

RESEARCH FINDINGS



Sustainability at a Crossroads

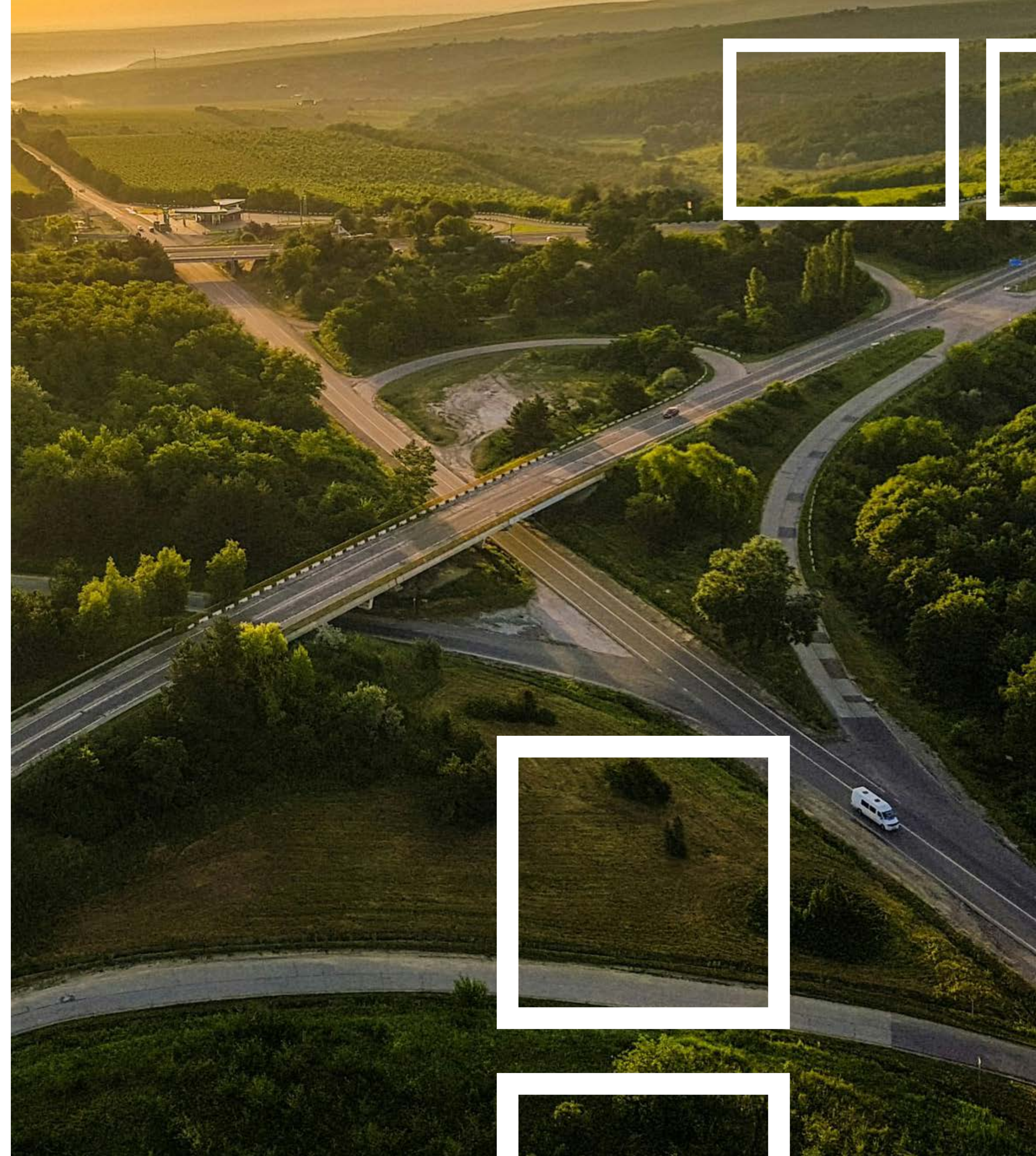
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ERM
SUSTAINABILITY
INSTITUTE



THE GLOBESCAN / ERM SUSTAINABILITY INSTITUTE RESEARCH PROGRAM



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Introduction & survey methodology



Introduction

Sustainability at a Crossroads was jointly developed and fielded by **GlobeScan**, **ERM**, and **Volans**. This survey of 844 sustainability experts across 72 countries reveals a pivotal inflection point in the evolution of the global sustainability agenda.

While the sustainability field has matured, expanded, and mainstreamed over the nearly four decades since the 1987 publication of the Brundtland Report, ***Our Common Future***, established the foundation on which much of today’s sustainable development agenda and approaches stand, experts say that that current practices simply are not working. Over nine in ten respondents say the agenda requires revision, while more than half of experts call for a radical overhaul. We are truly at a crossroads in terms of the way forward.

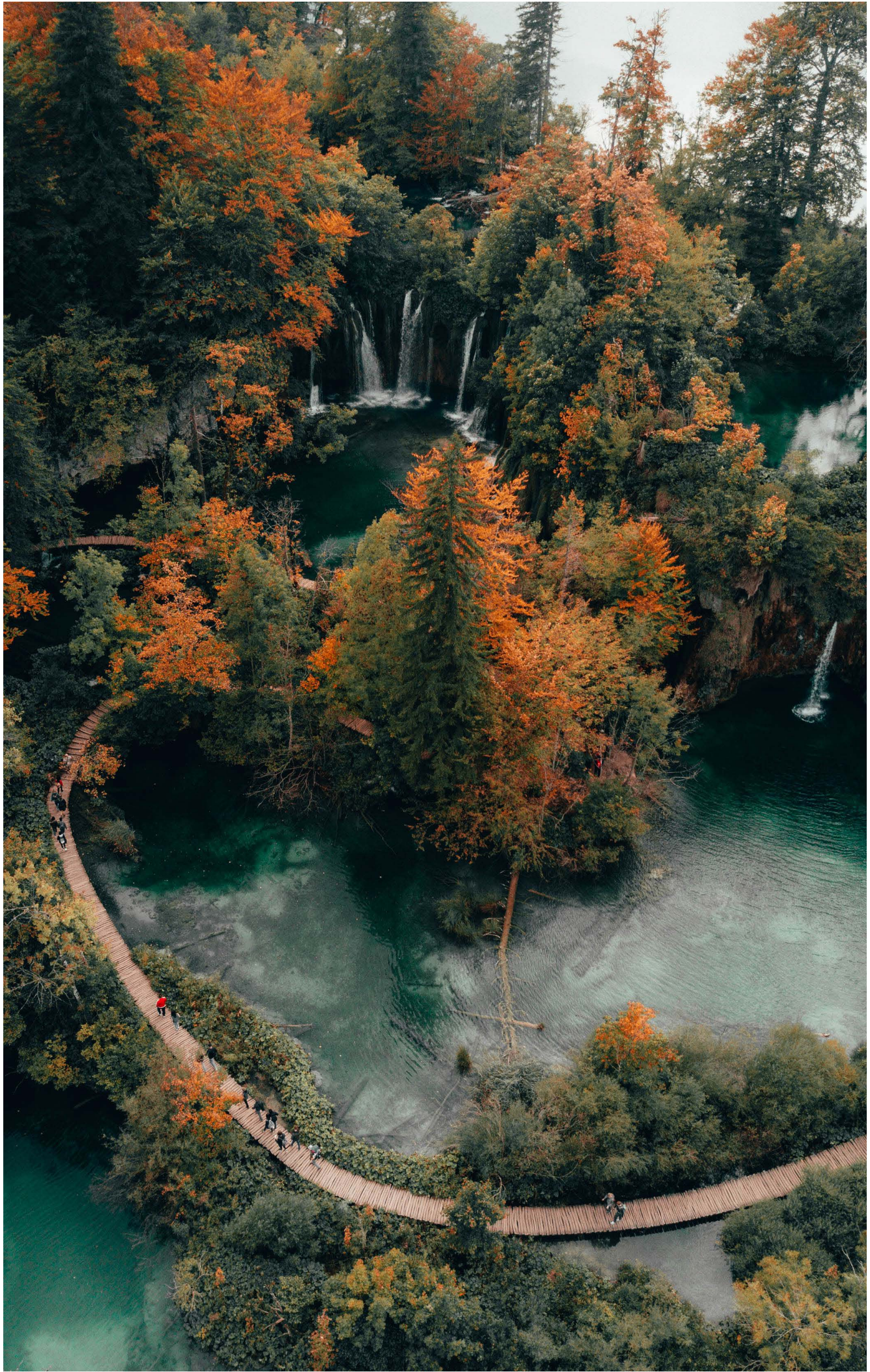
Experts express declining trust in civil society organizations, including non-governmental organizations, social movements, the United Nations, and multi-sector partnerships, and low confidence in the effectiveness of global frameworks such as the Sustainable Development Goals and the Paris Agreement. Significant pushback against sustainability continues to hinder progress, especially in North America, while respondents from Latin America and Asia-Pacific report greater optimism, often viewing political and economic disruptions as opportunities for advancement.

Experts identify a range of high-impact, high-feasibility actions that signal momentum across sectors. In the corporate space, integrating sustainability into business strategy, investing in R&D, and accelerating circular economy models are seen as promising paths forward. In finance, mechanisms such as green bonds, impact

investing, and ESG integration are viewed as key levers for change. Government policy measures like carbon pricing and mandatory reporting are also cited for their potential to deliver tangible results.

While the perception of how well government, the private sector, and civil society have done in terms of their contributions to sustainable development has declined, academic and research institutions have gained credibility, standing out as trusted sources of innovation and impact.

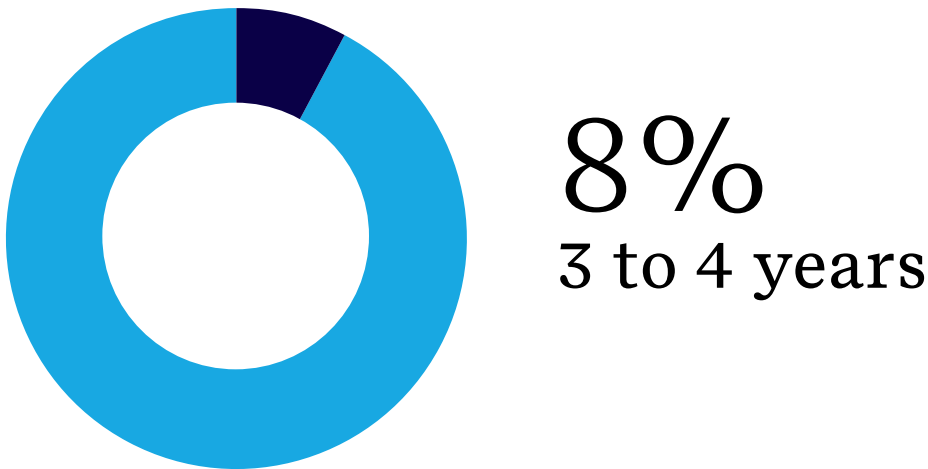
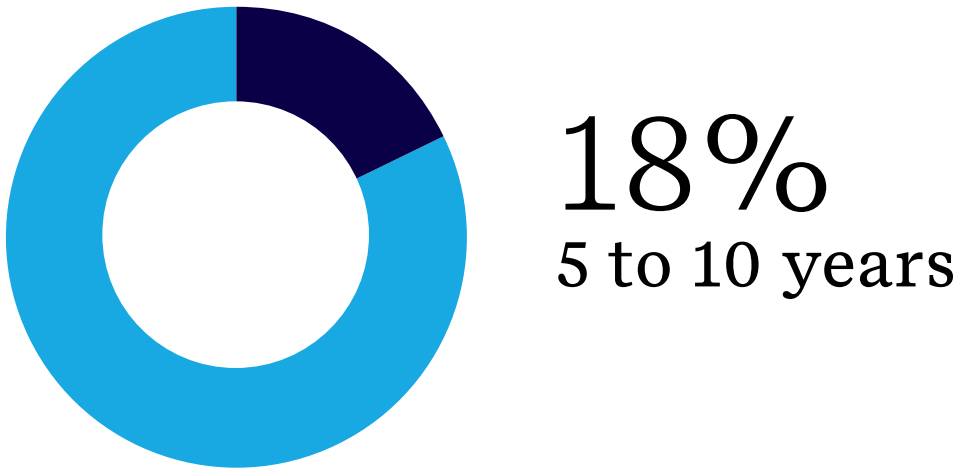
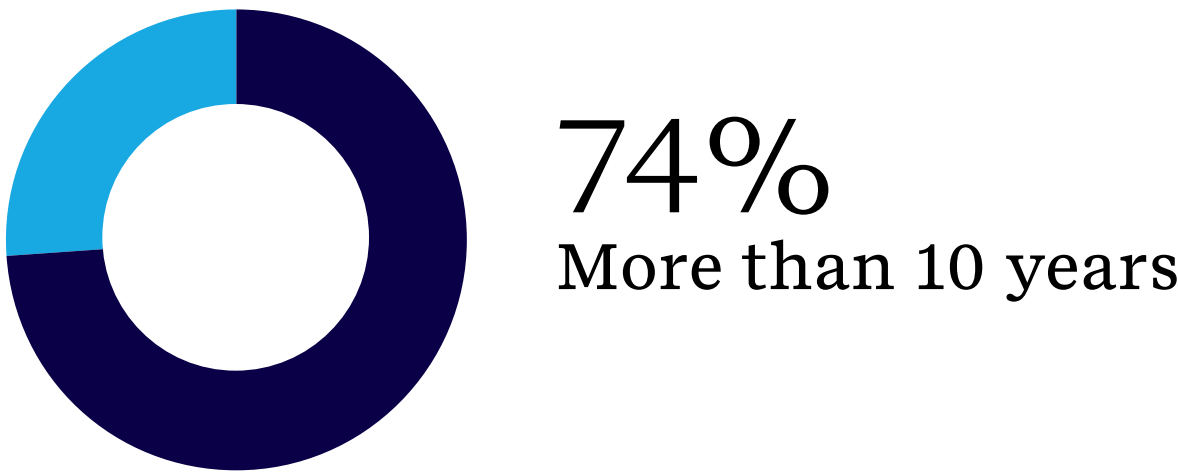
GlobeScan, ERM, and Volans do not interpret the survey’s findings to mean the field is in an existential crisis. We see a glass-half-full moment of opportunity. At this time, leaders in the private, public, and civil society sectors can pivot and make the bold strategic adjustments needed to deliver the just, low-carbon, and nature-positive transition needed. This will mean creating new markets that strengthen societies and economies at the same time as increasing business resilience. This requires developing opportunities that build commercial value while simultaneously addressing sustainability imperatives.



Survey methodology

A total of 844 qualified, highly experienced sustainability experts across 72 countries completed the Sustainability at a Crossroads survey from April 22nd to May 26th, 2025. The questionnaire was offered online to respondents in English.

Experience



Geography



Sectors



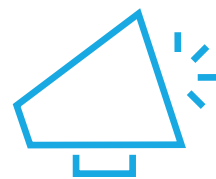
38%
Corporate



31%
Service & Media



10%
Academia & Research



9%
NGO



4%
Government



8%
Other

The state of the sustainability agenda – fit for purpose?

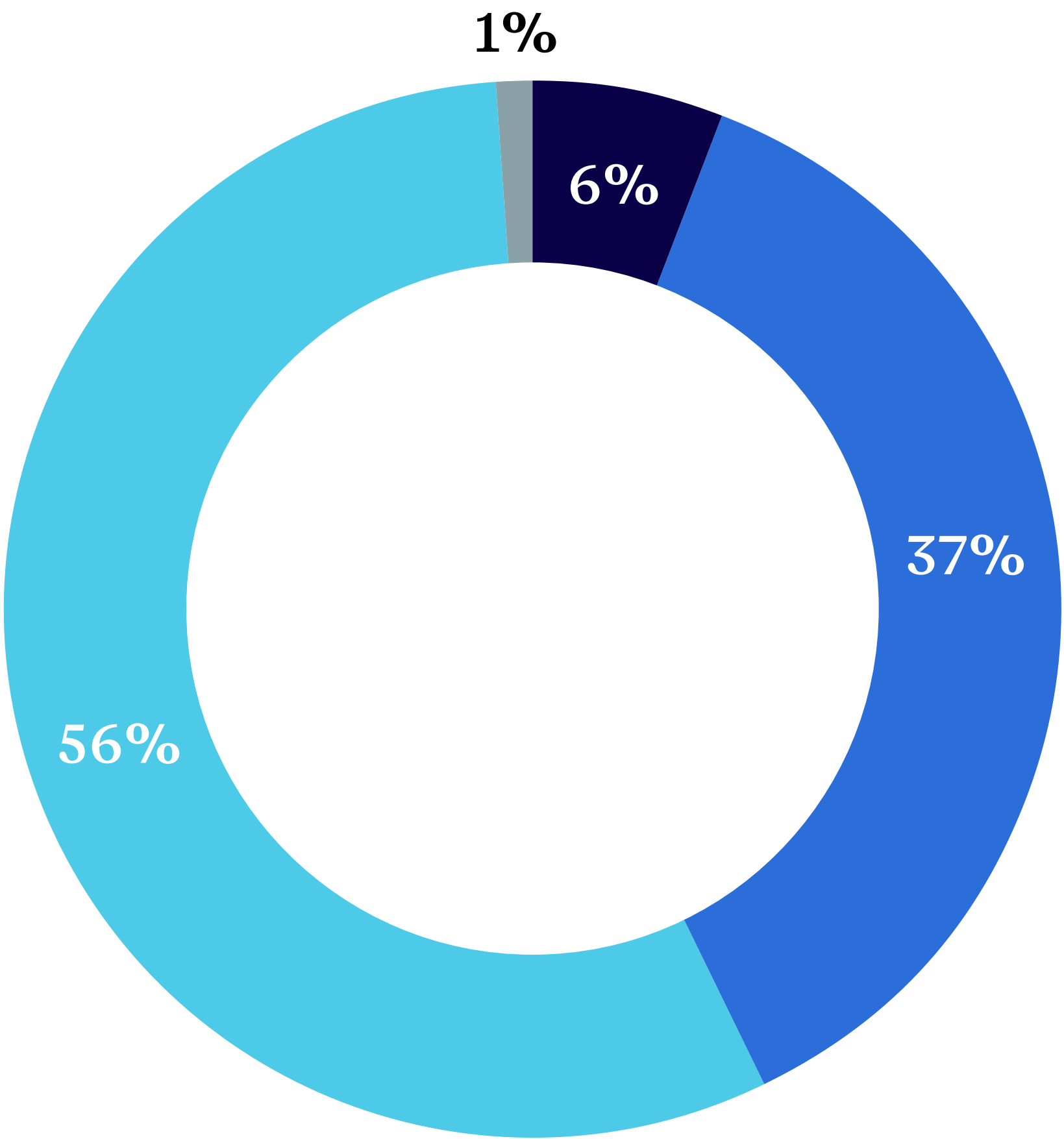
Most experts believe current approaches to sustainability need radical revision

When asked how they personally feel about the current state of the sustainability agenda, more than half of sustainability professionals say that the current approach should be radically revised. Another 37 percent believe it needs to be modestly revised but say things are on the right track overall. Fewer than one in ten experts fully endorse the current approach as is, meaning almost all respondents are calling for at least some change to the current approach to meet the 2030 sustainability goals.

