ROUTES TO TRANSFORMATION

Sustainability at a Crossroads 2026

A global stakeholder survey on the sustainability agenda

October 2026



GlobeScan | ERM SUSTAINABILITY INSTITUTE | VOLANS

THE GLOBESCAN / ERM SUSTAINABILITY INSTITUTE RESEARCH PROGRAM

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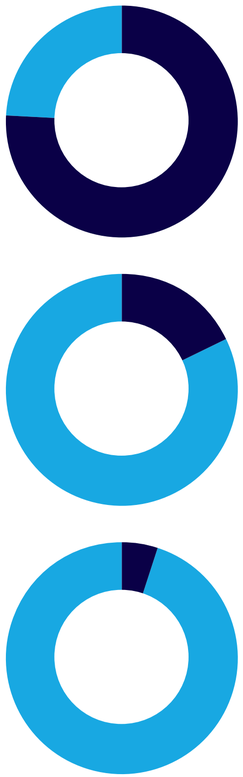
Introduction & survey methodology



Introduction & survey methodology

The Sustainability at a Crossroads 2026 survey captures the views of sustainability professionals across sectors and regions on the future of the sustainability agenda. A total of 610 sustainability experts across 57 countries completed the survey from June 9th to August 9th, 2026. Their responses provide a snapshot of how the sustainability community views progress to date, emerging challenges, and priorities for future impact.

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

Key findings



Key findings

1

Calls for change to the sustainability agenda have intensified.

Support for radical revision increased from 56 percent in 2025 to 59 percent in 2026, and 95 percent now support at least some form of revision, up from 93 percent last year. With only 4 percent satisfied with the status quo, the debate is not whether change is needed, but how fundamental that change should be.

Many experts calling for change believe sustainability has become overly focused on disclosure, compliance, and incremental improvements, while underlying economic incentives remain largely unchanged. Experts are looking for stronger regulation and accountability, renewed political leadership, and better alignment of economic incentives with sustainability goals.

2

Confidence in institutions remains fragile.

Non-governmental organizations (NGOs) continue to receive the strongest assessments for their contribution to sustainable development, increasing from 45 percent in 2025 to 48 percent in 2026, while ratings for the United Nations fell from 29 percent to 24 percent.

Governments and institutional investors continue to be viewed as among the weakest contributors, reinforcing concerns about the effectiveness of some key sustainability actors.

3

Backlash has become part of the operating environment.

Seven in 10 experts report significant backlash against sustainability and ESG in their country, unchanged from 2025 but up from 57 percent in 2024.

Perceptions remain uneven, with experts in North America and Europe reporting substantially higher levels of backlash than those in Asia-Pacific.

4

Confidence in sustainability remains stronger than trust in the systems intended to deliver it.

While 52 percent of experts believe the business case for sustainability is compelling, only 10 percent strongly believe the world will achieve net zero by 2050, and just five percent believe most companies will meet their 2030 climate commitments.

5

The sustainability community is being challenged to evolve.

Experts increasingly call for generational renewal and stronger Global South leadership, with 55 percent supporting generational change, and 50 percent saying the field is too Global North-led. Many also believe sustainability should give greater attention to social and economic priorities alongside environmental concerns.

Key findings

6

Experts continue to favor systemic interventions.

The highest-rated interventions are those capable of shifting entire markets, industries, and economies. Strong policy incentives, technological innovation, supply-chain transformation, and financial market reforms are seen as offering the greatest potential to accelerate sustainability outcomes at scale.

7

Confidence in implementation is growing, but delivery remains uncertain.

Potential feasibility scores increased across every intervention area since 2025, with the largest gains being in Corporate/business actions (+6 points) and Investor/capital market actions (+5 points).

However, impact ratings continue to exceed feasibility ratings across all categories, highlighting a persistent gap between what experts believe would work and what they think can realistically be delivered.

8

Technology remains one of the most important enablers, not a substitute for collective action.

Technological innovation consistently ranks among the highest-impact and most feasible interventions, yet only a minority believe technological innovation is more important than collective action. The findings suggest technology advances are most valuable when combined with supportive policies, institutions, and collective action.

9

Mandatory mechanisms are gaining favor over voluntary approaches.

Across the survey, stronger regulation, legal accountability, and policy incentives are generally rated more highly than voluntary approaches, reflecting concern that disclosure and voluntary commitments alone are not delivering sustainability outcomes at the required scale.

10

External pressures increasingly shape sustainability outcomes.

Political polarization, policy uncertainty, authoritarianism, and geopolitical tensions are seen as the external forces most affecting sustainability outcomes. Additionally, climate impacts as well as water and energy security are perceived as having a catalytic influence on sustainability progress by increasing urgency, investment, policy attention, and demand for solutions. The findings suggest political and economic instability and other disruptions can act as both barriers to progress and catalysts for change.

The state of the sustainability agenda – fit for purpose?

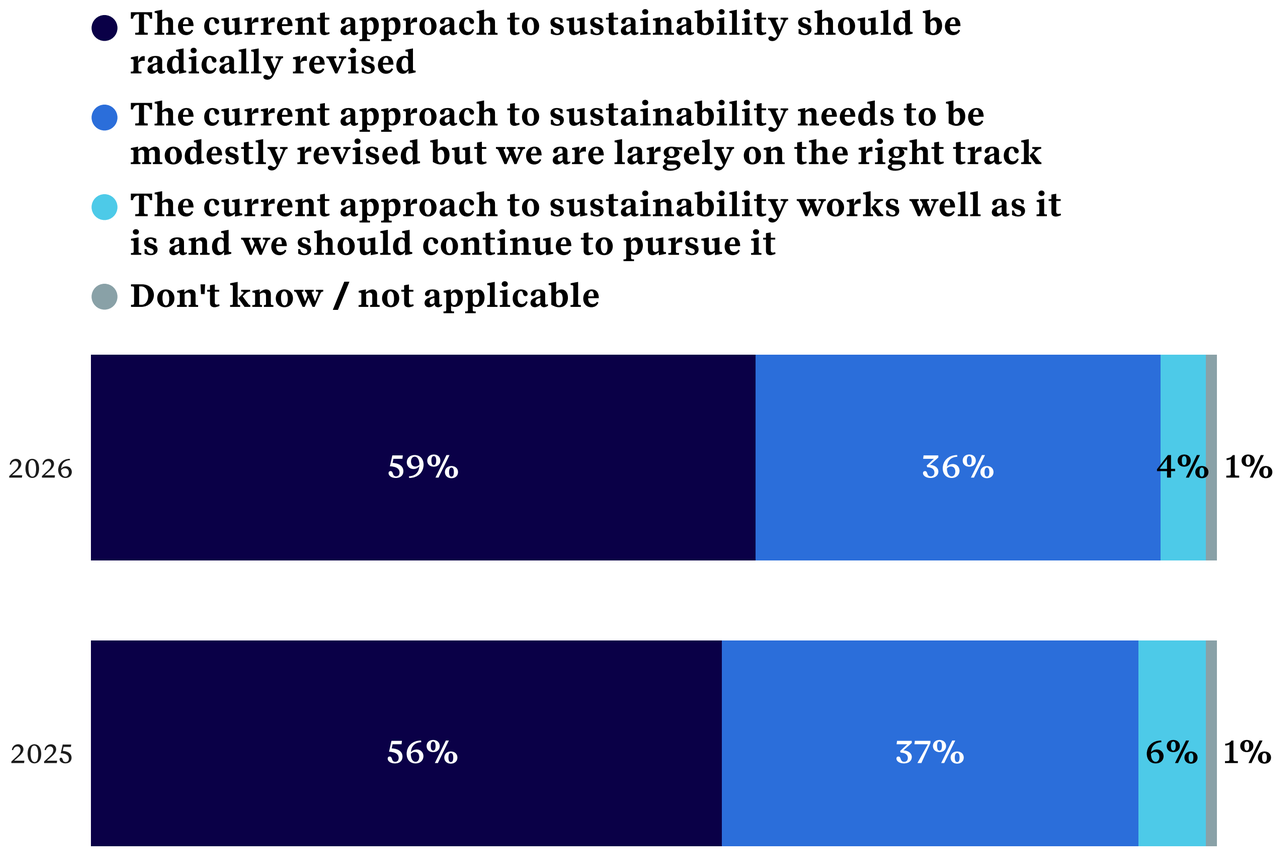


Most experts believe the sustainability agenda requires radical revision

QUESTION

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

In 2026, almost six in ten sustainability professionals say the current approach to sustainability must be radically revised, up slightly from one year ago. Ninety-five percent of experts now call for change of some kind.



% of Experts, 2026

Corporate experts are the group most likely to favor moderate change

QUESTION

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

Calls for radical revision are strongest among Academic & Research experts (77%), NGOs (69%), Government (65%), and among experts of all kinds based in Europe (68%). Fewer in the corporate sector want radical revision (49%), suggesting greater confidence in adapting and improving existing sustainability approaches rather than fundamentally redesigning them. Almost no one, in any group, endorses staying the course.

	Academic & Research	Corporate	Government	NGO	Service & Media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
The current approach to sustainability works well as it is and we should continue to pursue it	0%	6%	0%	0%	3%	12%	6%	2%	7%	4%
The current approach to sustainability needs to be modestly revised but we are largely on the right track	23%	44%	30%	29%	33%	32%	42%	28%	46%	42%
The current approach to sustainability should be radically revised	77%	49%	65%	69%	63%	53%	53%	68%	46%	54%

% of Experts, by Sector and Region, 2026

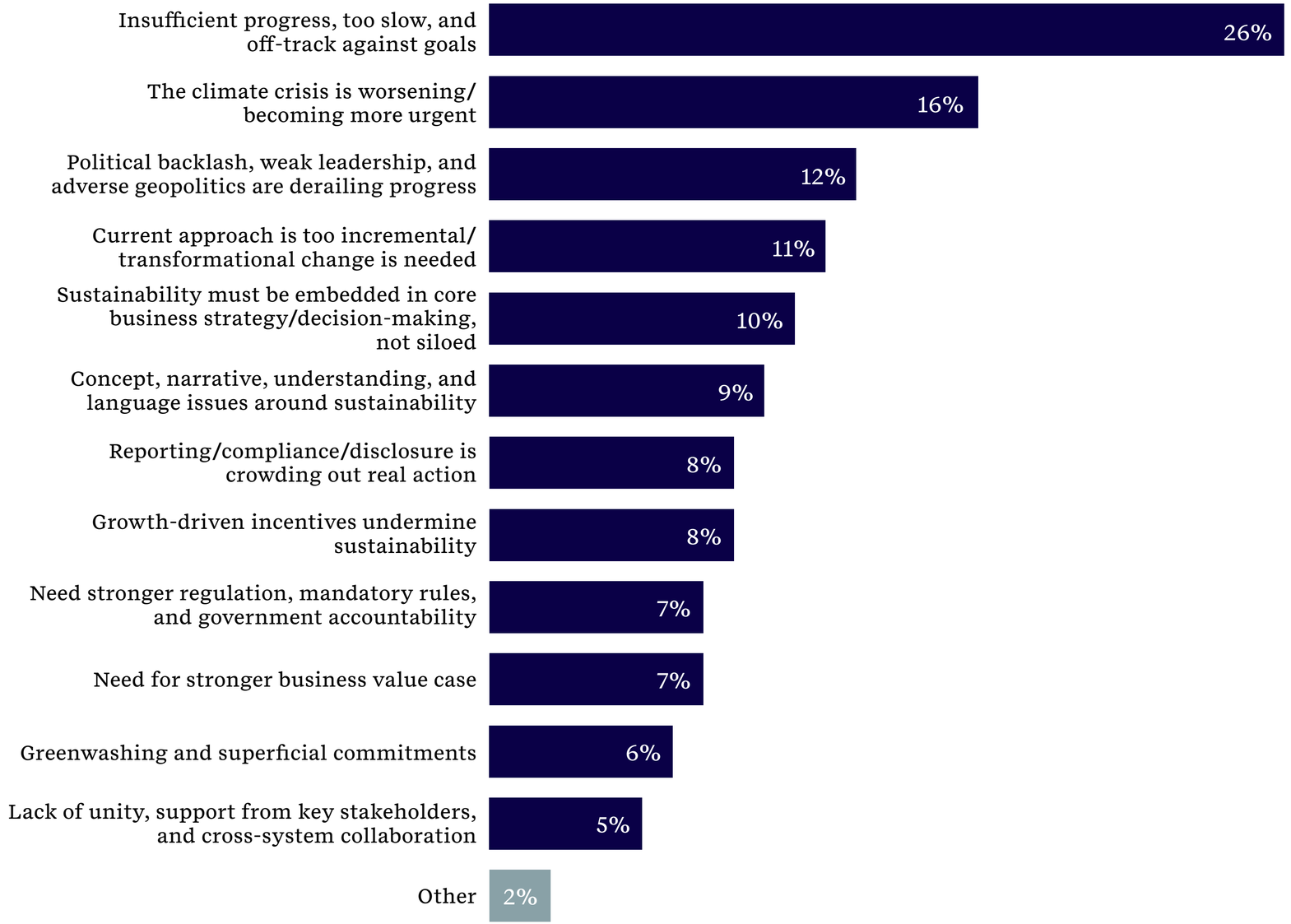
Lack of progress, backlash, and incrementalism seen as top reasons for radical revision

QUESTION

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

Experts calling for radical revision tend to see a fundamental mismatch between the scale of the sustainability crisis and the response.

They argue that reporting, voluntary commitments, and incremental efficiencies have displaced implementation while leaving the underlying economic incentives and political systems largely intact.



% of Experts Saying We Need Radical Revision, Open-ended Responses, 2026

The current approach is not delivering at scale

QUESTION

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

Experts calling for radical revision believe the current approach is failing to deliver change at the required speed and scale.

Many argue that sustainability has become overly focused on disclosure, compliance, and incremental efficiency improvements, sometimes encouraging greenwashing rather than measurable action.

The agenda is also criticized for operating within economic and financial systems that continue to reward short-term growth, consumption, and unpriced environmental and social costs.

Main themes:



Progress is too slow and off-track: Rising emissions, accelerating climate impacts, biodiversity loss, and breached planetary boundaries show that existing approaches are not delivering at the necessary pace.



Incremental action cannot address systemic problems: Efficiency improvements and "doing less harm" are viewed as inadequate without redesigning underlying energy, food, transport, production, and consumption systems.



Reporting has displaced implementation: Excessive attention to disclosure, auditing, metrics, and compliance is seen as consuming resources while producing limited real-world change and, in some cases, enabling greenwashing.



The underlying economic model remains unchanged: Current approaches rarely challenge short-term financial incentives, growth-dependent business models, overconsumption, or the failure to price environmental and social externalities.



Sustainability remains peripheral to core decisions: It is still frequently treated as a standalone CSR, ESG, or compliance activity rather than being embedded in business models, capital allocation, policy, and executive decision-making.



Voluntary commitments lack accountability: Respondents call for clearer and more consistent regulation, stronger enforcement, better incentives, and obligatory standards to ensure companies and governments act on their commitments.



Governance and collaboration are fragmented: Misalignment between global and national policy guidance, institutional weakness, siloed initiatives, and inconsistent funding limit coordinated, long-term action.



The agenda has lost political and public traction: Sustainability and ESG language are seen by many as politicized, polarized, or discredited, creating a need to reconnect the agenda to resilience, human well-being, business continuity, and tangible benefits.



Social and economic dimensions need greater attention: Respondents argue that sustainability remains too environmentally focused and must better integrate equity, collective well-being, democracy, and the economic realities shaping implementation.



