

The *green* race is on
The new business agenda



2010 2015 2020 2025 2030 2035 2040 2045 2050

WBCSD Annual Review 2009

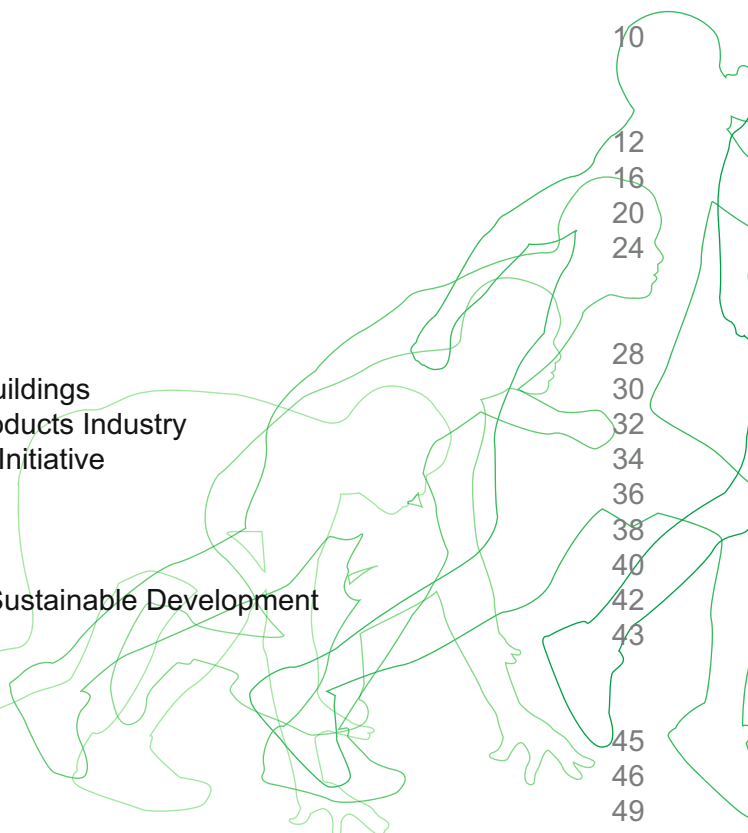


World Business Council for
Sustainable Development

15th anniversary

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Chairman's message

In 2009 it was business as ^{un}usual.

Despite the fragility of world economies, many of our WBCSD member companies successfully anticipated the uncertainties and altered their strategies in light of changing demands and resources. Not only were these companies resilient amid the crisis, some even found opportunities to enter new markets and grow their global market share, particularly in developing economies, which are growing faster than their developed country counterparts. Not surprisingly, these organizations are among the leaders in fully integrating sustainability into their core business strategies and processes.

The challenging business environment also influenced the annual WBCSD Council meeting in Washington DC, which despite economic pressures enjoyed record attendance from around the world.

Sustainable development has clearly become a top priority for leaders of governments, businesses and civil society. While there has been progress toward government and business leaders working more closely in partnership, not enough has been done to create the systemic changes necessary to successfully address the global challenges of climate change, poverty and natural resource scarcity.

Our discussions in DC and in other leadership forums make us certain that now is the opportune time for business leaders to create the coalitions necessary to drive the kind of cross-border innovation and transformation that by 2050 will allow 9 billion people to live well, within the limits of our planet.

In my view, the Council's key initiative, Vision 2050, clearly sets out the business priorities for the coming decade. We now understand that, in many areas, society has the resources, science and technology to manage the global challenges we face. However, our Vision 2050 work has revealed a lack of motivation and leadership to make the necessary changes, a vacuum I believe business, at least in part, can fill. As leaders of complex organizations, operating across multiple borders and cultures, we have a significant opportunity to make a real difference and to ensure a prosperous and more sustainable future for our companies as well as for our children and grandchildren.

We learned from the global financial crisis that in times of dire need, it takes only a few insightful, intelligent and trusted individuals to persuade countries and companies to collaborate in ways they never once imagined.

I am confident that such individuals are engaged within the WBCSD and its member companies. I look forward to seeing business lead the change we need to create a more prosperous and sustainable future.