QUESTION

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

PLEASE CHOOSE ONE



- The current approach to sustainability works well as it is and we should continue to pursue it
- The current approach to sustainability needs to be modestly revised but we are largely on the right track
- The current approach to sustainability should be radically revised
- Don't know / not applicable

% of Experts, 2025

Experts from the NGO and academic & research sectors, plus those based in Europe, are most likely to call for radical revision

Experts in the NGO and academic & research sectors, plus those based in Europe, are much more likely than other surveyed experts to support a complete overhaul of the current approach to sustainability. Experts in the corporate sector and those based in Asia-Pacific and Latin America / Caribbean are more likely to say that only a modest adjustment is needed.

QUESTION

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

PLEASE CHOOSE ONE.

	NGO	Academic & Research	Corporate	Service & Media	Government	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	3%	9%	6%	5%	6%	9%	10%	6%	12%	3%
The current approach to sustainability needs to be modestly revised but we are largely on the right track	23%	22%	48%	36%	38%	42%	42%	30%	49%	41%
The current approach to sustainability should be radically revised	71%	67%	45%	58%	56%	45%	45%	64%	39%	55%

% of Experts, by Sector and Region, 2025
Small sample size for Government (n=32) and Africa / Middle East (n=33).

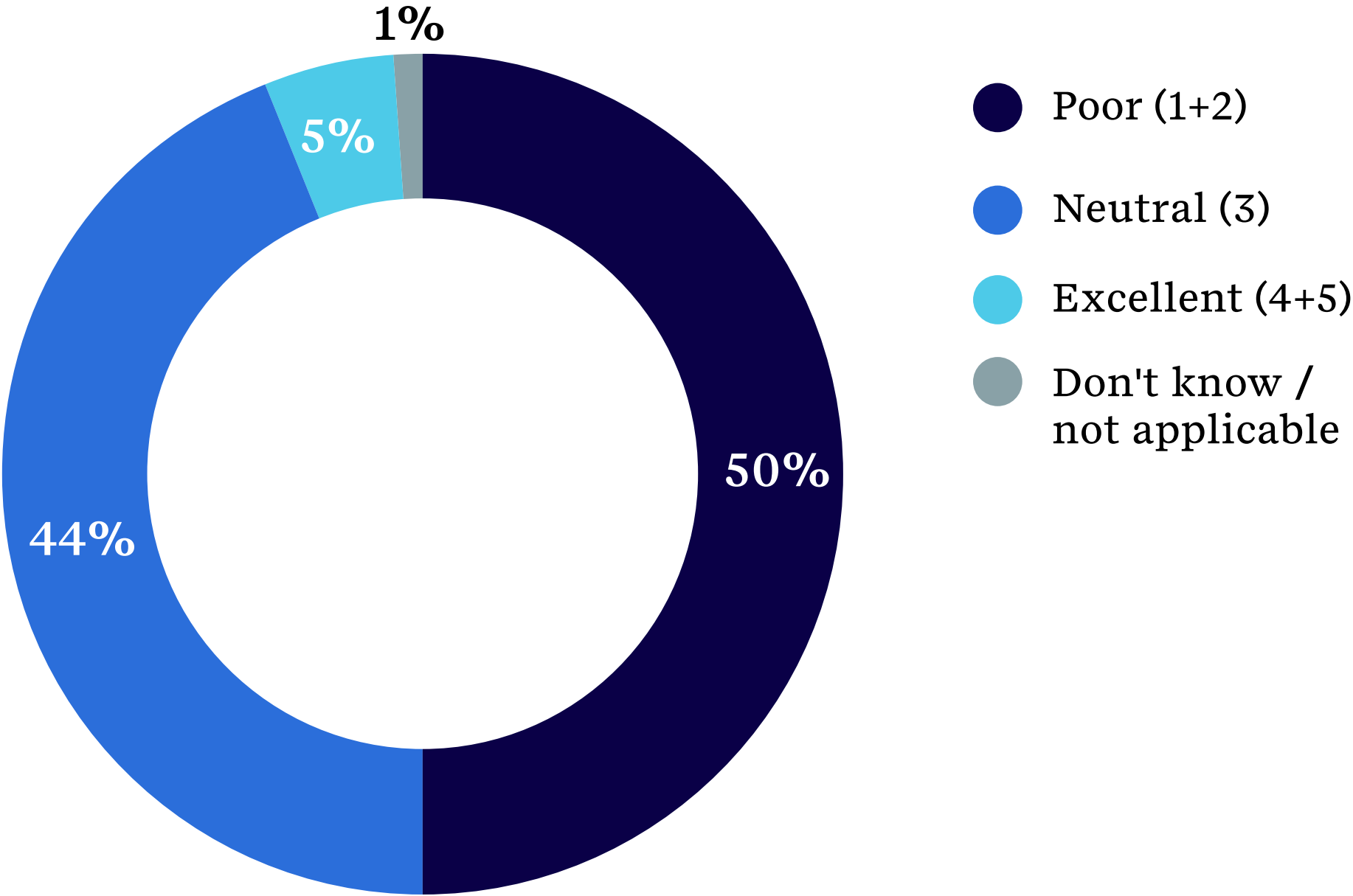
Half of experts are dissatisfied with global sustainable development progress to date

Half of sustainability professionals give a rating of “poor” to progress made on the global transition to sustainable development, which is a slight improvement from 2021 (54 percent). Another 44 percent feel neutral about progress made, while one in 20 respondents say progress has been excellent.

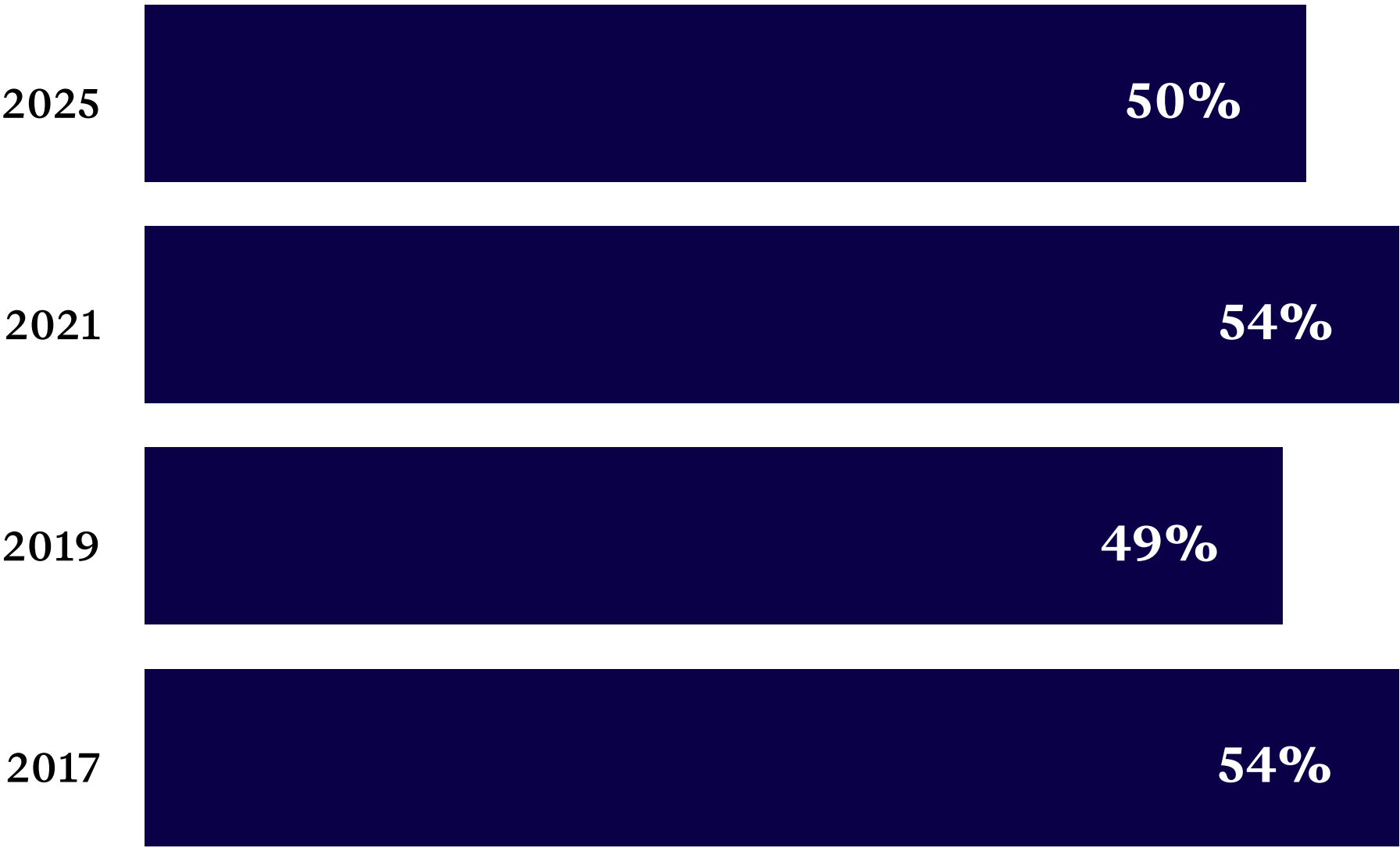
QUESTION

How would you rate the progress made to date in the transition to sustainable development globally?

PLEASE USE A SCALE WHERE 1 IS “POOR” AND 5 IS “EXCELLENT.”



% of Experts, 2025



“Poor” (1+2), % of Experts, 2017–2025

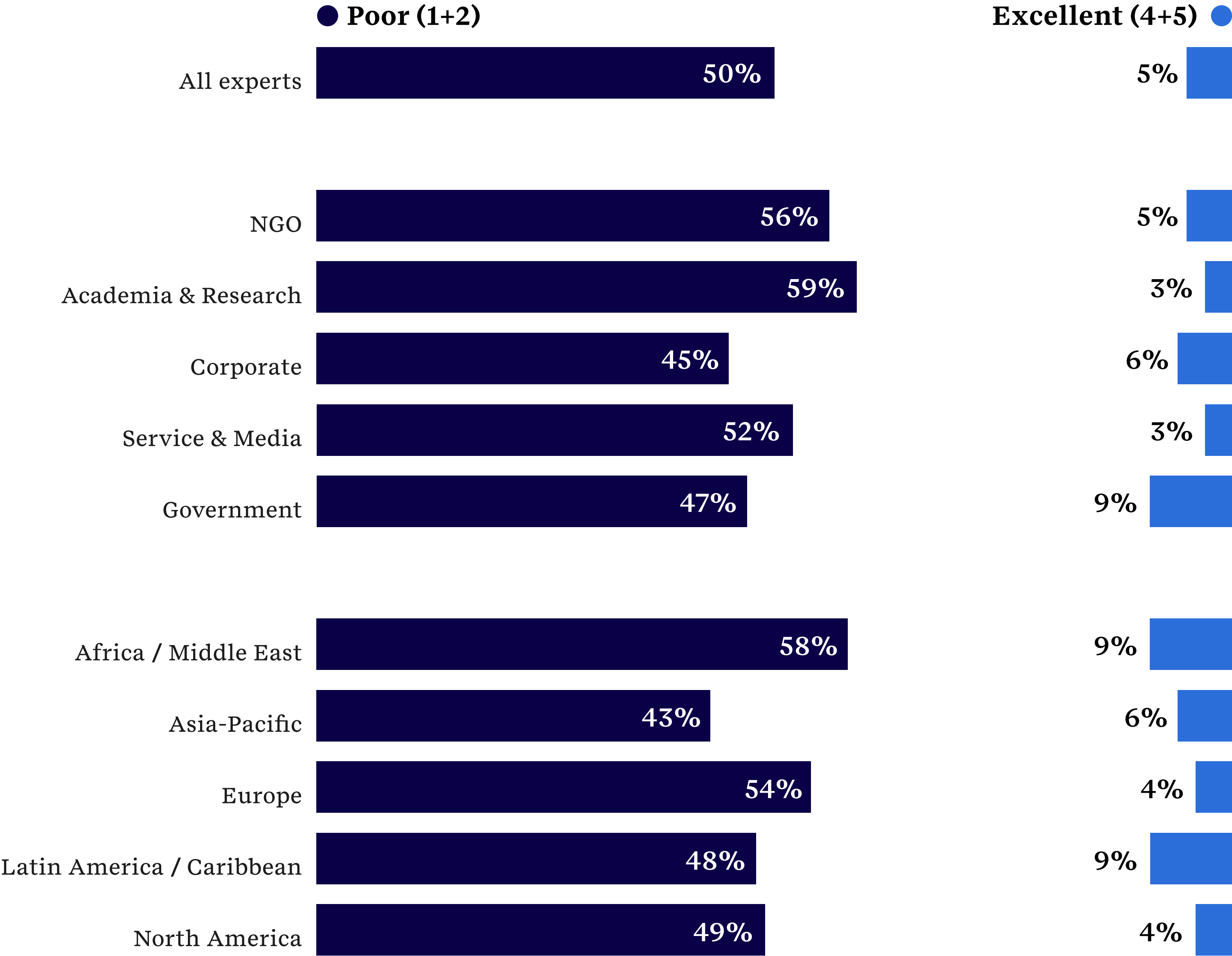
Experts in Europe and Africa / Middle East are most critical about progress on sustainability

Sustainability experts based in Europe and in Africa / Middle East as well as experts in the academic & research and NGO sectors have the most critical views of global progress on sustainable development made to date. Fewer than one in ten respondents in all regions and sectors believe that performance to date has been excellent.

QUESTION

How would you rate the progress made to date in the transition to sustainable development globally?

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



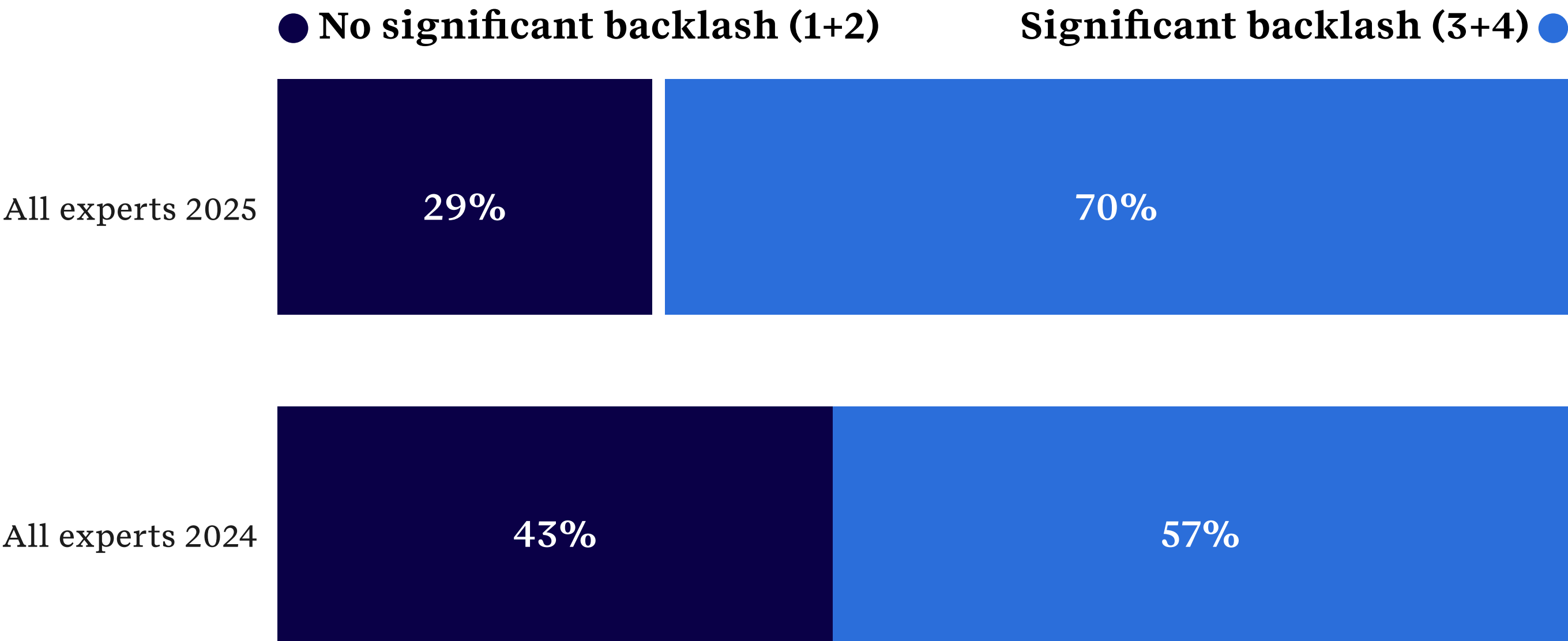
% of Experts, by Sector and Region, 2025
White space indicates "Don't know / No answer" (DK/NA).