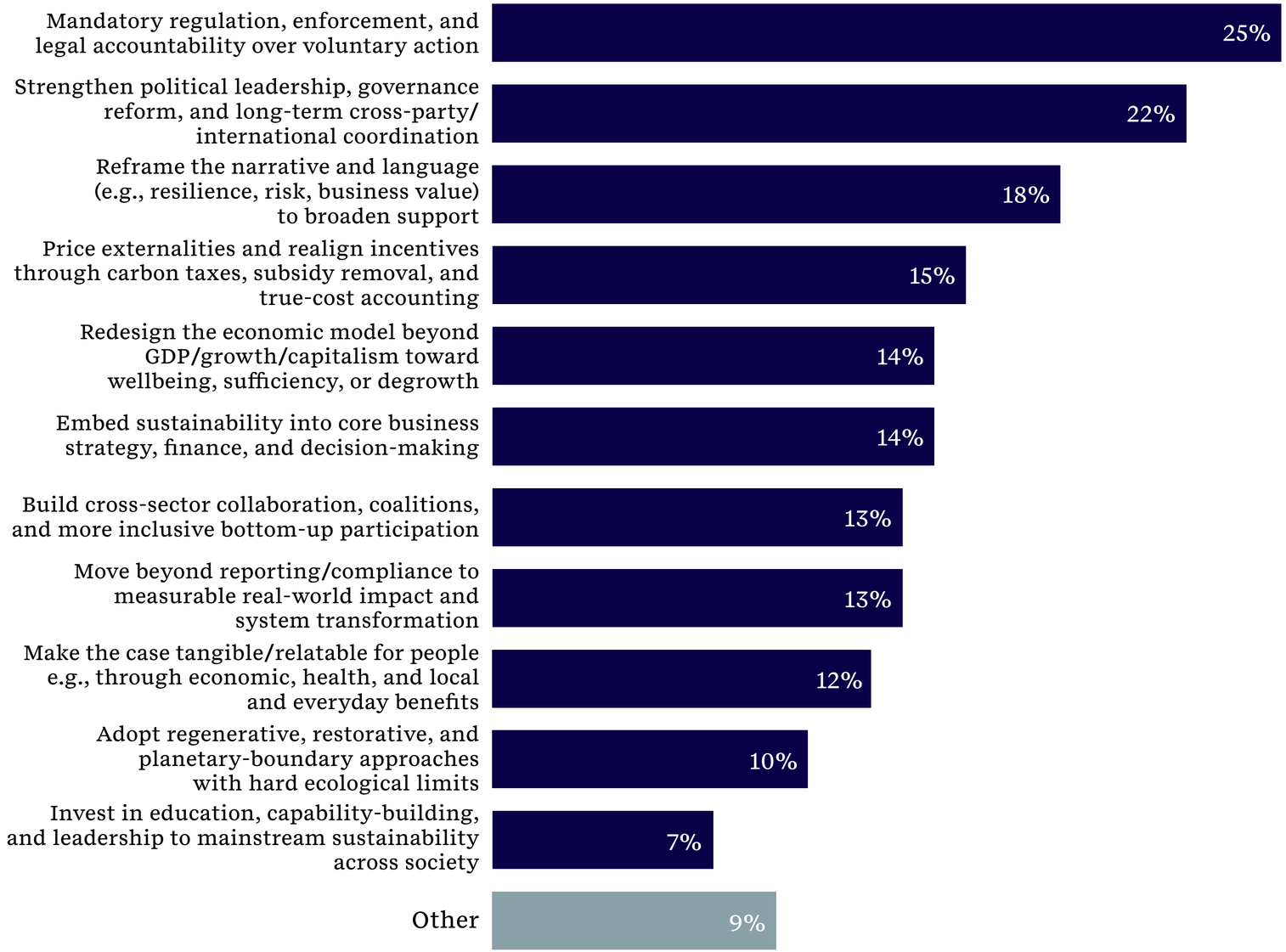
Leadership, funding, and capabilities are insufficient: Weak executive engagement, limited managerial understanding, short-term financing, and a lack of investment in deployment prevent promising solutions from reaching scale.

Radical revision means stronger rules, stronger leadership, new economic incentives – and reframing to broaden support

QUESTION

Earlier you indicated that “the current approach to sustainability should be radically revised.” Can you suggest a specific way in which the agenda should be radically revised?

Experts envision a sustainability agenda that relies less on voluntary commitments and more on accountability, stronger economic incentives, and political leadership. Many also recognize that broader support may require a new narrative that connects sustainability more directly to resilience, competitiveness, risk management, and tangible benefits for people and businesses.



% of Experts Saying We Need Radical Revision, Open-ended Responses, 2026

Radical revision means stronger rules, stronger leadership, new economic incentives – and reframing to broaden support: Verbatims

QUESTION

Earlier you indicated that "the current approach to sustainability should be radically revised." Can you suggest a specific way in which the agenda should be radically revised?

"We need to be clearer about the multiple reasons for action to phase out fossil fuels - economic security, health, nature, climate, cost, social inclusion - and focus less on the single issue of carbon emissions as a driver of transformation. We also need to make sustainability much more clearly part of each nation's mission and sense of purpose."

"Societies should be fully informed about the threats related to environmental and social crises and about progress in addressing them."

"Focus on links with day-to-day struggles of citizens. And reframing the debate towards making it tangible why a sustainable future is attractive, desirable, and doable."

"Only focus on economic and health arguments."

"Focus on building for the future, not only on accounting for the past."

"Sustainability needs to challenge the current capitalist model of business rather than exist within/ alongside it."

"The sustainability agenda should shift from a reporting-focused approach to an impact-focused approach, emphasizing measurable outcomes, business transformation, and stronger accountability rather than disclosure alone."

Experts call for new voices to advance sustainability

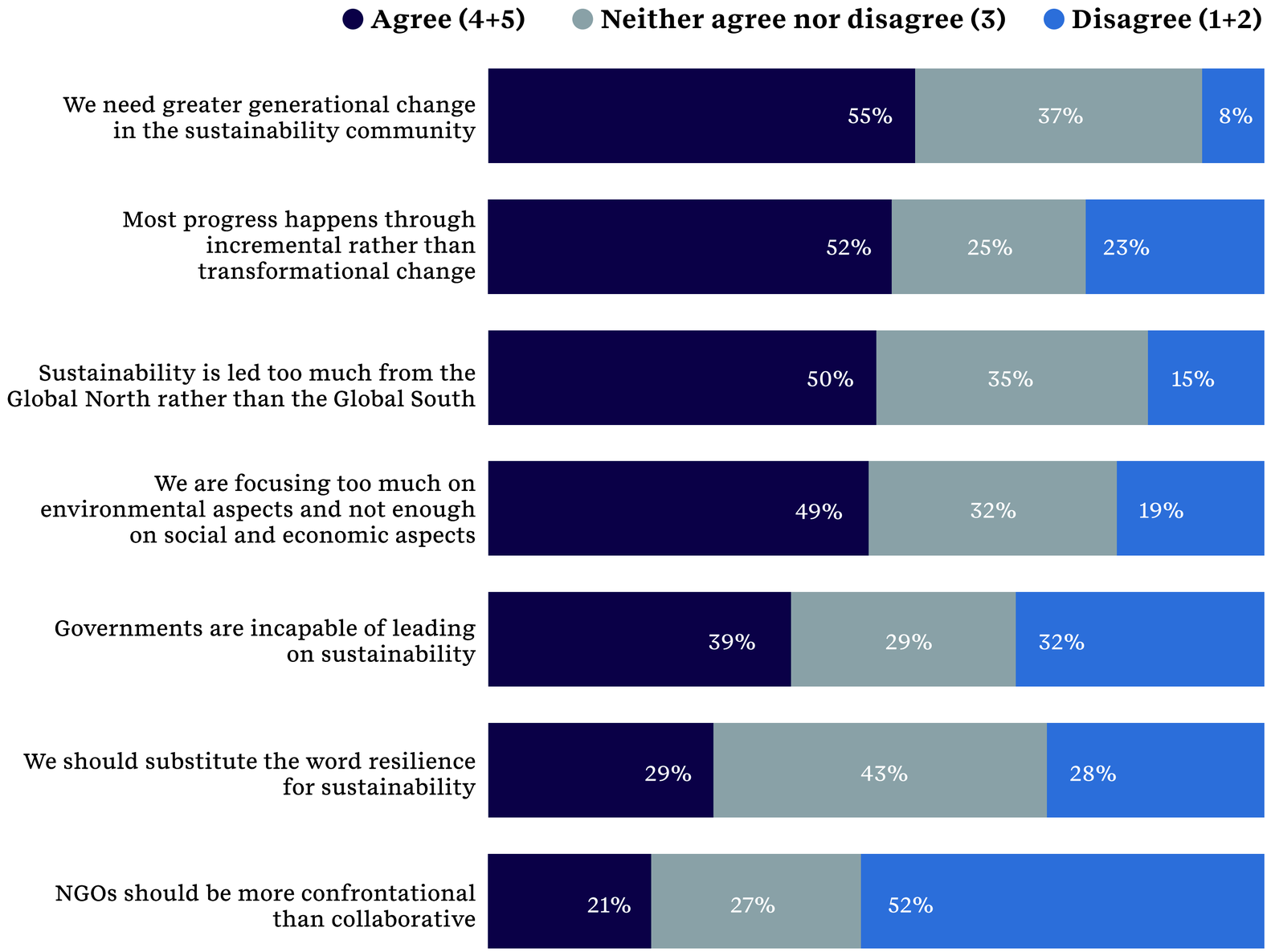
QUESTION

Please indicate if you agree or disagree with each of the following statements.

Against this challenging backdrop, experts want fresh thinking and new voices.

A majority (55%) say the sustainability community needs greater generational change, and half believe that sustainability is led too much from the Global North rather than the Global South.

Nearly half (49%) think the agenda overemphasizes environmental issues at the expense of social and economic priorities.



% of Experts, 2026

Experts in the corporate sector and in the Global South are most likely to call for generational change in the sustainability community

QUESTION

Please indicate if you agree or disagree with each of the following statements.

The majority of experts in the corporate and NGO sectors, as well as those based in Asia-Pacific (71%), Africa / Middle East (65%), and Latin America and the Caribbean (56%), believe the sustainability community needs greater generational renewal.

	Academic & Research	Corporate	Government	NGO	Service & Media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
We need greater generational change in the sustainability community	49%	61%	40%	59%	49%	65%	71%	51%	56%	48%
Most progress happens through incremental rather than transformational change	47%	59%	54%	39%	53%	64%	60%	49%	43%	53%
Sustainability is led too much from the Global North rather than the Global South	49%	52%	76%	42%	50%	65%	57%	52%	50%	41%
We are focusing too much on environmental aspects and not enough on social and economic aspects	43%	49%	80%	54%	44%	54%	44%	50%	73%	40%
Governments are incapable of leading on sustainability	38%	38%	27%	42%	40%	42%	45%	45%	33%	26%
We should substitute the word resilience for sustainability	23%	27%	25%	32%	31%	32%	33%	27%	25%	30%
NGOs should be more confrontational than collaborative	46%	20%	8%	18%	17%	16%	27%	22%	10%	20%

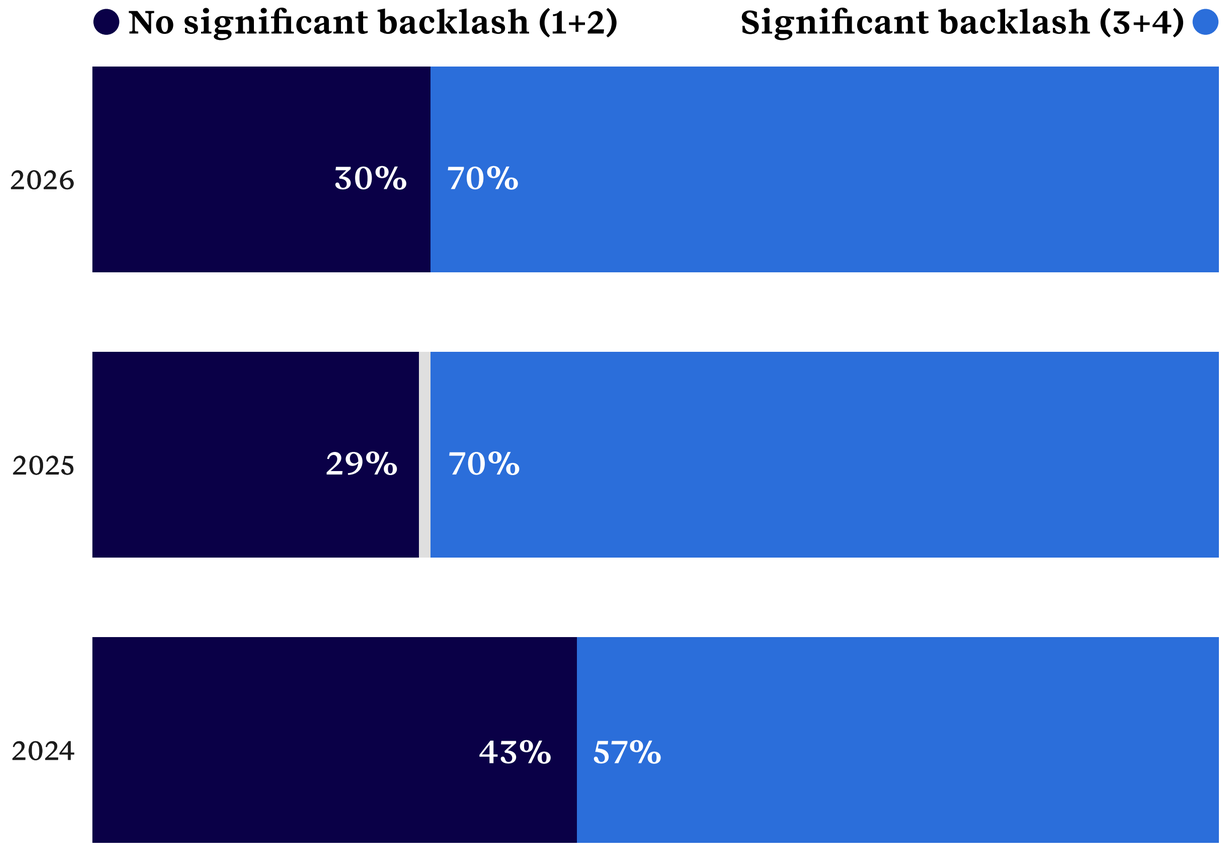
% of Experts, “Agree” (4+%), by Sector and Region, 2026

Seven in ten experts report significant backlash for a second consecutive year

QUESTION

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

Seven in ten experts say the backlash against the sustainability agenda, including ESG, is significant in their country in 2026, unchanged from 2025 and well above the 57 percent recorded in 2024. Elevated resistance now appears to be an enduring condition that practitioners should continue to plan around.



