ROUTES TO TRANSFORMATION

Rebuilding momentum for sustainable transformation

THURSDAY, 29 OCTOBER 2026

THE WEBINAR WILL BEGIN SHORTLY

GlobeScan | ERM SUSTAINABILITY INSTITUTE | VOLANS

THE GLOBESCAN / ERM SUSTAINABILITY INSTITUTE RESEARCH PROGRAM





Mark Lee
Global Director,
Thought Leadership
ERM

Agenda

1. Overview of 2026 survey findings
2. Reflections from panelists
3. Panel discussion
4. Final 30-minutes: Green Paper consultation

Our Panelists



Chris Coulter

CEO, GlobeScan



John Elkington

Founder, Volans



Peggy Liu

Chairperson, Joint US China Collaboration on Clean Energy (JUCCCE)



Susan Njoroge

Managing Director, Responsible Business Consulting Limited



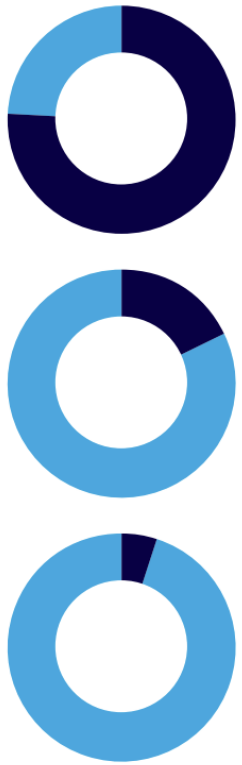
Rianne Buter

Global VP, Sustainability Unilever

Sustainability at a Crossroads Survey Methodology

A total of 610 sustainability experts across 57 countries completed the Sustainability at a Crossroads survey from June 9th to August 9th, 2026.

Experience



77%
More than 10 years

18%
5 to 10 years

5%
3 to 4 years

Geography

41%
Europe

26%
North America

17%
Asia-Pacific

10%
Latin America / Caribbean

6%
Africa / Middle East

Sectors

44%
Corporate

31%
Service & Media

8%
Academic & Research

7%
NGO

3%
Government

7%
Other

The state of the sustainability agenda – fit for purpose?



Nearly six in ten experts believe the sustainability agenda requires *radical* revision



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

Please choose one.

% of Experts, 2026

Many reasons why stakeholders feel the need for revision

Q Why do you think we need to radically revise the current approach to sustainability?

Progress is too slow and off-track

Incremental action cannot address systemic problems

Reporting has displaced implementation

Voluntary commitments lack accountability

The underlying economic model remains unchanged

Sustainability remains peripheral to core decisions

Leadership, funding, and capabilities are insufficient

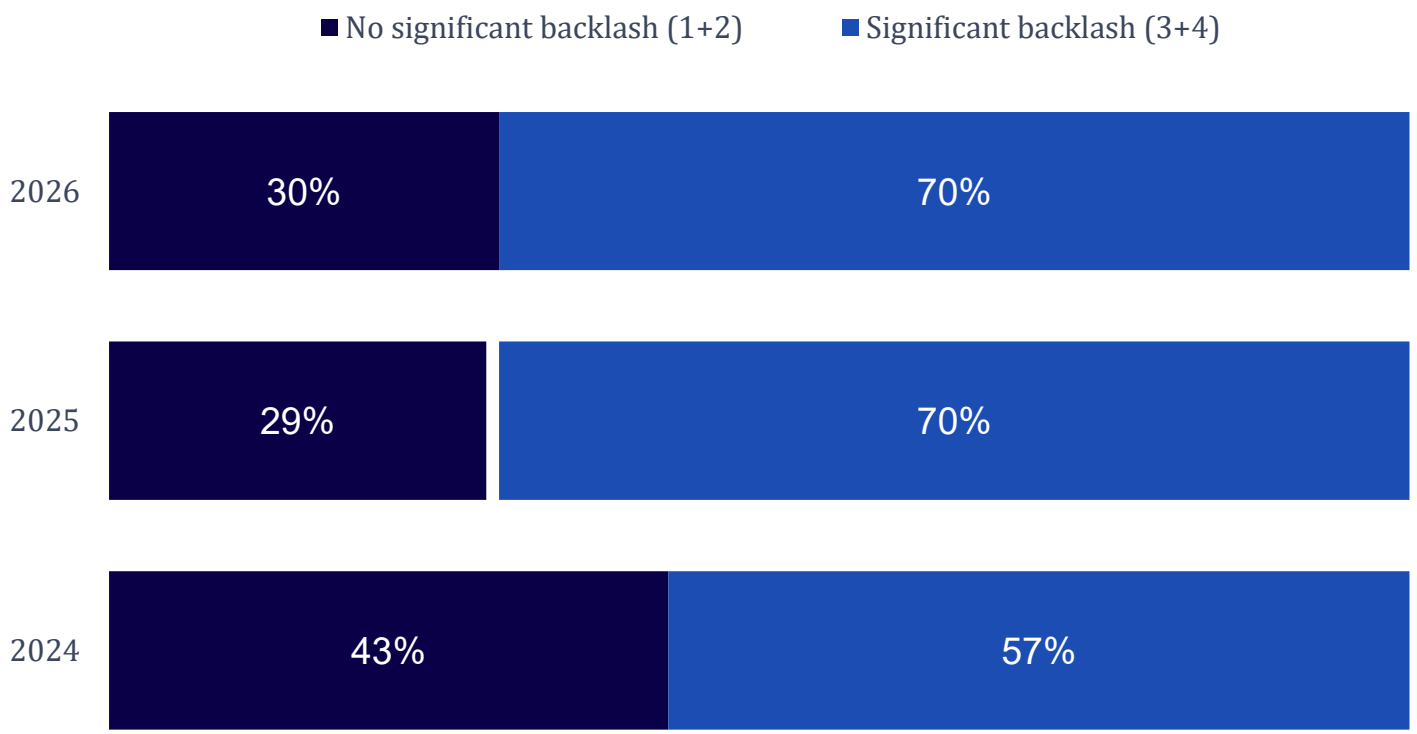
The agenda has lost political and public traction