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

Seven in ten sustainability experts surveyed say there is significant backlash against the sustainability agenda (including ESG) in their country, an increase of 13 percentage points compared to 2024.

QUESTION

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



% of Experts, 2024–2025

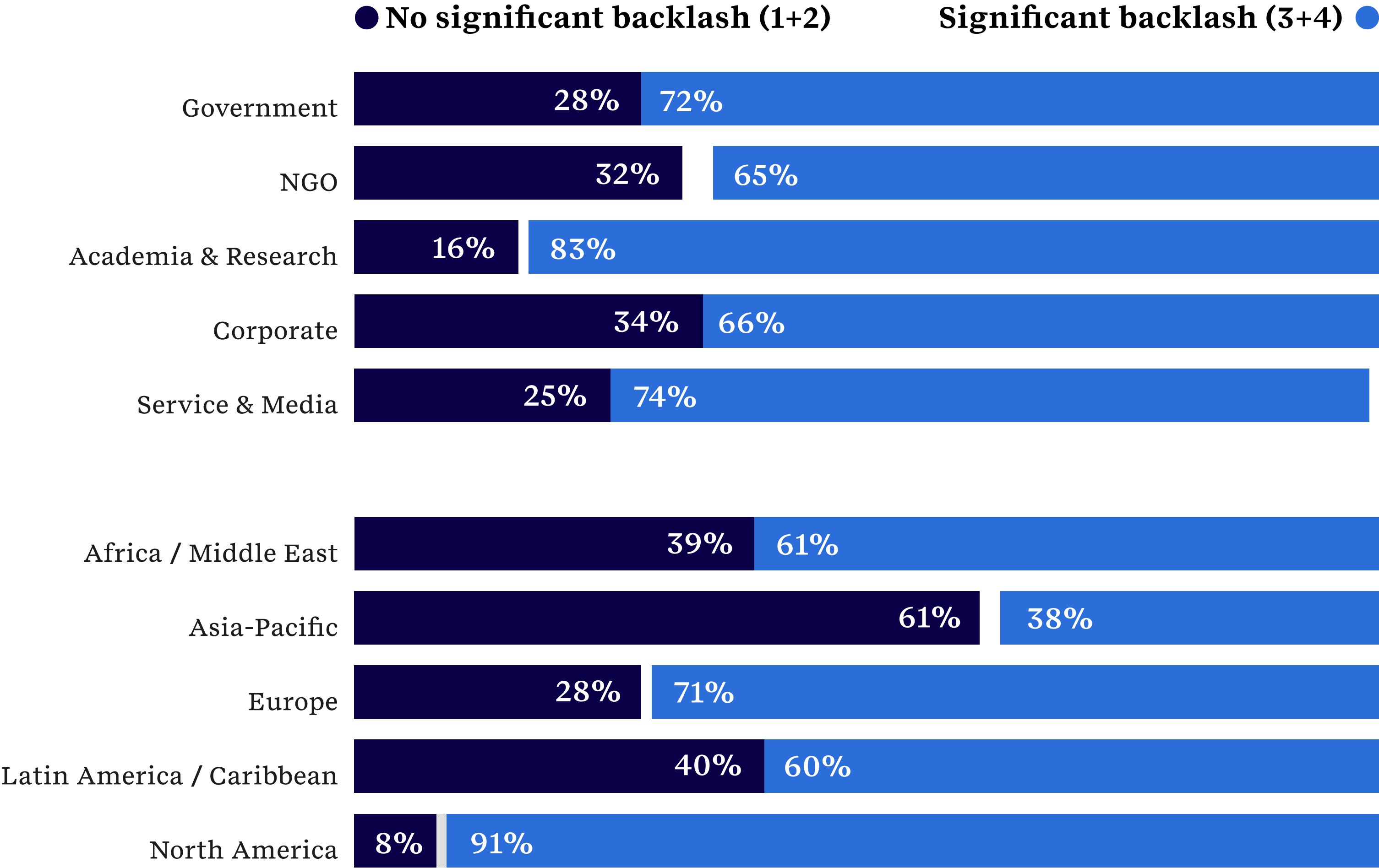
White space indicates “Don’t know / No answer” (DK/NA).

Nine in ten experts in North America believe there is significant backlash against the sustainability agenda in their country, but most experts in Asia-Pacific disagree

Over nine in ten North American experts say there is a significant backlash against the sustainability agenda in their country. However, 61 percent of experts based in Asia-Pacific claim there is no significant backlash in the region, showing the extent of pushback on the agenda is not equal globally.

QUESTION

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



% of Experts, by Sector and Region, 2025

White space indicates "Don't know / No answer" (DK/NA).
Small sample size for Government (n=32) and Africa / Middle East (n=33).

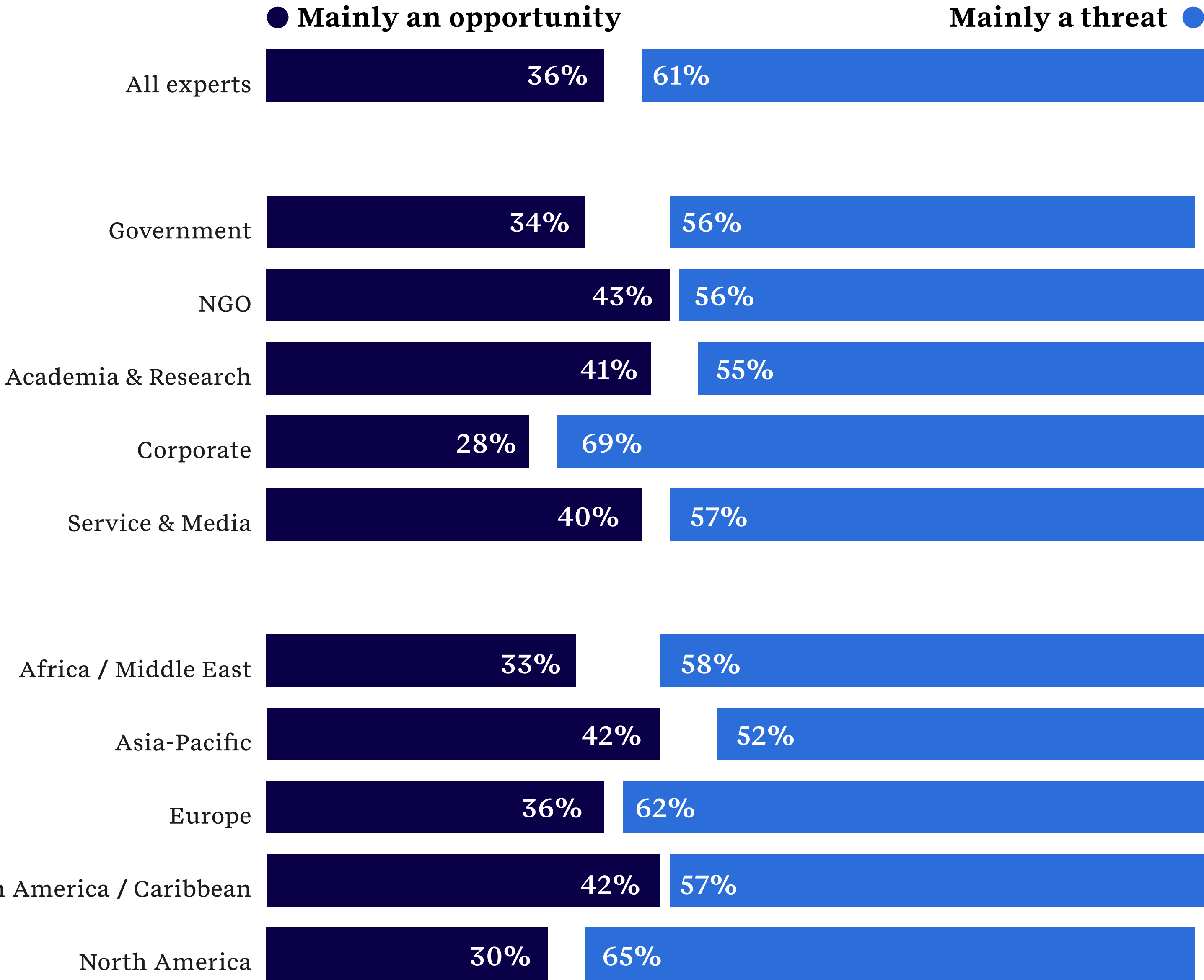
Most experts believe current global political and economic shocks are a threat to sustainability

More than half of sustainability professionals think current global political and economic shocks are a threat, rather than an opportunity, to the creation of a more sustainable economic system. This is true especially among respondents in the corporate sector and those based in North America and Europe. While the majority of experts in all sectors and regions say these shocks are mainly a threat, NGO respondents and those based in Latin America / Caribbean and Asia-Pacific are more likely to think that current shocks present an opportunity.

QUESTION

Do you think current global political and economic shocks are an opportunity for or a threat to the creation of a more sustainable economic system?

PLEASE CHOOSE ONE.



% of Experts, by Sector and Region, 2025

White space indicates "Don't know / No answer" (DK/NA).
Small sample size for Government (n=32) and Africa / Middle East (n=33).

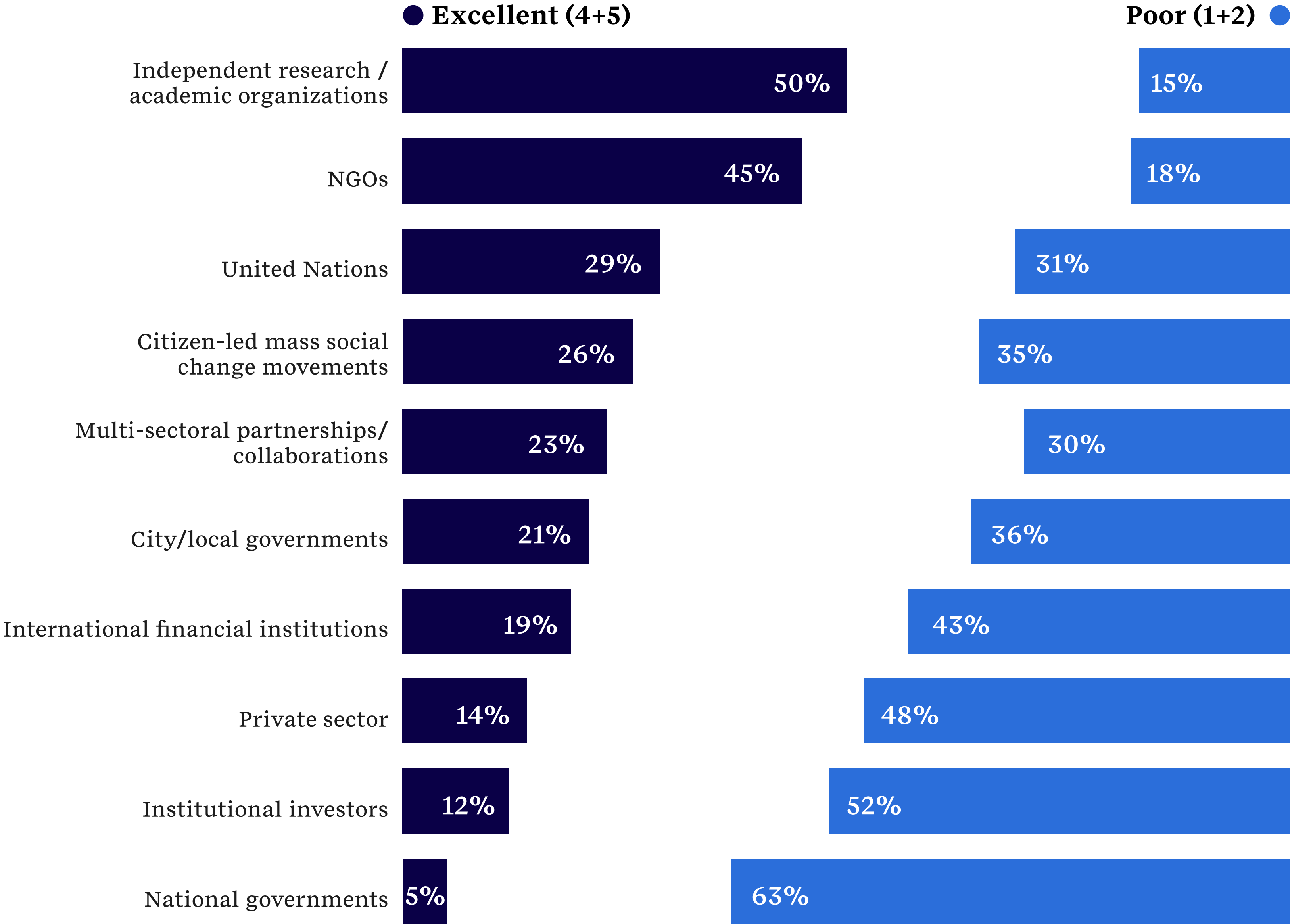
Experts say national governments have contributed the least to progress on sustainable development

Over half of sustainability experts rate national governments and institutional investors as “poor” in terms of their contributions to sustainable development, with only five percent crediting national governments as doing excellent work. Institutional investors and the private sector are also rated negatively. In contrast, independent research and academic institutions and NGOs are more widely seen as having made a positive contribution.

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.”



% of Experts, 2025

White space indicates “Don’t know / No answer” (DK/NA).

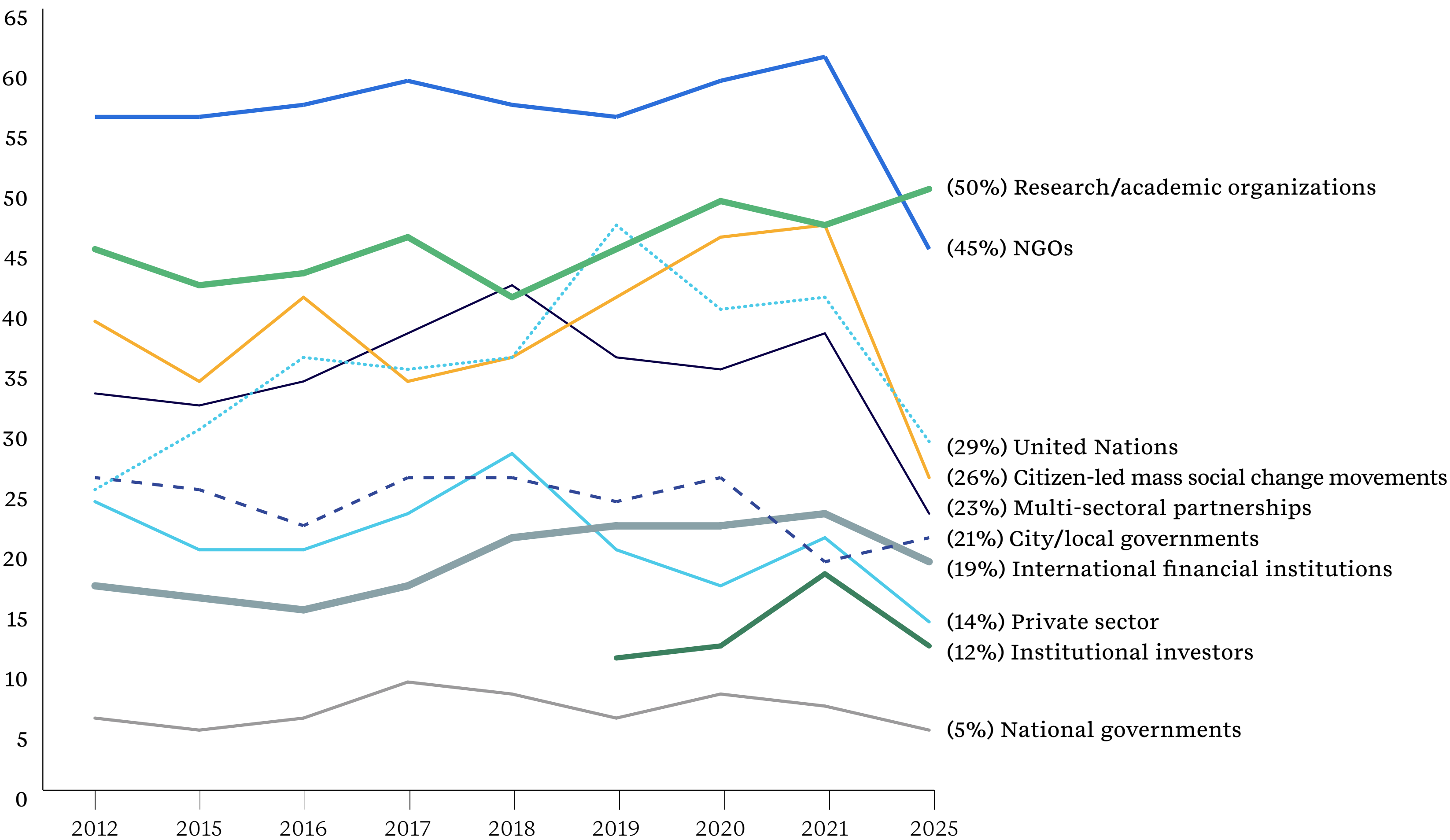
Experts are losing faith in the ability of social movements and NGOs to drive progress on sustainable development

Experts have become less likely to positively rate most organizations’ performance on contributing toward sustainable development. These declines in perceived contributions to the sustainability agenda are especially significant for citizen-led mass social movements (-21 percentage points), NGOs (-16 points), multi-sectoral partnerships (-15 points), and the UN (-12 points). However, experts increasingly rate the contribution of research and academic organizations as positive.