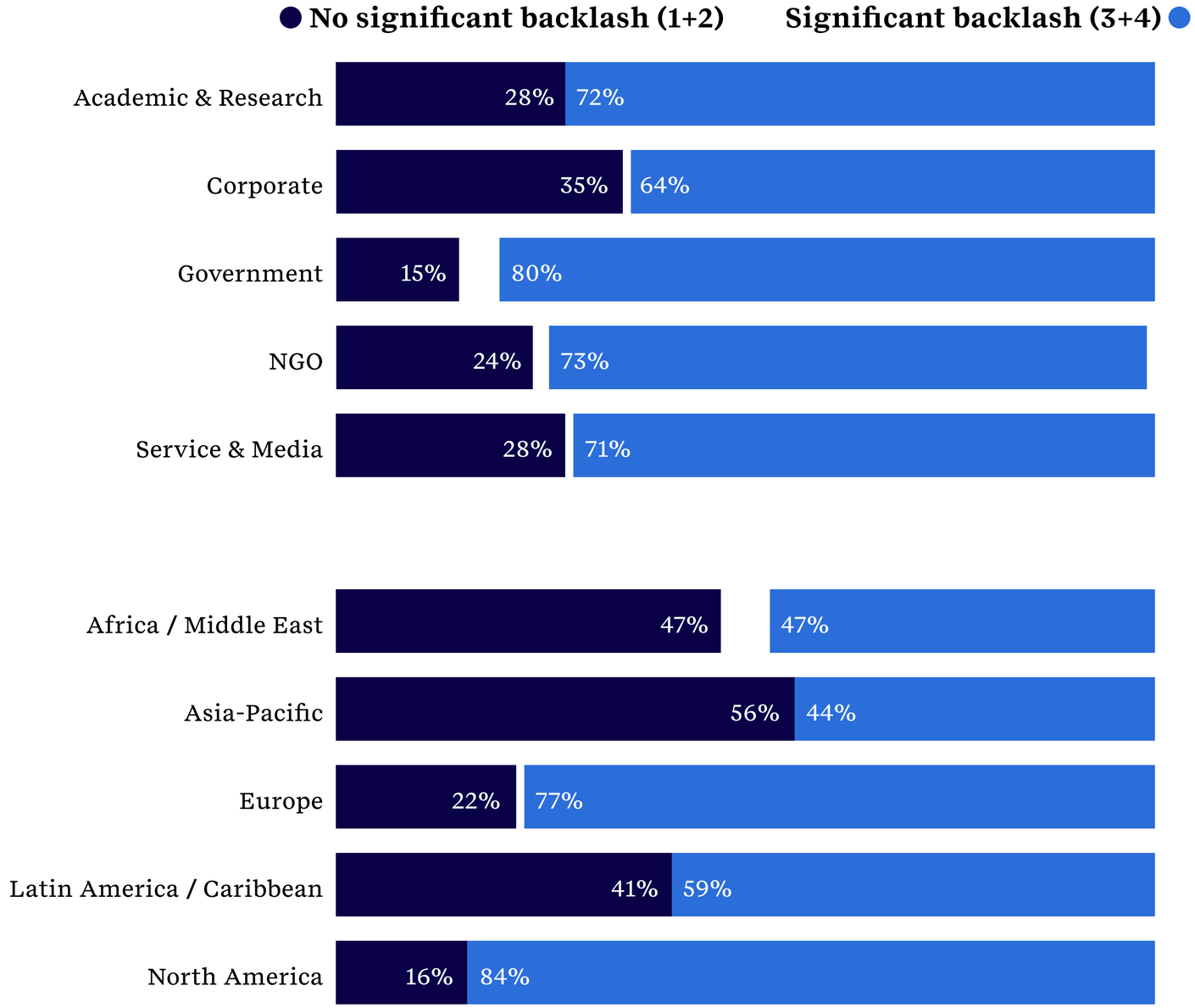
% of Experts, 2024–2026

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

QUESTION

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

Perceptions of backlash vary considerably across regions, but clear geographic clusters emerge. Experts in North America (84%) and Europe (77%) are most likely to perceive a current backlash against the sustainability agenda, while perceptions are substantially lower in Asia-Pacific (44%) and Africa / Middle East (47%).



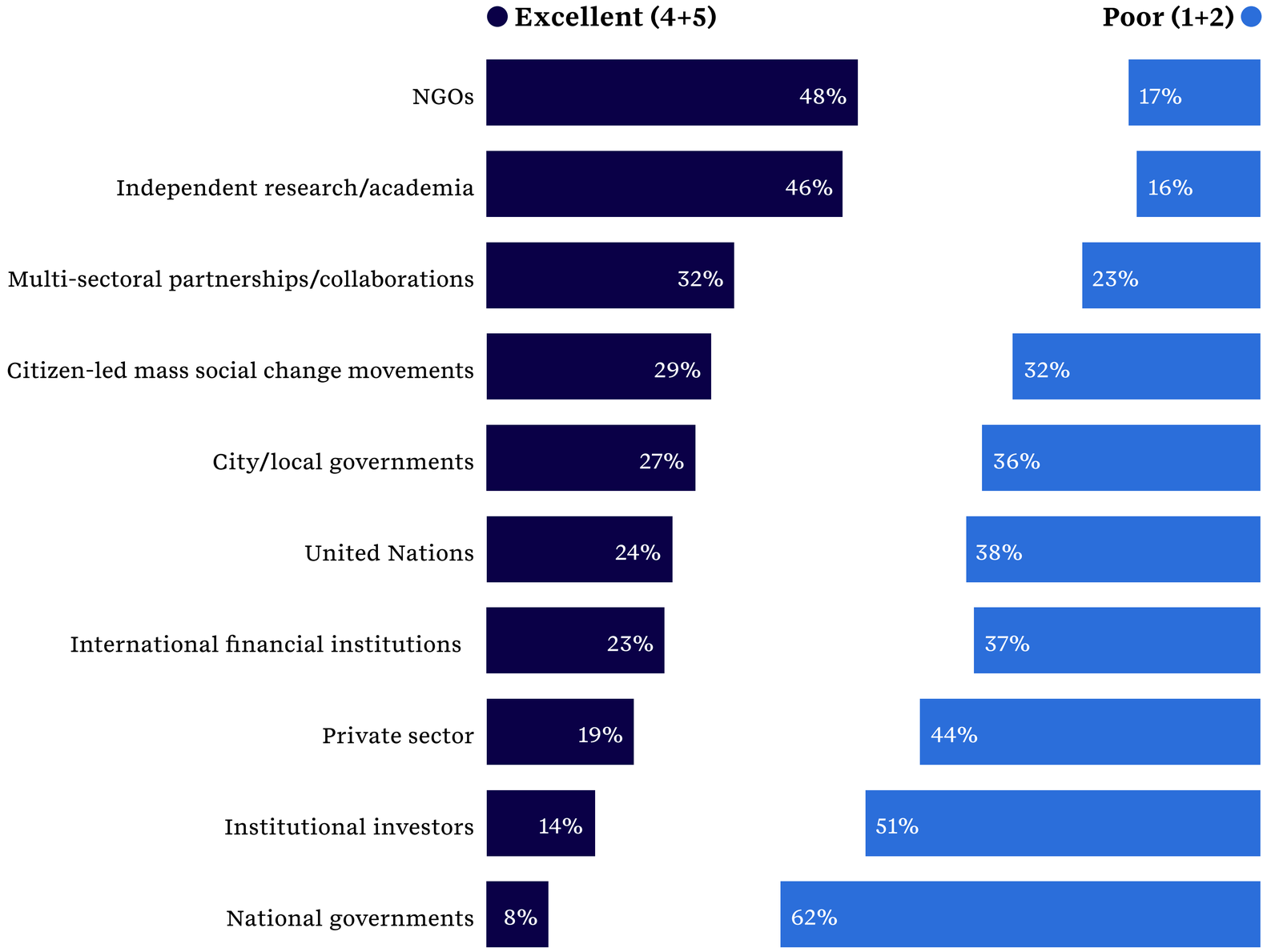
% of Experts, by Sector and Region, 2026

Governments, investors, and business get low marks on sustainability performance to date

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?

While nearly half of experts rate NGOs (48%) and independent research and academic institutions (46%) as excellent contributors to progress on sustainable development, national governments, institutional investors, and the private sector are viewed as the weakest contributors.



% of Experts, 2026

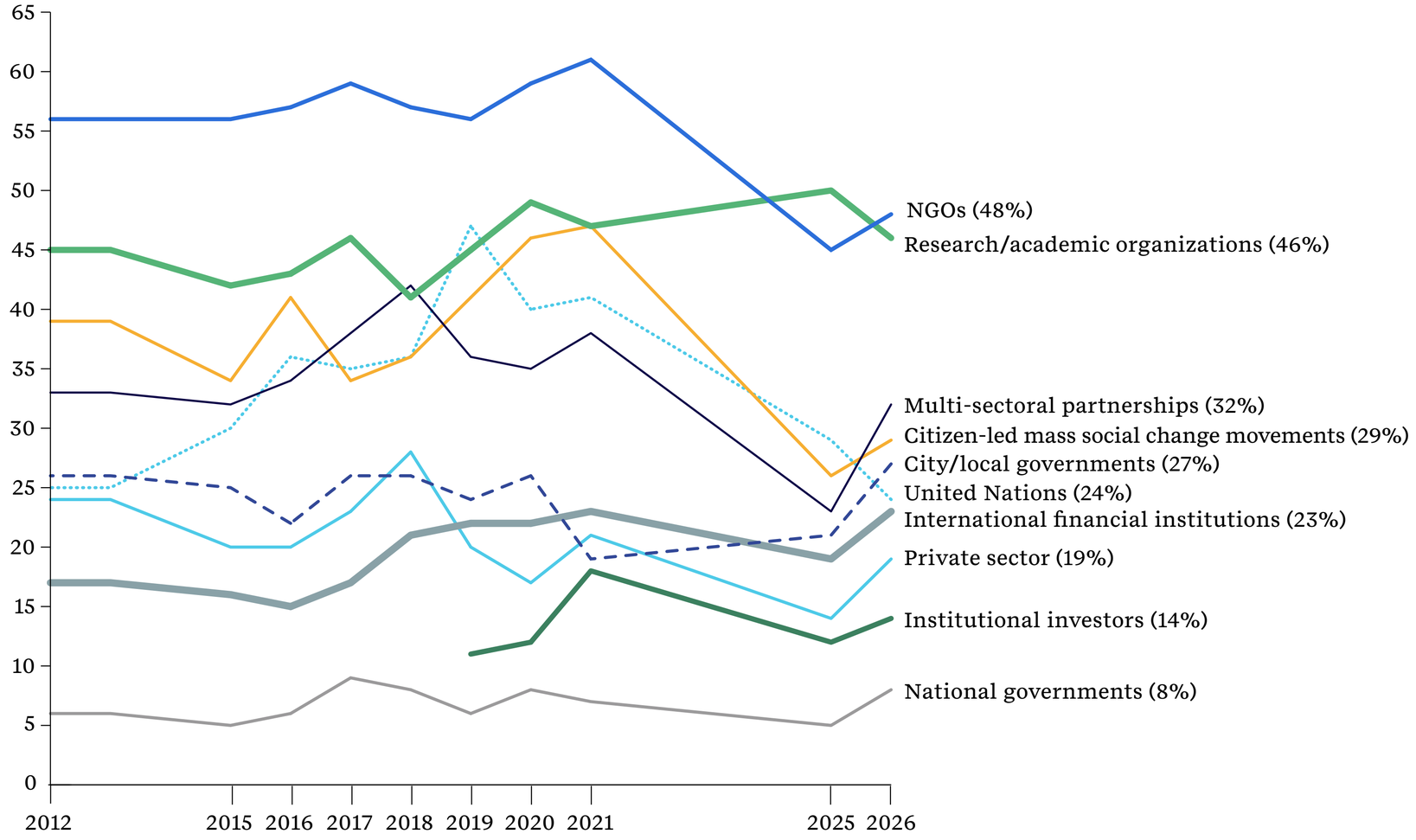
Expert confidence in institutional drivers of sustainability progress remains relatively low

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 A SCALE WHERE 1 IS "POOR" AND 5 IS "EXCELLENT."

Confidence has declined across many institutional sustainability leaders, especially citizen-led movements, the UN, and NGOs. Research and academic organizations are the standout exception, maintaining strong ratings. National governments and institutional investors remain persistently poorly rated on their contribution to sustainability.



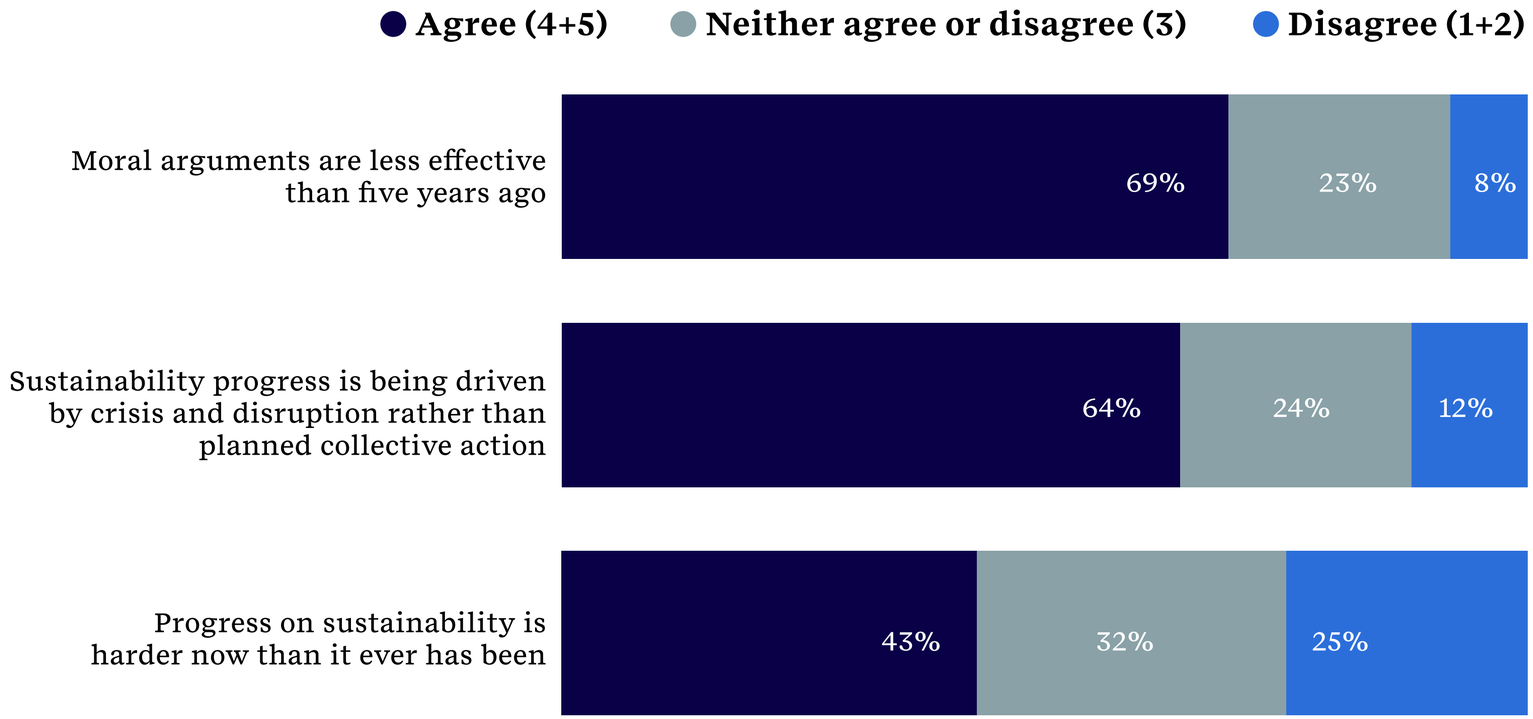
% of Experts, "Excellent" (4+5), 2012–2026

Moral arguments are losing power to drive sustainability progress

QUESTION

Please indicate if you agree or disagree with each of the following statements?

Experts see a sustainability agenda under growing pressure, with many saying progress is harder now than it has ever been (43%). Most believe moral arguments are becoming less effective (69%) and that progress is increasingly driven by crises rather than coordinated action (64%).