Samuel A. DiPiazza, Jr.
Global CEO, PricewaterhouseCoopers

A handwritten signature in dark ink, appearing to read 'Samuel A. DiPiazza, Jr.', written in a cursive style.

1 Building and transforming...

b. Infrastructure

a. Cities

Building & space management
 Urban planning/design
 Smarter appliances
 Urban mobility

Transportation infrastructure

Energy infrastructure:
 • Smarter energy mix/renewables
 • Low-carbonization & smartening of energy systems

Smarter mobility
 Eco-housing

c. Livelihoods & lifestyles

Tailored solutions for all markets
 Health: prevention and care
 Education
 Consumer education/marketing
 Making sustainable living easier
 Smarter product design
 Product-sharing businesses
 Products and services for aging populations

Food for cities
 Forest products
 Protecting & restoring nature

Efficiency improvements
 Land-use planning & management
 Recycling
 Waste management infrastructure
 Smarter water systems

Water infrastructure:
 • Supply-side innovations & solutions
 • Reducing & leveraging water waste
 • Water management with forests

Access to:
 • Water
 • Energy
 • Housing
 • Education
 • Finance
 • Health
 • Mobility

Natural literacy & partnerships
 Resource-sharing enterprises
 Worker training/education

2 Improving biocapacity and managing ecosystems

Forest preservation and enhancement
 Avoided deforestation
 Soil erosion prevention
 Habitat and biodiversity conservation
 Restoration of degraded & abandoned land

3 Helping change happen

Building & managing complex coalitions
 Financing, transparency & insurance
 True-value accounting
 Connecting through ICT

Labeling/product certification
 Education & awareness-raising
 Research and influencing:
 • Policies
 • Investments
 • Consumers

2050

2020

2010

President's message

The year 2009 proved pivotal, but not in the way we expected

We hoped the December climate talks in Copenhagen would deliver a clear new framework to manage climate change. It did not. But the year did deliver a new sense of the reality and urgency of the energy and climate agenda. Business leaders realized that they must help lead society toward solutions, stepping into political and diplomatic arenas previously alien to them.

At the same time, the Council's own *Vision 2050 Project* began to document the spectacular breadth of business opportunity inherent in pathways toward sustainability. Prosperity lies in rapid change, while business-as-usual will bring disaster.

The year also highlighted the overlap of agendas – energy, climate, development, urbanization – in the real world and the need for systems thinking and systems solutions to coordinate these agendas. The Council is responding by linking its various Focus Areas, Projects and Initiatives. The Water Project is working on the link between water and energy. The Development Focus Area has an “energy for development” workstream. The Council will be working on systems thinking and systems approaches in its future work, especially urban systems, energy, water and development.

It was a year of change and turmoil: new leaders in the United States, the European Union and Japan; an unsteady but closer alliance emerging between the US and China; and positive movement in the economy, amid continued bailouts and high unemployment.

Emerging economies continued to emerge, with an ongoing power shift from West to East and from the old G8 to the newer, bolder G20. The future is one of growth: of populations, cities and economic activity.

Business is being called upon to provide the innovations and solutions needed to help manage that growth. In fact, business in general and the WBCSD in particular are being handed ever more sustainable development responsibility, ready or not. In 2009 I advised the US, Chinese and German governments on sustainable development, low-carbon economics and climate change issues (see Advocacy section). The WBCSD won an EU tender to develop a proposal on how business can be formally involved in the climate change negotiations. This suggests two things: that the WBCSD remains the preeminent business voice on sustainability issues, and that governments need and appreciate a business presence in their deliberations.

Despite the mixed results of the climate change meetings in Copenhagen, the yearlong focus on the event caused governments to prepare legislation and policies, to seriously debate complex issues such as carbon footprinting and embedded carbon.

It inspired the WBCSD to sharpen its advocacy messages for Copenhagen and beyond, to aggressively market its tough, peer-reviewed report on Energy Efficiency in Buildings (EEB) and to develop an EEB Manifesto for members to sign up to, demonstrating that this efficiency talk is being walked. It also saw Sustainable Forest Products Industry group champion the inclusion of sustainable forestry initiatives in the climate negotiations to sequester carbon.

