

Sustainability at a Crossroads

JULY 2025



THE GLOBESCAN / ERM SUSTAINABILITY INSTITUTE RESEARCH PROGRAM



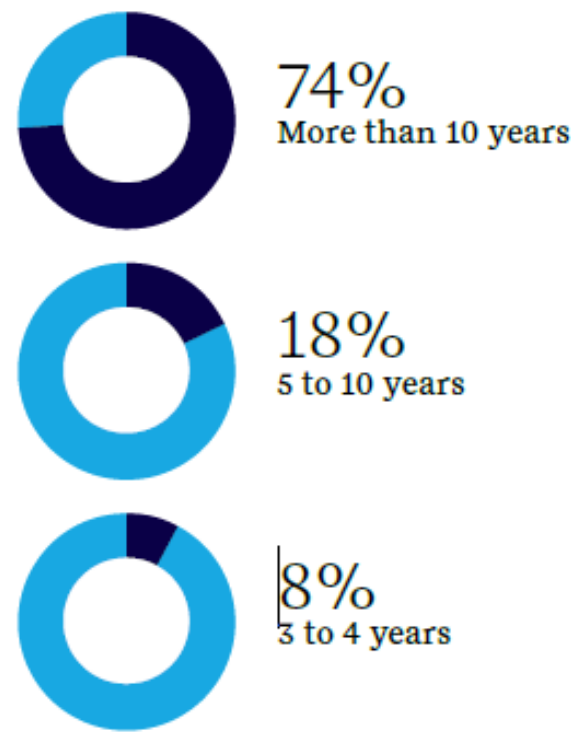
Sustainability at a Crossroads



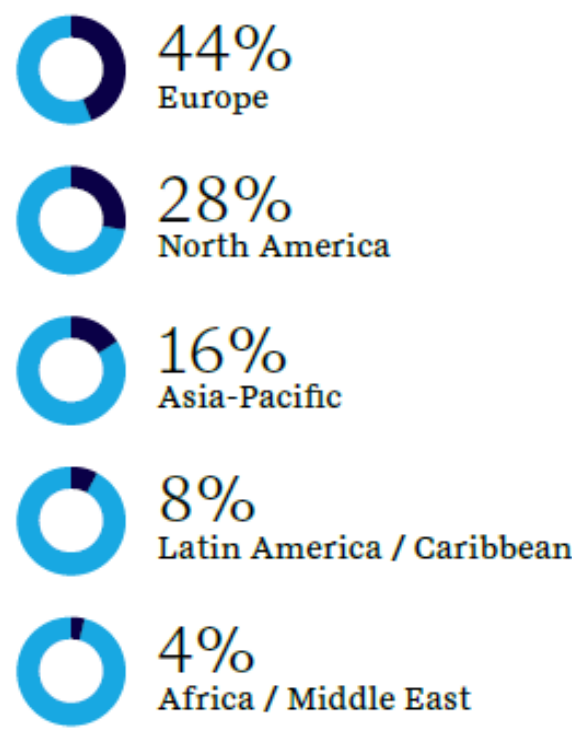
Sustainability at a Crossroads Survey Methodology

A total of 844 sustainability experts across 72 countries completed the Sustainability at a Crossroads survey from April 22nd to May 26th, 2025.