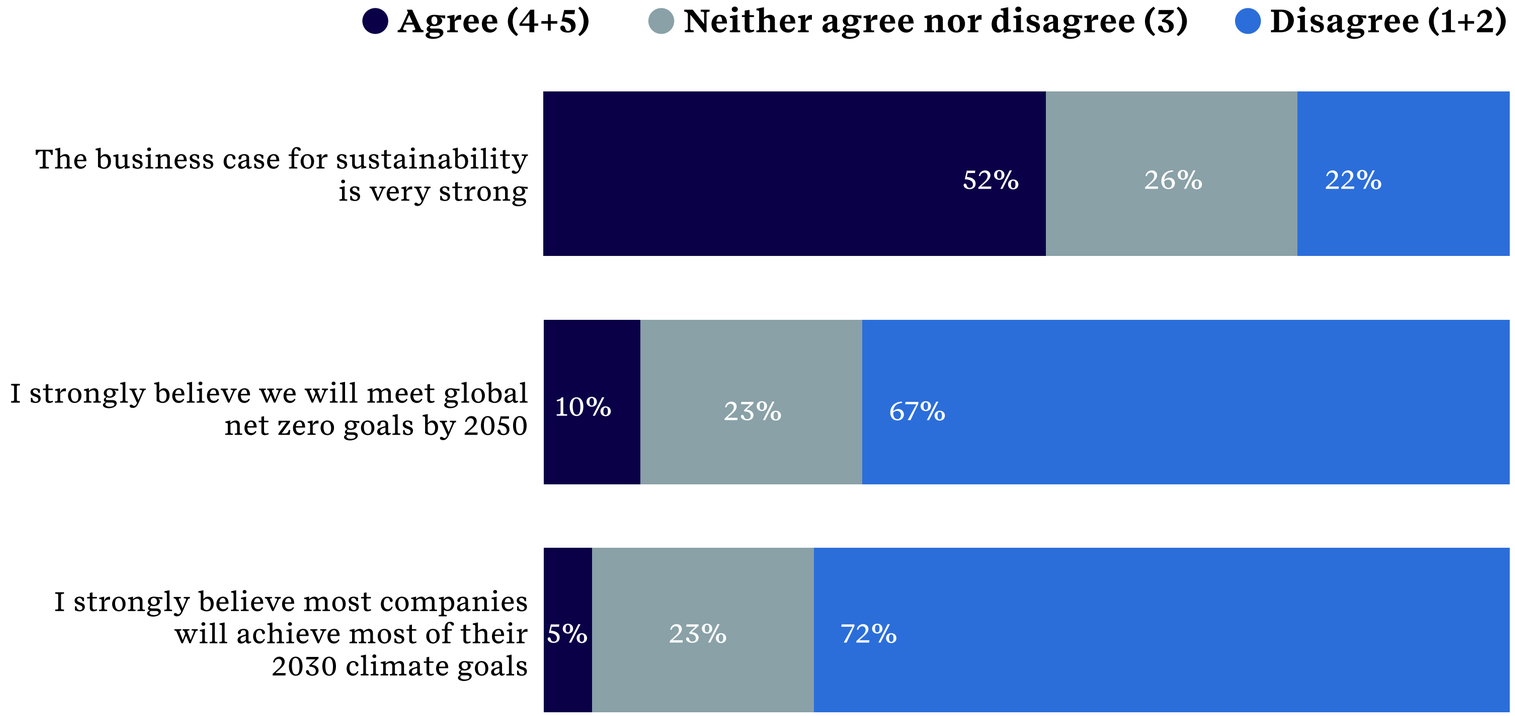
% of Experts, 2026

Belief in the business case remains strong, while confidence in sustainability outcomes is low

QUESTION

Please indicate if you agree or disagree with each of the following statements?

Confidence in sustainability outcomes is strikingly low: only one in ten strongly believe the world will achieve net zero by 2050, and just five percent believe most companies will meet their 2030 climate commitments. Yet a majority continue to say that sustainability has the potential to create value for business.



% of Experts, 2026

Moral argument for sustainability has weakened most in Asia-Pacific and North America

QUESTION

Please indicate if you agree or disagree with each of the following statements.

Corporate experts and those based in Asia-Pacific and North America are more likely than others to say moral arguments have lost influence compared to five years ago, while those in Africa / Middle East and Latin America are less convinced that this is the case.

	Academic & Research	Corporate	Government	NGO	Service & Media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
Moral arguments are less effective than five years ago	59%	71%	69%	66%	68%	52%	78%	67%	57%	73%
Sustainability progress is being driven by crisis and disruption rather than planned collective action	69%	64%	59%	59%	63%	63%	73%	65%	55%	61%
The business case for sustainability is very strong	29%	53%	63%	55%	53%	50%	51%	52%	35%	60%
Progress on sustainability now is harder than it has ever been	31%	46%	23%	47%	40%	42%	58%	35%	49%	42%
I strongly believe we will meet global net zero goals by 2050	5%	10%	24%	7%	11%	7%	13%	10%	11%	8%
I strongly believe most companies will achieve most of their 2030 climate goals	0%	6%	13%	11%	4%	7%	1%	5%	8%	6%

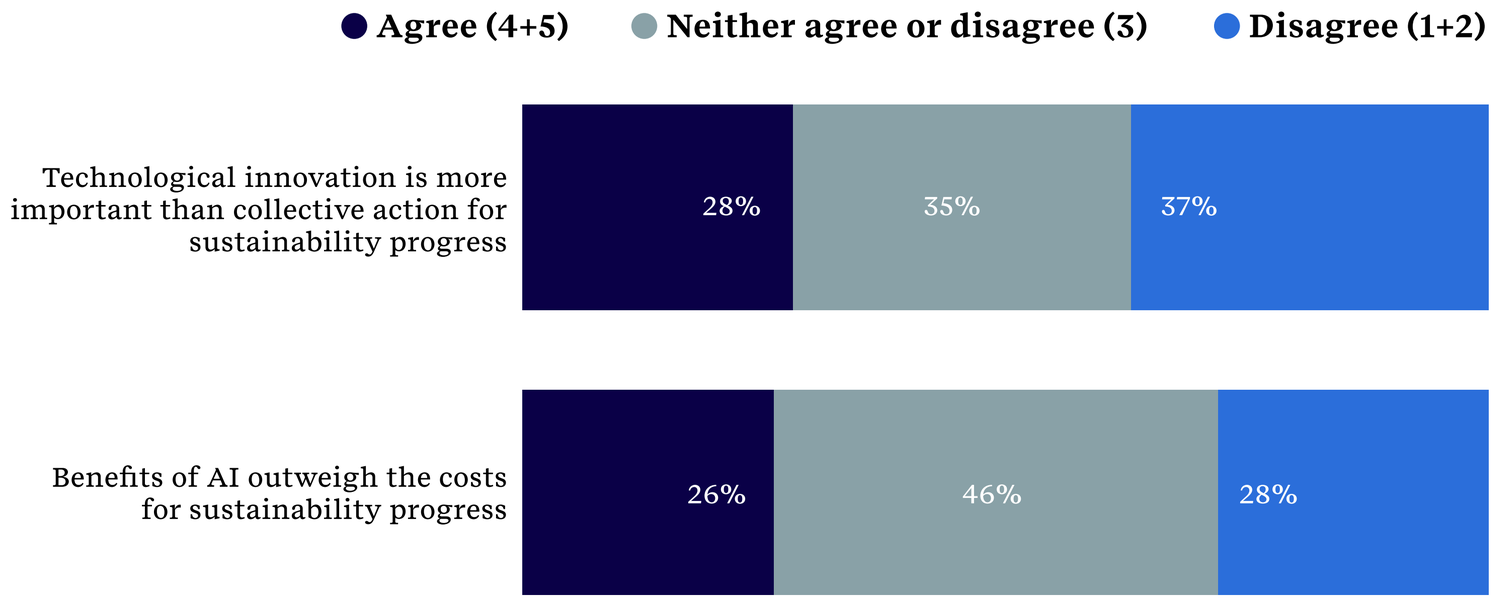
% of Experts, “Agree” (4+5), by Sector and Region, 2026

Few experts see technological innovation outweighing collective action

QUESTION

Please indicate if you agree or disagree with each of the following statements?

A relatively small proportion of experts agree that technological innovation matters more than collective action (28%), while even fewer believe that AI's benefits outweigh its costs (26%). Instead, more respondents disagree or withhold judgement.



% of Experts, 2026

Experts in Latin America and the Caribbean are especially unconvinced that the value of technological innovation is more important than collective action

QUESTION

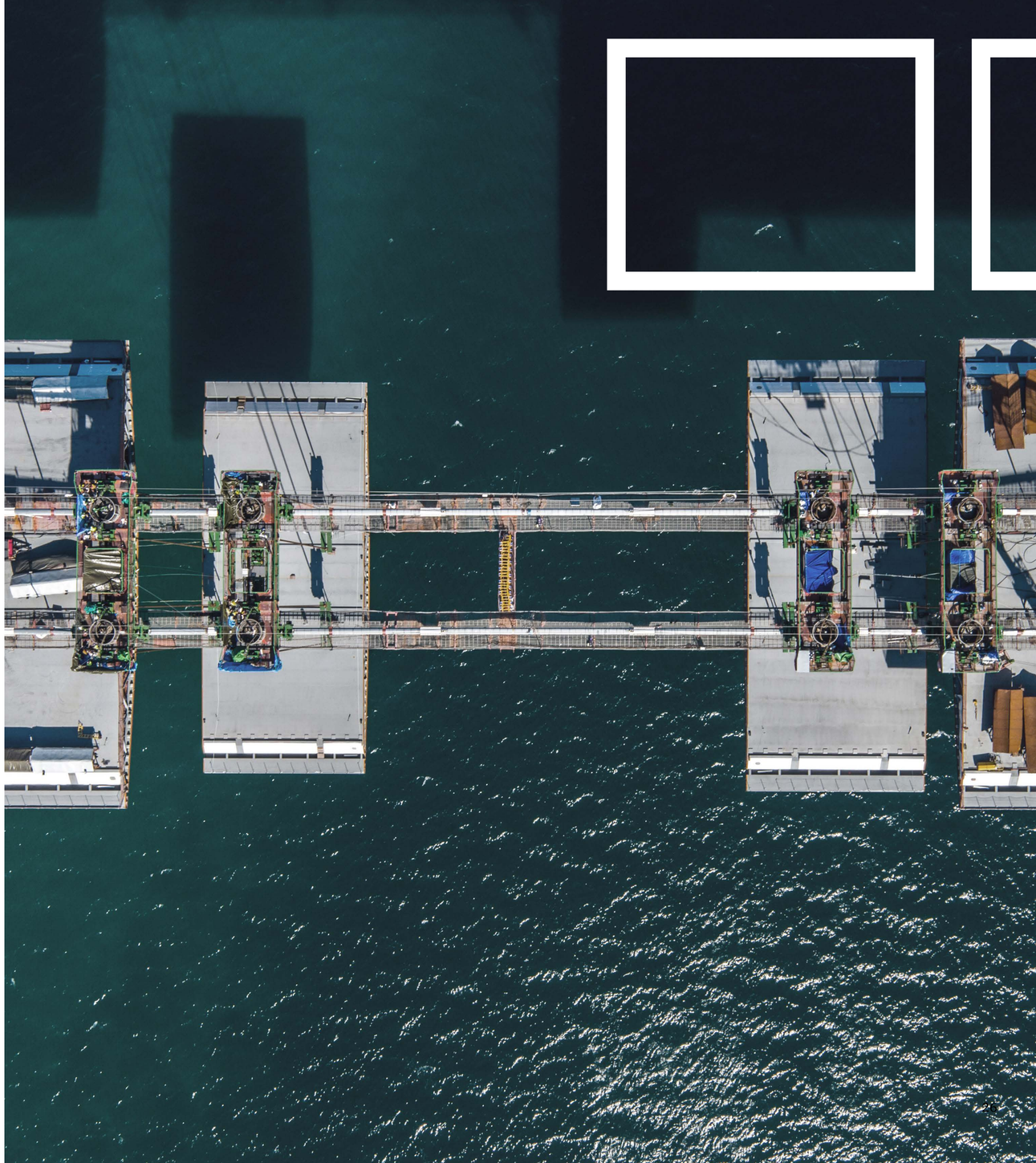
Please indicate if you agree or disagree with each of the following statements.

	Academic & Research	Corporate	Government	NGO	Service & Media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
Technological innovation is more important than collective action for sustainability progress	29%	31%	31%	15%	25%	27%	33%	28%	7%	33%
Benefits of AI outweigh the costs for sustainability progress	16%	32%	6%	33%	22%	35%	32%	25%	27%	22%

% of Experts, “Agree” (4+5), by Sector and Region, 2026

What should we do?

Assessing potential impact vs. feasibility of different levers of change



Levers of change: Impact vs. feasibility of actions

QUESTION

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**, helping to identify the most promising pathways for meaningful progress.

The actions span four key categories of change agents:



Government and public policy actions – involving policymakers, regulators, and multilateral institutions.



Investor and capital market actions – targeting investors, asset managers, banks, insurers, and financial regulators.



Corporate and business actions – focusing on private sector companies, supply chains, and industry-led initiatives.



Civil society actions – encompassing NGOs, grassroots movements, Indigenous groups, academia, media, and consumers.

Levers of change: Key takeaways

Experts see a persistent delivery gap

No intervention is considered highly likely to scale over the next five years. Even the most feasible option, AI, reaches only 59 percent on feasibility, suggesting persistent doubts about the ability to implement sustainability solutions at scale.

Implementation is viewed as more plausible than transformation

Feasibility ratings rose for sustainability ratings and rankings, mandatory reporting, and CSRD-related actions, while perceived impact remained flat or declined. Experts increasingly expect these mechanisms to expand, but are less convinced they will drive major sustainability outcomes.

The most transformative levers appear hardest to deliver

Judicial action is viewed as one of the most impactful civil society interventions, yet experts remain skeptical it can scale. Overall, the interventions perceived as most capable of driving systemic change tend to face the greatest implementation barriers.

Confrontational activism is losing support

Direct action and public pressure tactics rank among the weakest levers on both impact and feasibility, while most experts oppose a more confrontational role for NGOs. The center of gravity has shifted toward regulatory, institutional, and market-based approaches.

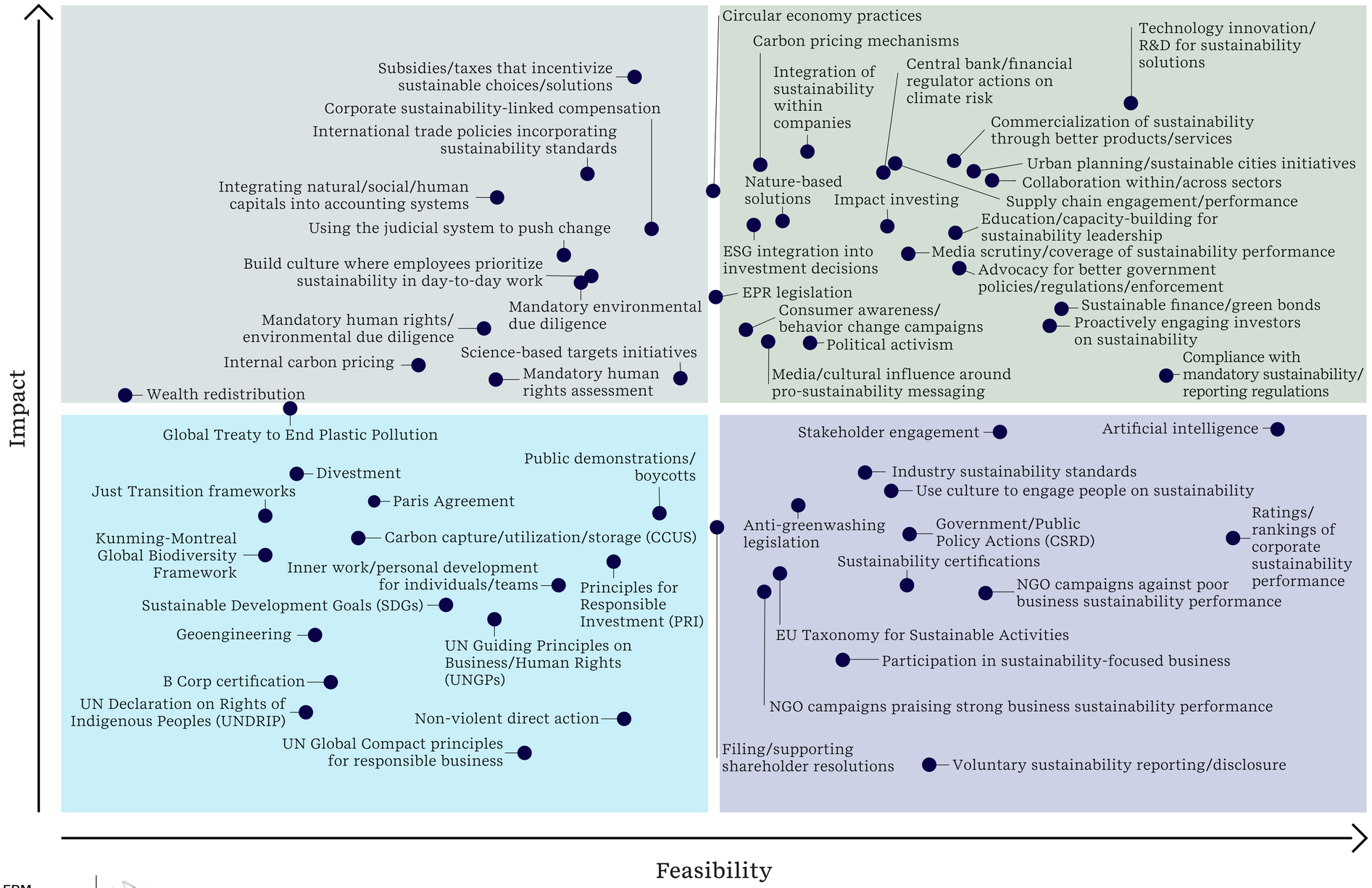
Faith in disclosure-era tools is weakening

Impact investing experienced the largest decline in perceived impact, alongside weaker assessments of several reporting and framework-based approaches. Experts appear increasingly focused on mechanisms that change incentives, accountability, and economic rules rather than voluntary commitments alone.