Social and economic dimensions need greater attention

Governance and collaboration are fragmented

Enduring sense that the backlash to sustainability is material

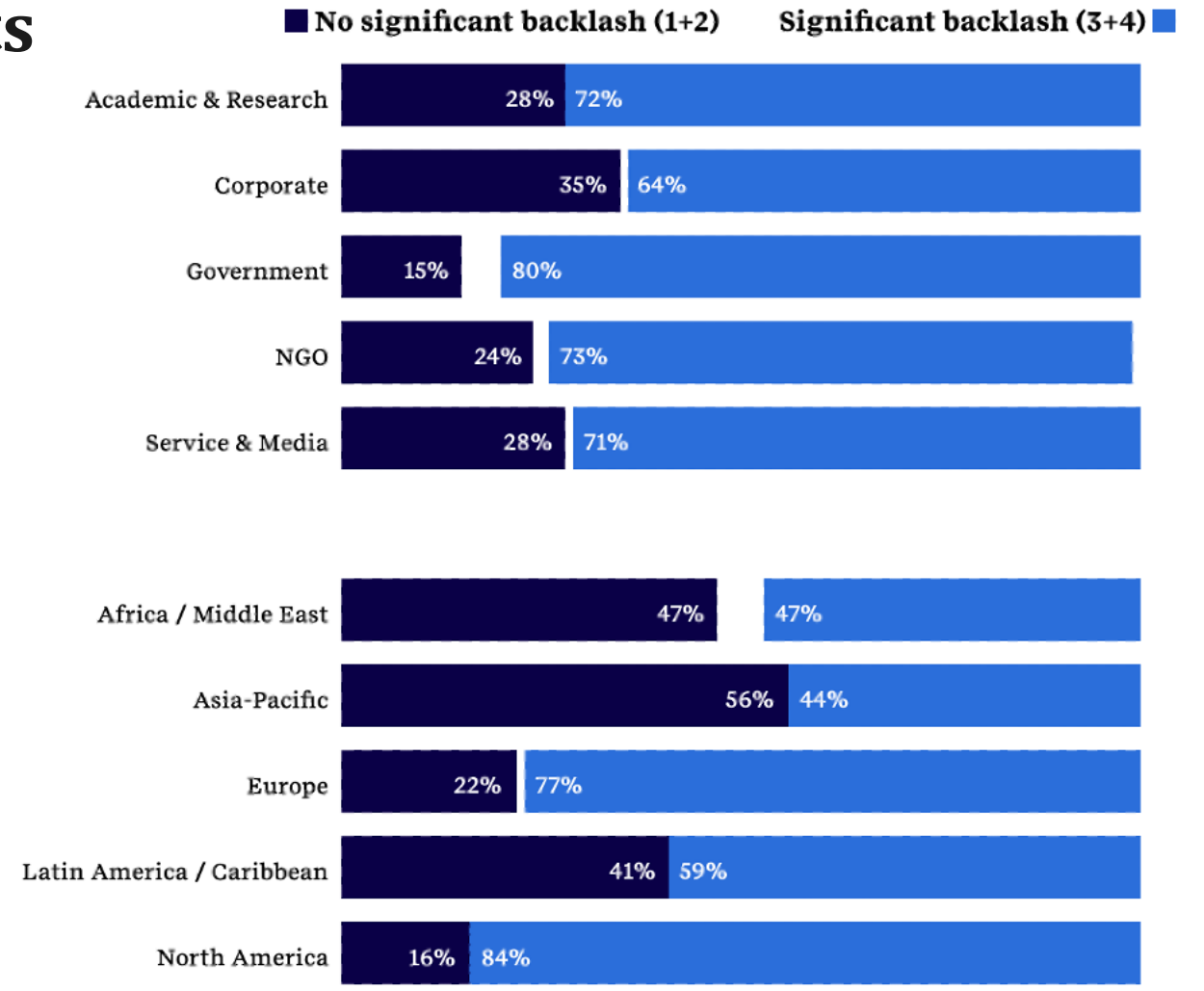
Q How significant do you think the current backlash against the sustainability agenda (including ESG) is in your country at this time in 2026?



% of Experts, 2024–2026

North America reports the highest levels of backlash against the sustainability agenda, while Asia-Pacific reports the lowest

Q How significant do you think the current backlash against the sustainability agenda (including ESG) is in your country at this time in 2026?