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.”



% 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 2025–2030

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 5-POINT SCALE WHERE 1 IS THE POTENTIAL TO HAVE “NO POSITIVE IMPACT AT ALL,” 3 IS “MODERATE POSITIVE IMPACT,” AND 5 IS “VERY SIGNIFICANT POSITIVE IMPACT.”

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 5-POINT SCALE WHERE 1 IS “COMPLETELY UNLIKELY,” 3 IS “MODERATELY LIKELY,” AND 5 IS “VERY LIKELY.”

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.

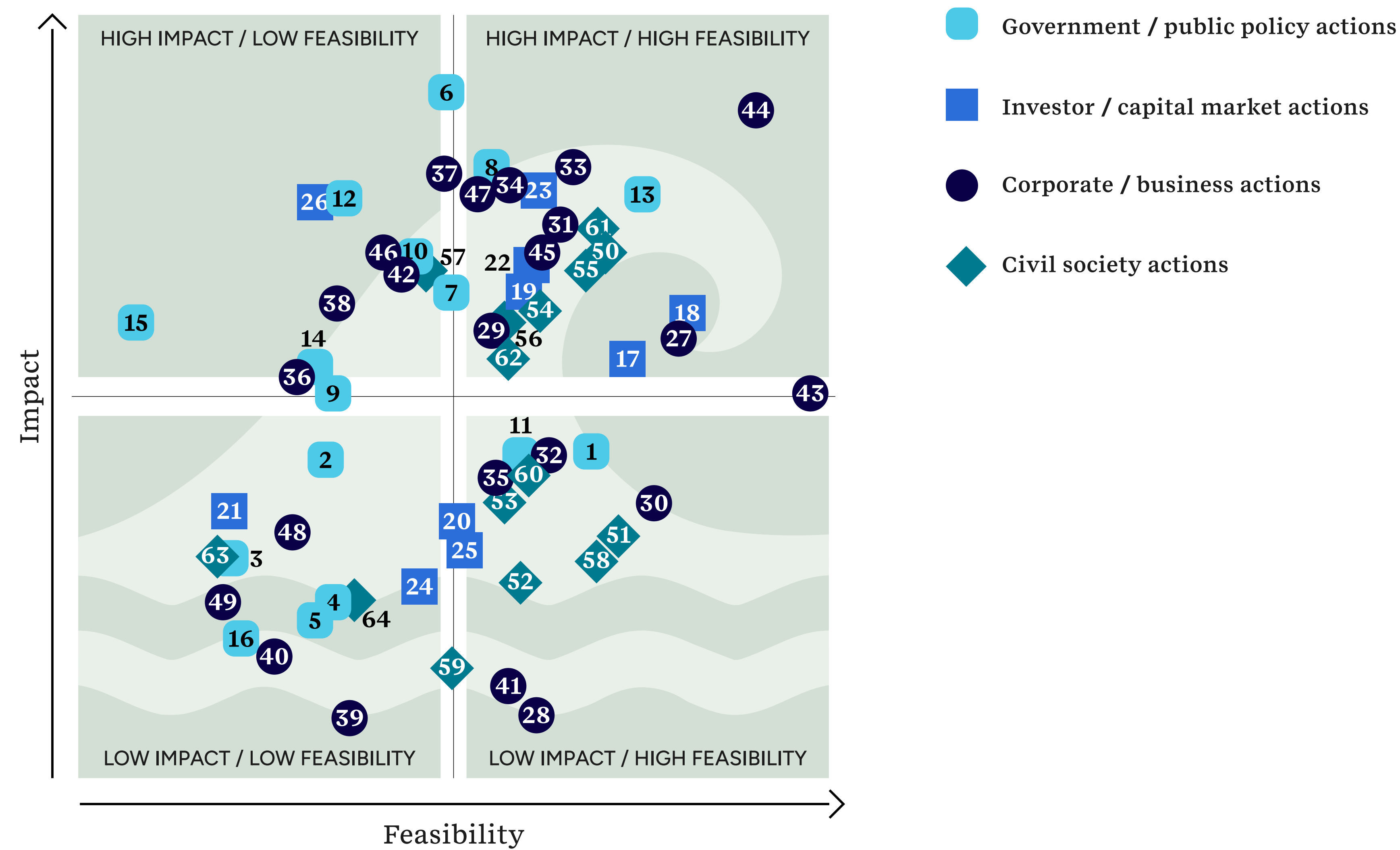


Civil society actions – encompassing NGOs, grassroots movements, Indigenous groups, academia, media, and consumers.

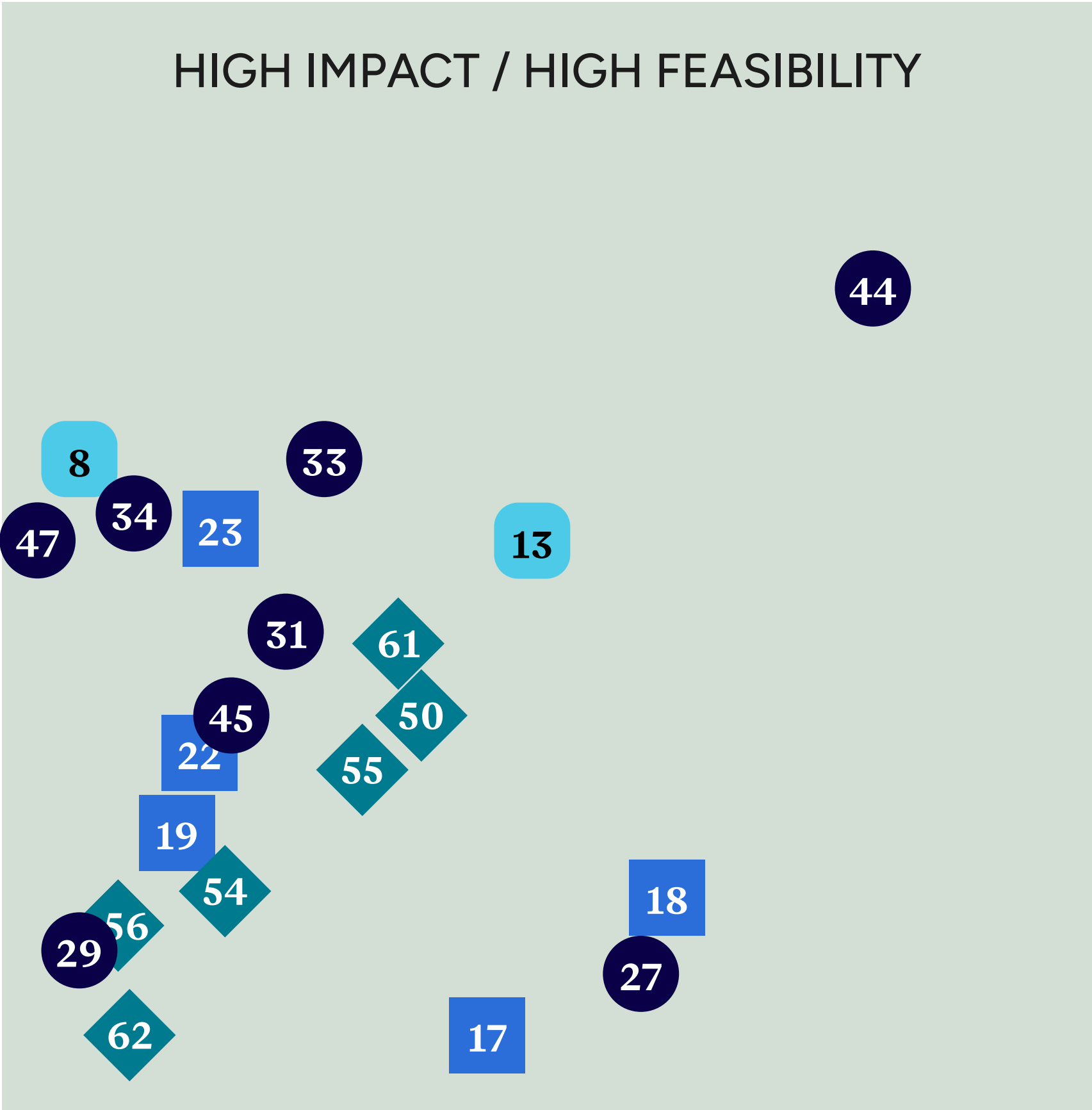
The following matrix and graphs on the next five pages serve as strategic tools to prioritize initiatives that are not only visionary but also actionable, enabling stakeholders to align efforts and resources toward high-impact, high-feasibility solutions.

Additional insight on these levers of change grouped by change agent can be found in the Appendix.

Levers of change: Impact vs. feasibility of actions 2025–2030



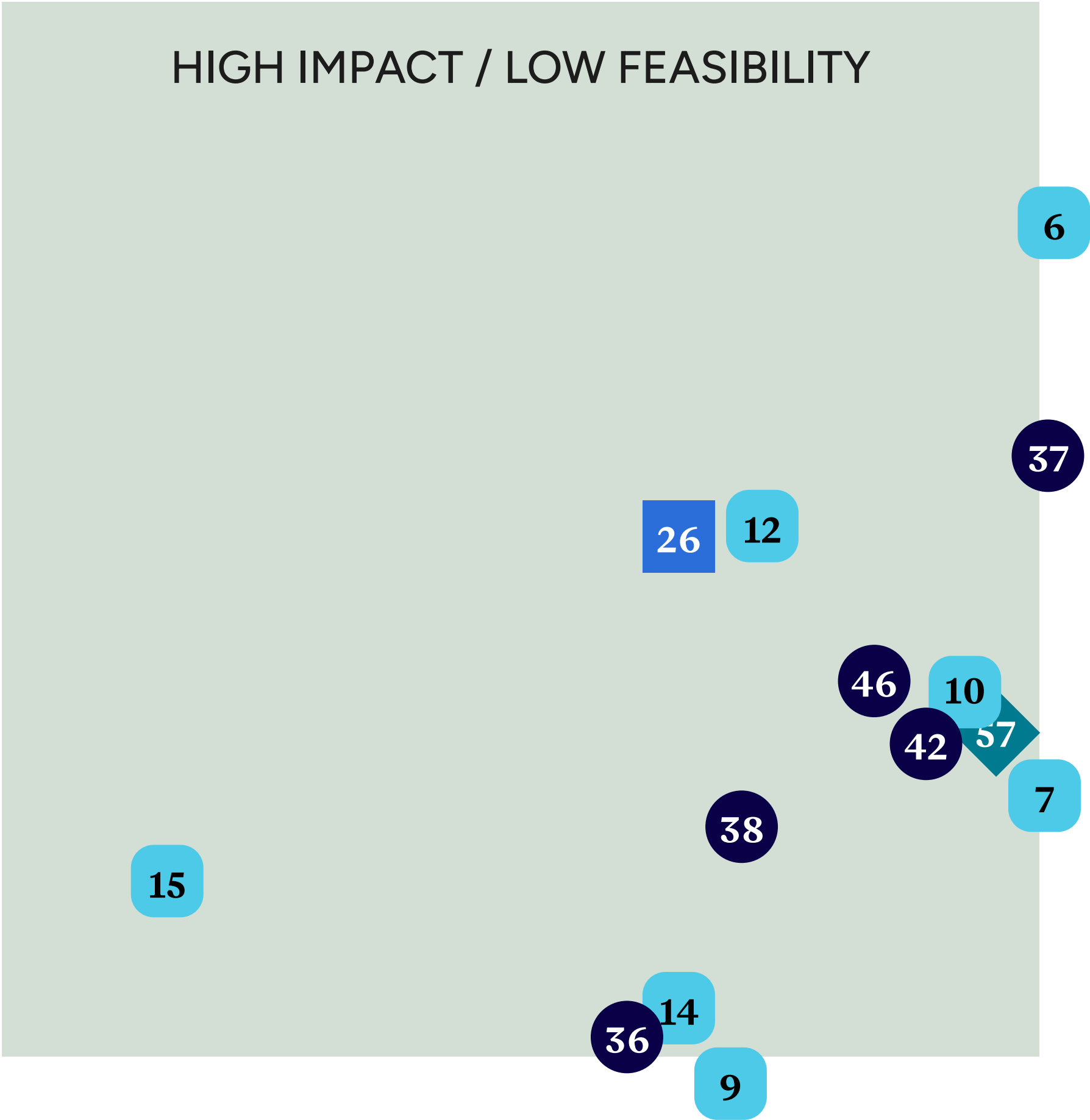
Levers of change: Impact vs. feasibility of actions 2025–2030



High impact / High feasibility

<div></div> <div>Government / public policy actions</div>	<div>8. Carbon pricing mechanisms</div> <div>13. Urban planning / sustainable cities initiatives</div>
<div></div> <div>Investor / capital market actions</div>	<div>17. Proactively engaging investors on sustainability</div> <div>18. Sustainable finance / green bonds</div> <div>19. ESG integration into investment decisions</div> <div>22. Impact investing</div> <div>23. Central bank / financial regulator actions on climate risk</div>
<div></div> <div>Corporate / business actions</div>	<div>27. Compliance with mandatory sustainability/reporting regulations</div> <div>29. Science-based targets initiatives</div> <div>31. Supply chain engagement/performance</div> <div>33. Commercialization of sustainability through better products/services</div> <div>34. Integration of sustainability within companies</div> <div>44. Technology innovation / R&D for sustainability solutions</div> <div>45. Collaboration within/across sectors</div> <div>47. Circular economy practices</div>
<div></div> <div>Civil society actions</div>	<div>50. Advocacy for better government policies/regulations/enforcement</div> <div>54. Consumer awareness / behavior change campaigns</div> <div>55. Media scrutiny / coverage of sustainability performance</div> <div>56. Political activism</div> <div>61. Education/capacity-building for sustainability leadership</div> <div>62. Media/cultural influence around pro-sustainability messaging</div>

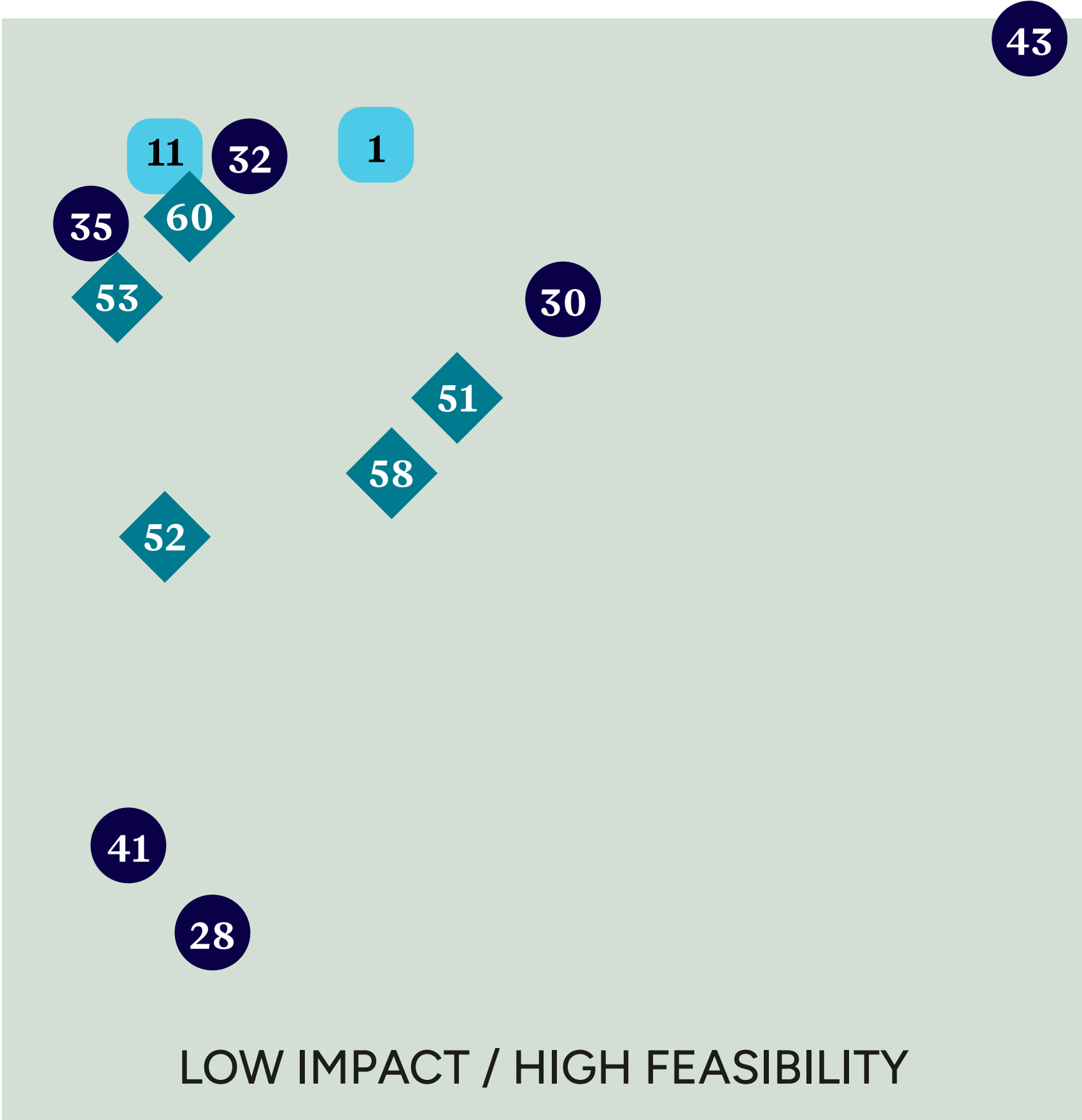
Levers of change: Impact vs. feasibility of actions 2025–2030