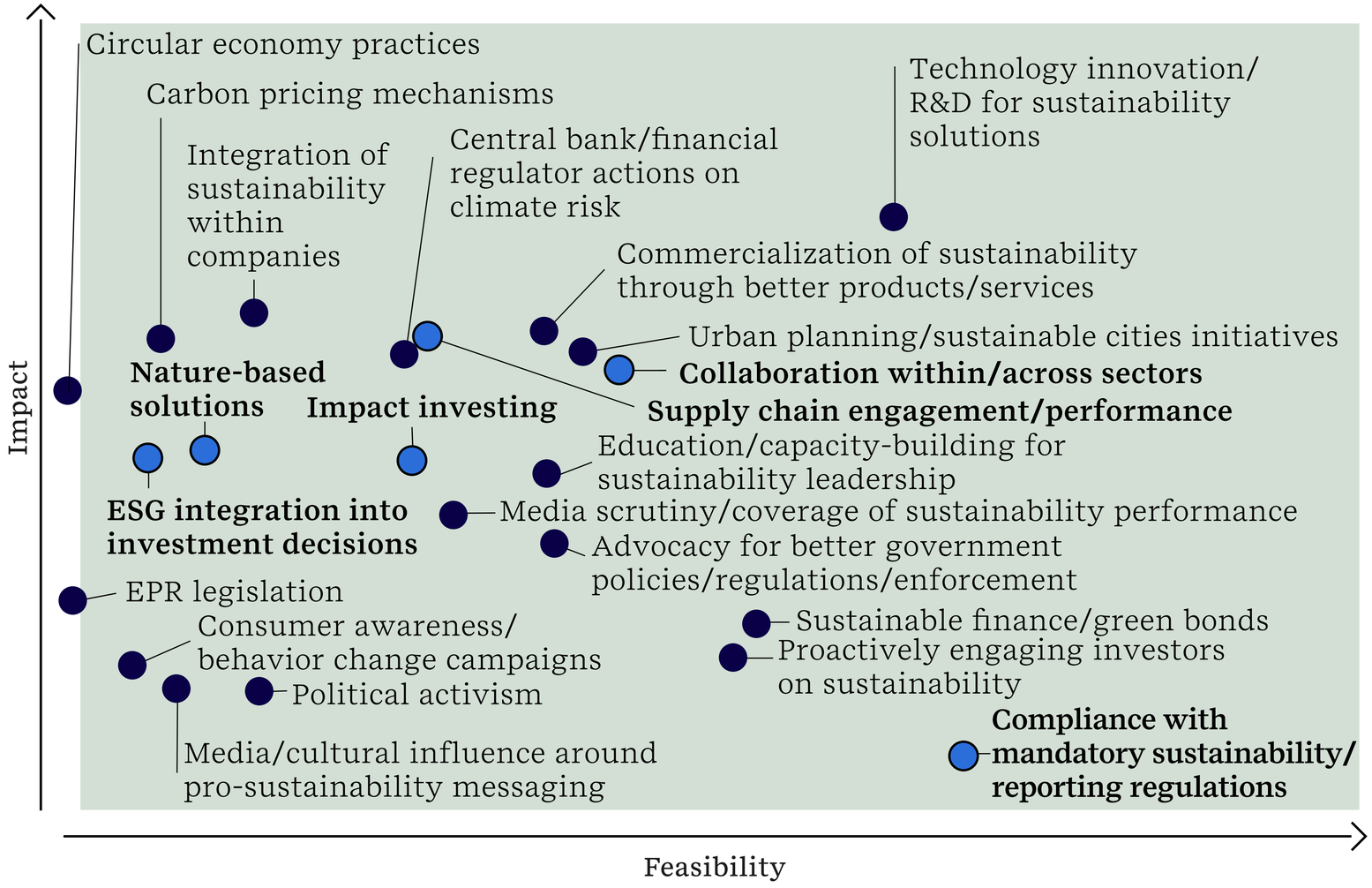
Technology is viewed as an enabler, not a silver bullet

Technological innovation and AI score relatively highly on both impact and feasibility, but experts do not see technological solutions as a substitute for collective action. The findings suggest technology is most effective when supported by policy, institutions, and broader system change.

Levers of change: Summary



Levers of change: Impact vs. feasibility of actions



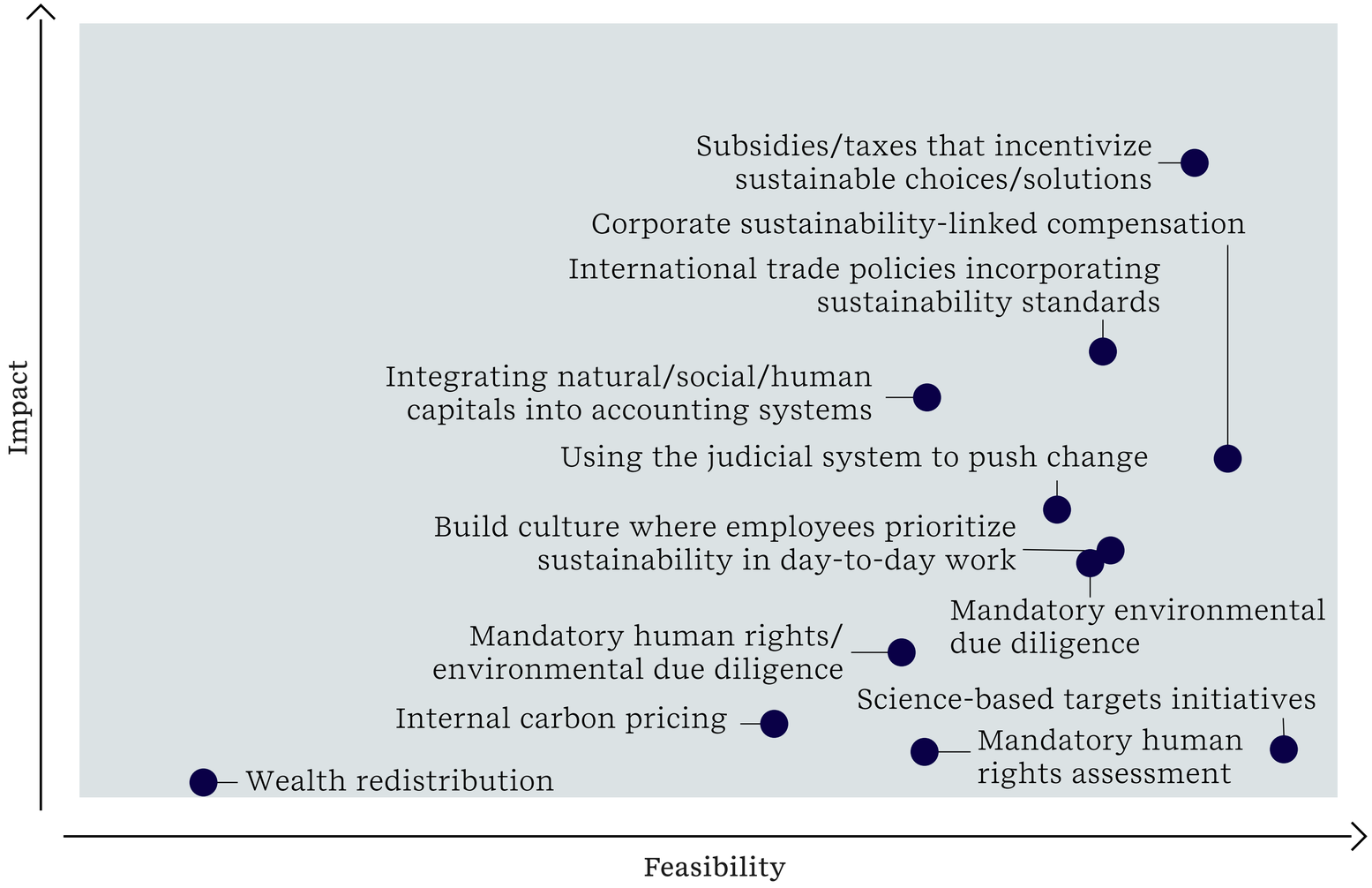
Largest movers from 2025

Note: Impact investing is the only lever that decreased on either axis across the four quadrants.

The strongest levers for sustainability progress remain the everyday machinery of business, including better technology and products, what investors and regulators require, and the standards firms must report against.

Advocacy, media scrutiny and public education still rate well, but sit a step below the market and regulatory levers.

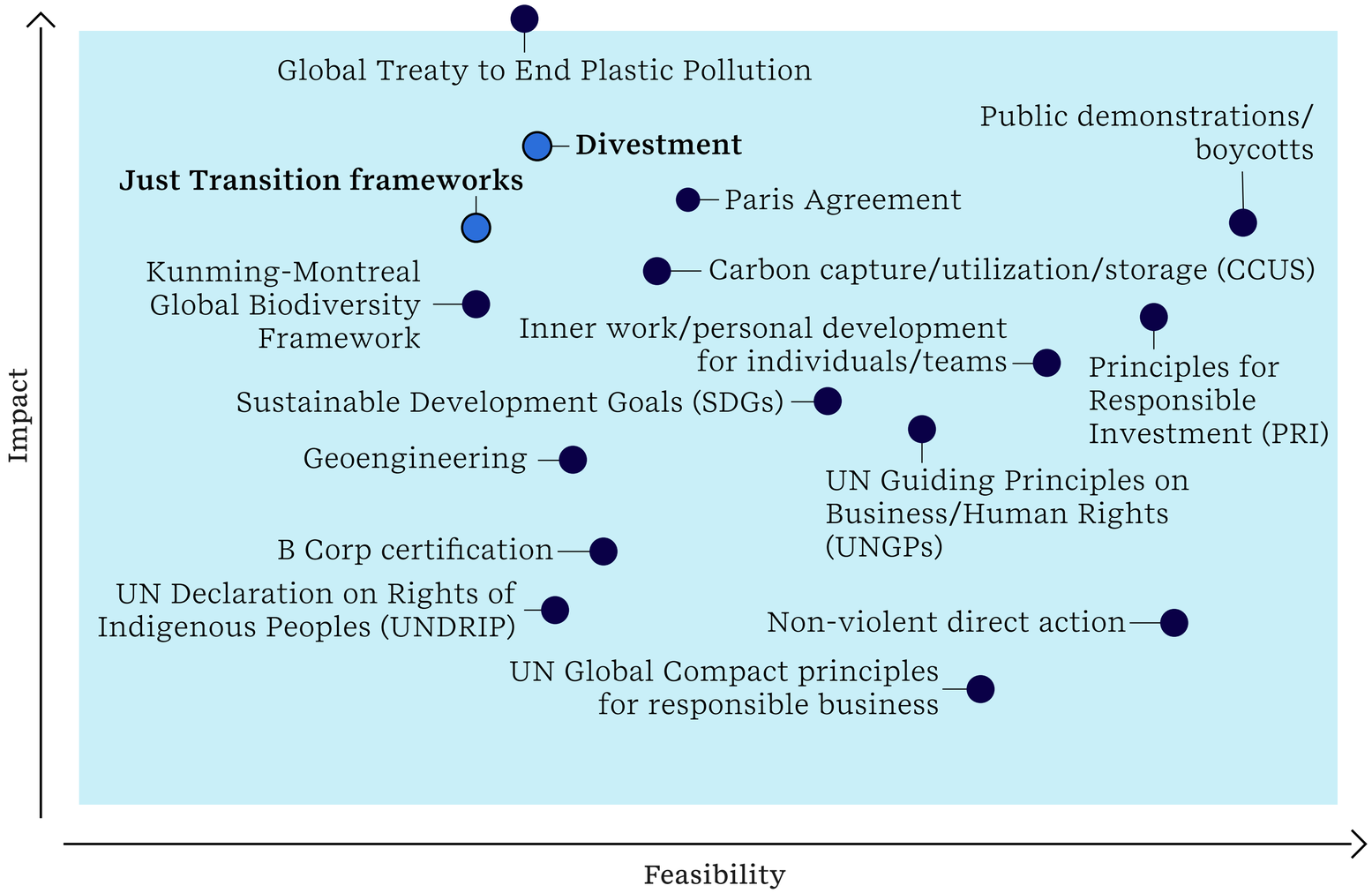
Levers of change: Impact vs. feasibility of actions



No significant shift from 2025

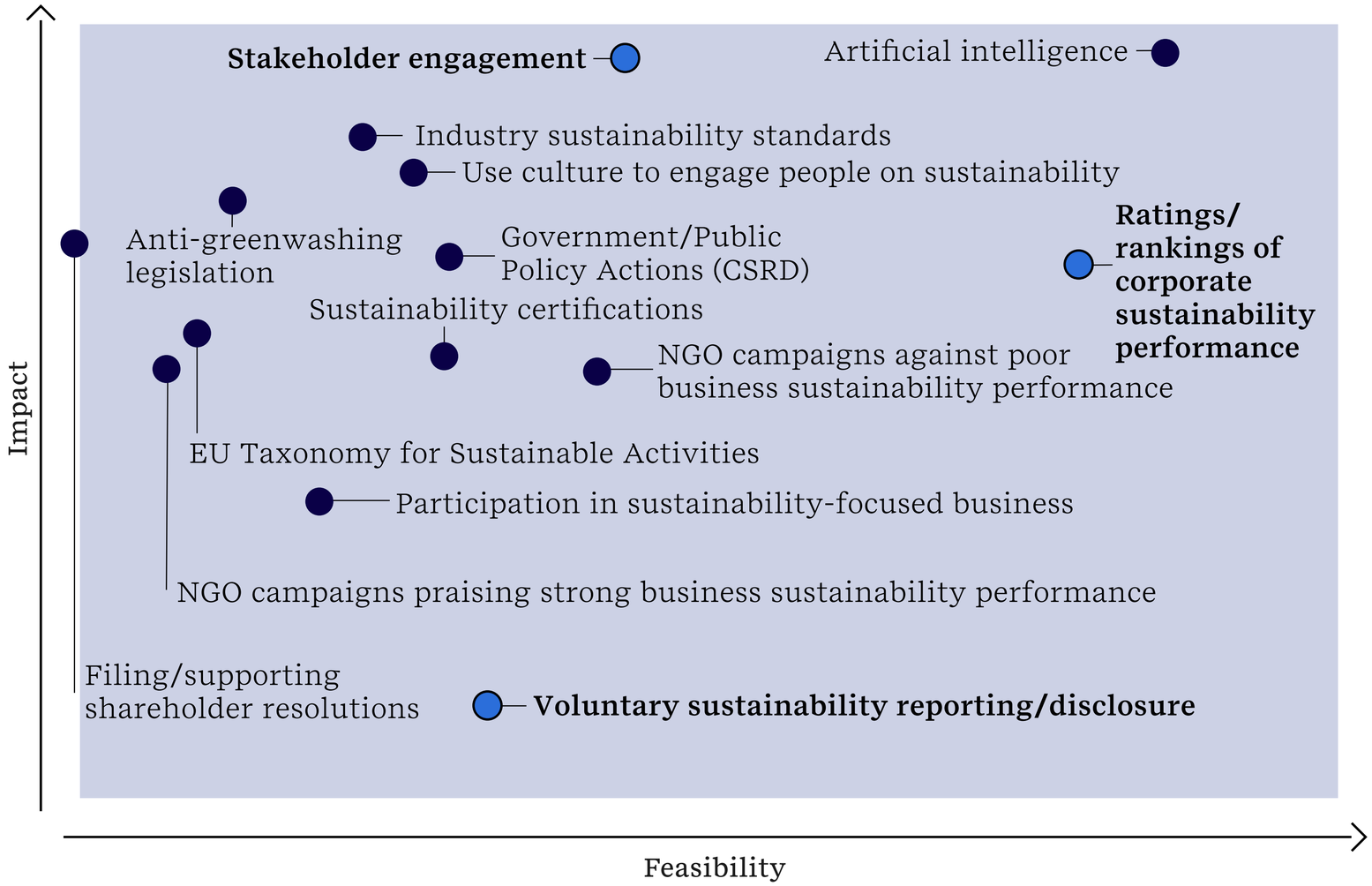
Many potentially transformative actions, such as shifting prices through taxes and subsidies, using the courts, and holding firms to account for nature and people, are also perceived as the hardest to deliver and have not shifted notably compared to 2025 in perceived feasibility.

