. Progress is judged to have been generally better in Europe than in other regions.

5. How would you assess progress in your country over the past 20 years in the following specific areas?

Note: On a scale from 1 to 5 where 5 is excellent and 1 is poor, "good progress" equals ratings of 4 plus 5, and "poor progress" equals ratings of 1 and 2.

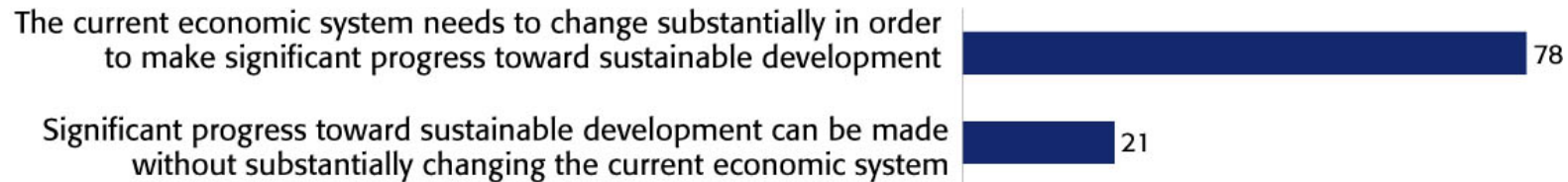


# Experts believe that the current economic system needs substantial change for SD to move forward

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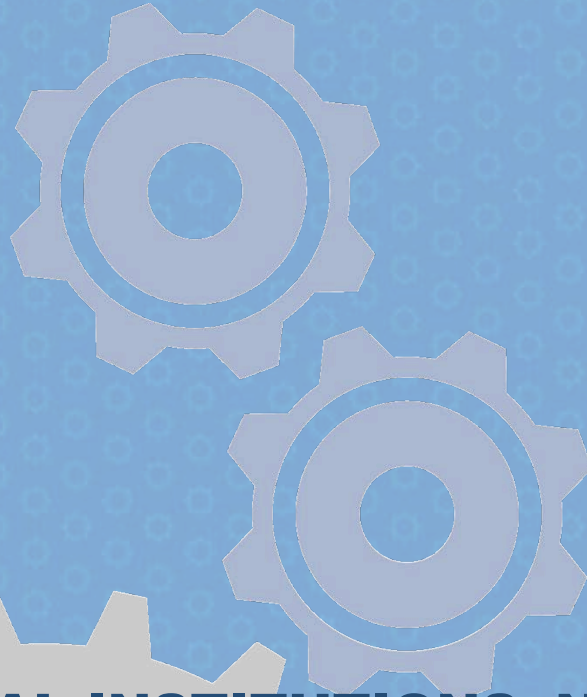
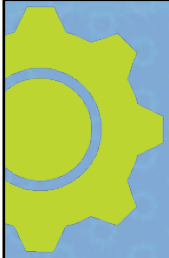
## Views on Global Systems

Sustainability Experts, 2012



TRP2012\_Q14\_B

Almost eight in ten experts think that the current economic system needs substantial change in order to make significant progress on SD. This view is consistent with the perceived need to address vested interests and reflects experts' support for a "green" economy. Corporate sector experts are somewhat less inclined to agree with this notion, as are North Americans.



**GLOBAL INSTITUTIONS, NATIONS AND OBSTACLES  
TO PROGRESS**



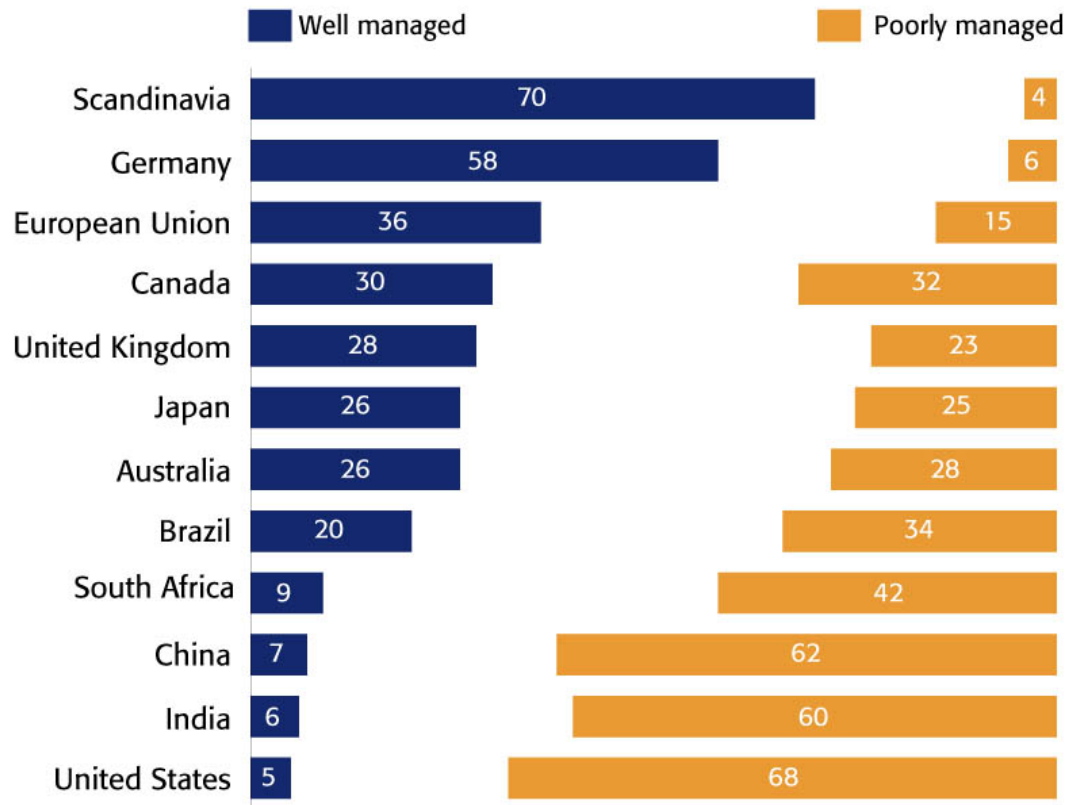


# Scandinavian countries and Germany hold a commanding lead on SD; the USA, India, and China trail distantly

Global Expert Opinion

## Managing Transition to Sustainable Development

Sustainability Experts, 2012



TRP2012\_Q4

Note: On a scale from 1 to 5 where 5 is excellent and 1 is very poor, "well managed" equals ratings of 4 plus 5, and "poorly managed" equals ratings of 1 and 2.

Strong majorities of experts think that Scandinavia does a good job managing the transition to SD. Germany is also rated strongly. The EU is in a distant third place, perhaps dragged down by poorer performance by some members, including the UK. The gap between Canada and the USA is likely connected to the latter's economic problems and social inequity. China and India are rated low in spite of economic advances.

4t. Please rate the following countries and regions on how well they have managed the transition to Sustainable Development in the past 20 years.