High impact / Low feasibility

- | | |
|--|---|
| <p>Government / public policy actions</p> | <p>6. Subsidies/taxes that incentivize sustainable choices/solutions</p> <p>7. Extended producer responsibility (EPR) legislation</p> <p>9. Mandatory human rights assessments</p> <p>10. Mandatory environmental due diligence</p> <p>12. International trade policies incorporating sustainability standards</p> <p>14. Global Treaty to End Plastic Pollution</p> <p>15. Wealth redistribution</p> |
| <p>Investor / capital market actions</p> | <p>26. Integrating natural/social/human capitals into accounting systems</p> |
| <p>Corporate / business actions</p> | <p>36. Internal carbon pricing</p> <p>37. Corporate sustainability-linked compensation</p> <p>38. Mandatory human rights / environmental due diligence</p> <p>42. Build culture where employees prioritize sustainability in day-to-day work</p> <p>46. Nature-based solutions</p> |
| <p>Civil society actions</p> | <p>57. Using the judicial system to push change</p> |

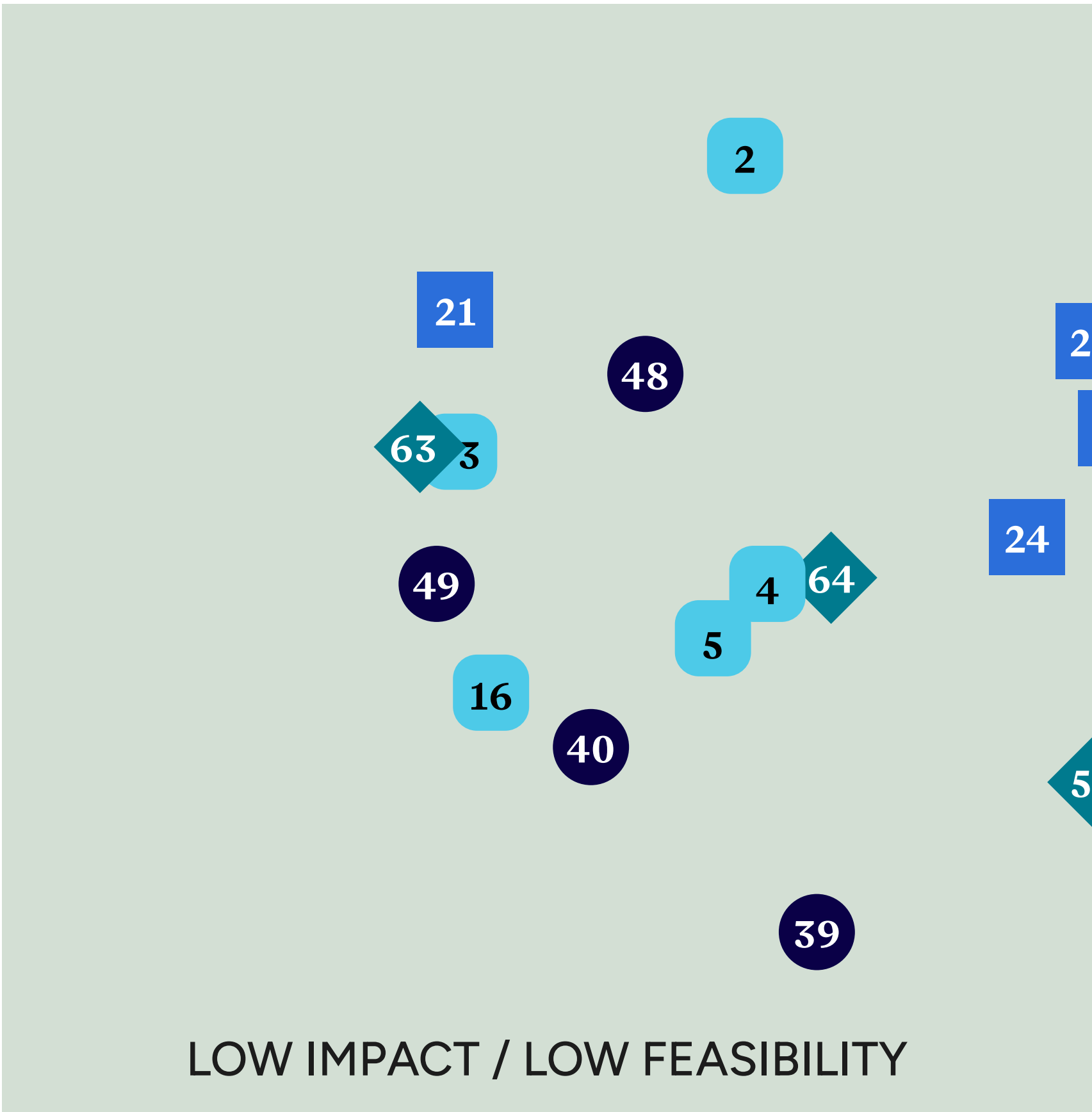
Levers of change: Impact vs. feasibility of actions 2025–2030



Low impact / High feasibility

Government / public policy actions	1. Government / Public Policy Actions (CSRD) 11. Anti-greenwashing legislation
Investor / capital market actions	N/A
Corporate / business actions	28. Voluntary sustainability reporting/disclosure 30. Ratings/rankings of corporate sustainability performance 32. Stakeholder engagement 35. Industry sustainability standards 41. Participation in sustainability-focused business associations / collaborations 43. Artificial intelligence
Civil society actions	51. NGO campaigns against poor business sustainability performance 52. NGO campaigns praising strong business sustainability performance 53. Public demonstrations / boycotts 58. Sustainability certifications 60. Use culture to engage people on sustainability

Levers of change: Impact vs. feasibility of actions 2025–2030



Low impact / Low feasibility

<div></div> Government / public policy actions	2. Paris agreement 3. Kunming-Montreal Global Biodiversity Framework 4. Sustainable Development Goals (SDGs) 5. UN Guiding Principles on Business / Human Rights (UNGPs) 16. UN Declaration on Rights of Indigenous Peoples (UNDRIP)
<div></div> Investor / capital market actions	20. Filing/supporting shareholder resolutions 21. Divestment 24. Principles for Responsible Investment (PRI) 25. EU Taxonomy for Sustainable Activities
<div></div> Corporate / business actions	39. UN Global Compact principles for responsible business 40. B Corp certification 48. Carbon capture/utilization/ storage (CCUS) 49. Geoengineering
<div></div> Civil society actions	59. Non-violent direct action 63. Just Transition frameworks 64. Inner work / personal development for individuals/teams

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



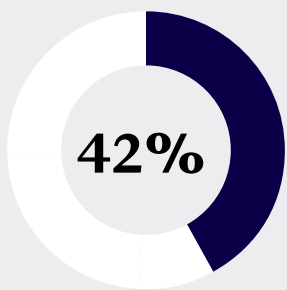
A segmentation of global sustainability experts

To better understand the dynamics at play among the global sustainability community, we conducted a statistical segmentation of the 844 experts surveyed. The research reveals four distinct mindsets: Traditionalists, Institutionalists, Pathfinders, and Radicals differing in how they assess the current agenda, the types of actions they prioritize, and the size of their appetite for change.

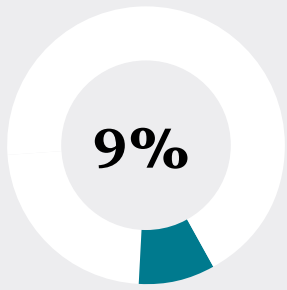
These segments reflect a complex and evolving sustainability landscape. Understanding their distinctions can help leaders tailor strategies, foster dialogue, and build coalitions that bridge ambition with action.

The four mindsets break down into two camps, each made up of two groups, which we call Incumbents and Insurgents. We will need all their energy and wisdom to redesign sustainability, so building understanding among them will be key.

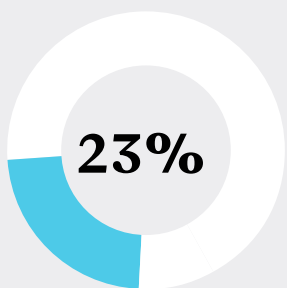
Despite differences, 93 percent of all respondents think the sustainability agenda needs to be revised, with 56 percent calling for radical revision. So, all these groups want change – the question is how and whether the best of their approaches and instincts can be harmonized. Alignment is critical to this being a truly global agenda, as the four groups are demographically and geographically different in composition, as well as their approaches.



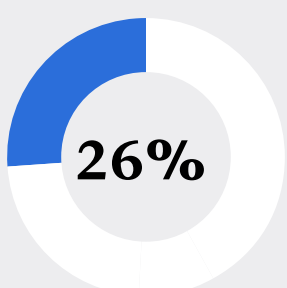
Traditionalists (42 percent of respondents) are the most aligned with the current agenda, favoring continuity and incremental improvements. More prevalent in Asia, Latin America, and the public and corporate sectors, they rate legacy frameworks like the SDGs and UNGPs more positively and are less inclined toward disruptive change.



Institutionalists (9 percent) believe in strengthening institutional accountability. With a technocratic mindset and a strong presence in government and corporate roles, they favor regulatory tools like mandatory reporting and central bank oversight. This small segment is less supportive of symbolic or activist approaches and are most concentrated in Africa, Latin America, and Asia.



Pathfinders (23 percent) are reform-minded and optimistic, and they largely work in the corporate and government sectors. While 64 percent support radical revision, they are pragmatic and focused on scalable, solution-oriented strategies. They favor a mix of high-impact, feasible actions such as sustainable finance, ESG integration, urban planning, and cross-sector collaboration. They are less enthusiastic about politically sensitive or disruptive measures like wealth redistribution or judicial activism, and skeptical about legacy frameworks. Regionally diverse, they are especially active in Europe, Africa/Middle East, and North America.

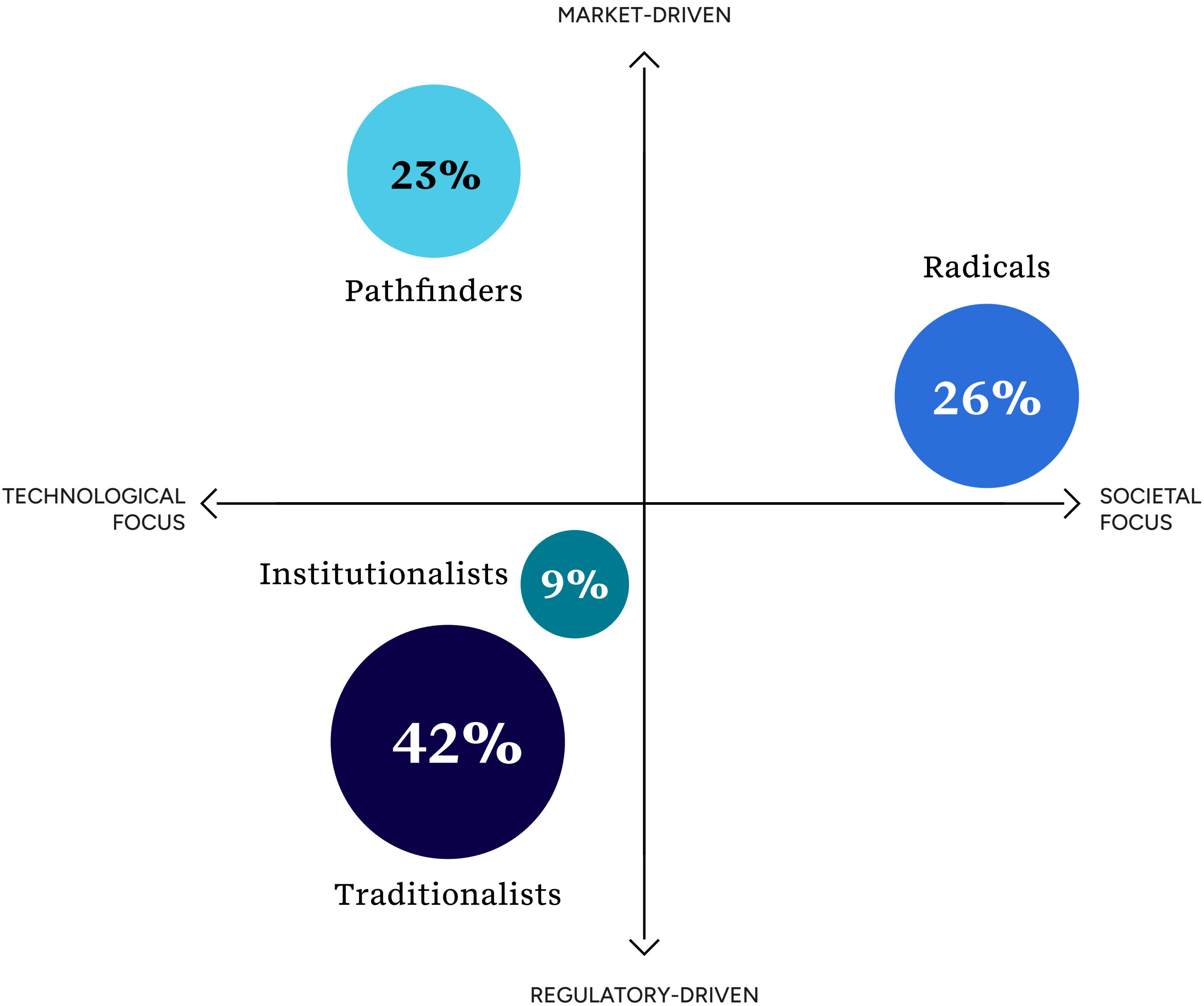


Radicals (26 percent) are the most dissatisfied with the status quo. Predominantly from academia and NGOs, and concentrated in Europe, North America, and Oceania, they call for a radical overhaul of the sustainability agenda. They champion bold, systemic interventions – such as wealth redistribution, carbon pricing, and judicial action – while rejecting legacy frameworks and incrementalism. Overrepresented among academia and NGOs, and concentrated in Europe, North America, and Oceania, they call for a radical overhaul of the sustainability agenda.

Global sustainability segments

Mapping the four sustainability segments along two axes – market-driven vs. regulatory-driven and technological focus vs. societal focus – reveals how each group envisions the path to progress.

Pathfinders prefer change driven by market incentives and technological innovation, favoring tools like ESG integration, sustainable finance, and product innovation. Institutionalists lean toward regulatory solutions grounded in institutional accountability, with a moderate emphasis on structured systems and compliance mechanisms. Radicals advocate for deep societal transformation through regulation, justice, and civil society action, prioritizing equity and redistribution over market or tech fixes. In contrast, Traditionalists, by far the largest group, favor familiar, regulatory-driven approaches with modest technological emphasis, supporting continuity through established frameworks and incremental improvements.



Incumbents vs. Insurgents: Description of global sustainability segments

Incumbents are comprised of **Traditionalists** and **Institutionalists** – these sustainability practitioners are more disposed to maintain and incrementally evolve the sustainability agenda than to remake it.

● Traditionalists

Traditionalists are the most aligned with the current sustainability agenda – over 50 percent believe only modest revisions are needed. They are more optimistic about institutional contributions and progress, particularly from governments, corporations, and multilateral frameworks. They favor continuity and incremental improvements, rating legacy tools like the SDGs, UNGPs, voluntary reporting, and industry standards more positively than other groups. They are less supportive of radical or politically contentious actions and more comfortable with established norms.

Regionally

They dominate in Asia (65 percent), Latin America / Caribbean (58 percent), and Africa / Middle East (42 percent).

Professionally

They are most prevalent in government (53 percent), corporate (44 percent), and service/media (43 percent) sectors, reflecting a preference for stability, structure, and gradual progress.

● Institutionalists

Institutionalists believe in reform through improved governance, transparency, and accountability. Two-thirds support radical revision, but they are more institutionalist in their approach. They strongly favor compliance-based and regulatory actions – such as mandatory reporting, central bank oversight, and corporate due diligence – and are less supportive of symbolic or voluntary initiatives. They are also more skeptical of multilateral frameworks and civil society-led disruption.