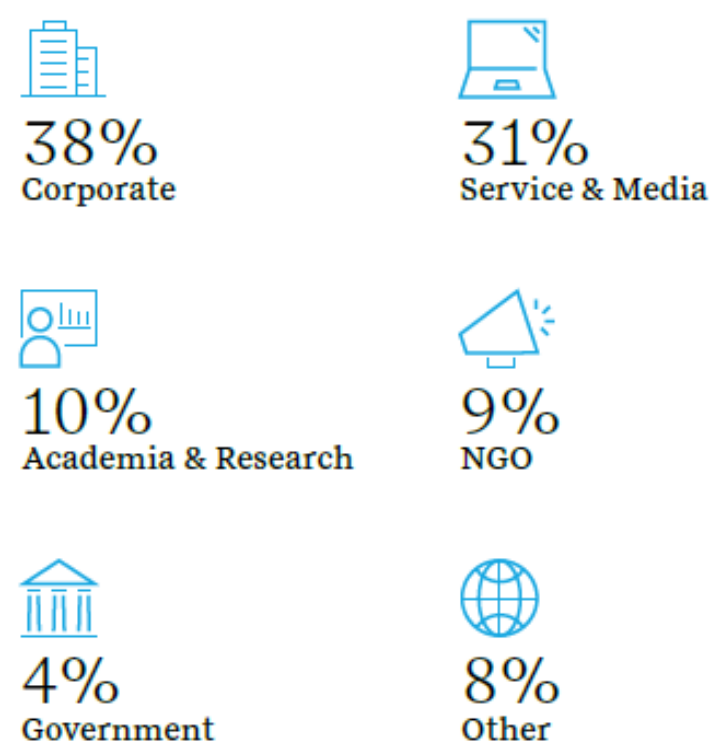
Experience



Geography



Sectors

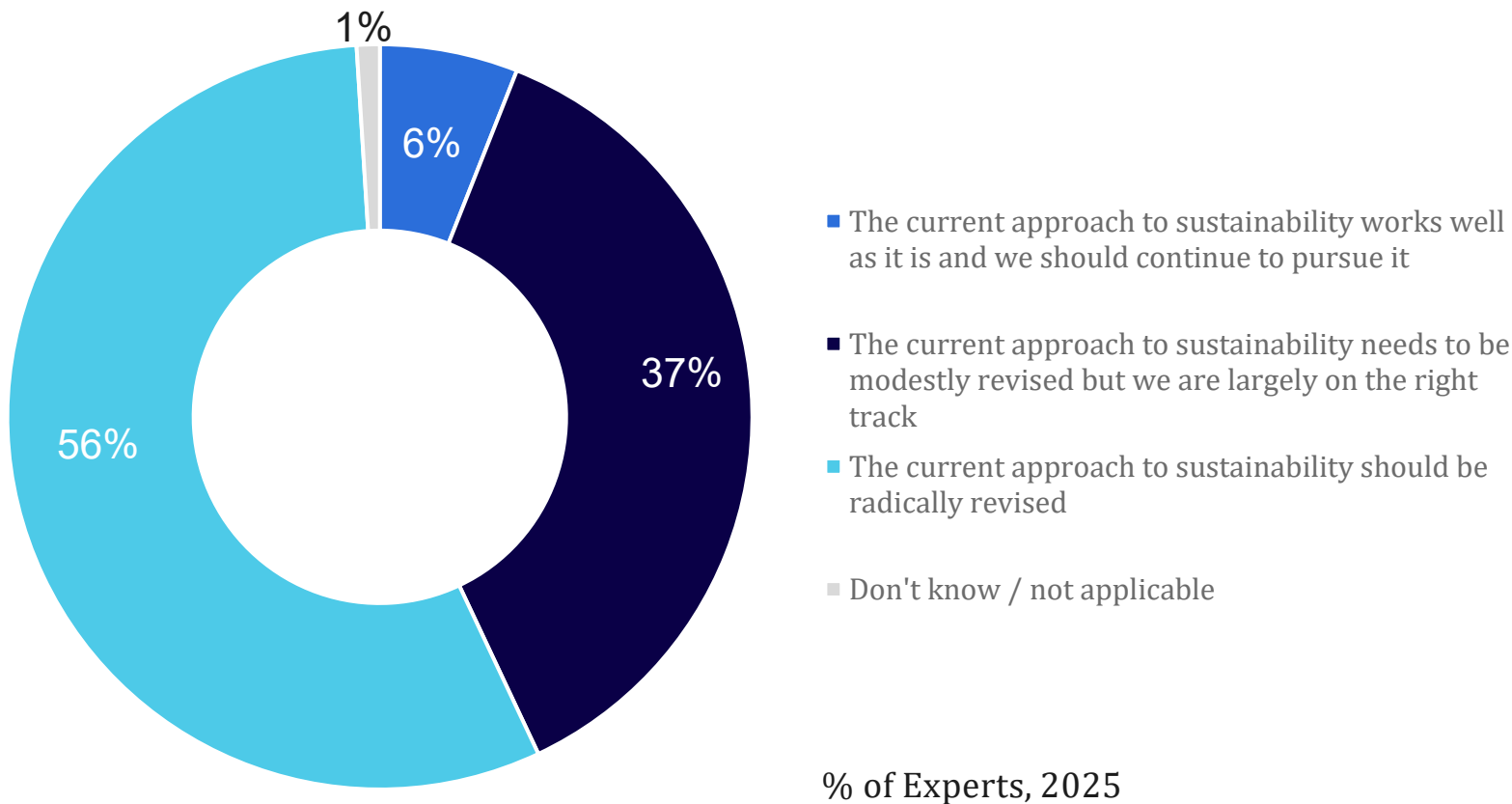


The state of the
sustainability
agenda – fit for
purpose?



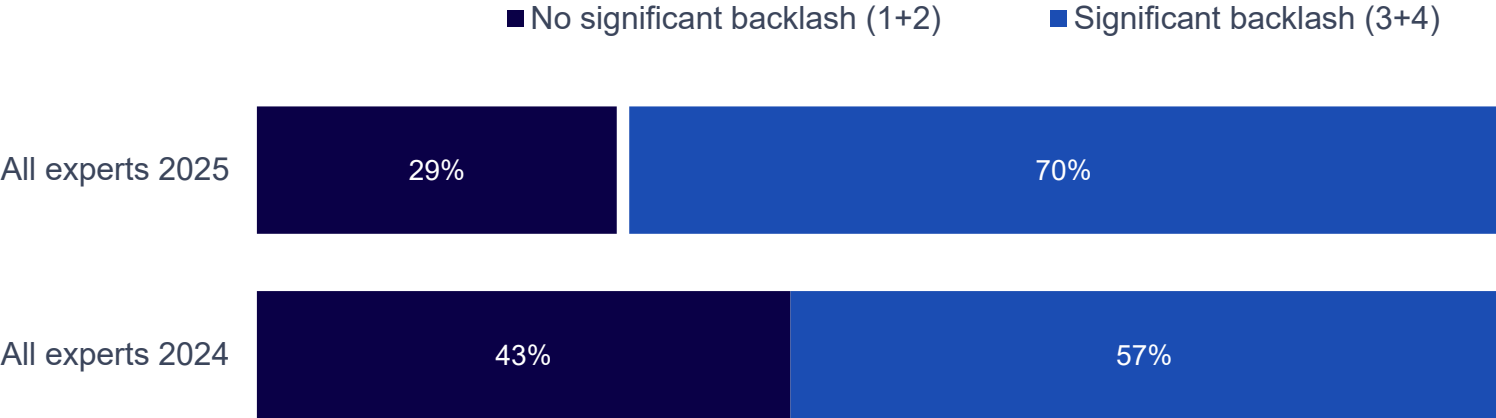
Most experts believe current approaches to sustainability needs (radical) revision

Q How do you personally feel about the current state of the sustainability agenda?



Experts have become more likely to say there is a significant backlash against the sustainability agenda