14 The white space in this chart represents ratings of "3" and "DK/NA."



# NGOs and social entrepreneurs are seen as the greatest contributors to SD; national governments receive the worst ratings

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## Contribution to Sustainable Development Progress Since 1992 Earth Summit

Sustainability Experts, 2012



Majorities of experts in all regions and in all sectors except government itself give national governments poor SD ratings. Also, experts in all sectors but the corporate sector rate the performance of business poorly.

### Contribution to SD Progress Since 1992: "Private Sector," by Stakeholder Group



TRP2012\_Q3\_sec

Note: On a scale from 1 to 5 where 5 is excellent and 1 is poor, "good performance" equals ratings of 4 and 5, and "poor performance" equals ratings of 1 and 2. The white space in this chart represents ratings of "3" and "DK/NA."

15 3. 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?

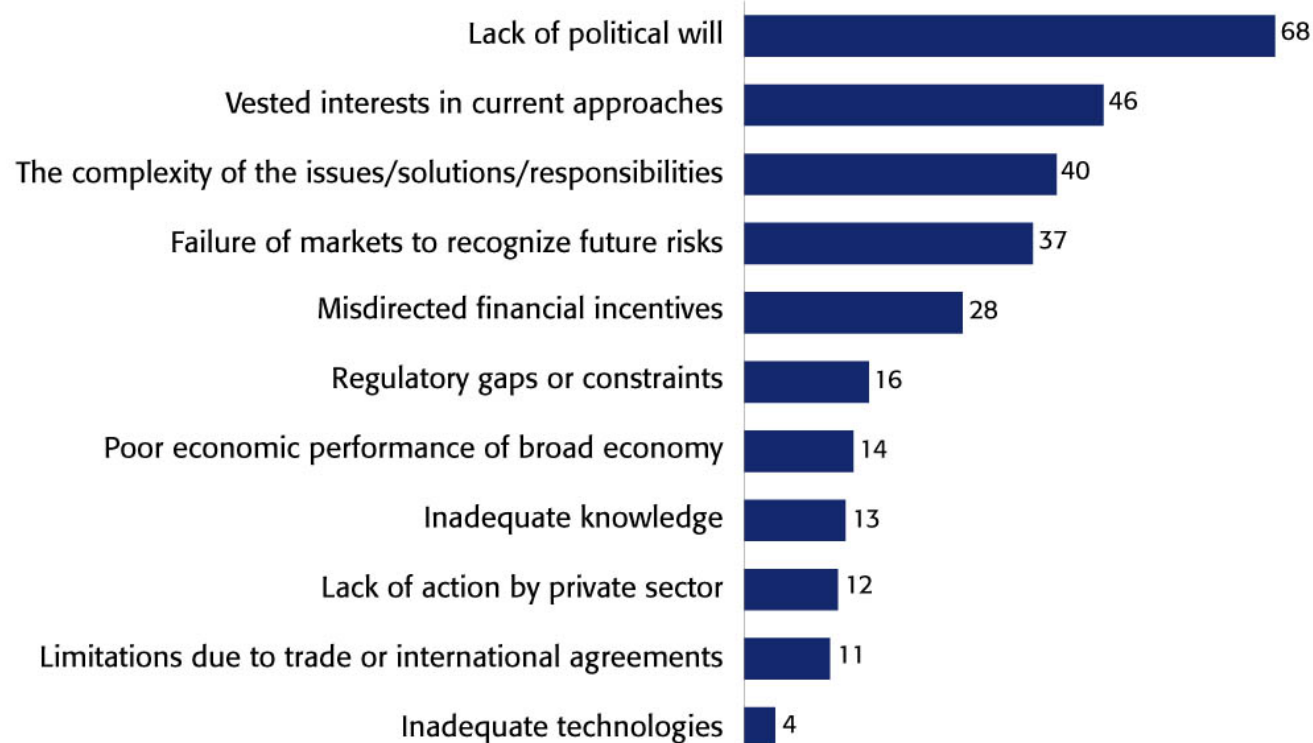


# Lack of political will is identified as the most significant barrier to progress on SD. Vested interests and related factors are also important

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## Barriers to Progress on Agenda 21

Sustainability Experts, 2012

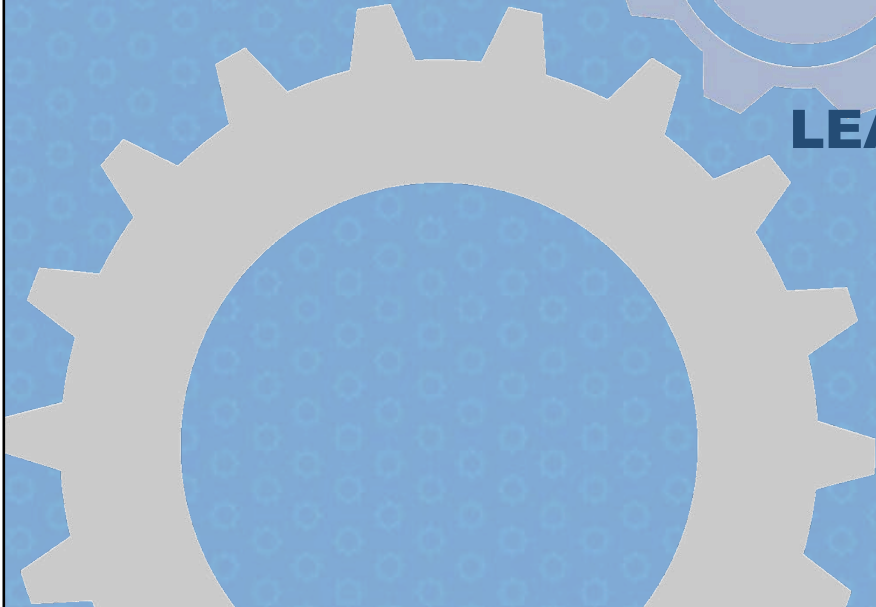
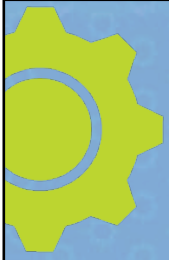


Lack of political will is, by far, the biggest barrier to progress on Agenda 21. Vested interests in the status quo and related factors such as misdirected financial incentives and lack of private sector action are also seen as important. Experts acknowledge that complexity is an issue but not when it comes to having adequate knowledge or technologies. The corporate sector is more inclined than others to blame the poor economy.

TRP2012\_Q2

16 2. The Rio Earth Summit in 1992, and specifically its Agenda 21 document, provided an agenda for action toward sustainability. Please indicate which three of the following you think are the most significant barriers to progress on Agenda 21.