Regionally

They are a smaller segment, with modest presence in Africa / Middle East (12 percent) and Latin America / Caribbean (13 percent), and very low in Oceania (3 percent) and Europe (8 percent).

Professionally

Professionally, they are most concentrated in government (13 percent) and corporate roles (8 percent), with minimal representation in academia (3 percent) and NGOs (5 percent). They are the least likely to come from non-corporate sectors (5.6 percent), suggesting a technocratic, systems-oriented mindset.

Insurgents are made up of **Pathfinders** and **Radicals** – they are less satisfied with current progress and are more impatient about finding solutions. They want more change, faster, and are less concerned about preserving the current system than identifying and implementing the changes they believe necessary for the sustainability agenda to deliver on its ambitions.

● Pathfinders

Pathfinders are reform minded and optimistic. While 64 percent support radical revision, they are pragmatic and focused on scalable, solution-oriented strategies. They favor a mix of high-impact, feasible actions – such as sustainable finance, ESG integration, urban planning, and cross-sector collaboration. They are less enthusiastic about politically sensitive or disruptive measures like wealth redistribution or judicial activism, and more cautious about legacy frameworks.

Regionally

They are well distributed, with strong representation in Europe (28 percent), Africa / Middle East (27 percent), and North America (24 percent).

Professionally

They are most prominent in the corporate sector (31 percent), followed by government (22 percent) and NGOs (21 percent). They are more likely to come from corporate/service/media sectors (25.6 percent), reflecting a focus on innovation and market-based tools.

● Radicals

Radicals are the least satisfied with the current sustainability agenda, with over 70 percent saying it needs a radical overhaul. They are deeply critical of institutional performance, especially by governments and corporations, and they express strong concern over the pace of progress and the scale of backlash. More than others, this group champions bold, systemic interventions such as carbon pricing, wealth redistribution, mandatory due diligence, and nature-based solutions. They are skeptical of legacy frameworks like the SDGs and PRI and dismiss symbolic or incremental efforts. Civil society tools – advocacy, political activism, and judicial action – are seen as essential levers for transformation.

Regionally

They are most concentrated in Europe (31 percent), North America (27 percent), and Oceania (36 percent).

Professionally

They are dominated by academics (50 percent) and NGO leaders (39 percent), and are more likely to come from non-corporate sectors (39.5 percent), reflecting a values-driven, change-oriented stance.

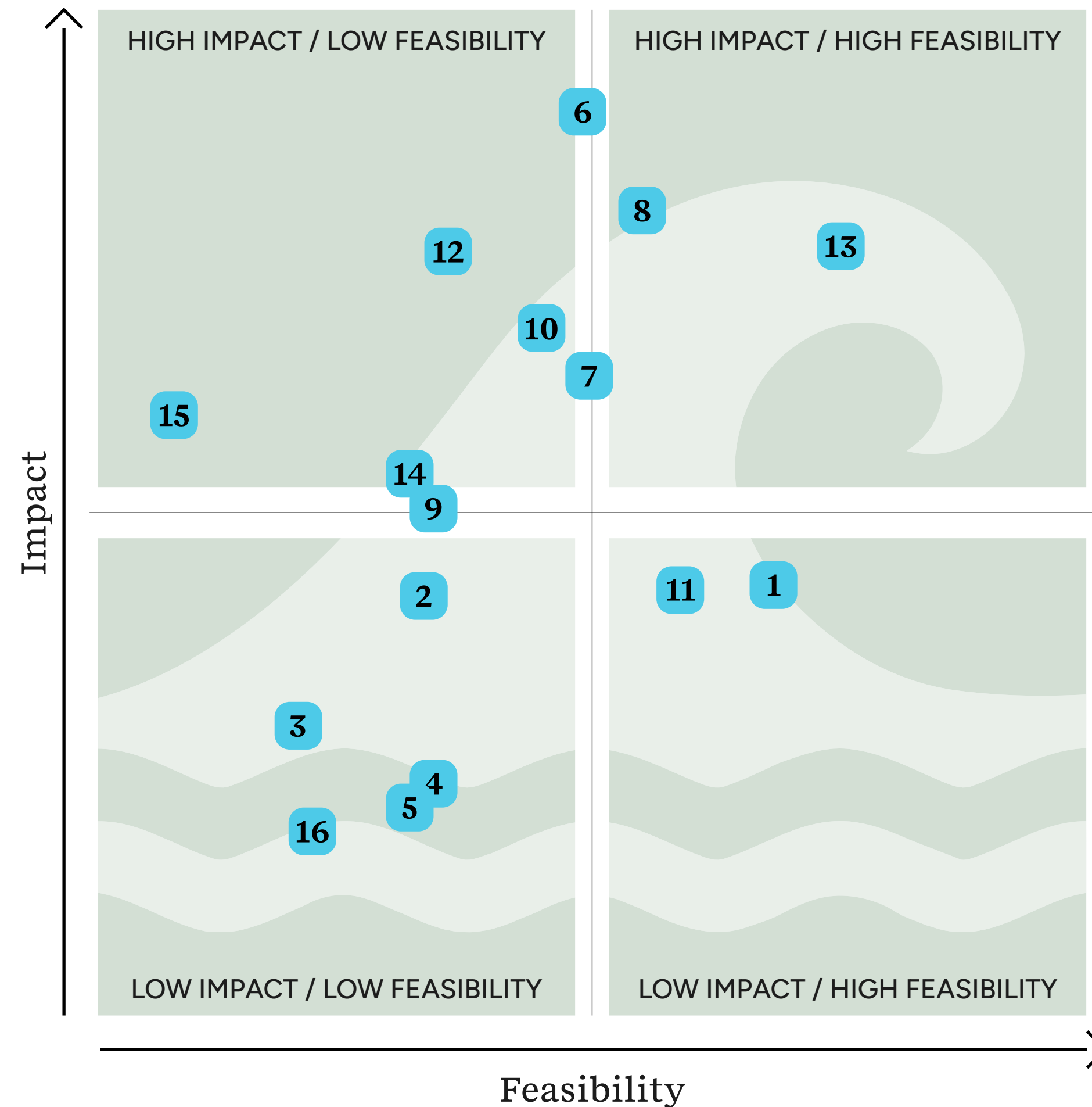
Appendix:

Levers of change by change agent



Levers of change: Impact vs. feasibility of actions

Experts see sustainable urban planning as the most promising government and public policy action over the next five years. Carbon pricing mechanisms, such as carbon taxes or cap-and-trade systems, also fall into the category of relatively high potential impact with just above average likelihood to be implemented in the short term. Incentivizing sustainable choices through subsidies or taxes is seen having the largest potential impact but with just under average likelihood to be quickly implemented.



1. Government / Public Policy Actions (CSRD)
2. Paris agreement
3. Kunming-Montreal Global Biodiversity Framework
4. Sustainable Development Goals (SDGs)
5. UN Guiding Principles on Business / Human Rights (UNGPs)
6. Subsidies/taxes that incentivize sustainable choices/solutions
7. Extended producer responsibility (EPR) legislation
8. Carbon pricing mechanisms
9. Mandatory human rights assessments
10. Mandatory environmental due diligence
11. Anti-greenwashing legislation
12. International trade policies incorporating sustainability standards
13. Urban planning / sustainable cities initiatives
14. Global Treaty to End Plastic Pollution
15. Wealth redistribution
16. UN Declaration on Rights of Indigenous Peoples (UNDRIP)

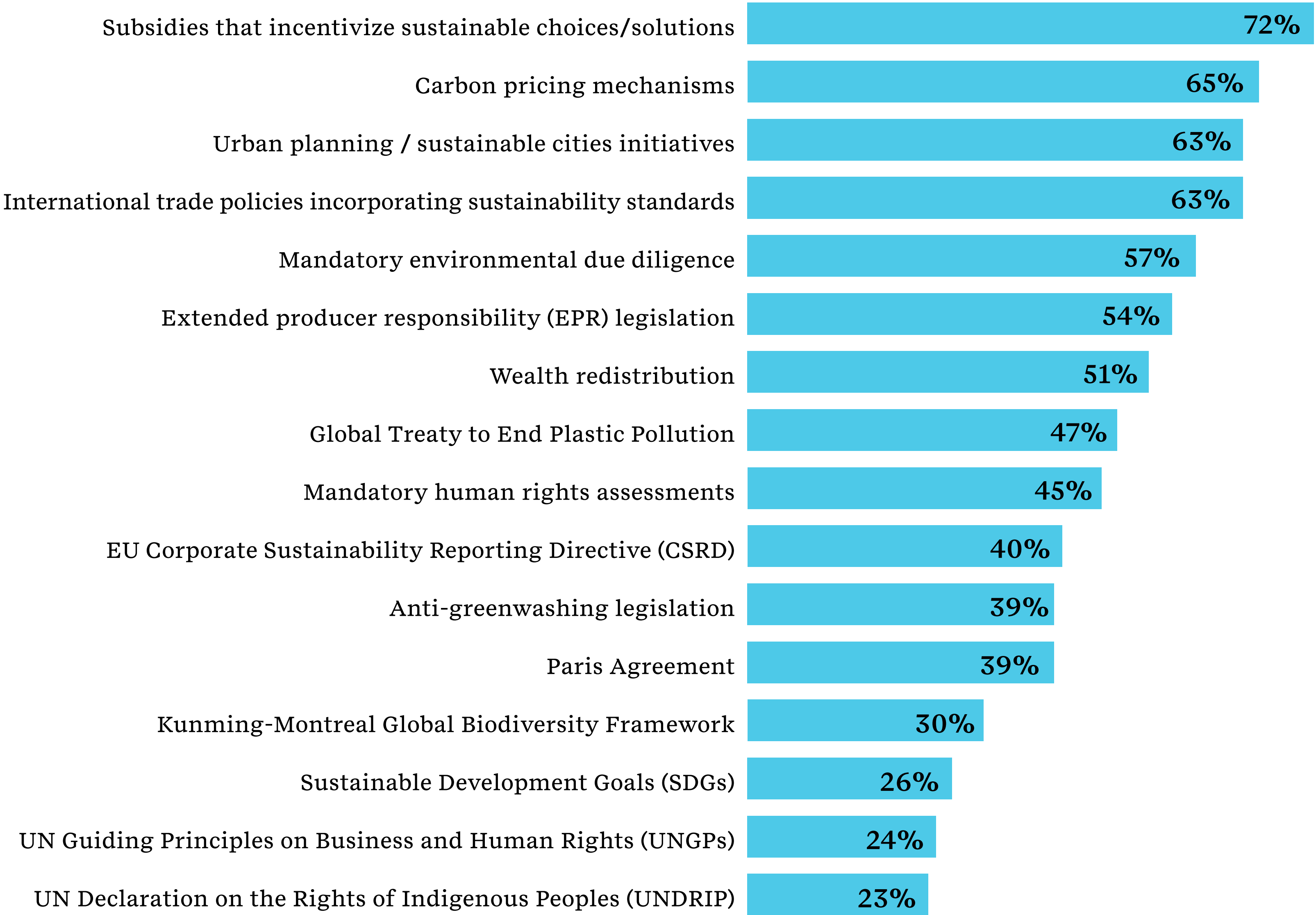
Impact of actions and interventions

Experts believe that government and public policy actions such as subsidies for sustainable choices and carbon pricing mechanisms have the most potential to lead to significant positive sustainability outcomes over the next five years.

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 5-POINT SCALE WHERE 1 IS THE POTENTIAL TO HAVE “NO POSITIVE IMPACT AT ALL,” 3 IS “MODERATE POSITIVE IMPACT,” AND 5 IS “VERY SIGNIFICANT POSITIVE IMPACT.”



% of Experts, “Significant Positive Impact” (4+5), 2025

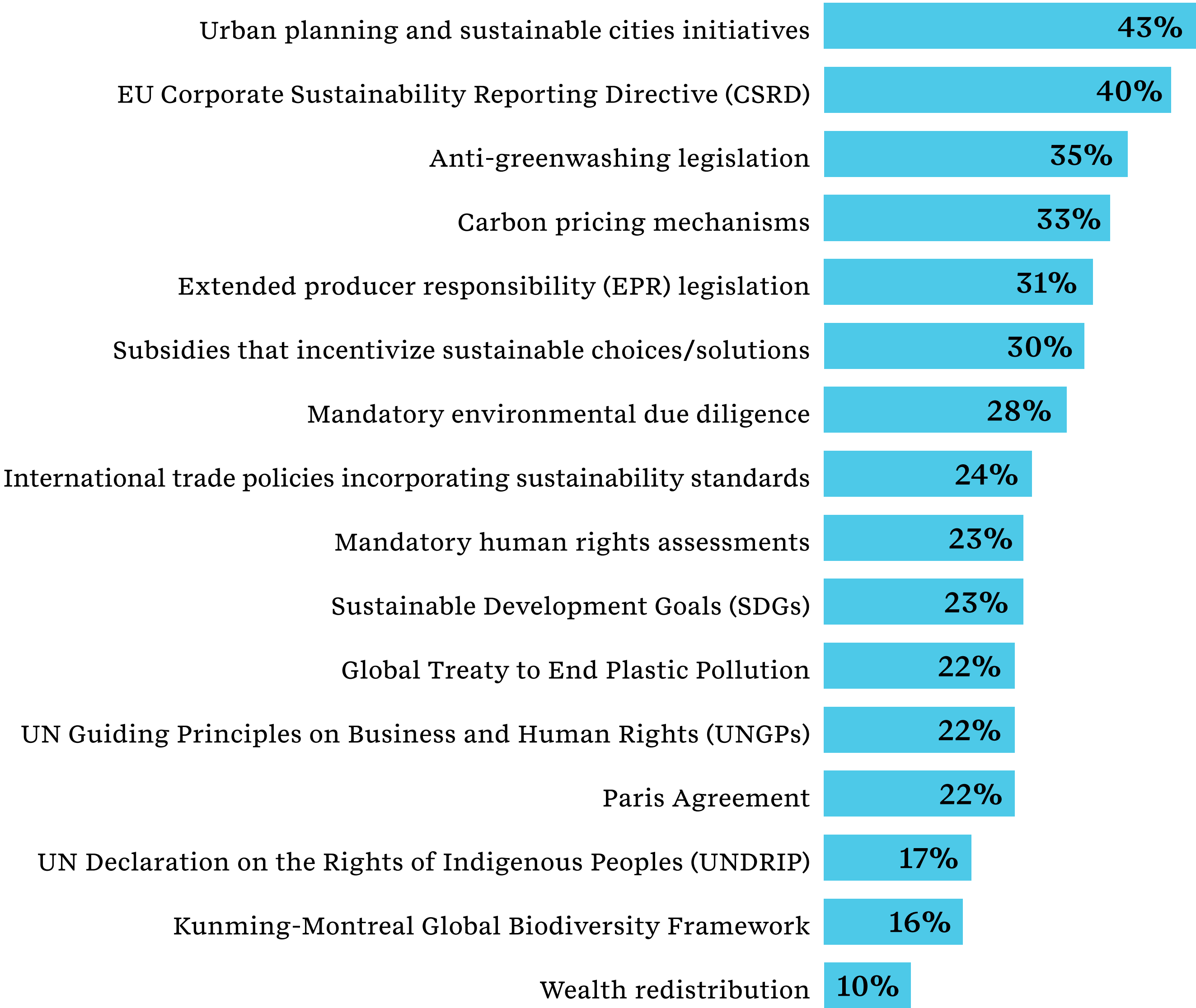
Feasibility of actions and interventions

Urban planning initiatives and the EU Corporate Sustainability Reporting Directive are considered the most likely government or public policy actions to be implemented in the short term. In contrast, very few experts believe that wealth redistribution is feasible in the next five years.

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 5-POINT SCALE WHERE 1 IS “COMPLETELY UNLIKELY,” 3 IS “MODERATELY LIKELY,” AND 5 IS “VERY LIKELY.”



% of Experts, “Very Likely” (4+5), 2025

Levers of change: Impact vs. feasibility of actions

Experts identify central bank or financial regulator actions on climate risk, impact investing, sustainable finance including green bonds, integration of ESG into investment decisions, and proactively engaging investors on sustainability as the most promising capital market levers for advancing sustainability in the short term. Integrating natural, social, and human capitals into accounting systems is seen as having the potential to have a large impact but is thought to be less likely to be implemented quickly at scale.