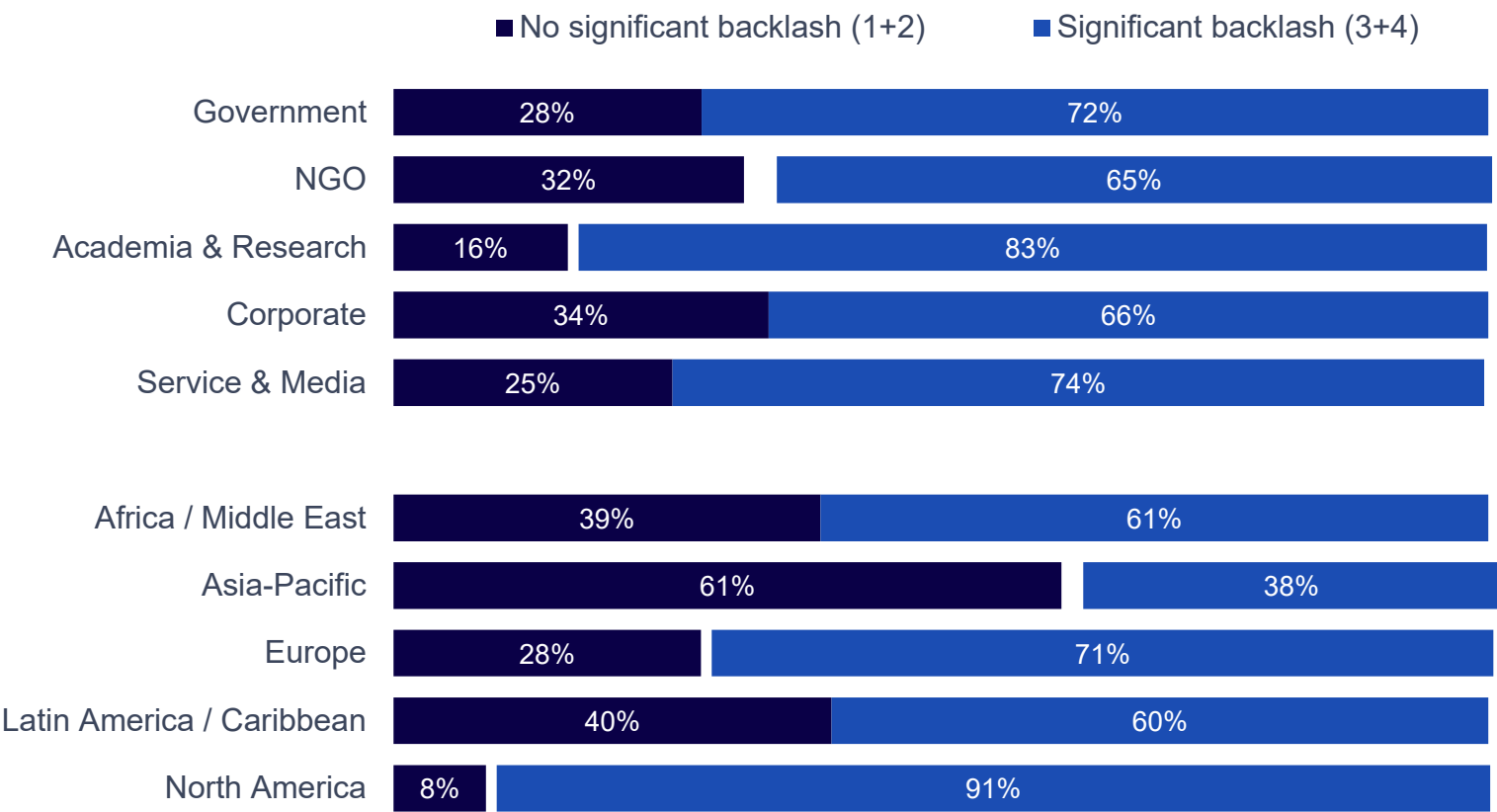
Q How significant do you think the current backlash against the sustainability agenda (including ESG) is in your country?



% of Experts, 2024–2025

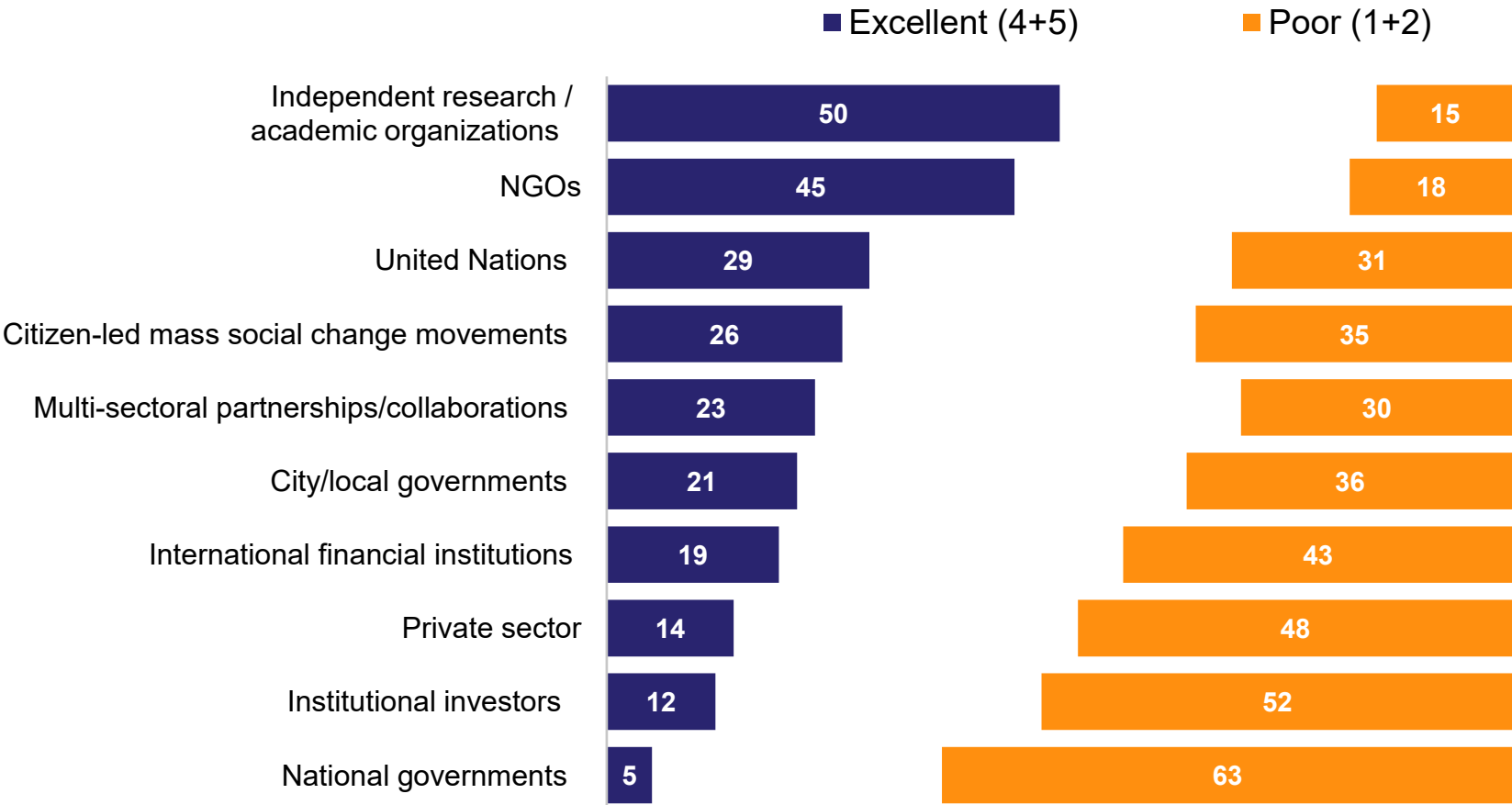
Nine in ten experts in North America believe there is a significant backlash, but most experts in Asia-Pacific disagree

Q How significant do you think the current backlash against the sustainability agenda (including ESG) is in your country?



Experts say national governments have contributed least to progress on sustainable development

Q 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?