**LEADERSHIP**

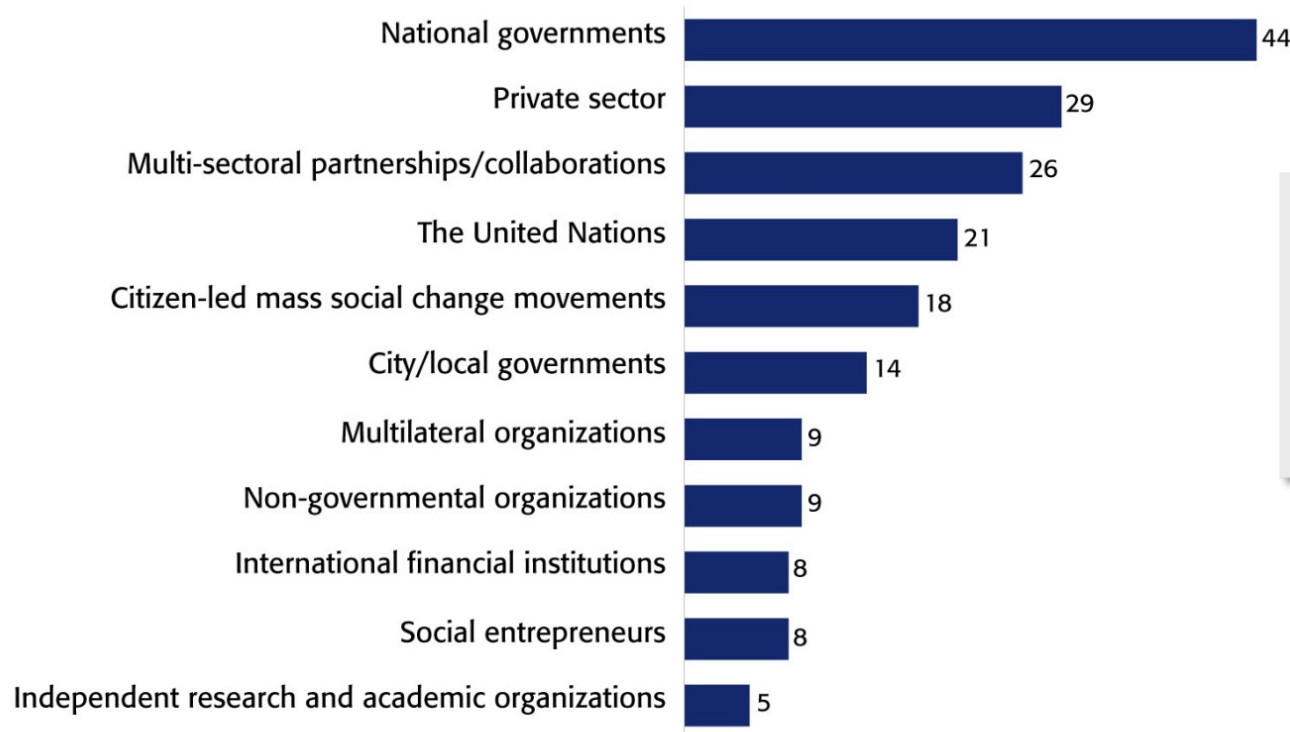


# Experts think that national governments should lead the SD agenda, but, given poor government performance to date, they are not convinced

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## Who Should Lead the Sustainable Development Agenda Over the Next Twenty Years?

Prompted, Total Mentions, Sustainability Experts, 2012



Experts in all regions except Latin America prefer that national governments lead on SD, but fewer than half hold this view, reflecting government's lacklustre performance to date.

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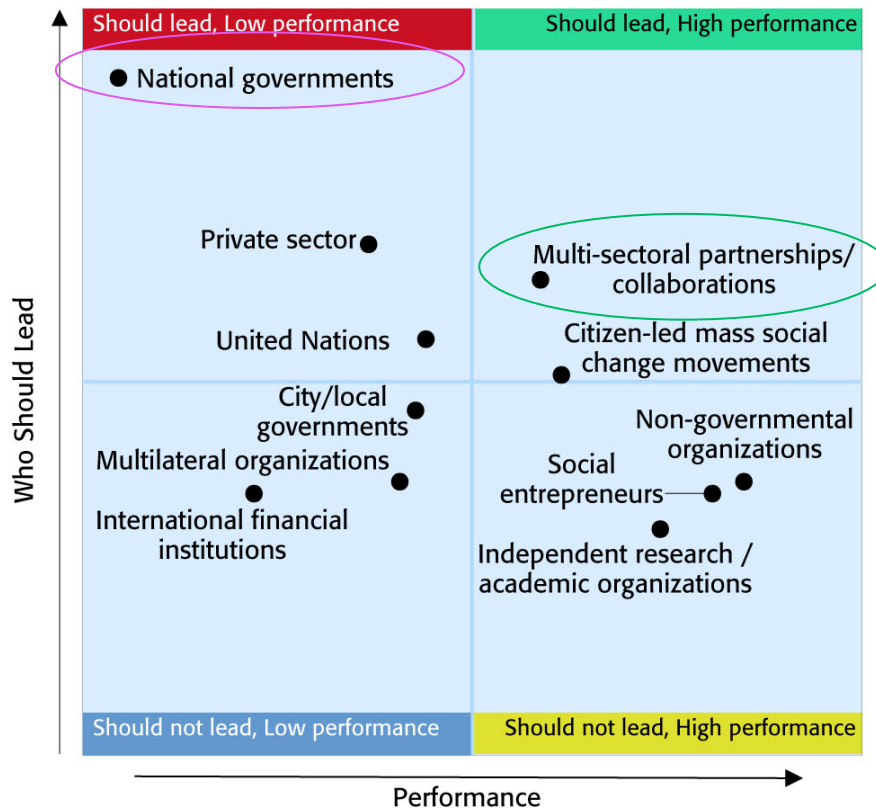


# Experts see high potential in multi-sectoral collaborations and citizen movements leading the future SD agenda

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## Who Should Lead vs Performance on Sustainable Development Progress

Sustainability Experts, 2012



Perceptions of performance and potential for leadership are misaligned. National governments have been poor SD performers, but experts think they still need to play a leadership role. Conversely, top performers (e.g., NGOs, social entrepreneurs, and academics) are not expected to lead, perhaps due to their lack of institutionalized authority.

Experts rate the private sector's SD performance as poor but would like to see more leadership from it, albeit subordinate to government.

MLOs and IFIs are neither seen as good performers nor are they endorsed as leaders.

TRP\_q3\_10mtrx

3. 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?

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

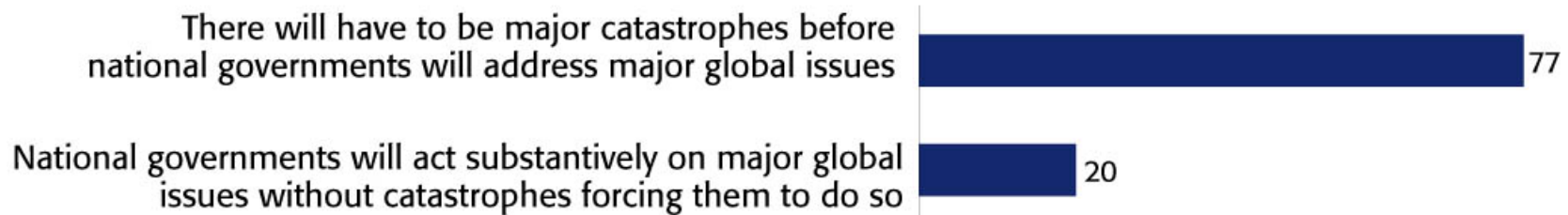


# Experts gloomily predict that major catastrophes will be necessary before governments tackle important global issues

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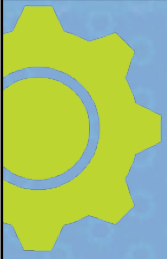
## Views on Global Systems

Sustainability Experts, 2012



TRP2012\_Q14\_A

Three-quarters of experts predict that there will have to be major catastrophes before national governments will address important global issues. Government sector experts are a bit less pessimistic than others. Having seen little effort in their regions on a major issue such as climate change, experts in Oceania and North America are notably more downbeat.