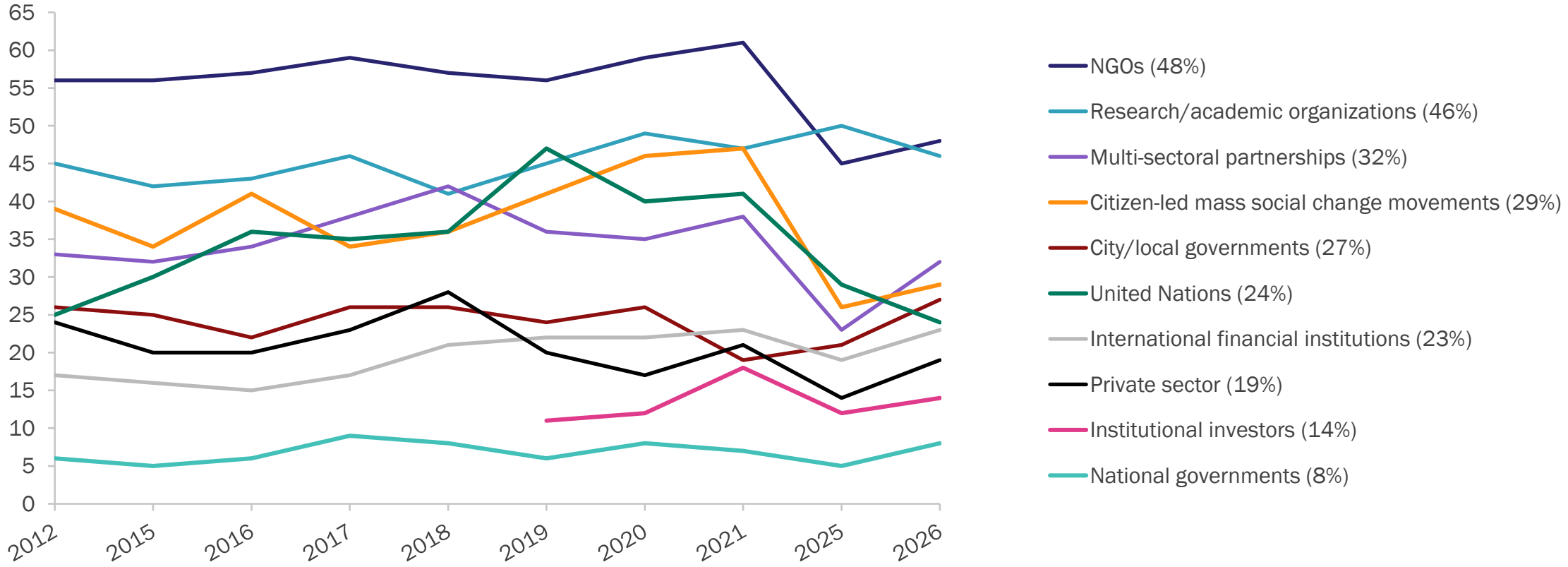


% of Experts, by Sector and Region, 2026

Expert confidence in government and business sustainability performance remains relatively low

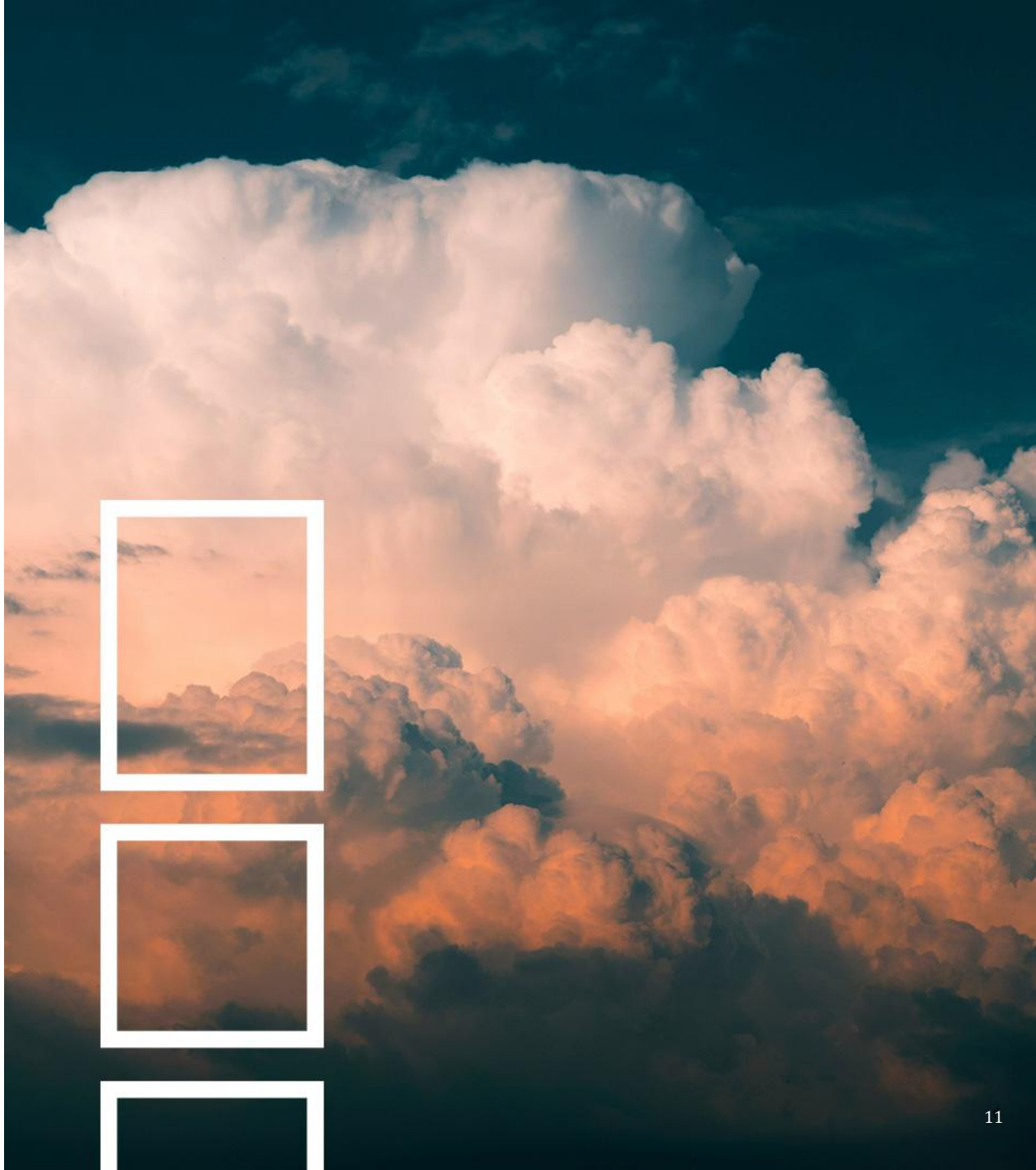
Q How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio?

Please use a scale where 1 is "poor" and 5 is "excellent."