17. Proactively engaging investors on sustainability
18. Sustainable finance / green bonds
19. ESG integration into investment decisions
20. Filing/supporting shareholder resolutions
21. Divestment
22. Impact investing
23. Central bank / financial regulator actions on climate risk
24. Principles for Responsible Investment (PRI)
25. EU Taxonomy for Sustainable Activities
26. Integrating natural/social/human capitals into accounting systems

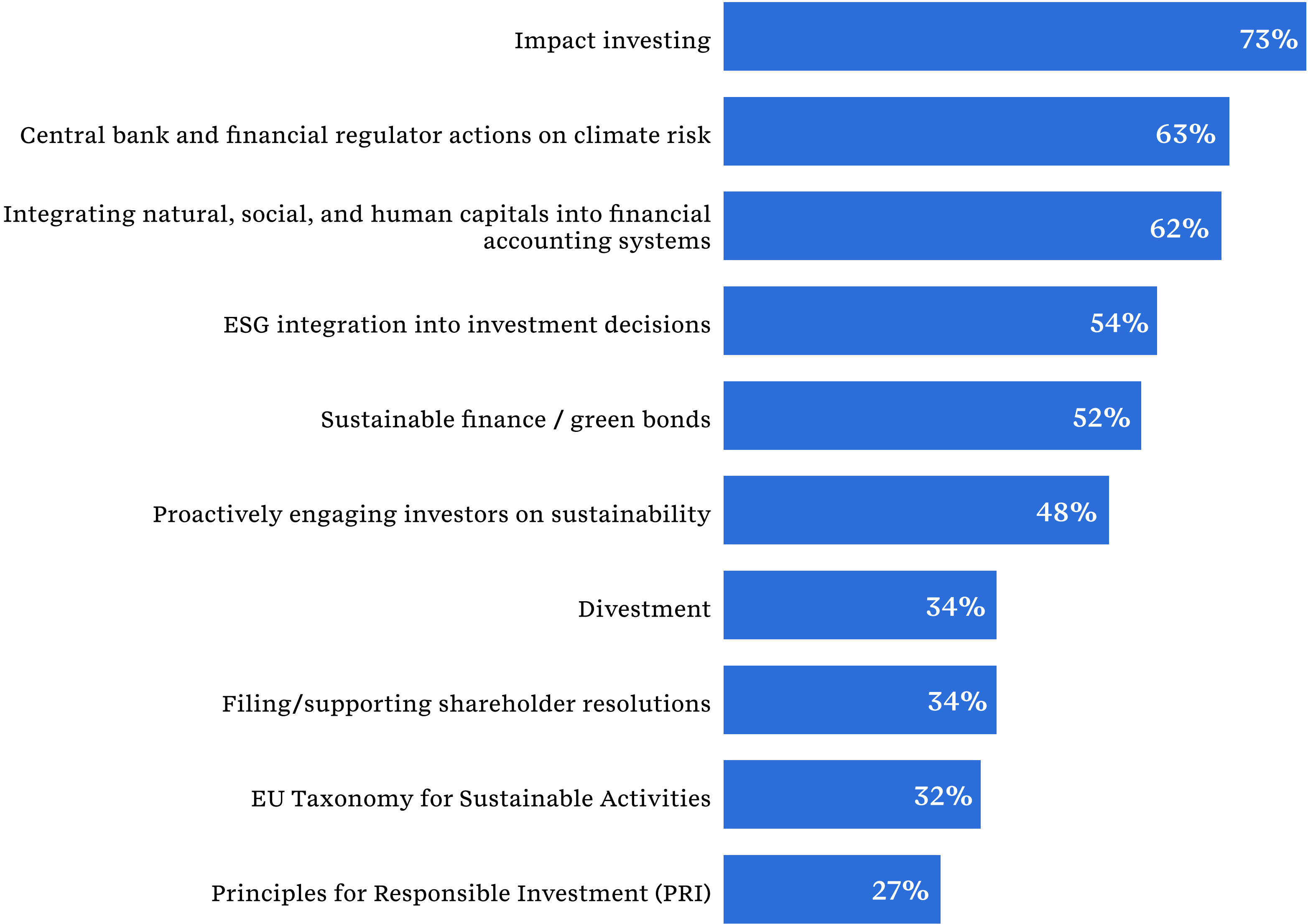
Impact of actions and interventions

Experts believe that actions such as impact investing, central bank and financial regulator actions on climate risk, and integration of natural, social, and human capital into financial accounting systems have the highest potential to drive significant positive sustainability outcomes.

QUESTION

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

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% of Experts, “Significant Positive Impact” (4+5), 2025

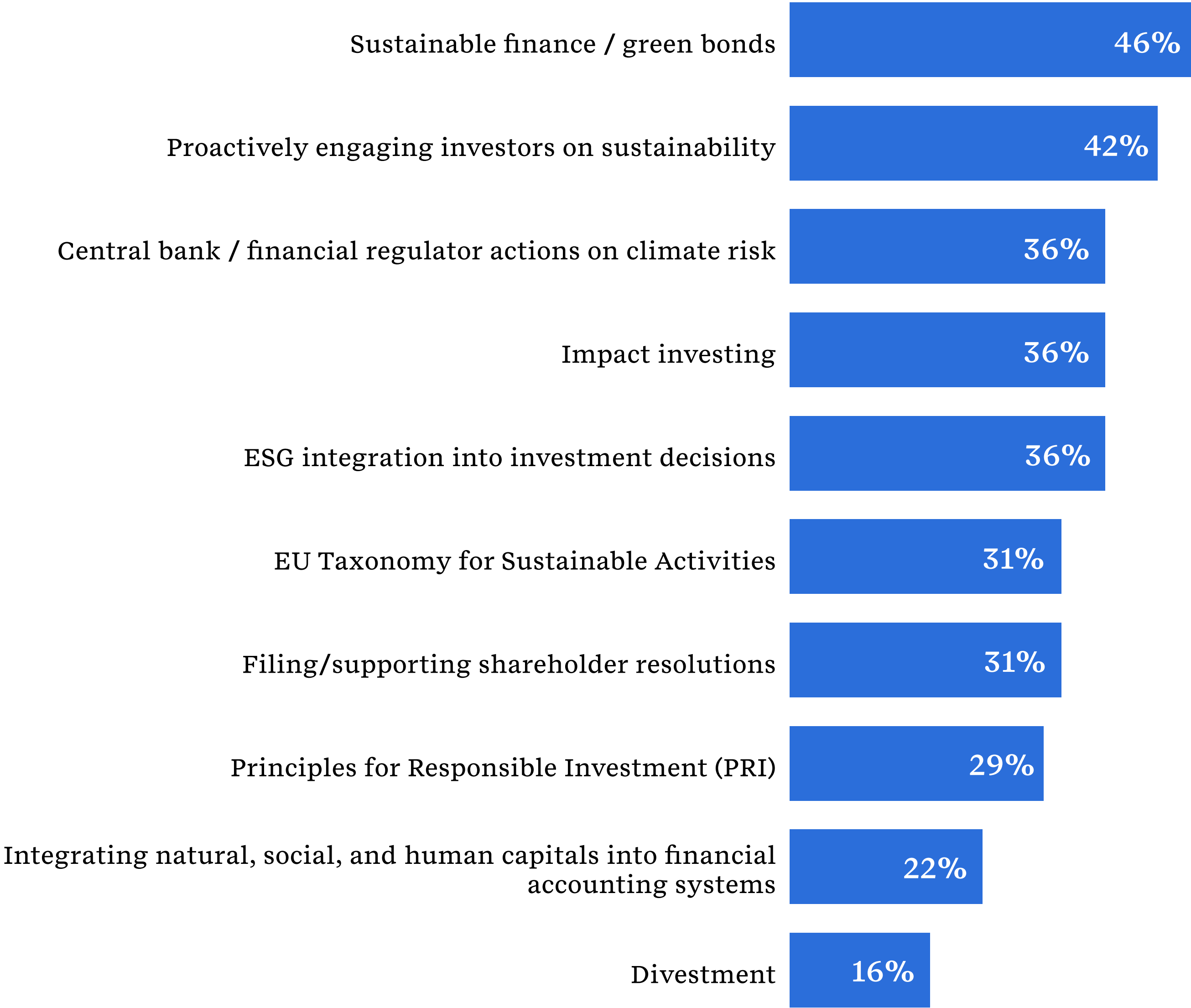
Feasibility of actions and interventions

Sustainable finance and green bonds are seen as the most feasible investor actions to be implemented at scale over the next five years, followed by proactively engaging with investors on sustainability. Few experts say divestment is likely to be implemented widely. Integrating natural, social, and human capital into financial accounting systems is also seen as relatively unfeasible despite its large potential impact.

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.

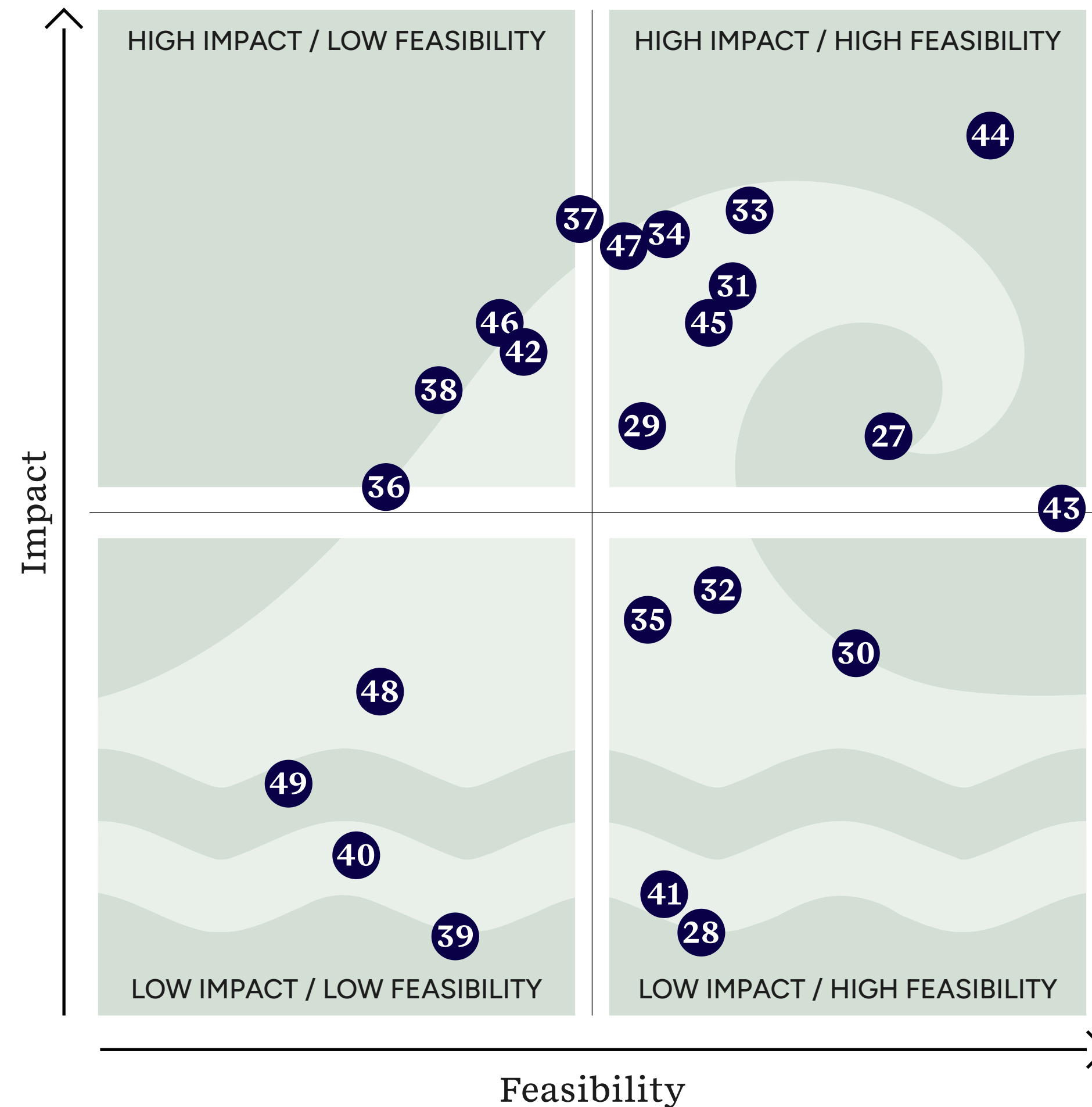
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% of Experts, “Very Likely” (4+5), 2025

Levers of change: Impact vs. feasibility of actions

Experts point to investing in new technologies and R&D to solve sustainability challenges as the one action that business can take that is especially powerful as a lever of change.



27. Compliance with mandatory sustainability/reporting regulations
28. Voluntary sustainability reporting/disclosure
29. Science-based targets initiatives
30. Ratings/rankings of corporate sustainability performance
31. Supply chain engagement/performance
32. Stakeholder engagement
33. Commercialization of sustainability through better products/services
34. Integration of sustainability within companies
35. Industry sustainability standards
36. Internal carbon pricing
37. Corporate sustainability-linked compensation
38. Mandatory human rights / environmental due diligence
39. UN Global Compact principles for responsible business
40. B Corp certification
41. Participation in sustainability-focused business associations/collaborations
42. Build culture where employees prioritize sustainability in day-to-day work
43. Artificial intelligence
44. Technology innovation / R&D for sustainability solutions
45. Collaboration within/across sectors
46. Nature-based solutions
47. Circular economy practices
48. Carbon capture/utilization/storage (CCUS)
49. Geoengineering

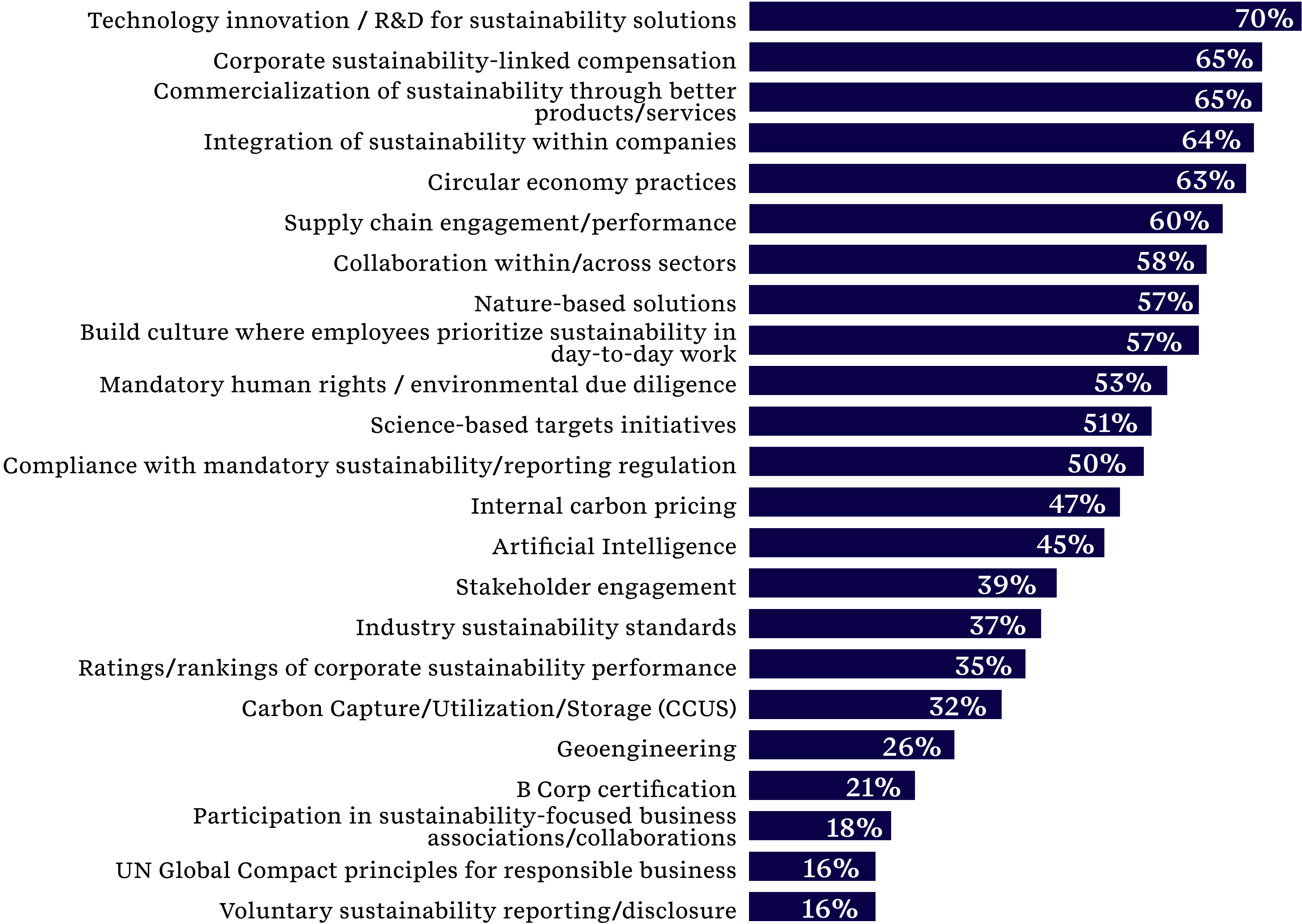
Impact of actions and interventions

Experts identify technology innovation, sustainability-linked compensation, and developing better products and services as the corporate actions with the greatest potential for significant positive impact in the short term. Actions like voluntary reporting, adherence to UN Global Compact principles, and participation in business associations are seen as having the least impact.

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 5-POINT SCALE WHERE 1 IS THE POTENTIAL TO HAVE “NO POSITIVE IMPACT AT ALL,” 3 IS “MODERATE POSITIVE IMPACT,” AND 5 IS “VERY SIGNIFICANT POSITIVE IMPACT.”