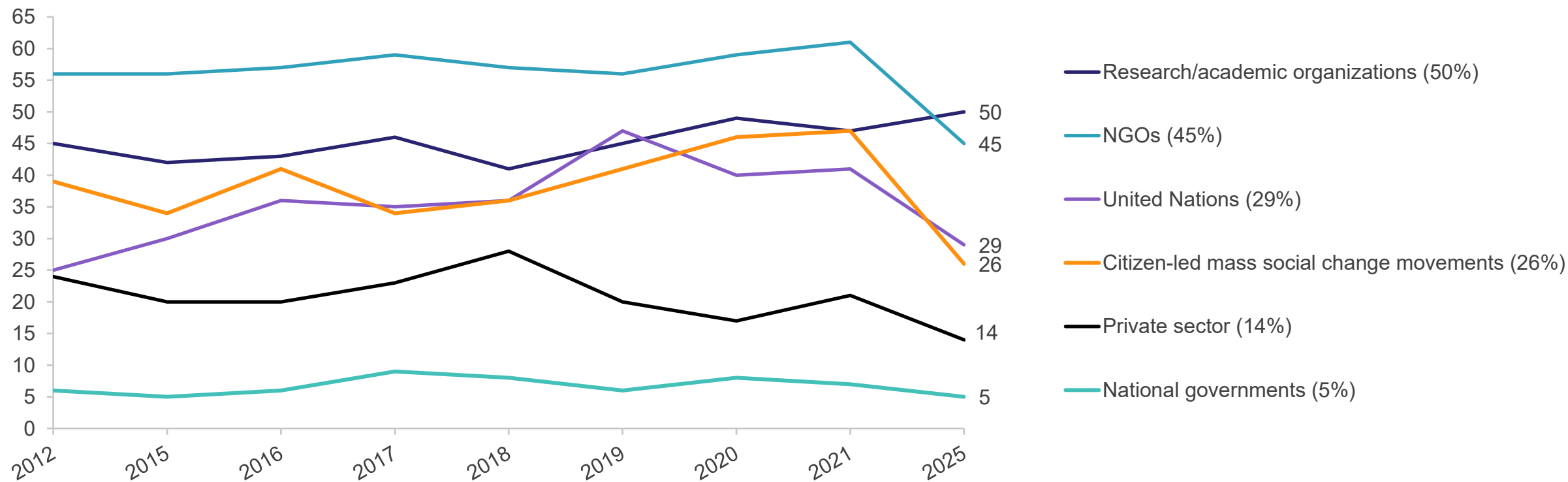


White space indicates “neutral” and DK/NA.

% of Experts, 2025

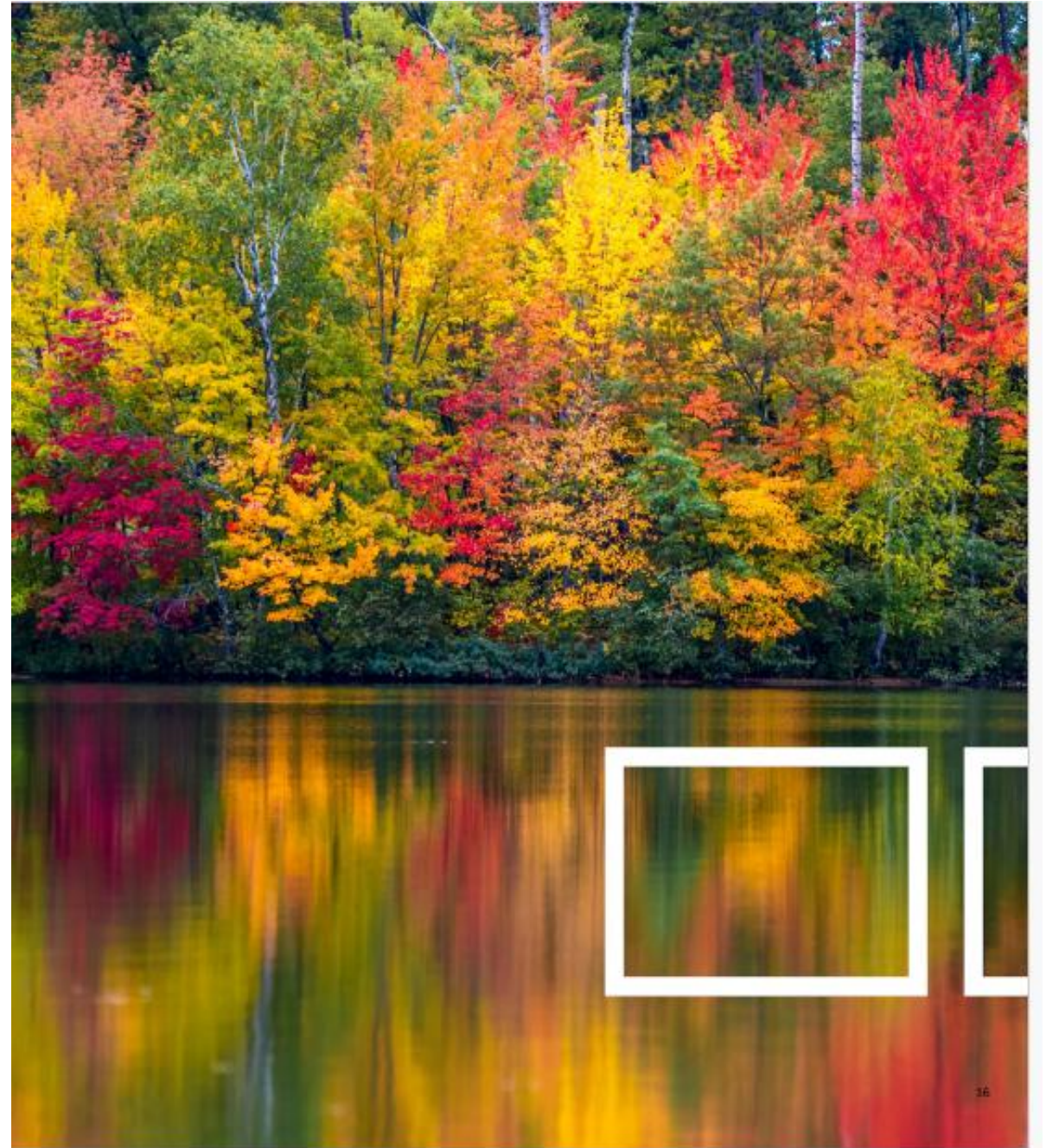
Experts give most institutions the lowest performance scores since tracking began in 2012; dramatic decline in ratings for civil society

Q 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?