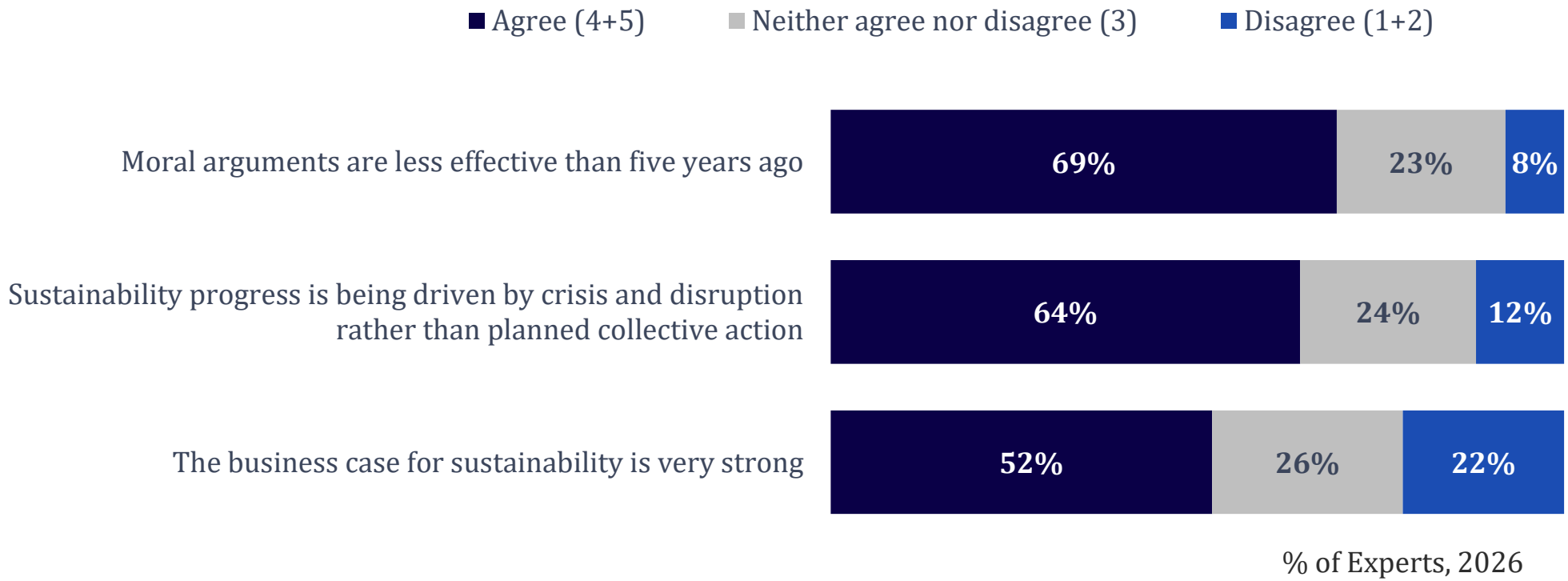
% of Experts, "Excellent" (4+5), 2012–2026

What forces are shaping the sustainability agenda?



Disruption and business imperatives are stronger drivers of sustainability than moral arguments

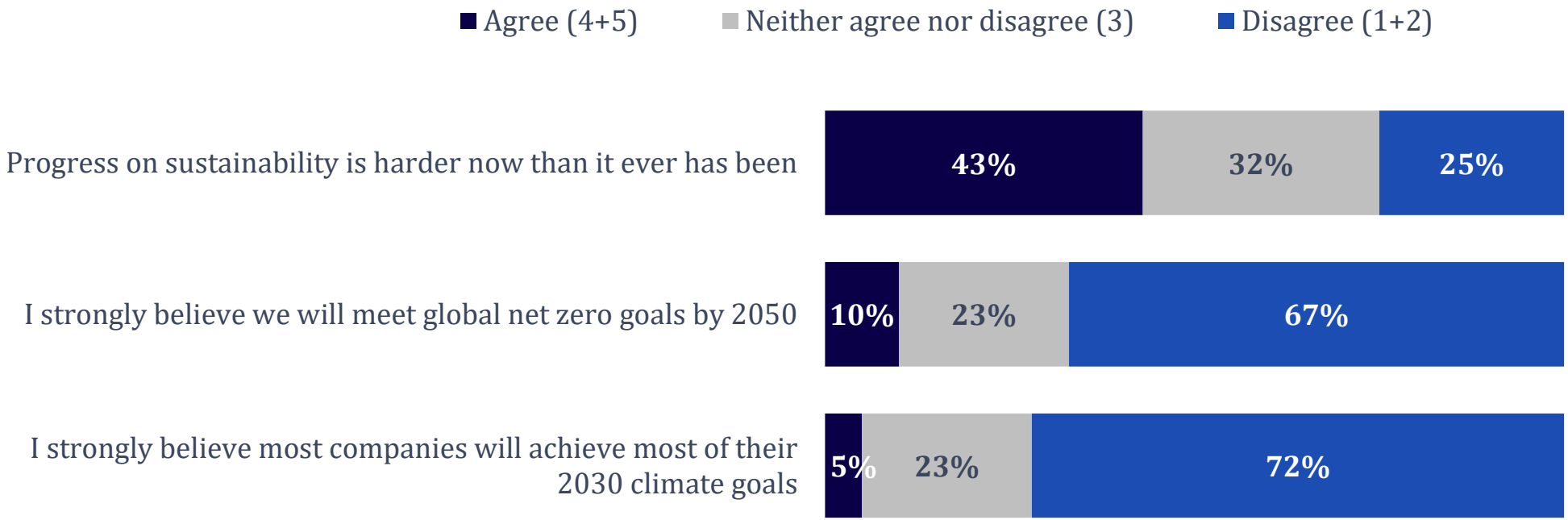
Q Please indicate whether you agree or disagree with the following statements.



% of Experts, 2026

Experts see progress getting harder and have little confidence current climate goals will be met

Q Please indicate whether you agree or disagree with the following statements.