% of Experts, “Significant Positive Impact” (4+5), 2025

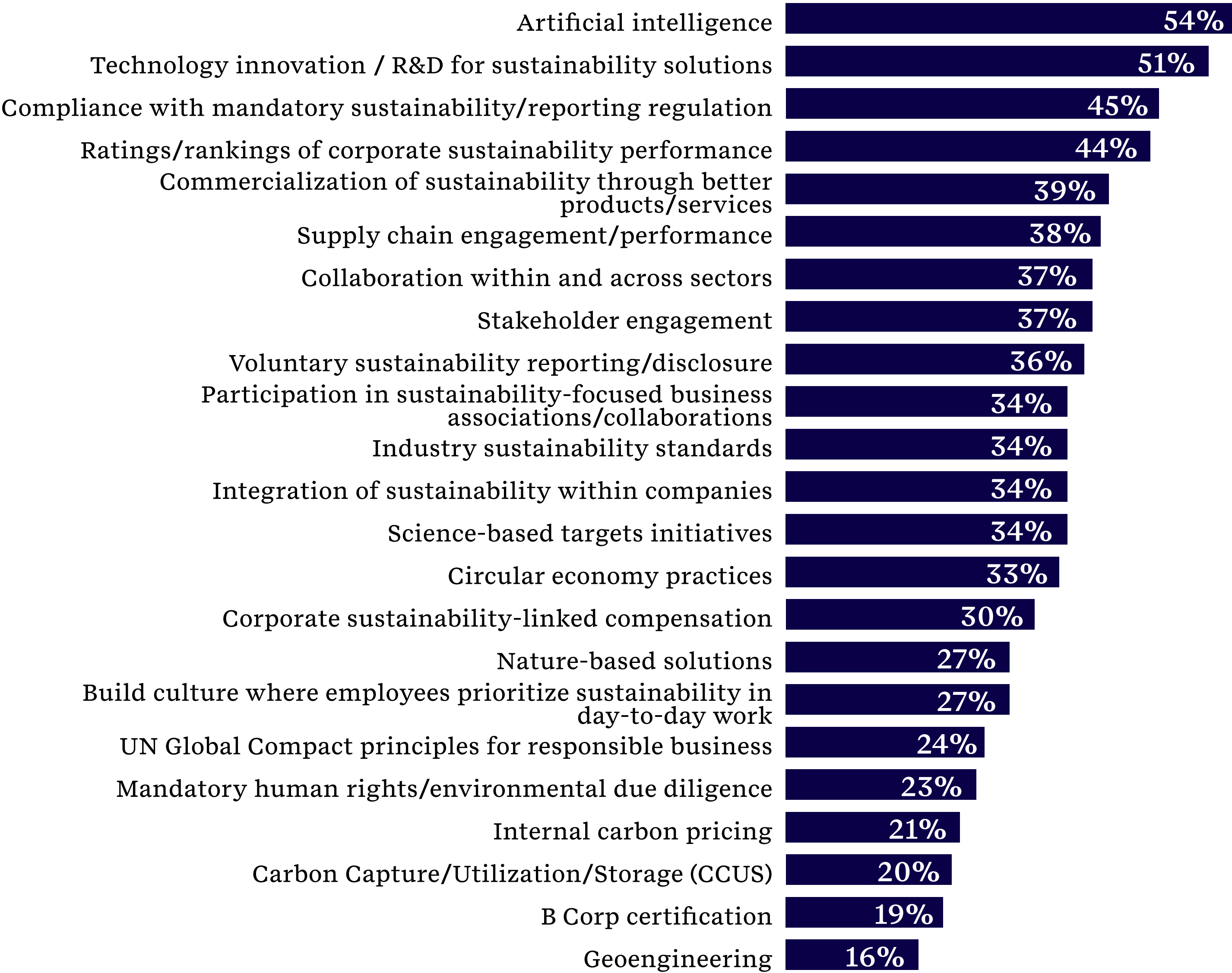
Feasibility of actions and interventions

Experts view artificial intelligence, technology innovation, and regulatory compliance as the most feasible corporate actions to implement. In contrast, approaches like geoengineering, B Corp certification, and carbon capture technologies are seen as less likely to be widely adopted in the near term.

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.

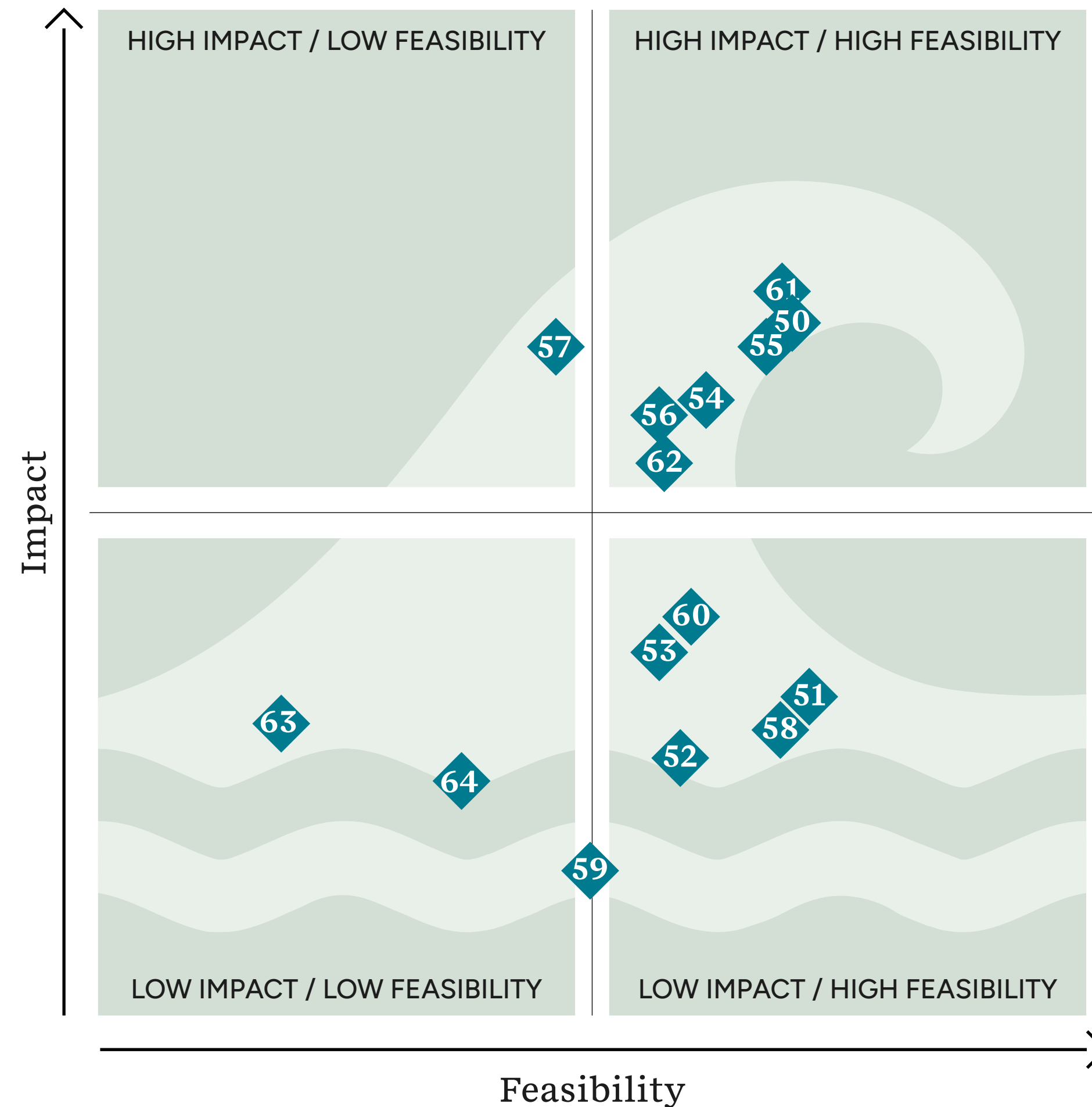
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% of Experts, "Very Likely" (4+5), 2025

Levers of change: Impact vs. feasibility of actions

Experts think that education and capacity building for sustainability leadership, advocacy for better government policies, regulations, and enforcement, and media scrutiny and coverage of sustainability performance are the best civil society actions to focus on over the next five years to achieve progress. Consumer awareness and behavior change campaigns, political activism, and media or cultural influence to push sustainable behaviors also fall into the category of relatively high potential impact and high feasibility.



50. Advocacy for better government policies/regulations/enforcement
51. NGO campaigns against poor business sustainability performance
52. NGO campaigns praising strong business sustainability performance
53. Public demonstrations / boycotts
54. Consumer awareness / behavior change campaigns
55. Media scrutiny / coverage of sustainability performance
56. Political activism
57. Using the judicial system to push change
58. Sustainability certifications
59. Non-violent direct action
60. Use culture to engage people on sustainability
61. Education/capacity-building for sustainability leadership
62. Media/cultural influence around pro-sustainability messaging
63. Just Transition frameworks
64. Inner work / personal development for individuals/teams

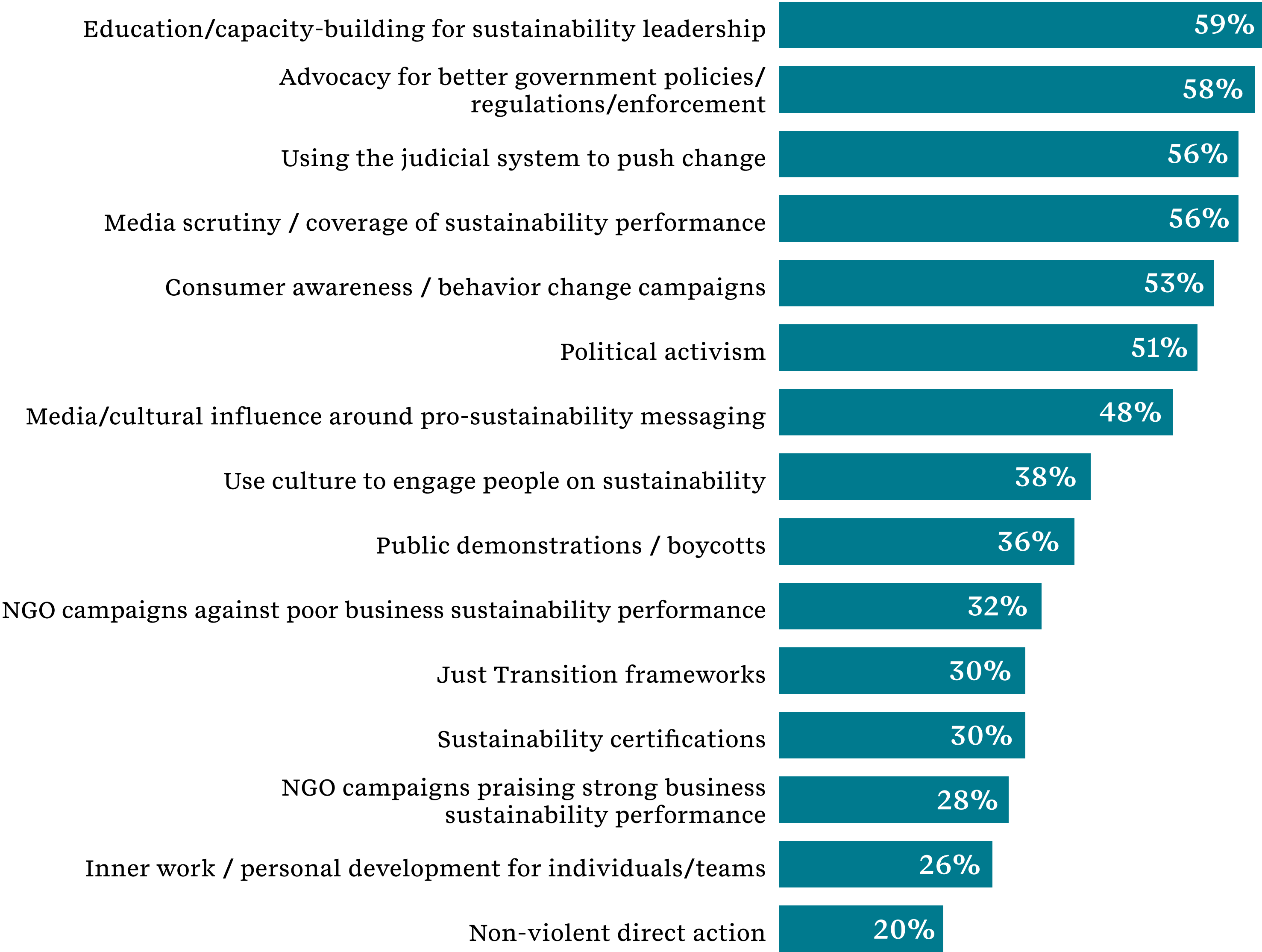
Impact of actions and interventions

Experts highlight education and leadership development, policy advocacy, and judicial action as the most promising civil society strategies for advancing sustainability. In contrast, approaches like non-violent direct action, personal development retreats, and praise-based NGO campaigns are viewed as less influential in driving large-scale 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.

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% of Experts, “Significant Positive Impact” (4+5), 2025

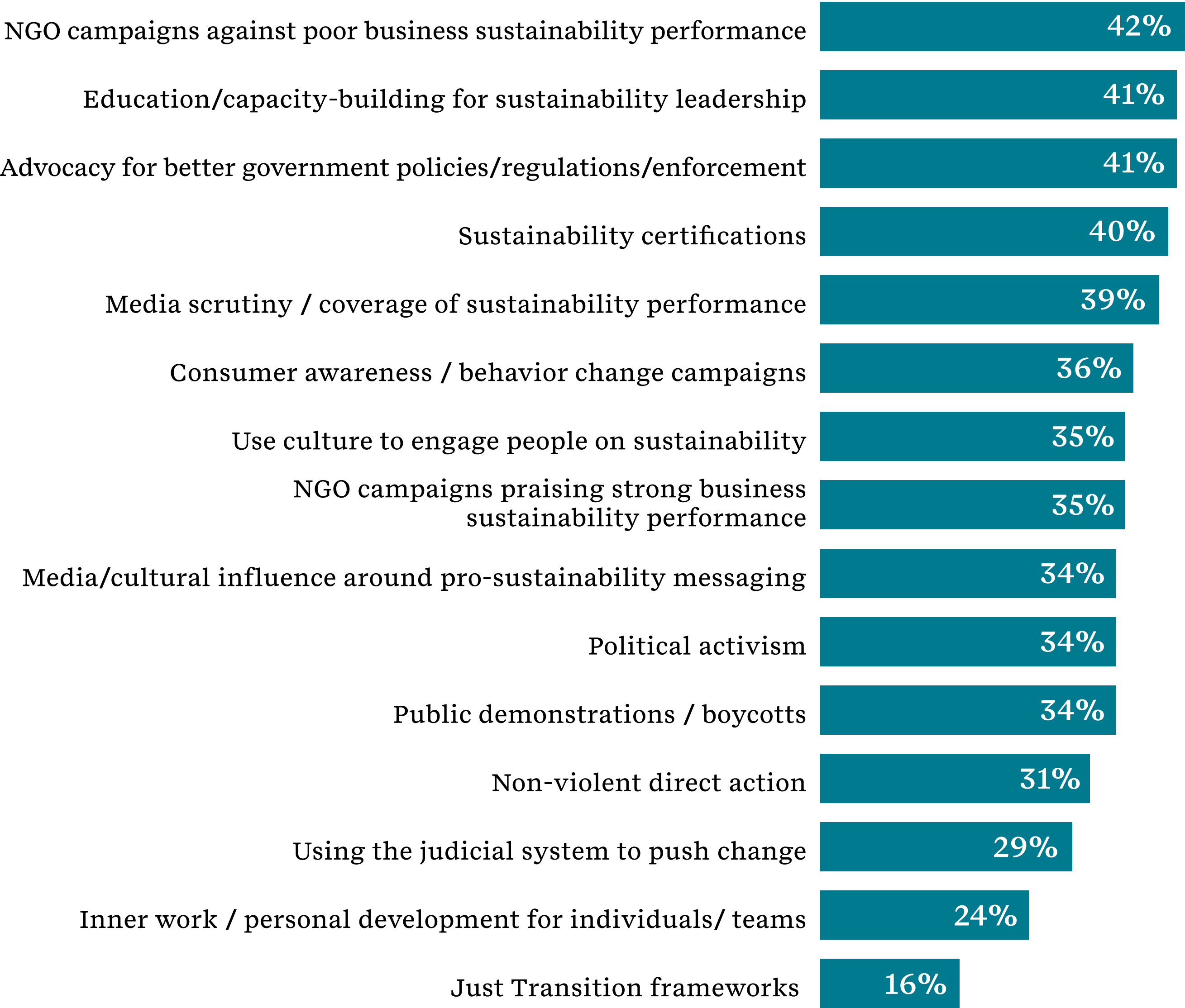
Feasibility of actions and interventions

Experts consider NGO campaigns against poor business performance on sustainability, education and capacity building, and policy advocacy as the most feasible civil society strategies for advancing sustainability. Meanwhile, actions like Just Transition frameworks, personal development, and judicial interventions are seen as less likely to be widely implemented in the near term.

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 5-POINT SCALE WHERE 1 IS “COMPLETELY UNLIKELY,” 3 IS “MODERATELY LIKELY,” AND 5 IS “VERY LIKELY.”



% of Experts, “Very Likely” (4+5), 2025

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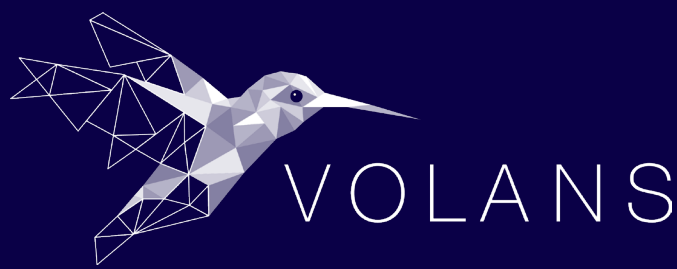


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