**THE ROAD AHEAD**

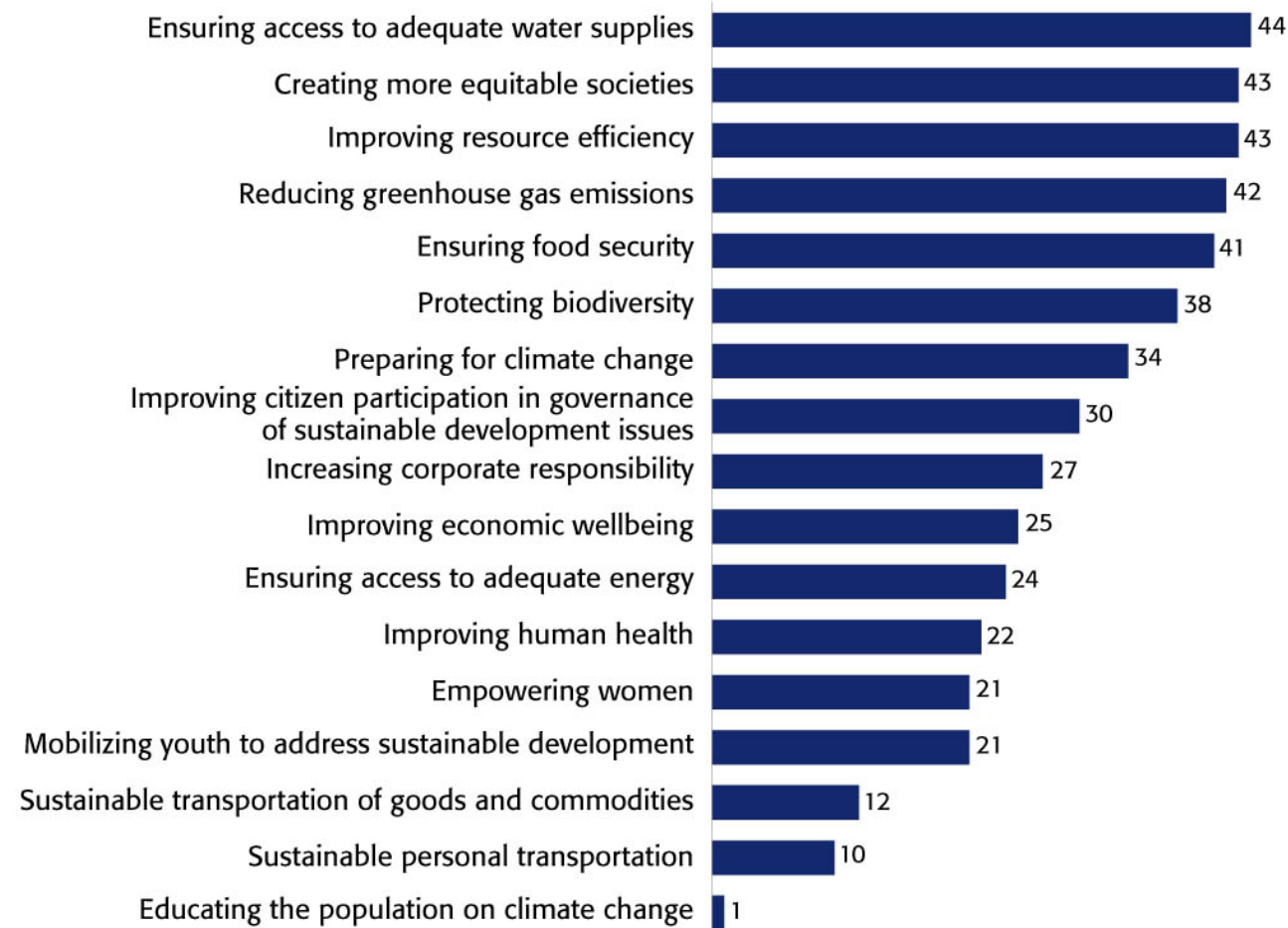


# Highest priority issues are access to water, equitable societies, resource efficiency, climate change mitigation, and food security

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## Important Sustainability Issues to Prioritize

Sustainability Experts, 2012



When asked to prioritize among 17 global sustainability issues, experts emphasize five for attention over the next five years: access to water, more equitable societies, resource efficiency, GHG reductions, and food security.

While there is a fairly high degree of consistency across experts' sectors about these high-priority issues, corporate sector experts tend more than others to prioritize food, water, and resource efficiency.

6. In thinking about making progress globally on sustainable development, please choose the five issues that are most important to prioritize **over the next five years**.