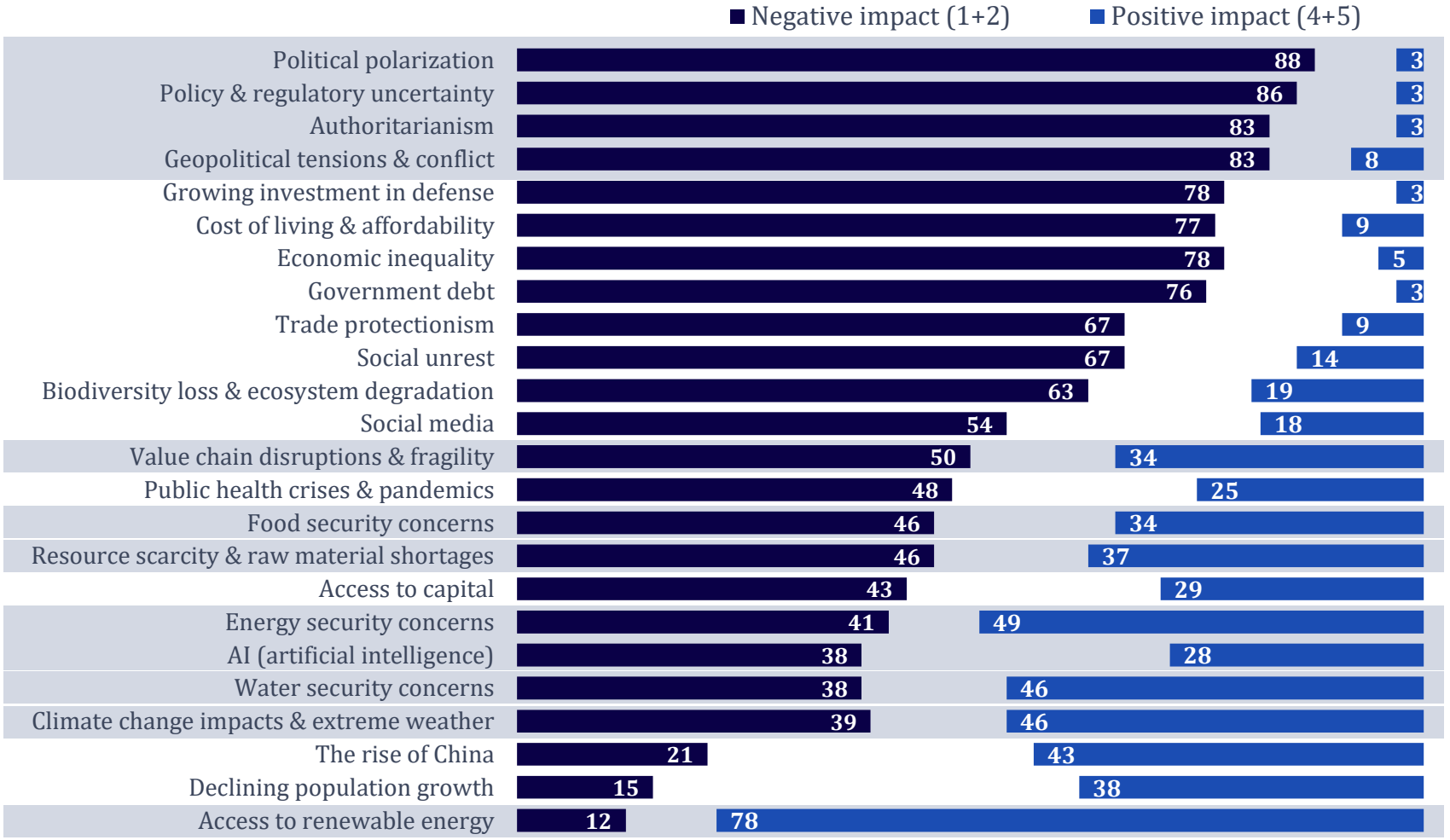


% of Experts, 2026

Political disruption is hindering progress, while renewables and resource pressures are accelerating action

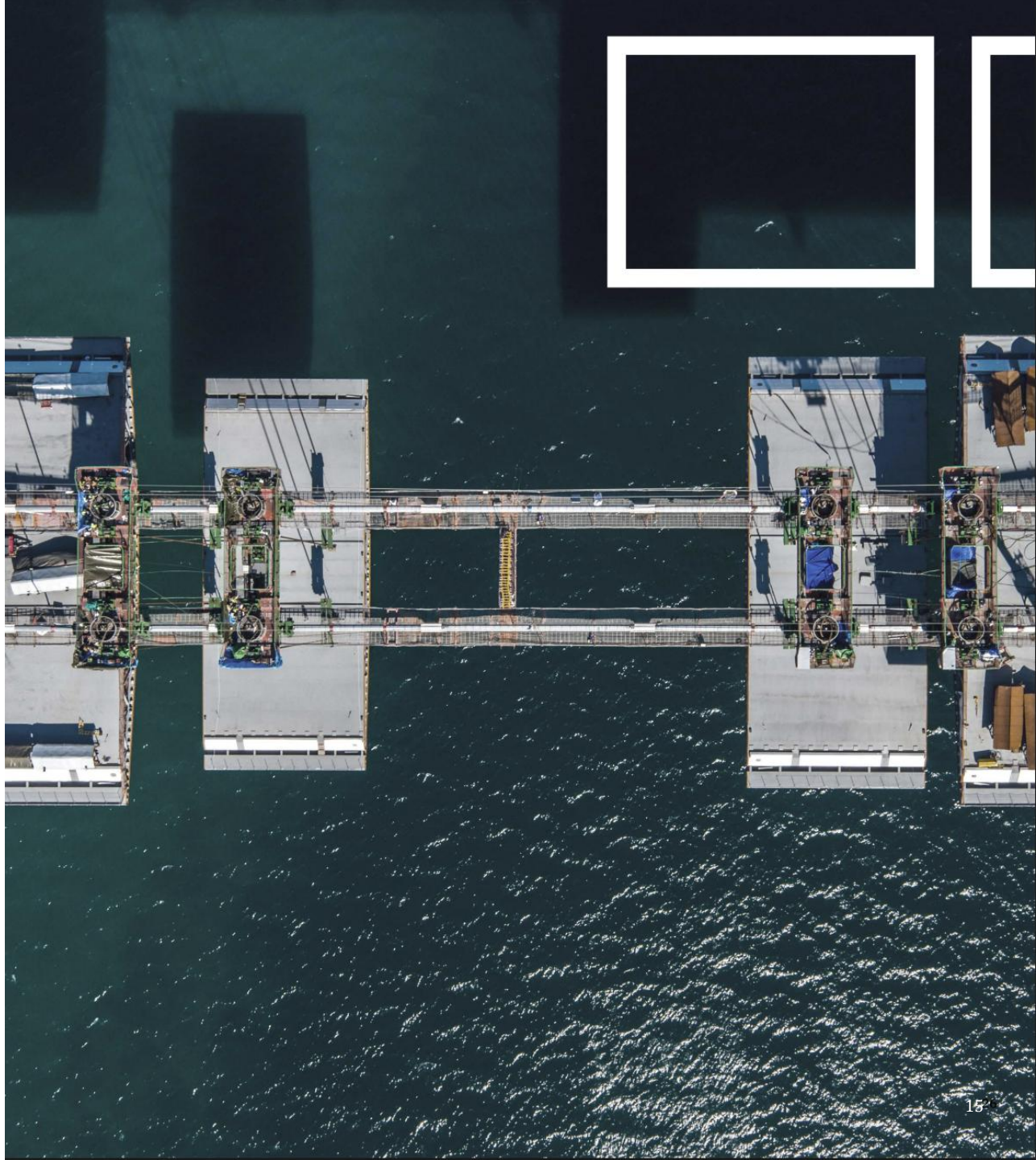
Q The world is experiencing great change, and some of these changes may be helping or hurting progress on sustainability.