Levers of change: Impact vs. feasibility of actions



Non-violent direct action and voluntary pledges sit at the bottom on both feasibility and potential impact. Although divestment and Just Transition frameworks gained a little ground on perceived impact, expert confidence has largely shifted toward rules and markets rather than principles and frameworks.

Levers of change: Impact vs. feasibility of actions



Reporting, ratings, and certification are seen by experts as the easiest to expand, and experts expect them to grow. But they are seen as having minimal contribution to impact, as disclosure is becoming routine without having significant positive impact.

Also, artificial intelligence has slipped into the lower-impact quadrant, having sat on the boundary of high and low impact in 2025. This suggests that experts are becoming slightly more cautious about its ability to drive meaningful sustainability outcomes in the near term.

Impact of actions/ interventions for systemic change



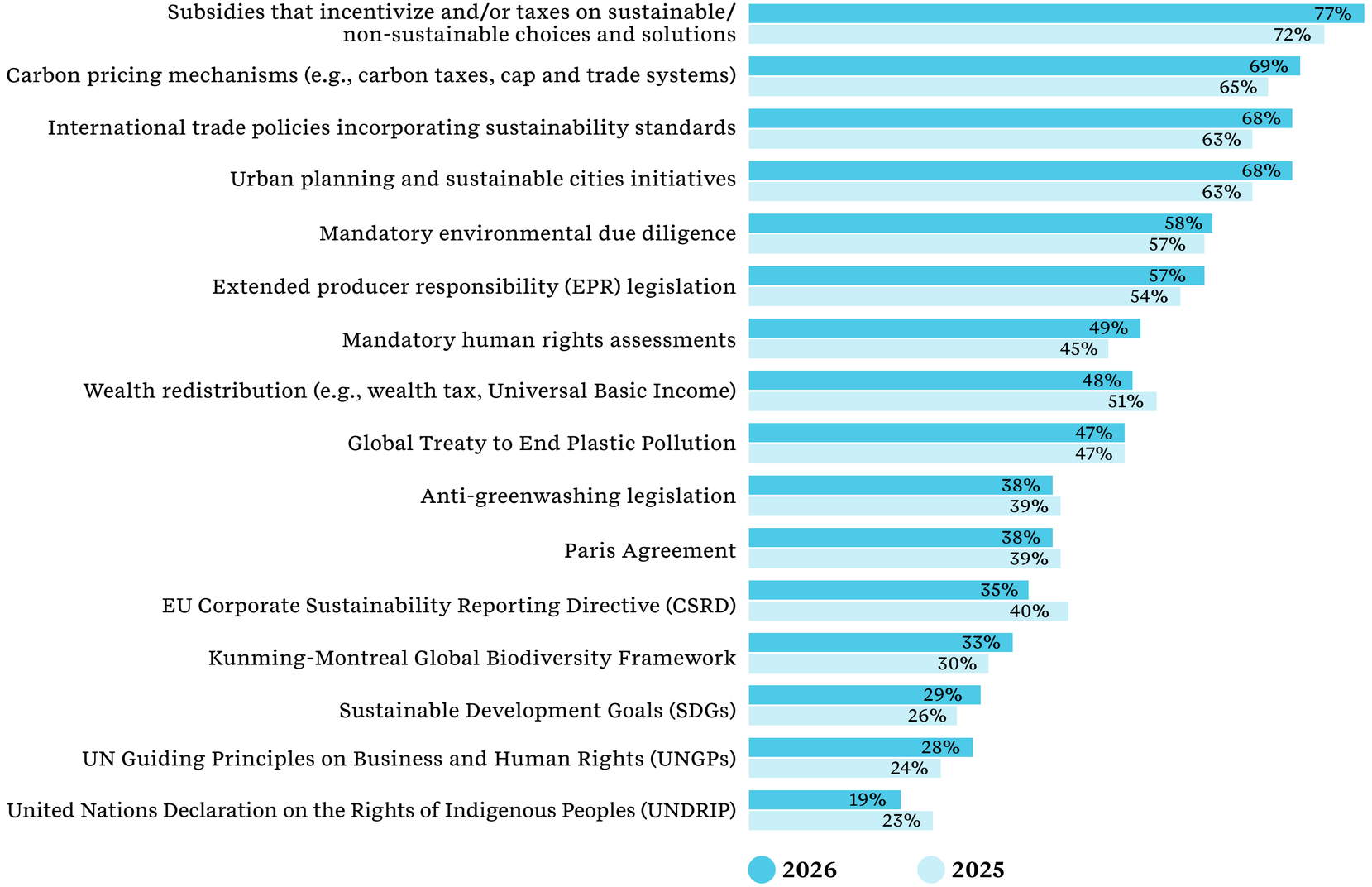
Impact of actions/interventions for systemic change

QUESTION

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

PLEASE USE A SCALE WHERE 1 HAS THE POTENTIAL TO HAVE "NO POSITIVE IMPACT" AND 5 A "VERY POSITIVE IMPACT."

Experts' views on the impact potential of policy action are broadly stable, with every measure rated within five points of its 2025 score. Expectations have risen modestly for subsidies and taxes that shape sustainable choices, international trade policies incorporating sustainability standards, and urban planning and sustainable cities initiatives (+5 points each). The clearest softening of perceived potential is on the EU Corporate Sustainability Reporting Directive (–5 points), UNDRIP (–4 points), and wealth redistribution (–3 points).



% of Experts, Significant Positive Impact (4+5), 2026 vs. 2025

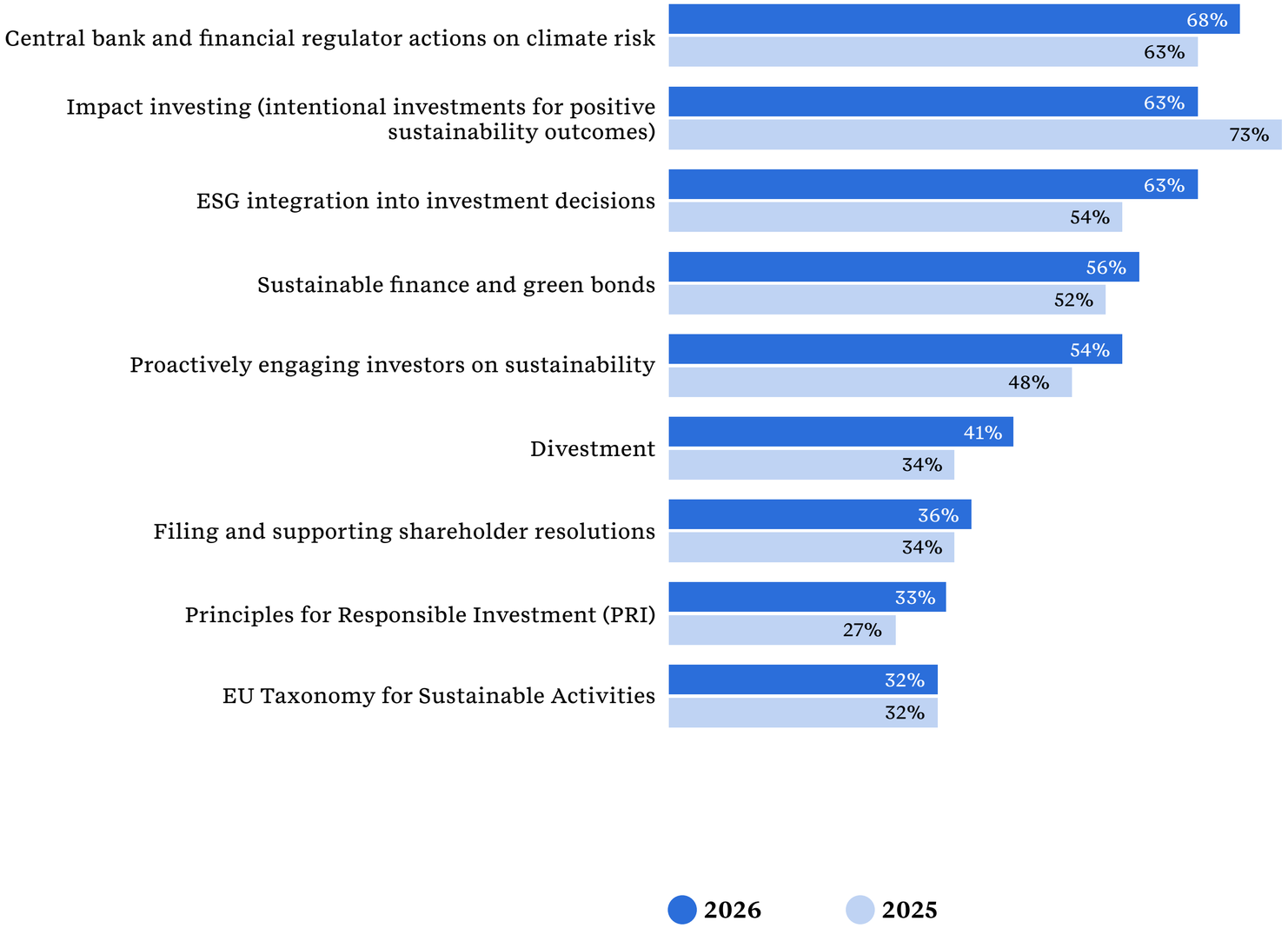
Impact of actions/interventions for systemic change

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PLEASE USE A SCALE WHERE 1 HAS THE POTENTIAL TO HAVE "NO POSITIVE IMPACT" AND 5 A "VERY POSITIVE IMPACT."

Expectations of what capital markets can deliver have shifted more than in any other category, especially declining expectations for impact investing (–10 points). ESG integration into investment decisions recorded the largest gain (+9 points), followed by divestment (+7 points), the PRI (+6 points), and proactively engaging investors on sustainability (+6 points).



% of Experts, Significant Positive Impact (4+5), 2026 vs. 2025

Impact of actions/interventions for systemic change

QUESTION

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

PLEASE USE A SCALE WHERE 1 HAS THE POTENTIAL TO HAVE "NO POSITIVE IMPACT" AND 5 A "VERY POSITIVE IMPACT."

Expert expectations of corporate action have edged upward, with the strongest gains associated with supply chain engagement and performance (+9 points), followed by integration of sustainability within companies, stakeholder engagement, and participation in sustainability-focused business associations (+6 points each).



% of Experts, Significant Positive Impact (4+5), 2026 vs. 2025

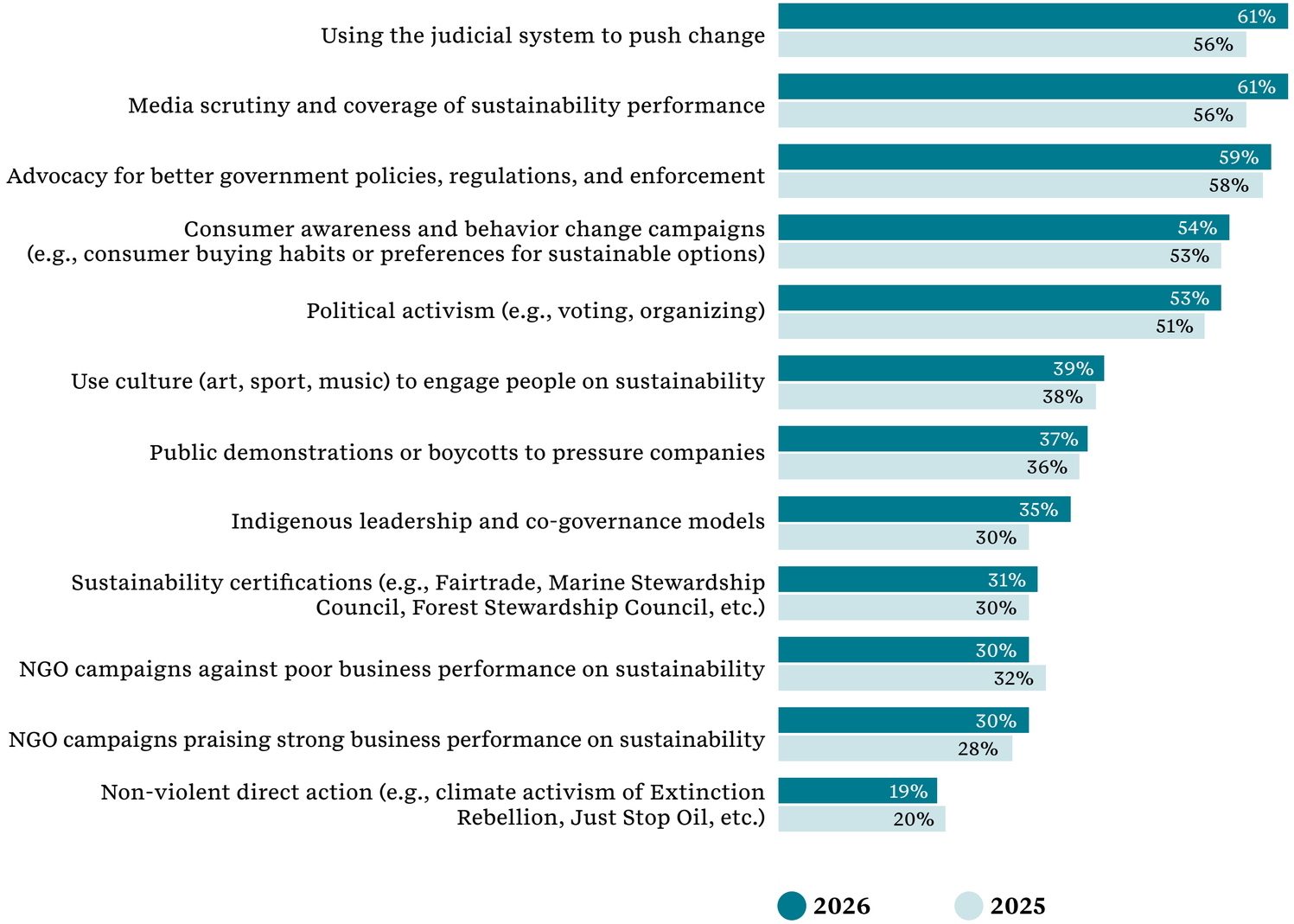
Impact of actions/interventions for systemic change

QUESTION

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PLEASE USE A SCALE WHERE 1 HAS THE POTENTIAL TO HAVE "NO POSITIVE IMPACT" AND 5 A "VERY POSITIVE IMPACT."

Experts have become somewhat more confident in the impact potential of civil society action. The largest gains are for media scrutiny and coverage of sustainability performance, using the judicial system to push change, and Indigenous leadership and co-governance models (+5 points each).