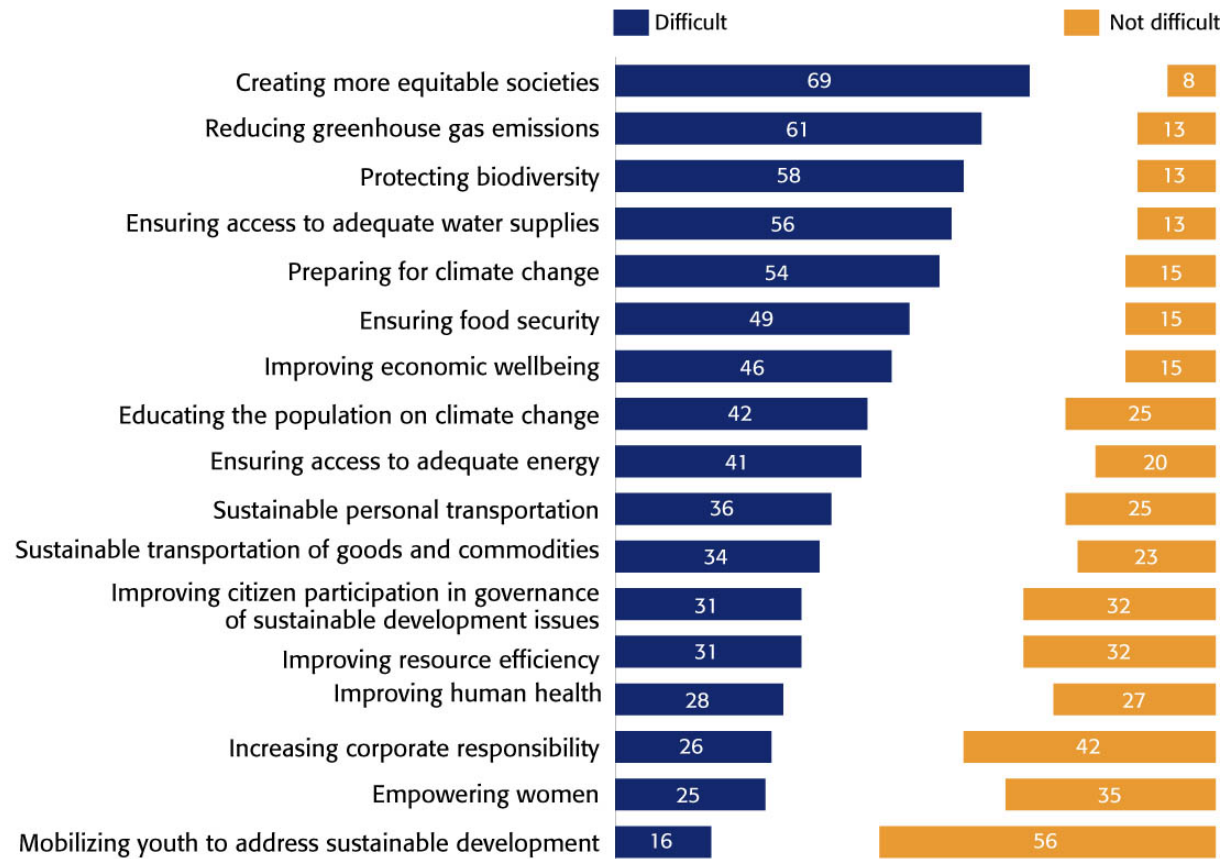


# Creating more equitable societies and reducing GHG emissions are considered the most difficult challenges

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## Perceived Difficulty in Making Global Progress on Specific Issues

Sustainability Experts, 2012



TRP2012\_Q7

Note: On a scale from 1 to 5 where 5 is very difficult and 1 is not at all difficult, "difficult" equals ratings of 4 and 5, and "not difficult" equals ratings of 1 and 2.

Generally, experts view most of the issues they rated to be difficult to make progress on. Majorities consider five of the 17 examined as such, and on seven further issues, more experts rate them as difficult than not difficult. Only one (mobilizing youth) is not considered to be tough. While views across experts' sectors are relatively consistent, regional assessments vary quite a lot. Experts in Asia tend to rate several of these challenges as less difficult than others do. Conversely, those in North America and Oceania are more prone to see difficulties.

7. How difficult do you believe it will be to make significant progress globally on each issue over the next five years?

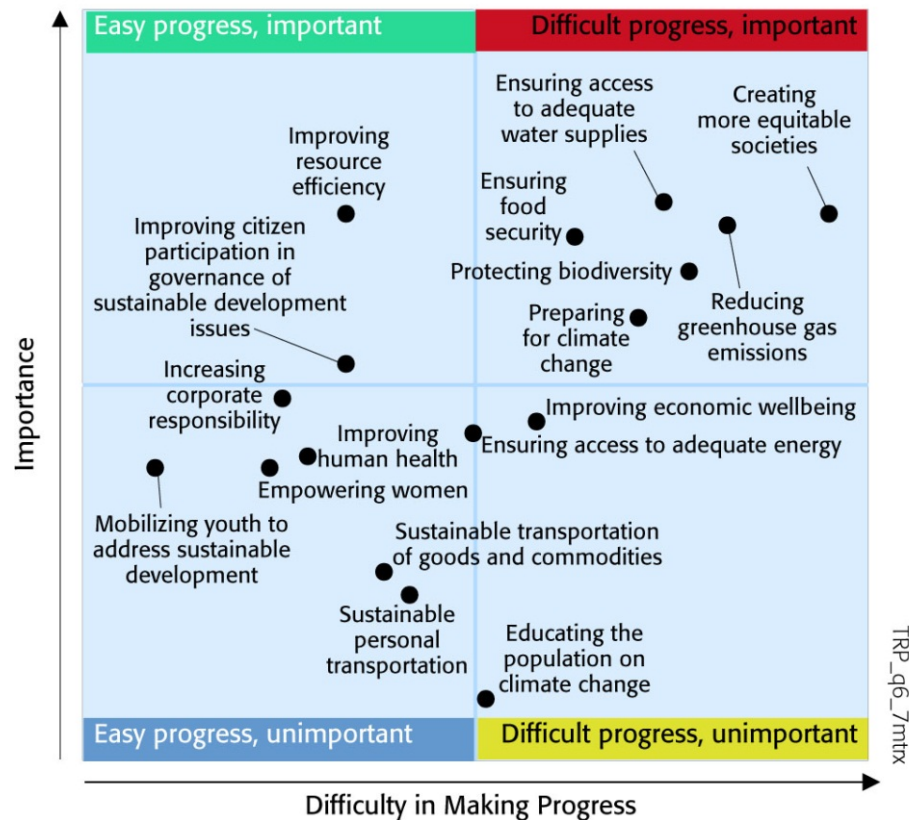


# Short-term focus should be on resource efficiency and citizen engagement; adaptation could be the most pragmatic approach to climate change

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## Importance vs Difficulty in Making Progress on Sustainability Issues

Sustainability Experts, 2012



Experts believe that only two actions, improving resource efficiency and citizen participation in SD governance, are both relatively easy and important to do, underscoring the magnitude of current challenges. Increasing corporate responsibility is thought to be an easy but slightly less important initiative. Ensuring food security and access to water are considered very important, but experts contemplate some difficulty in making progress on both. Addressing climate change is seen as difficult regardless of the approach. Adaptation is considered slightly less important than mitigation but could be less difficult.

6. In thinking about making progress globally on sustainable development, please choose the five issues that are most important to prioritize **over the next five years**.

24

7. How difficult do you believe it will be to make significant progress globally on each issue **over the next five years**?