Please indicate the impact each of the following disruptions is currently having on progress towards sustainability outcomes.

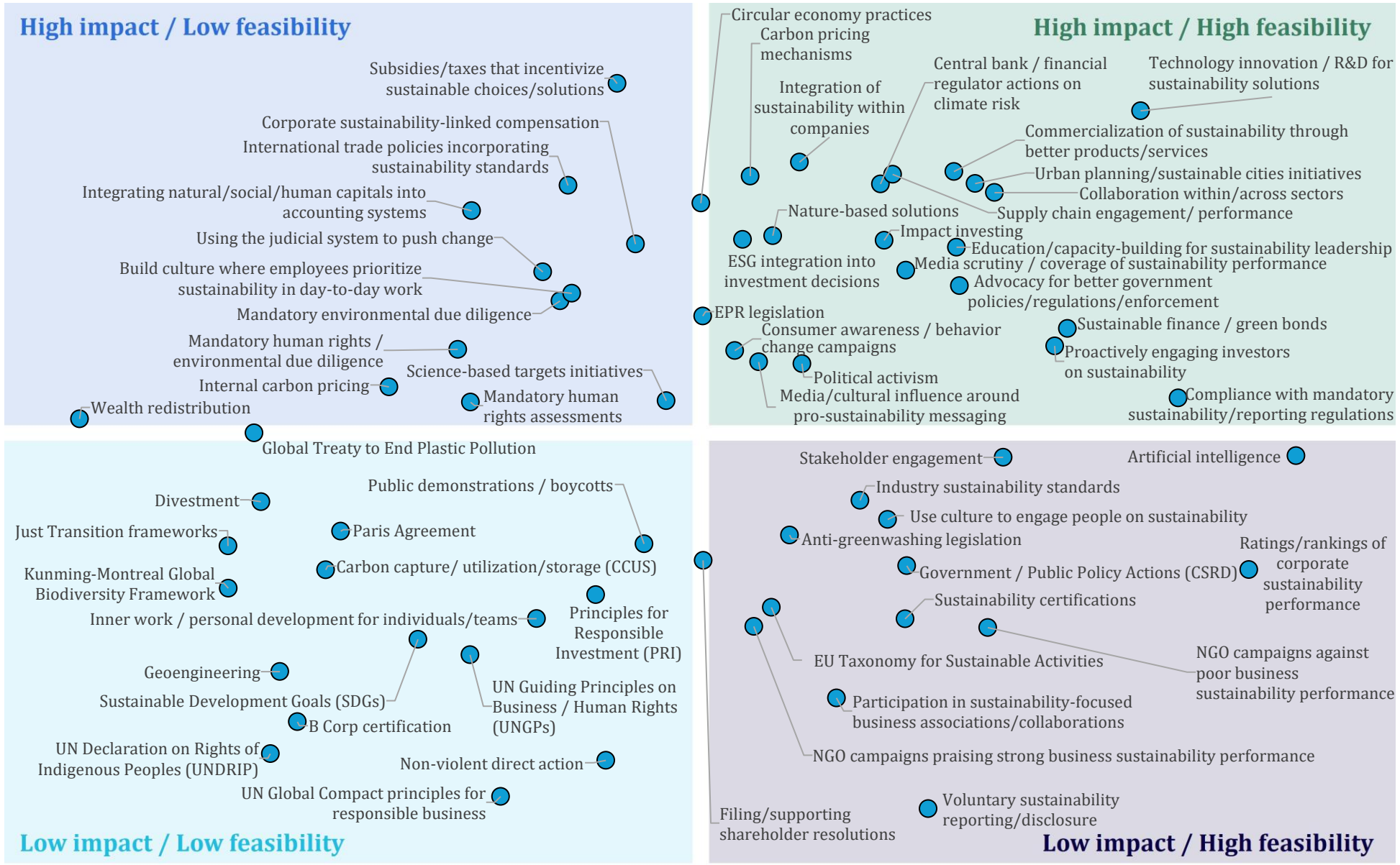


% of Experts, 2026

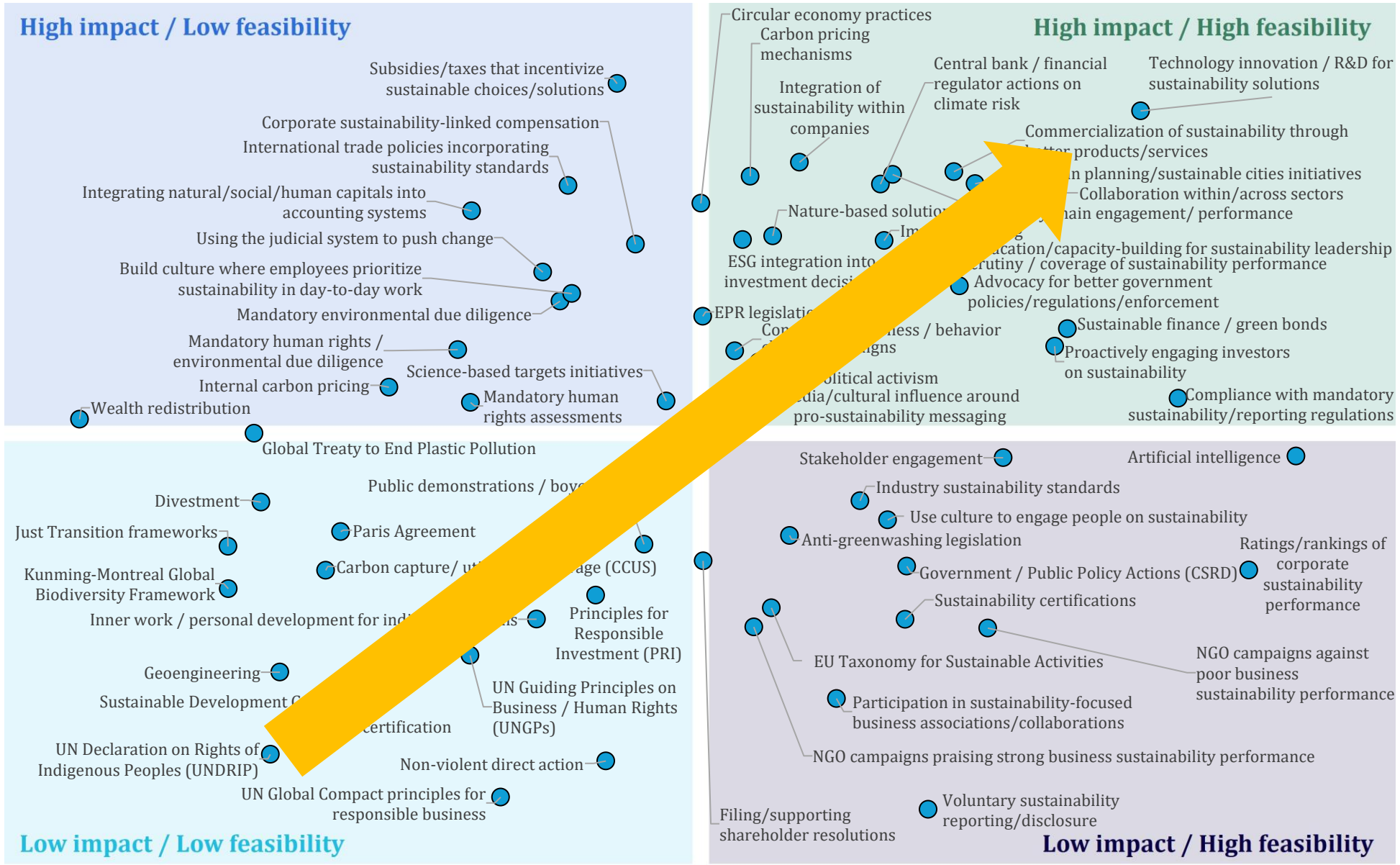
What should we do? Assessing potential impact vs. feasibility of different levers of change