% of Experts, “Excellent” (4+5), 2012–2025

What should we do?
Assessing potential
impact vs. feasibility of
different levers of
change



Levers of change: Impact vs feasibility of actions

Q Please rate the extent to which each of the following could potentially lead to significant positive sustainability outcomes over the next five years.

Now please rate how likely it is that we can implement at scale each of the following over the next five years considering political will, economic costs, social acceptance, and technical readiness.

To chart a practical course for the sustainability agenda over the next five years, we conducted a comprehensive assessment of 64 potential actions and interventions. These were evaluated and organized into a matrix based on their **feasibility** and **potential impact**.

The actions span four key categories:

- **Government and public policy actions**
- **Investor and capital market actions**
- **Corporate and business actions**
- **Civil society actions**

● Government / public policy actions

● Investor / capital market actions

● Corporate actions

● Civil society actions



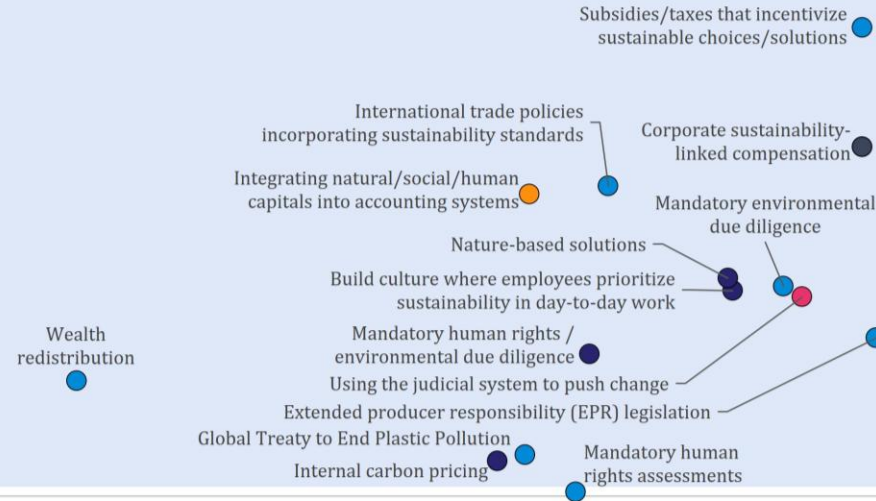
● Government / public policy actions

● Investor / capital market actions

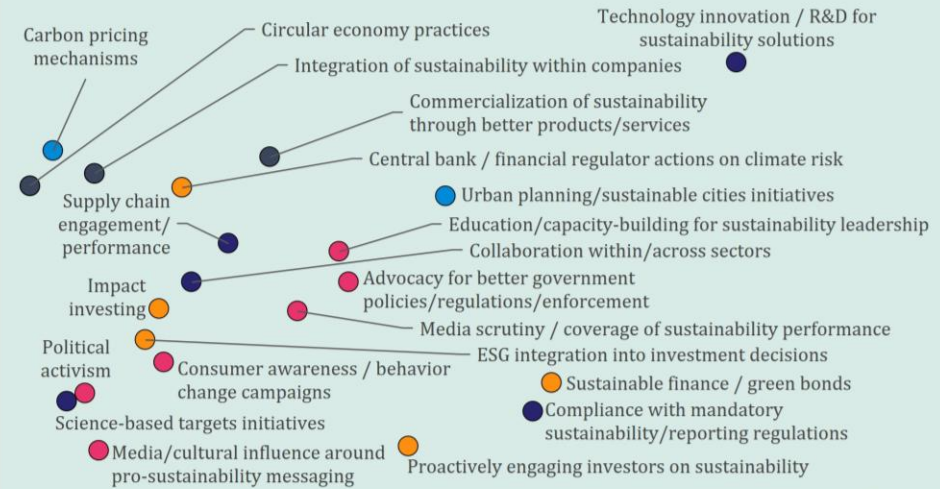