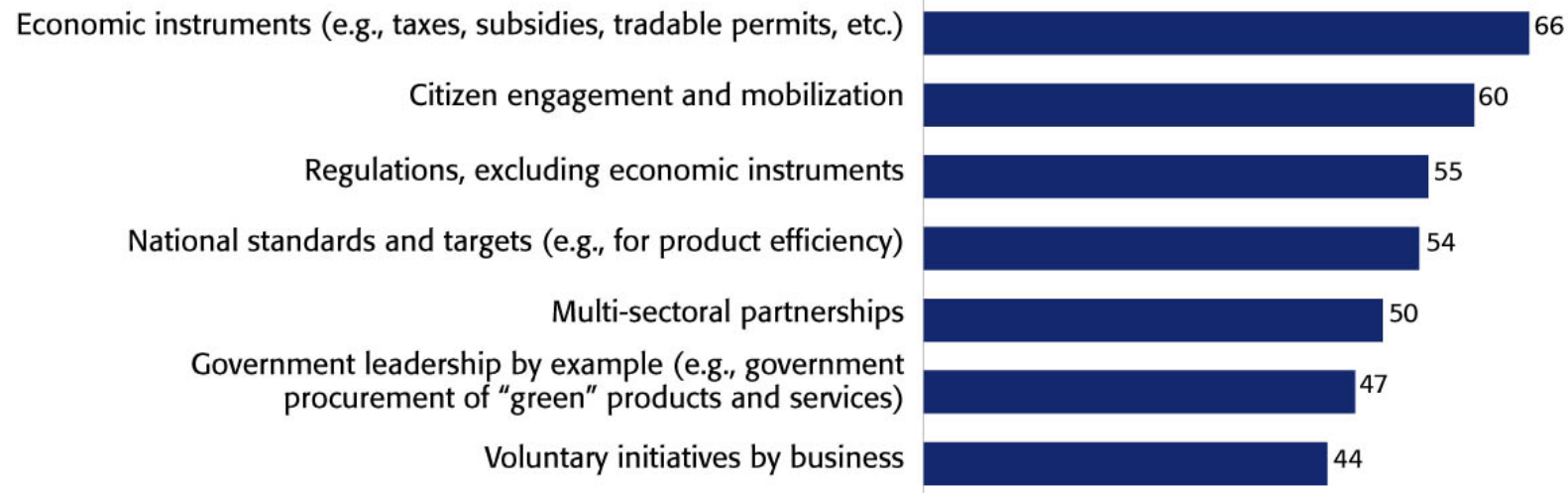


# Experts expect that economic instruments and citizen engagement and mobilization will play major roles in advancing the SD agenda

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## Expected Role of Approaches in Furthering Sustainable Development

Major Role\*, Sustainability Experts, 2012



TRP2012\_Q8

\*Major role equals ratings of 4 plus 5 on a five-point scale where 5 is "major" and 1 is "minor."

Findings here reflect growing expectations for economic instruments, with about two-thirds of experts in all sectors predicting a major role for them in the future. While experts have long called for this approach, governments have made limited use of it. More citizen engagement is also expected by majorities in all sectors. An expected minor role for corporate voluntary initiatives may reflect their limited overall impact to date.

25 8. How major a role do you expect each of the following approaches **will** play over the next twenty years in furthering sustainable development **in your country**?

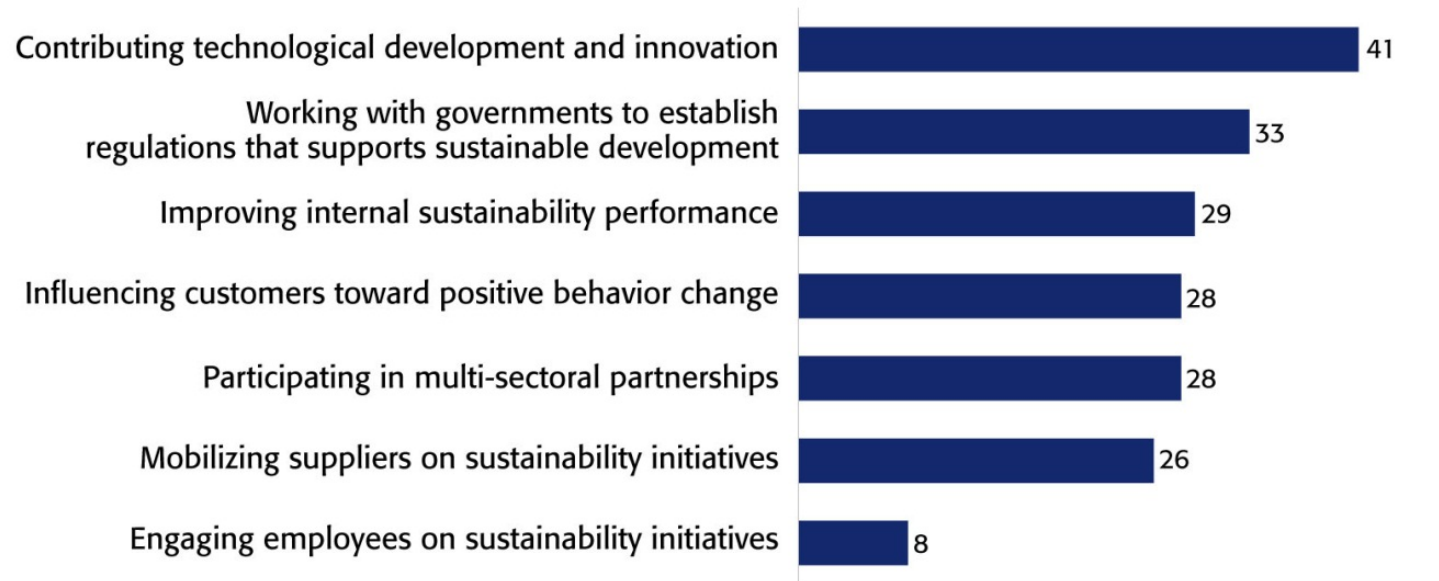


# The best ways for the private sector to advance the transition to SD are through technological development and innovation, and by collaborating with governments to develop effective regulations

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## Best Way Private Sector Companies Can Contribute to Society's Transition Toward Sustainable Development

Prompted, Total Mentions, Sustainability Experts, 2012



TRP2012\_Q11

Experts are more supportive of having companies focus on “harder edge” outputs (e.g., innovation and regulations) than on “softer” processes such as engagement and mobilization. Experts in Asia and Europe are more inclined than others to prefer technology and innovation.

That government experts think that the private sector should better enable governments is notable.

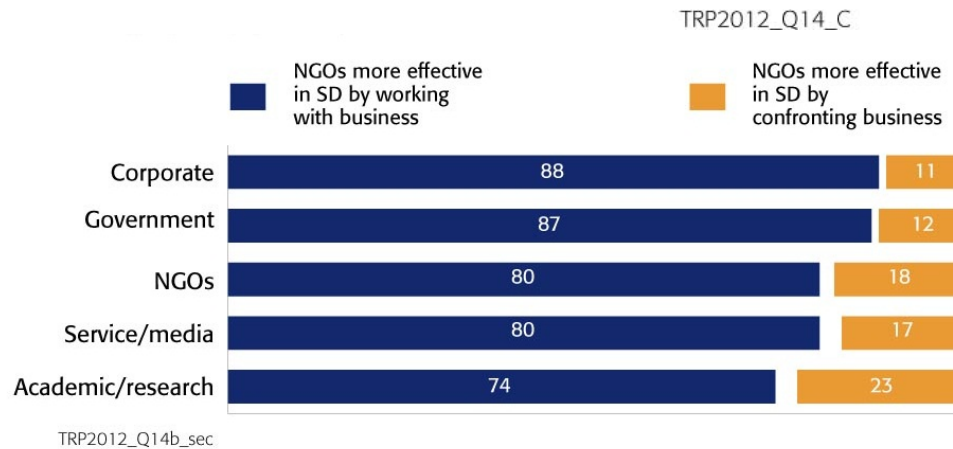


# Experts are convinced that NGOs can be more effective on SD by collaborating with business than by confronting it

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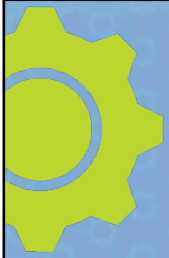
## Views on Global Systems

Sustainability Experts, 2012



Experts believe that NGOs can be most effective by working in partnership with companies than by drawing battle lines. Corporate and government sector experts are more convinced of this than academics and NGOs are—although eight in ten NGO experts do hold this view. Latin Americans and North Americans are especially inclined to agree.