% of Experts, Significant Positive Impact (4+5), 2026 vs. 2025

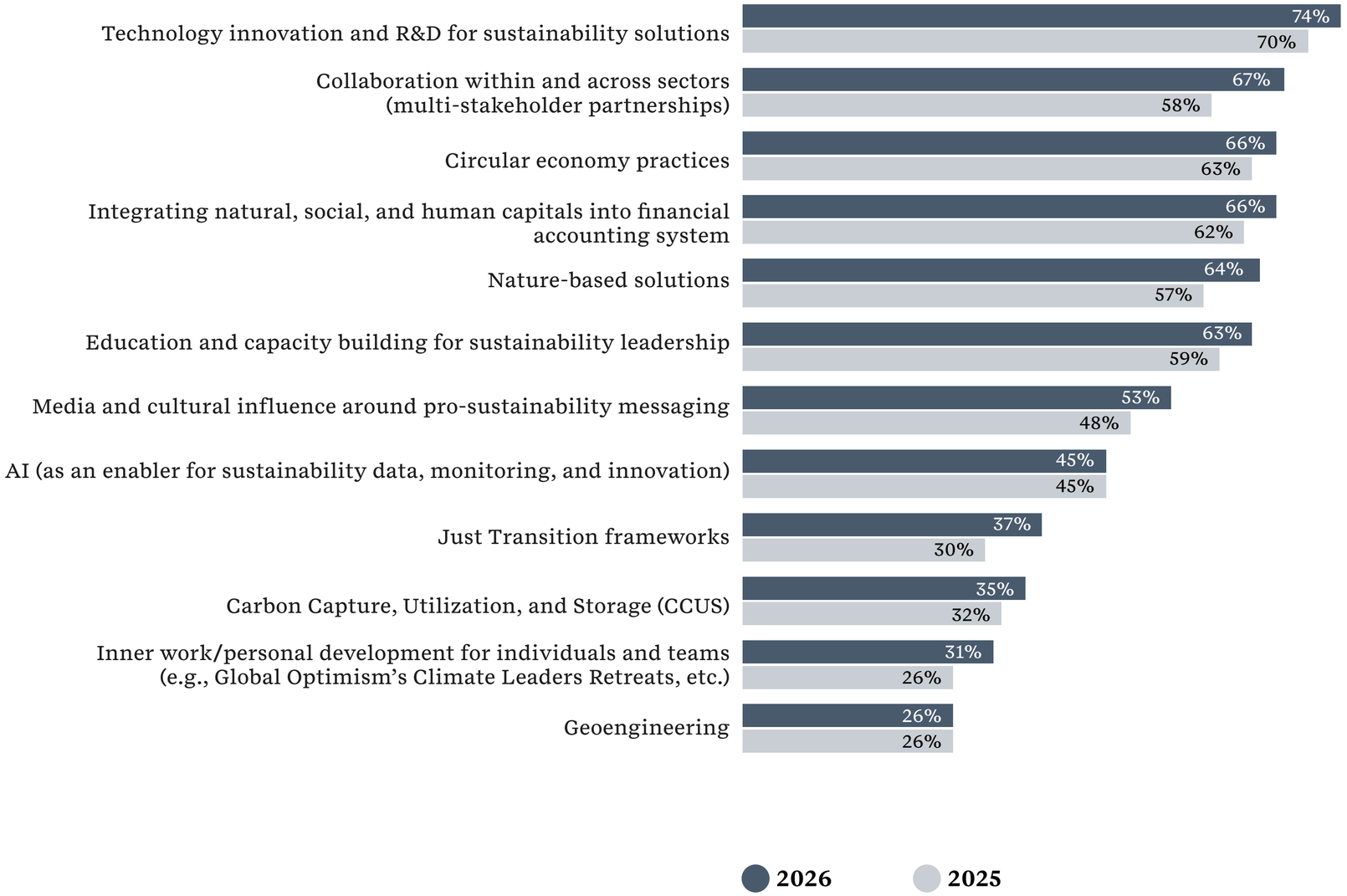
Impact of actions/interventions for systemic change

QUESTION

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

PLEASE USE A SCALE WHERE 1 HAS THE POTENTIAL TO HAVE "NO POSITIVE IMPACT" AND 5 A "VERY POSITIVE IMPACT."

Experts have become more likely to rate collaboration within and across sectors as potentially leading to significant positive sustainability outcomes (+9 points) along with Just Transition frameworks and nature-based solutions (+7 points each).



% of Experts, Significant Positive Impact (4+5), 2026 vs. 2025

Feasibility of actions/ interventions for systemic change



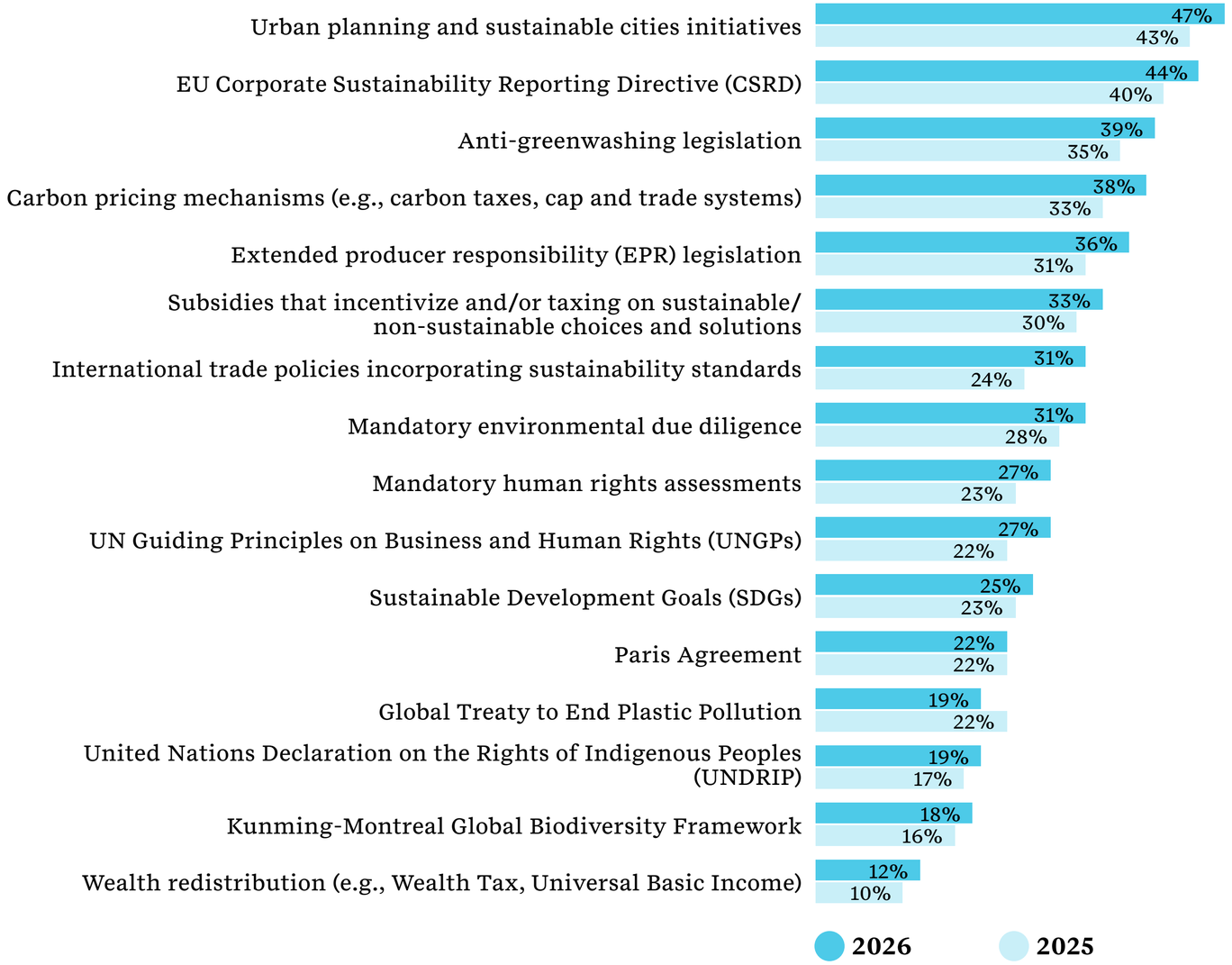
Feasibility of actions/ interventions for systemic change

QUESTION

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.

PLEASE USE A SCALE FROM 1 TO 5, WHERE 1 IS "STRONGLY DISAGREE", 3 IS "NEITHER AGREE NOR DISAGREE" AND 5 IS "STRONGLY AGREE."

Expert views on the feasibility of policy action have held mostly steady over the past year, with almost every measure rated within five points of its 2025 score. Experts have become slightly more optimistic about international trade policies that incorporate sustainability standards (+7 points) as well as the UN Guiding Principles, extended producer responsibility, and carbon pricing (+5 points each).



% of Experts, Very Likely (4+5), 2026 vs. 2025

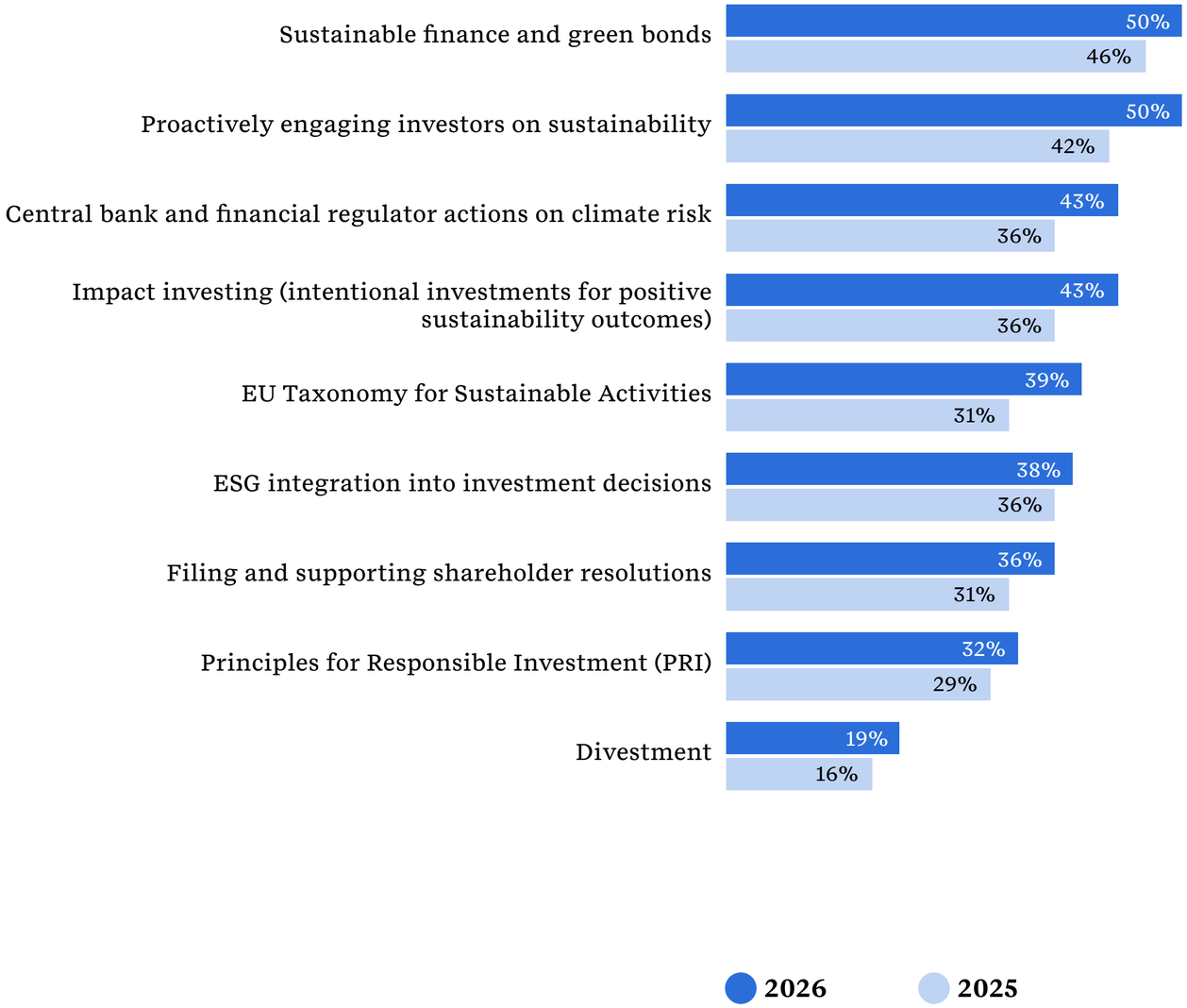
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Experts are slightly more confident than a year ago that capital market action can be implemented at scale. The gains are clearest for the EU Taxonomy and for proactively engaging investors on sustainability (+8 points each), followed by impact investing and action by central banks and financial regulators on climate risk (+7 points each).



% of Experts, Very Likely (4+5), 2026 vs. 2025

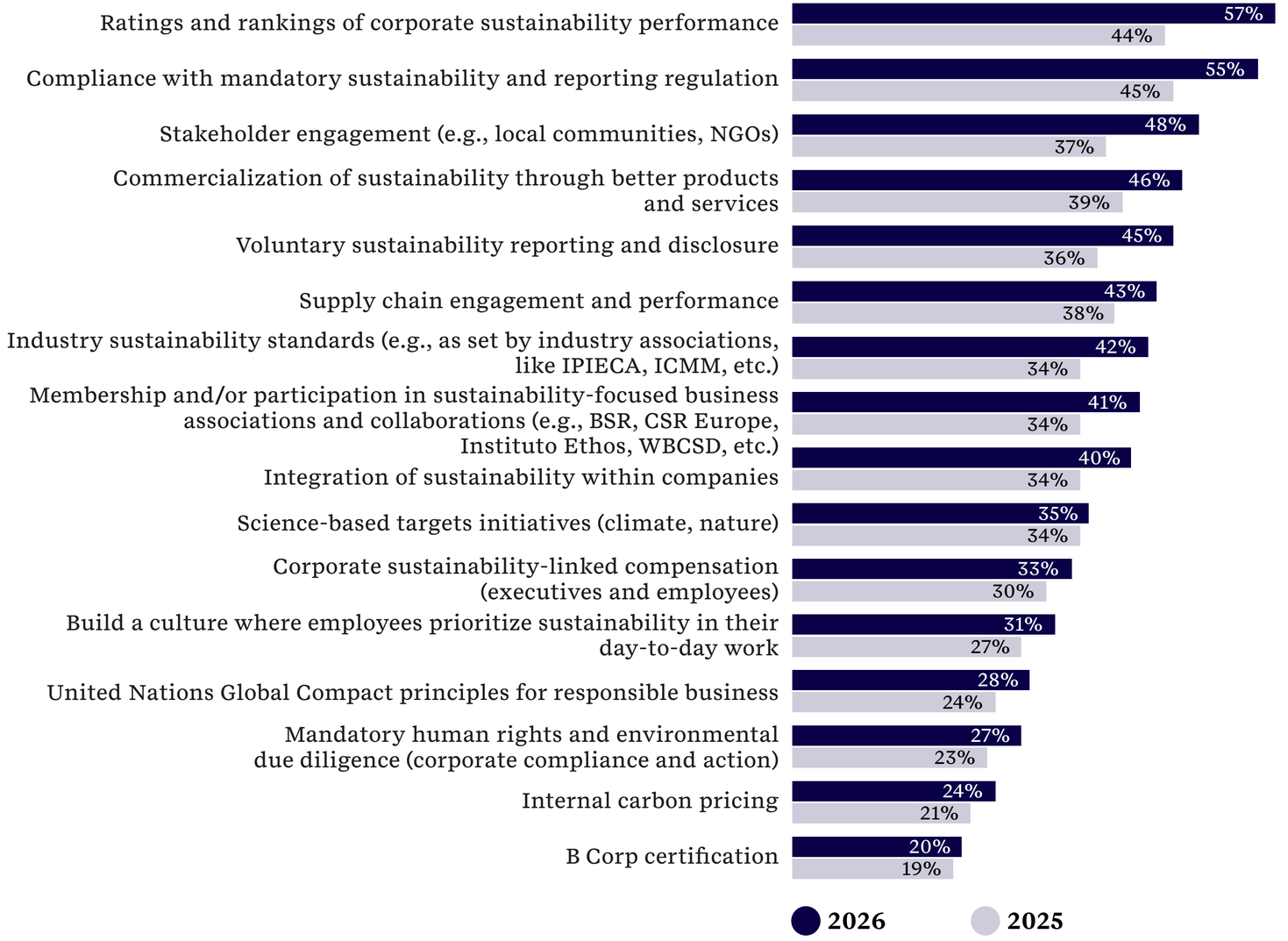
Feasibility of actions/ interventions for systemic change

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Corporate action shows the most pronounced movement on feasibility of any category this year. While most measures remain within five points of their 2025 scores, three rise by ten points or more: ratings and rankings of corporate sustainability performance (+13 points), stakeholder engagement (+11 points), and compliance with mandatory sustainability and reporting regulation (+10 points).