● Corporate actions

● Civil society actions

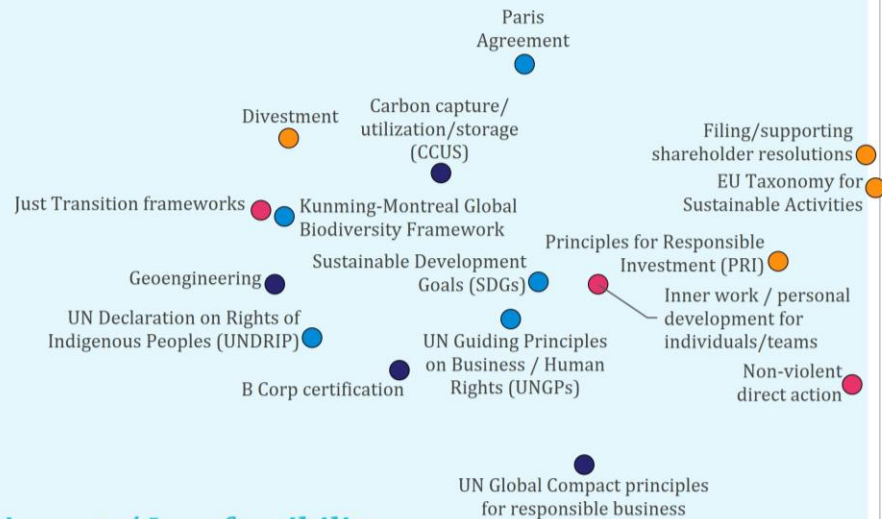
High impact / Low feasibility



High impact / High feasibility



Low impact / Low feasibility



Low impact / High feasibility



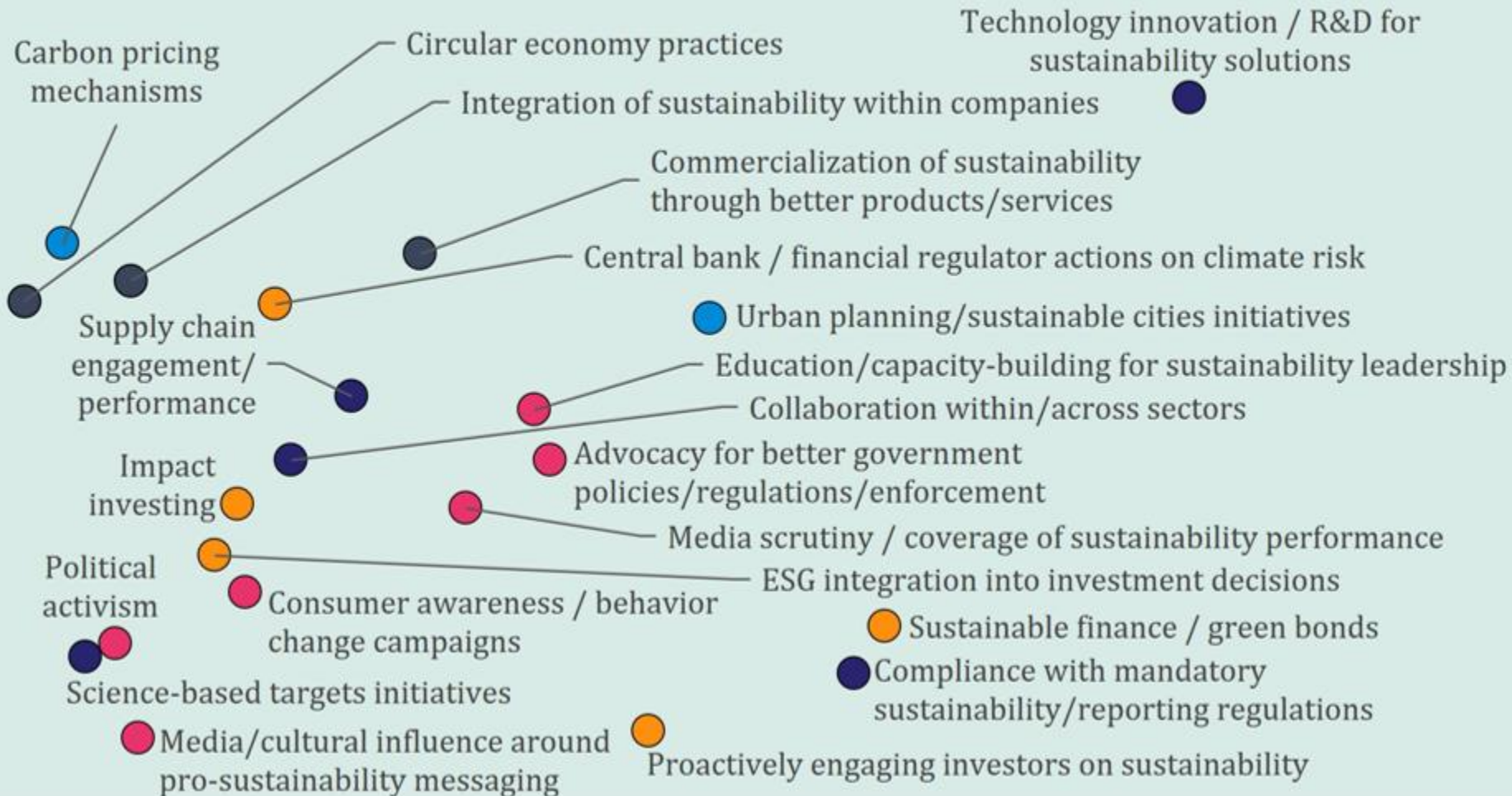
● Government / public policy actions

● Investor / capital market actions

● Corporate actions

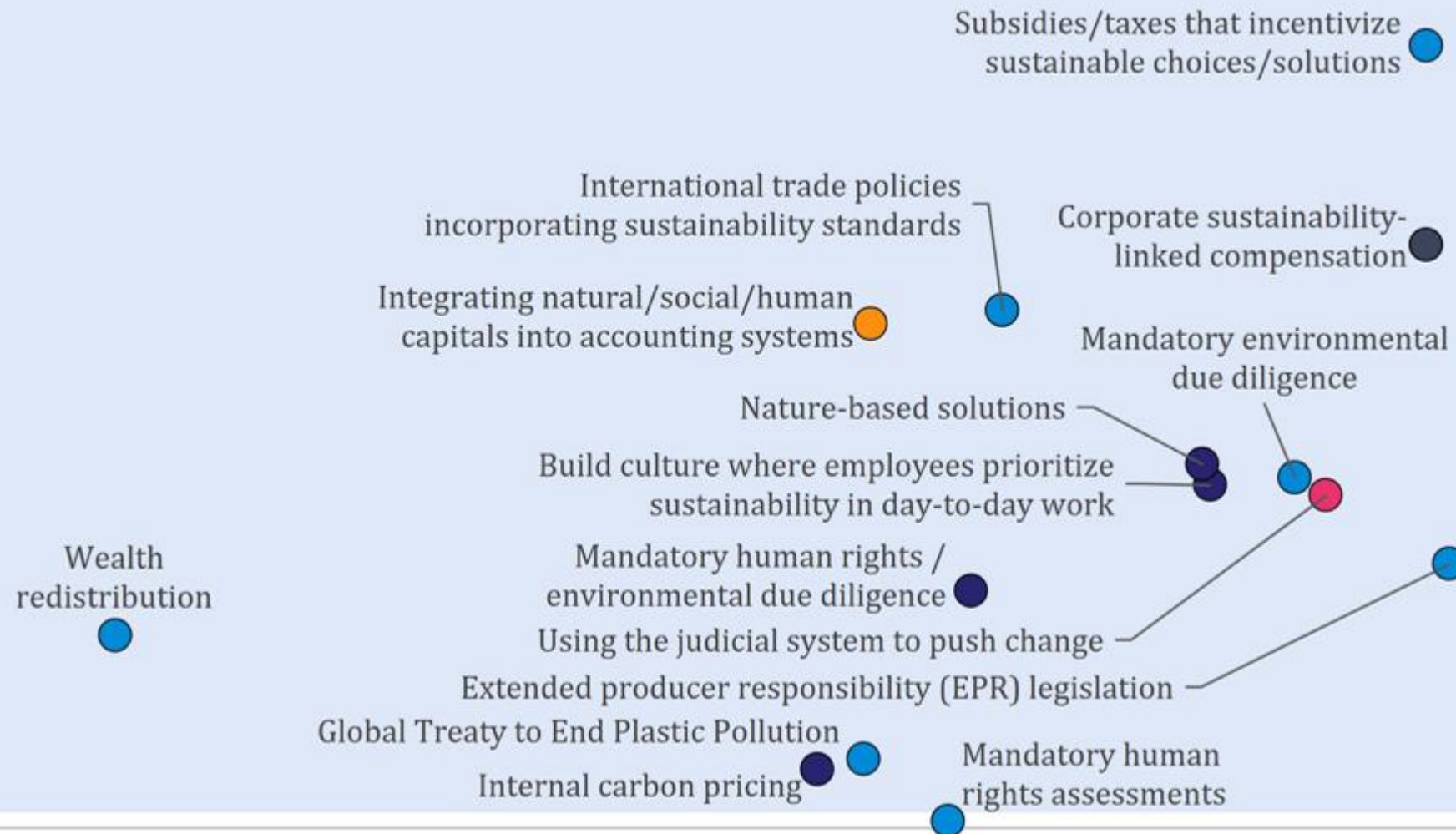
● Civil society actions

High impact / High feasibility



- Market mechanisms
- Finance
- Innovation
- Activism

High impact / Low feasibility



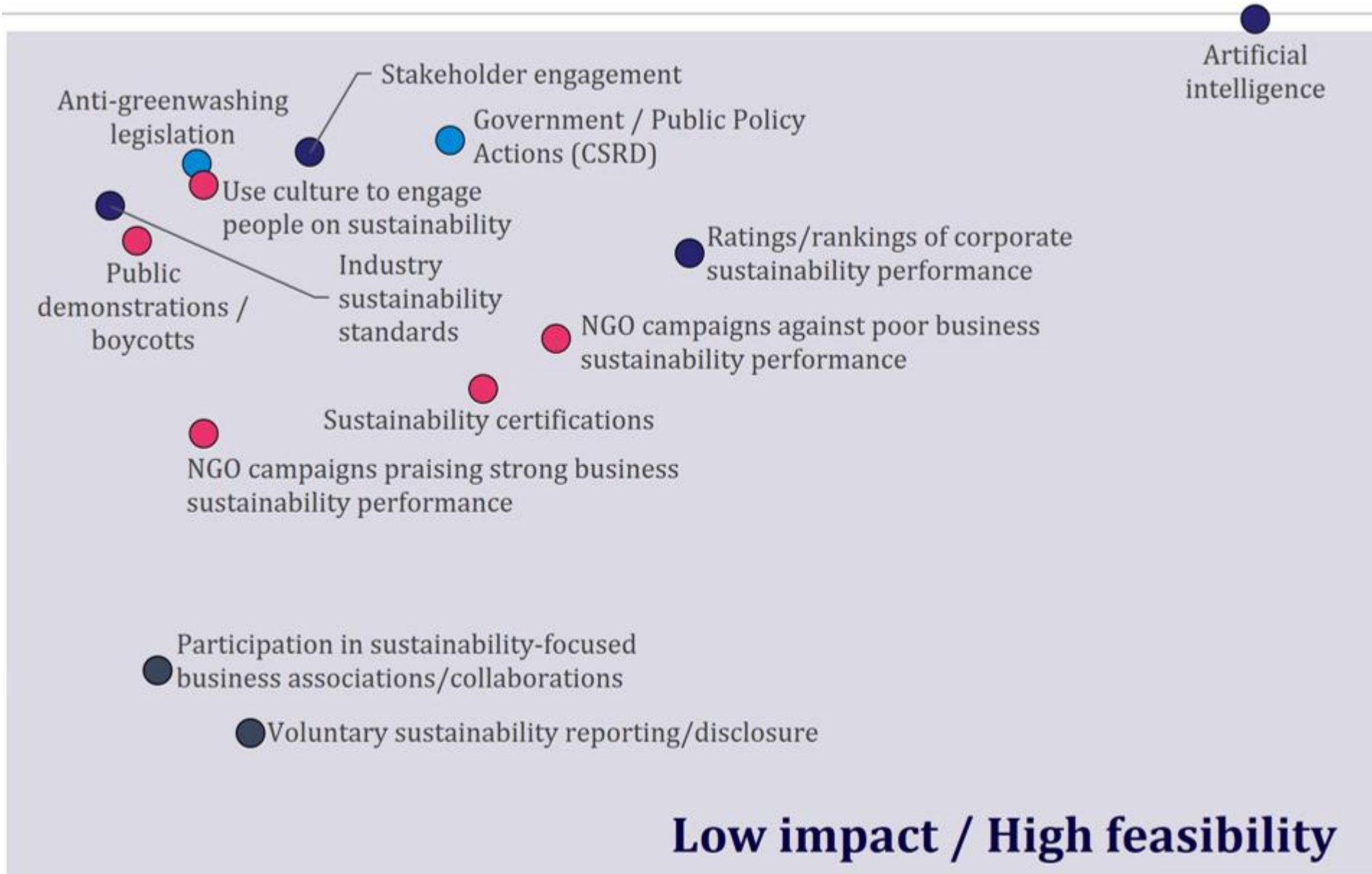
- Interventions
- Regulations
- Compliance
- Org change