27 14. Below are pairs of statements that capture some current sustainable development debates. For each pair, please select the statement that is closer to your opinion.



## **RIO+20 AND THE GREEN ECONOMY**



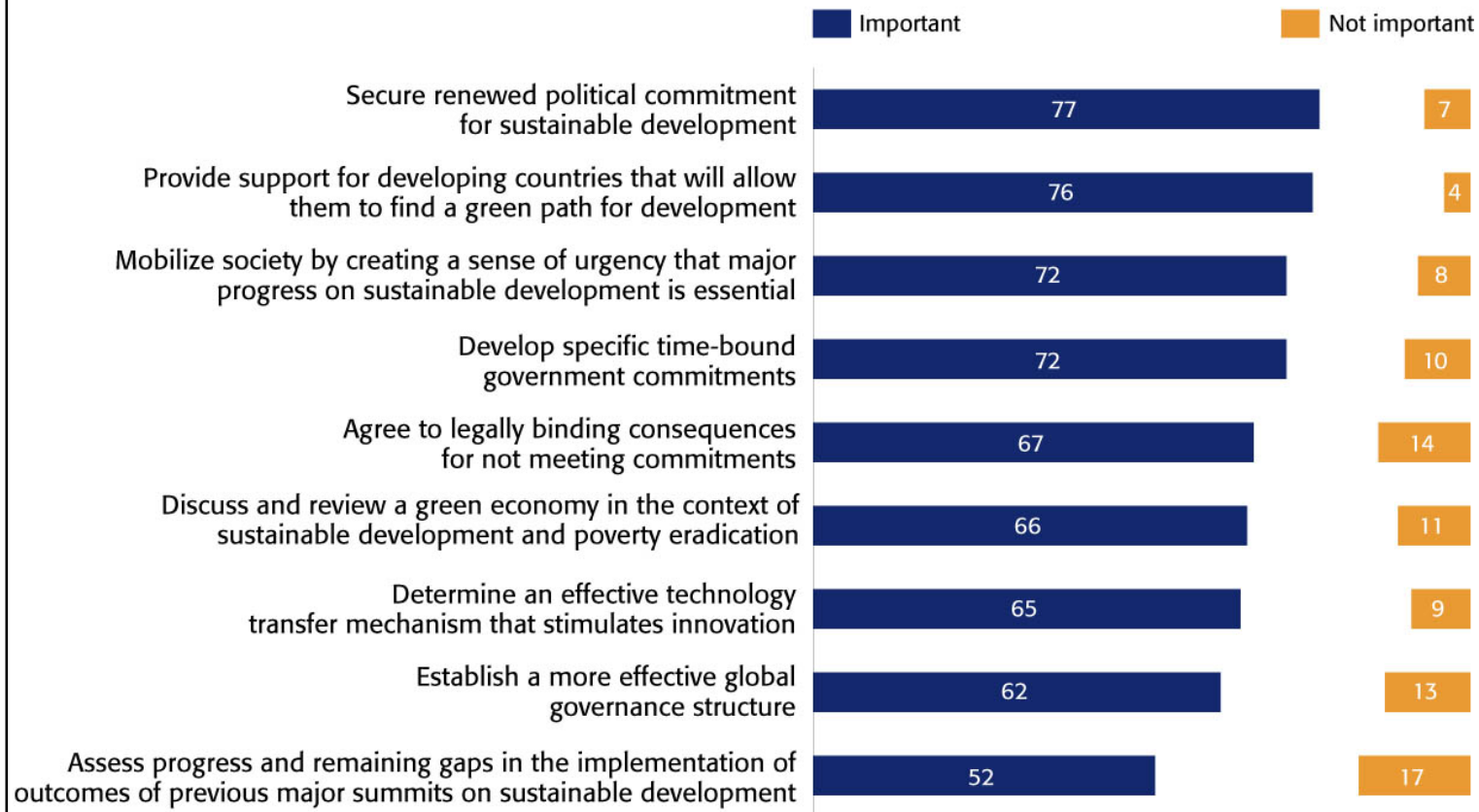


# Experts want a lot from Rio+20, especially renewed political commitment for SD and providing support for developing countries

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## How Important Is It That World Leaders at Rio+20 Produce Outcomes?

Sustainability Experts, 2012



Strong majorities of experts across all sectors and regions call for renewed political commitment for SD. While endorsement for support for developing countries to allow them to find a green path for development is strongest in Africa, Oceania, and Asia (over 80% in each), three-quarters of experts in North America and Europe also agree.

9. How important will it be for world leaders at Rio+20 to produce the following outcomes?

TRP2012\_Q9

Note: On a scale from 1 to 5 where 5 is very important and 1 is not at all important, "important" equals ratings of 4 and 5, and "not at all important" equals ratings of 1 and 2.

The white space in this chart represents ratings of "3" and "DK/NA."

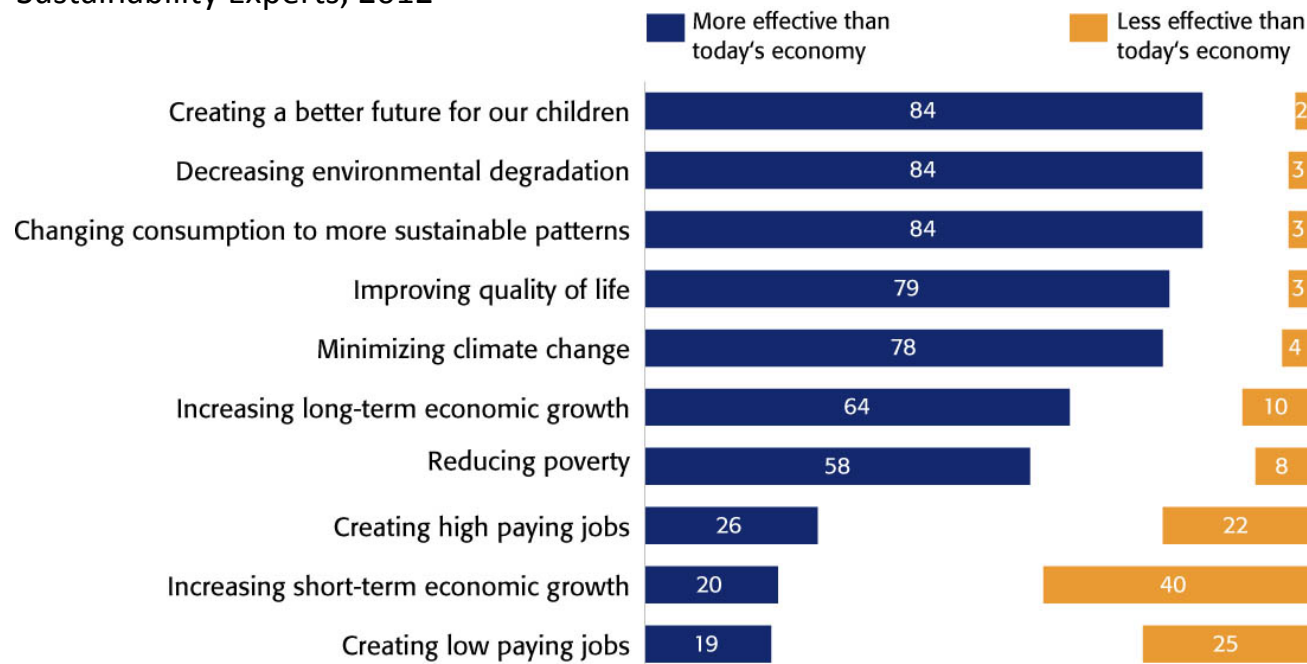


# A “green economy” would create a better future for later generations, protect the environment and make consumption more sustainable, but it could hurt short-term economic growth