% of Experts, Very Likely (4+5), 2026 vs. 2025

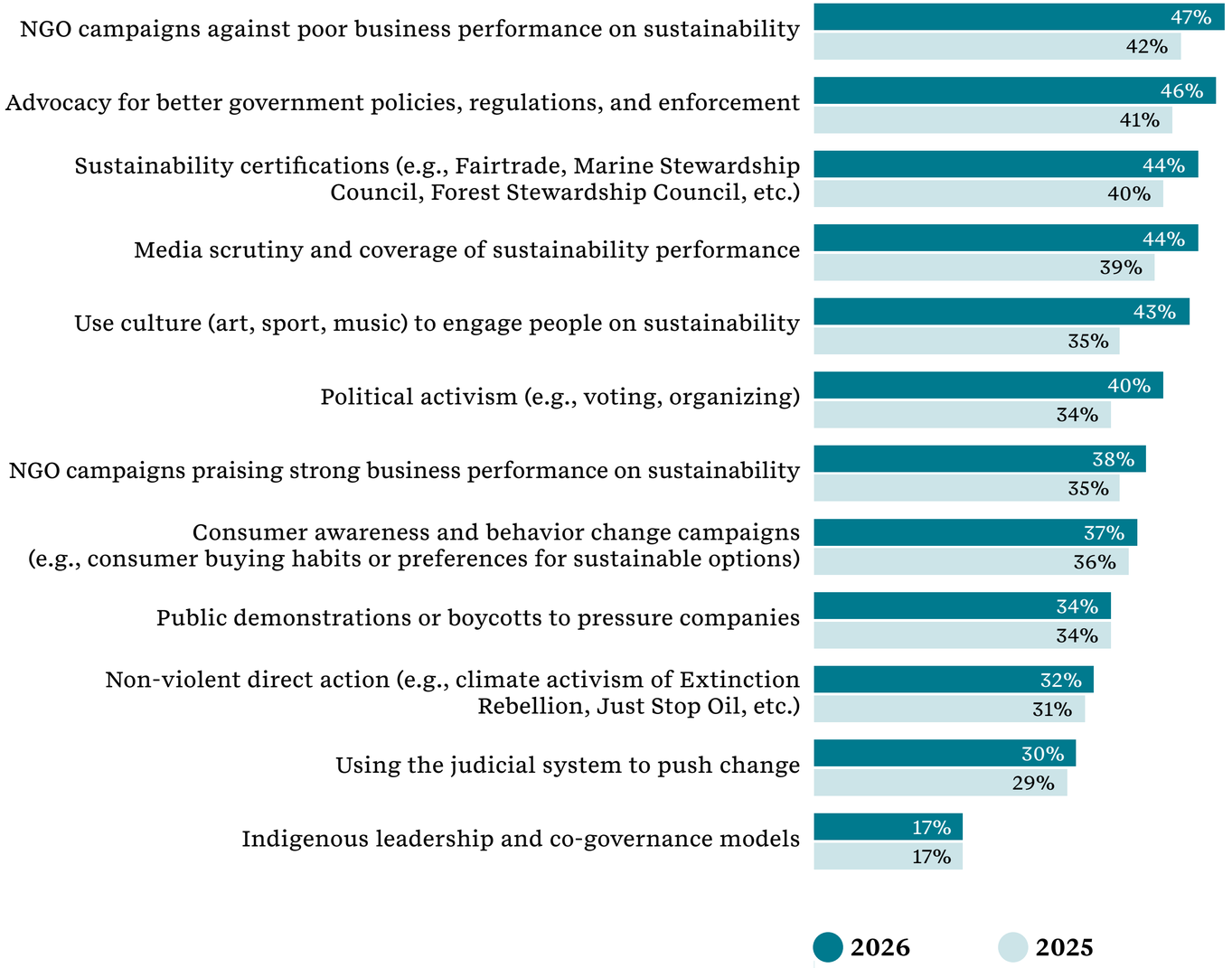
Feasibility of actions/ interventions for systemic change

QUESTION

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PLEASE USE A SCALE FROM 1 TO 5, WHERE 1 IS "STRONGLY DISAGREE", 3 IS "NEITHER AGREE NOR DISAGREE" AND 5 IS "STRONGLY AGREE."

Experts see modest but broad-based gains in the feasibility of civil society action compared to 2025. The largest movement is on using culture, art, sport, and music to engage people on sustainability (+8 points), followed by political activism (+6 points) and a cluster of advocacy-oriented measures: NGO campaigns against poor business performance, advocacy for better government policies, and media scrutiny of sustainability performance (+5 points each).



% of Experts, Very Likely (4+5), 2026 vs. 2025

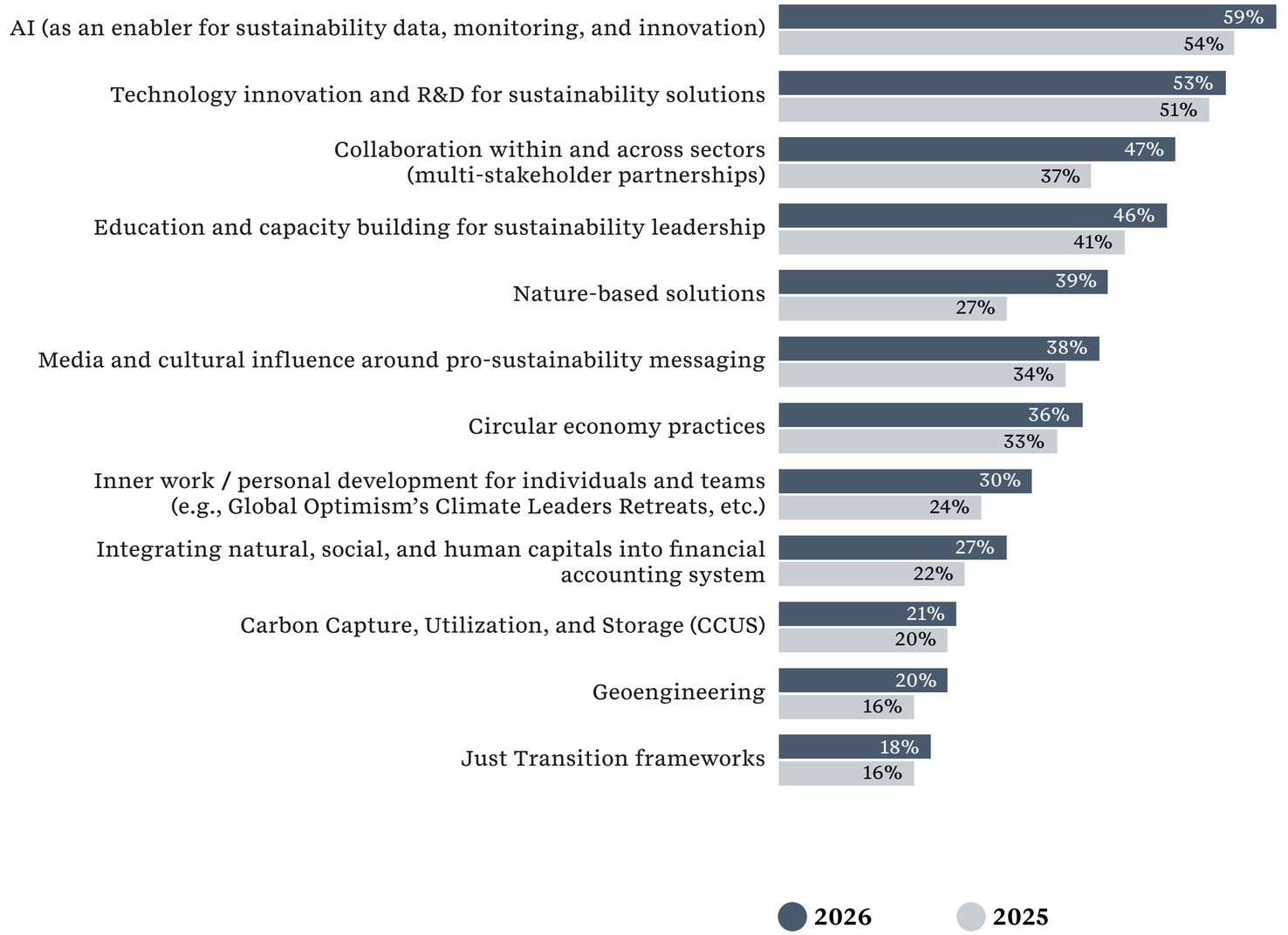
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Most cross-cutting enablers are rated close to where experts placed them a year ago, with two notable exceptions: nature-based solutions (+12 points) and collaboration within and across sectors (+10 points). AI and technological innovation remain the enablers experts consider most feasible overall.



% of Experts, Very Likely (4+5), 2026 vs. 2025

How do disruptions impact sustainability progress?

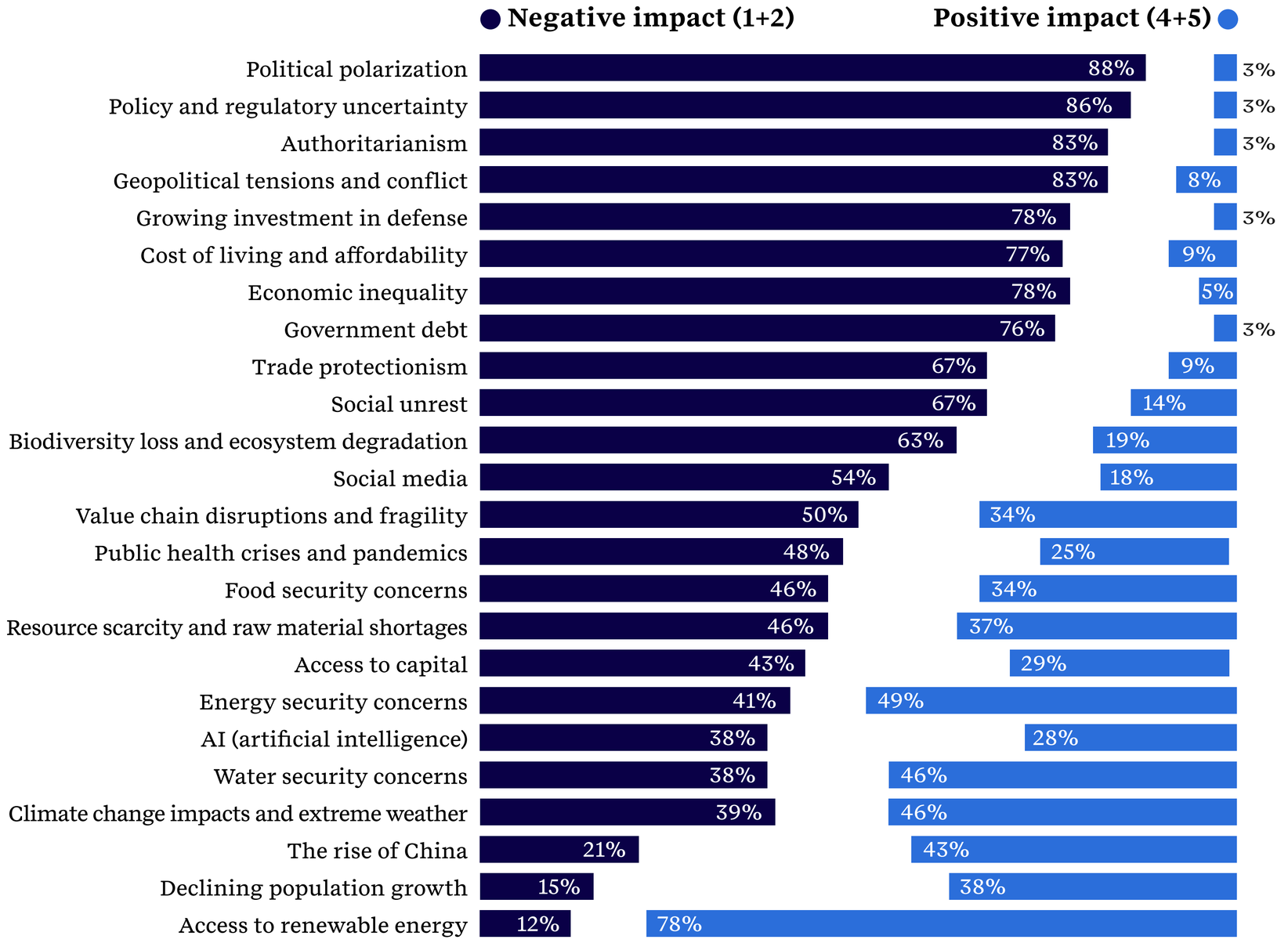


Experts see political dysfunction, polarization, and geopolitical tensions as having most negative impact

QUESTION

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.

Experts overwhelmingly view today's political environment as one of the greatest obstacles to sustainability progress. Political polarization (88% negative impact), policy and regulatory uncertainty (86%), authoritarianism (83%), and geopolitical conflict (83%) top the list of forces with a negative impact. In contrast, access to renewable energy is seen as a strong enabler of progress (78% positive impact), while climate change, water security, and energy security are viewed more as forces accelerating sustainability action than hindering it.



% of Experts, 2026

Political barriers as perceived obstacles to progress dominate across sectors and regions

QUESTION

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.

While experts broadly agree that political and governmental challenges are the biggest barriers to sustainability progress, priorities differ slightly across sectors and regions.

	Academic & Research	Corporate	Government	NGO	Service & Media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
Biggest obstacle to progress on sustainability	Policy & regulatory uncertainty (92%)	Policy & regulatory uncertainty; Political polarization (86% each)	Growing investment in defense (93%)	Policy & regulatory uncertainty (100%)	Political polarization (92%)	Geopolitical tensions & conflict; Economic inequality (95% each)	Geopolitical tensions & conflict (86%)	Policy & regulatory uncertainty (90%)	Political polarization (93%)	Political polarization (93%)
Second biggest obstacle	Political polarization (89%)	Geopolitical tensions & conflict (83%)	Political polarization (89%)	Growing investment in defense (89%)	Authoritarianism (87%)	Biodiversity loss & ecosystem degradation (91%)	Cost of living & affordability (85%)	Political polarization (88%)	Economic inequality (88%)	Authoritarianism (91%)
Third biggest obstacle	Cost of living & affordability (87%)		Authoritarianism (88%)	Geopolitical tensions & conflict (88%)	Geopolitical tensions & conflict (86%)		Political polarization (83%)	Authoritarianism (83%)	Growing investment in defense (87%)	Policy & regulatory uncertainty (89%)

% of Experts, Negative Impact (4+5), Top Three, by Sector and Region, 2026

Perceived sustainability-enabling changes are more diverse than obstacles across sectors and regions

QUESTION

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.

Experts in the Academic and NGO sectors, as well as experts based in Asia-Pacific, are more likely than others to see the rise of China as driving sustainability progress.

	Academic & Research	Corporate	Government	NGO	Service & Media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
Biggest enabler of progress on sustainability	Access to renewable energy (77%)	Access to renewable energy (78%)	Access to renewable energy (77%)	Access to renewable energy (84%)	Access to renewable energy (79%)	Access to renewable energy (86%)	Access to renewable energy (78%)	Access to renewable energy (78%)	Access to renewable energy (86%)	Access to renewable energy (73%)
Second biggest enabler	Climate change impacts & extreme weather (55%)	Energy security concerns; Climate change impacts & extreme weather (47% each)	Declining population growth (73%)	Energy security concerns (65%)	Water security concerns (53%)	Declining population growth (50%)	The rise of China (51%)	Energy security concerns (55%)	Water security concerns (59%)	Energy security concerns (48%)
Third biggest enabler	The rise of China (51%)		Energy security concerns (46%)	The rise of China (61%)	Energy security concerns (48%)	Energy security concerns (46%)	Water security concerns (45%)	Climate change impacts & extreme weather (49%)	Access to capital (53%)	Climate change impacts & extreme weather; Water security concerns (44% each)

% of Experts, Positive Impact (4+5), Top Three, by Sector and Region, 2026

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