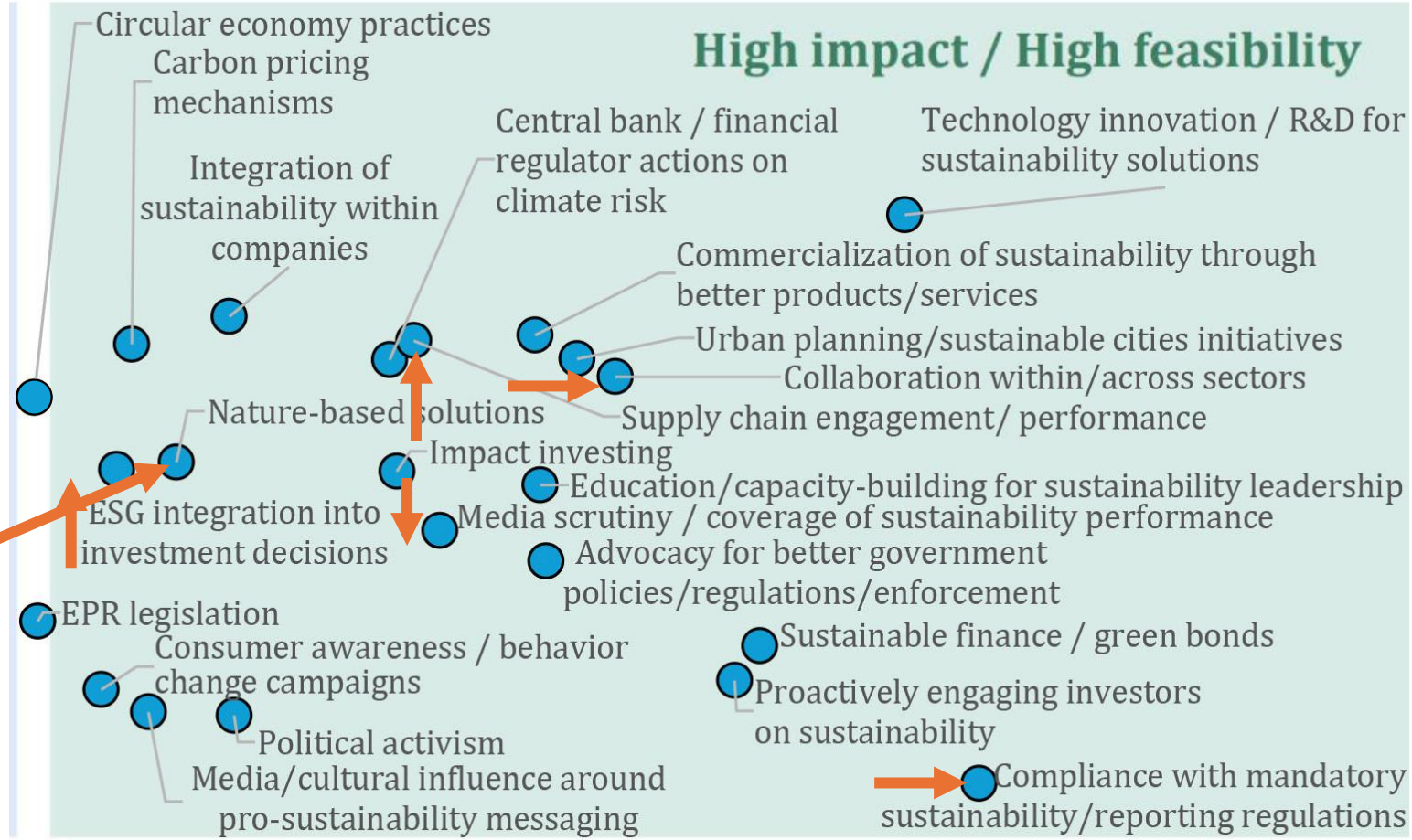
Levers of change: Impact vs. feasibility of actions



Levers of change: 2025 to 2026 momentum



Levers of change: High impact & high feasibility of actions



Arrows show shift from 2025 (largest movers)

- Market mechanisms
- Finance
- Innovation
- Activism

Panel Discussion



Rianne Buter

Global VP, Sustainability
Unilever



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GRAY RHINO TERRITORY



The 2026 Sustainability at a Crossroads survey

610 sustainability experts · 57 countries · fielded June–August 2026

THE GLOBESCAN / ERM SUSTAINABILITY INSTITUTE RESEARCH PROGRAM

John Elkington · Volans

The bounce: was 2025 the floor?