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## Effectiveness of Green Economy in Addressing Challenges

Sustainability Experts, 2012



TRP2012\_Q12

Note: On a scale from 1 to 5 where 5 is much more effective than today's economy and 1 is much less effective than today's economy, "more effective than today's economy" equals ratings of 4 and 5, and "less effective than today's economy" equals ratings of 1 and 2.

The white space in this chart represents ratings of "3" and "DK/NA."

12. The United Nations Environment Programme defines a green economy as one that results in **“improved human well-being and social equity, while significantly reducing environmental risks and ecological scarcities.”**

Please indicate if you think a “green economy” would be more or less effective than today's economy in addressing each of the following challenges.

Strong majorities see important advantages in transitioning to a green economy, including long-term economic growth. While experts are uncertain about the impact on job creation, they foresee more high than low paying jobs resulting. Experts in Europe and Oceania are especially concerned about negative short-term economic impacts. Asians and Latin Americans tend to be a little bit less convinced than others regarding effectiveness of “green economy” to address environmental degradation, sustainable consumption, and quality of life benefits.

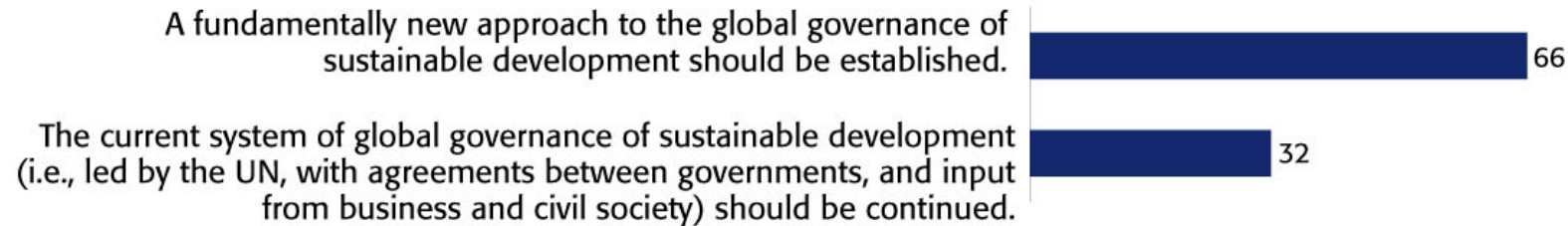


# A majority of experts want a new approach to the global governance of sustainable development

Global Expert Opinion

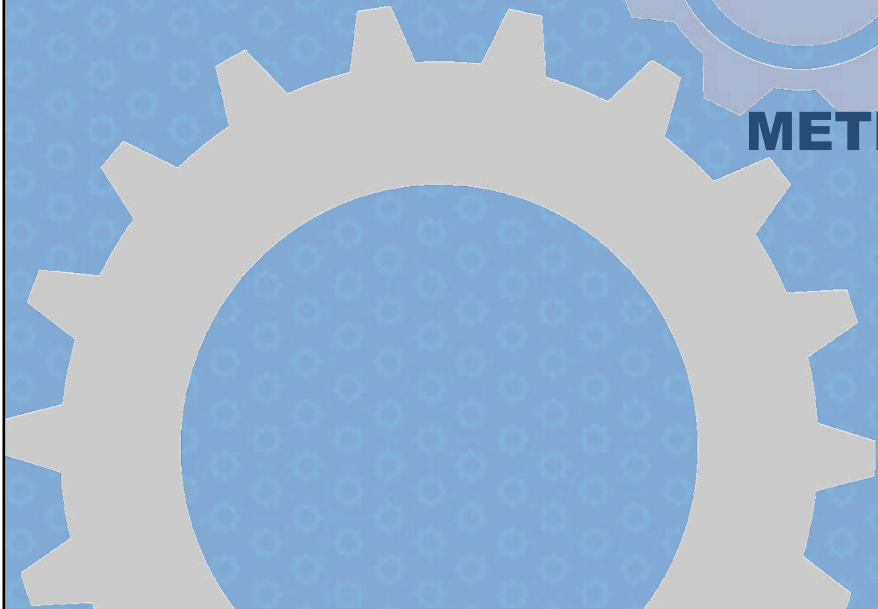
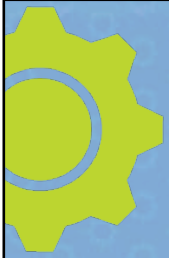
## Views on Global Systems

Sustainability Experts, 2012



TRP2012\_Q14\_D

Given poor progress over the past two decades and the importance of achieving difficult SD objectives, it is not surprising that a solid majority of experts across all sectors and regions call for a fundamentally new approach to the global governance of SD.



**METHODOLOGY**





# Methodology

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- From mid-April to mid-May 2012, a total of 1,603 experts were surveyed online by GlobeScan, SustainAbility and The Regeneration Project partners—ICMM, UNEP, Civicus, WBCSD, World Bank, CCSR, and GLOBE.
- Respondents were drawn from: corporate, government, non-governmental, academic/research, service/media, and other organizations.
- Experts surveyed span 117 countries in Asia, Africa / Middle East, Europe, North America, Latin America / Caribbean, Australia / New Zealand, and comprise a highly-experienced respondent pool:
  - 58 percent have more than ten years of experience working on sustainability issues.
  - 31 percent have five to ten years of experience.
  - 12 percent have three to four years of experience.
  - Respondents with less than three years of sustainability experience have been excluded from the results.
- 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.



## About The Regeneration Roadmap

*Global Expert Opinion*

The Regeneration Roadmap is a collaborative thought leadership initiative by GlobeScan and SustainAbility designed to offer a new path forward for achieving sustainable development within a generation, with a focus on how the private sector can improve sustainability strategy, increase credibility and deliver results at speed and scale.

Through global opinion polling, multimedia broadcast interviews, research and curated dialogues, we are exploring the past, present of sustainable development and crafting solutions for a better future.

The project is presented by BMW Group and SC Johnson and sponsored by Cisco, DuPont, Interface and Pfizer, and supported by many other partners.

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