● Government / public policy actions

● Investor / capital market actions

● Corporate actions

● Civil society actions



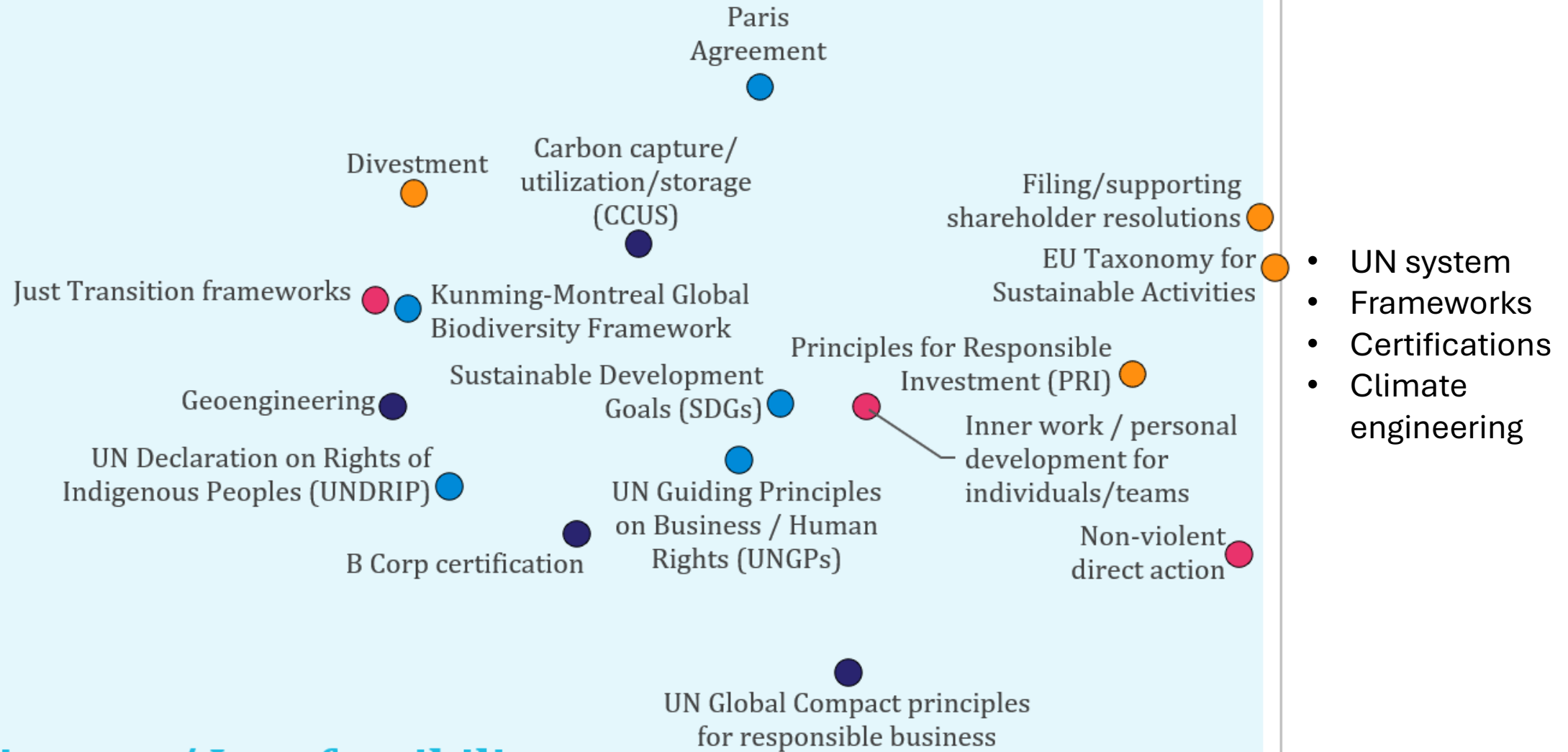
- Voluntary
- NGO campaigns
- Engagement
- Ratings

● Government / public policy actions

● Investor / capital market actions

● Corporate actions

● Civil society actions

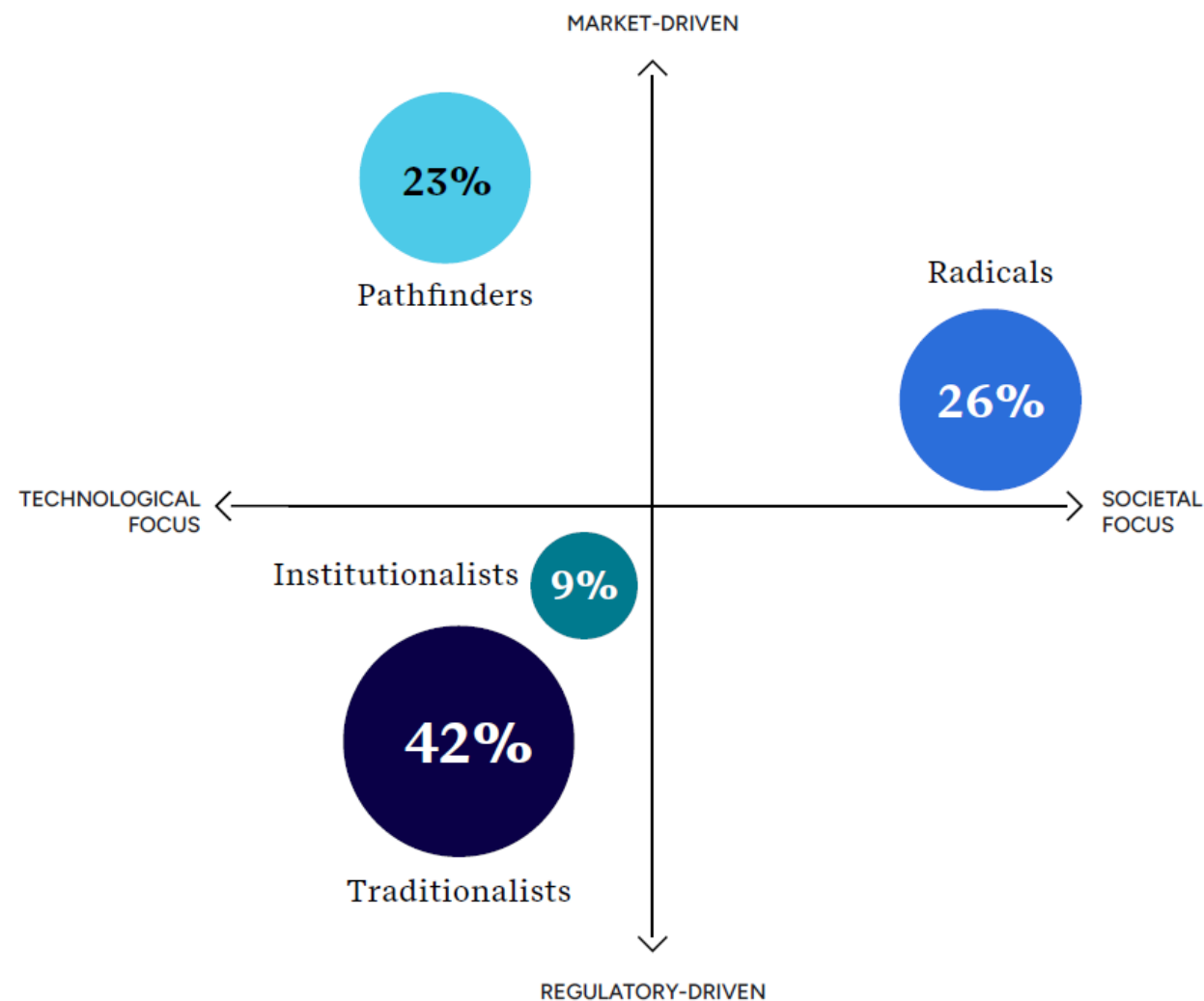


Low impact / Low feasibility

Different schools
of thought –
a segmentation of the
global sustainability
community



Segmentation of the Global Sustainability Community



Segmentation of the Global Sustainability Community