108 / 130

lever ratings rose between 2025 and 2026. Ten held flat; twelve fell.

Losing ground · 5

Impact investing, CSRD, UNDRIP, wealth redistribution, plastics treaty

Easier, not more believed · 5

Ratings, reporting, EU Taxonomy: easier to run, no more credible

Advancing on both · 12

Supply chains, products, trade policy, central banks, nature-based solutions

The biggest fall, the biggest rise

–10

Impact investing

ESG as a labeled product. Impact 73% → 63%: the largest fall in the survey

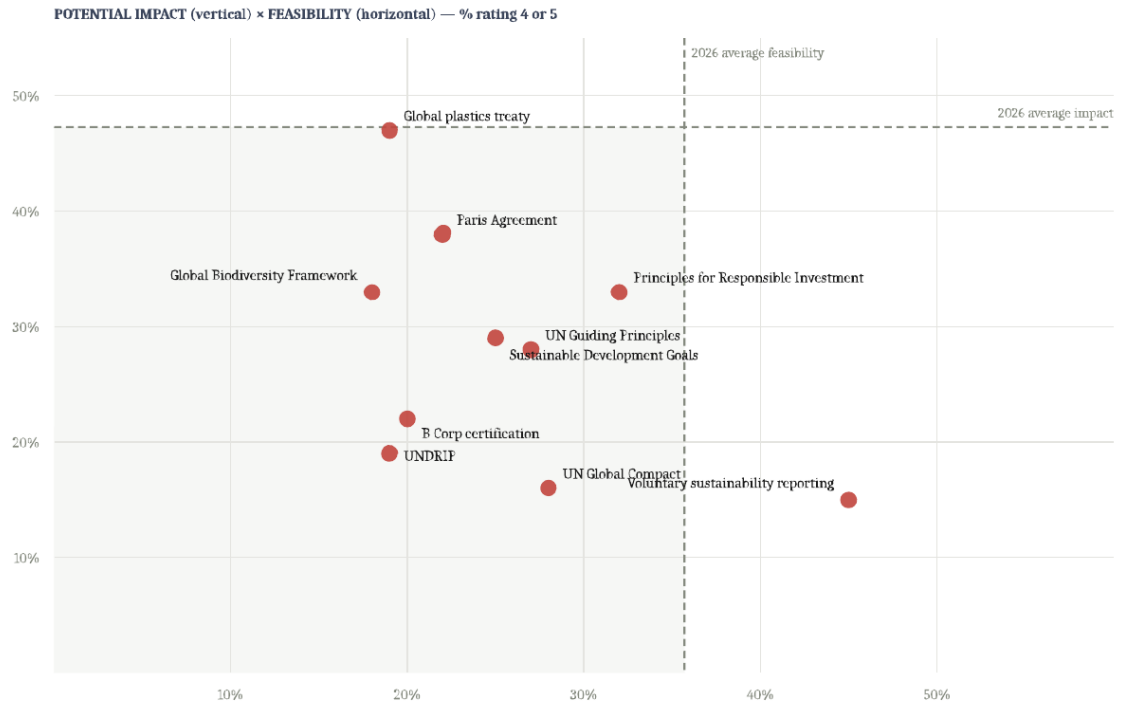
+9

ESG integration

ESG as an input to mainstream capital. Impact 54% → 63%: among the largest rises

Same three letters, opposite verdicts. The field has not turned against ESG. It has turned against the idea that a label is enough.

THE VOLUNTARY ERA, SCORED (2026)



Every instrument of the voluntary era sits below both 2026 averages.

From soft to hard sustainability, and a new cast

SOFT: THE OLD THEORY

Measure it, publish it, standardize it

Pledges, labels, ratings, disclosure. Carried by the sustainability profession. Voluntary reporting: 15.

▼

HARD: THE NEW THEORY

Price it, require it, enforce it, sell it

Taxes, contracts, court judgments. Subsidy reform and taxation 77, carbon pricing 69. It changes what companies pay, not what they say.

WHO IS BEING PULLED INTO THE SPACE

ROLE MOVING TO THE CENTER	PRINCIPAL LEVERS	2026	Δ
CFO, treasury and tax	Subsidy reform and taxation	**77**	**+5**
Chief product / R&D officer	Technology innovation; commercialization	**74**	**+4**
Business-unit P&L owner	Integration; internal carbon pricing	**70**	**+6**
Chief procurement officer	Supply chain; mandatory due diligence	**69**	**+9**
Government affairs	Trade policy standards	**68**	**+5**
Chief risk officer	Central banks and regulators	**68**	**+5**
General counsel	Judicial system; media scrutiny	**61**	**+5**

% of experts rating each lever's impact 4 or 5, and change since 2025. The roles are our inference. The CSO's new job: enable them, and keep them honest.

White Paper focus areas: AI, and shift to Asia

THE AI ABSTENTION, 2025 → 2026

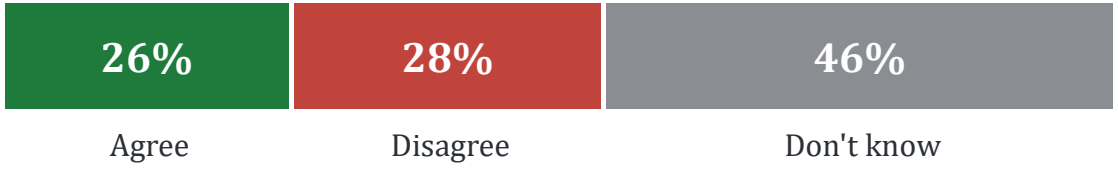
59%

feasibility: the highest score of anything in the survey

45 → 45%

impact: frozen, the only major lever that did not move

Do AI's benefits outweigh its costs?



The largest undecided block anywhere in the survey, sitting on the most consequential technology of the period.

THE SHIFT TO ASIA, AND CHINA

Significant anti-sustainability backlash



Expected influence on the agenda



GlobeScan survey of 124 sustainability leaders for BSR: Asia-Pacific, China and Japan hold three of the top five spots.

While the West set targets, China built the infrastructure, and now refines most of the world's critical minerals. Yet experts rank authoritarianism the third obstacle, at 83%.

Thank you