The year saw governments working to re-invent “green jobs,” to seek solutions in the form of smarter grids, new investments in energy supply and distribution.



Bjorn Sigson
President, WBCSD

GLOBAL ECONOMY & BUSINESS MODELS - Transform center

Internalize carbon costs

Necessary for scenario to be "on track" for 2050
Externalities internalized into new accounting standards that investors incorporate rapidly into risk and opportunity decision-making. These accounting changes enable companies to account for ecosystem services both positive and negative.

Necessary for scenario to be "on track" for 2050
Global price on carbon internalizes major costs of CO2 and other emissions

Necessary for scenario to be "on track" for 2050
Technology transfer for energy and some other areas such as food is successfully implemented. Collaboration between governments and private industry from major economies in both North and South leads to creation of a global venture capital fund to commercialize clean energy and food technologies. The fund licenses the intellectual property and sells technology on terms that vary with the per capita GDP of the country in which the technology is deployed, with concessional terms for developing countries. (or some other approach that is efficient and effective)

Job creation in developing countries beginning to increase
Economic growth boosts tax revenues, allowing for a certain level of safety/welfare nets, e.g. old-age financial assistance.

During this decade
Biggest populations and new technologies begin to enable high levels of labor productivity. Create a focus on research and development, innovation, education, training, and work-life balance.

FOREST - Sufficient fiber and fuel for 9 billion people by 2050

Global action on deforestation

The United Nations Framework Convention on Climate Change (UNFCCC) releases the Reducing Emissions from Deforestation and forest Degradation (REDD) report. Without REDD, the 2 degree C climate stabilization goal will not be met.

Approx. Amount of Carbon Stock in World Forests

Total carbon stock	24 Gt
Planted forest carbon stock	142 Gt
Primary forest carbon stock	185 Gt

Probably necessary to be on track to a sustainable 2050
Commitments to deep carbon reductions by industrialized countries to create demand for REDD carbon credits.

By the end of the decade
Major actions addressed by REDD begin to be implemented:
- Financial incentives for those living near or in forests so that they do not cut down trees
- Procedures for setting emissions levels
- Methodologies for monitoring, reporting and verification
- Processes to promote the participation of indigenous peoples and local communities

Necessary for scenario to be "on track" for 2050
Shift production from modified natural forest to planted forest by tripling planted forest yields by 2050

MATERIALS & MANUFACTURING - Closed-loop society

Accounting standards begin

Manufacturing emits more than one-third of all CO2, iron, steel & cement account for half of these emissions. Chemicals and petrochemicals also make significant contributions.

Key Actions Necessary to be on track for 2050
Global business and governments agree on a set of indicators & rules for accounting about resources, energy and materials. These rules establish the true cost of primary and secondary materials.

Need icon
Global business begins to reduce product sizes, avoid waste in packaging & increase product lifetime.

Validation of storage applications of industrial application Carbon capture and Storage for industrial applications is complete.

Key Actions Necessary to be "on track" for 2050
New landfill legislation begins to set standards for recycling and reuse.

Faster, leaner production processes becoming the norm.

Key Actions Necessary to be "on track" for 2050
Industrial application Carbon Capture and Storage
- Develop legal and regulatory frameworks, to include liability clarity for CO2.
- R&D to reduce capture costs, monitoring, storage integrity.
- Greater public awareness of benefits and cost.

ECOSYSTEMS & BIODIVERSITY - Maintain and restore

Natural literacy spreads

This will take time, but is required to be on track for a sustainable 2050
Improved NATURAL LITERACY - Increased knowledge and attention on ecosystem services. A range of in-depth and comprehensive multi-year studies have deepened our understanding of the functioning of the full range of ecosystem services. Widespread media attention of such studies has contributed to a greater focus on the protection and enhancement of ecosystem services.

This is our current situation

For the past 20 years, humans have exceeded global biocapacity

Supporting Provisioning Services
Regulating Cultural

Required to be on track for a sustainable 2050
Donor countries begin to finance protected biodiversity areas providing the kind of protection that the market can not provide in hopes of preventing disastrous loss of species.

Big risk avoided
Unknown, irreversible, runaway, non-linear climate tipping point processes unleashed

The Council and our members accelerated work on sustainable consumption, amid suggestions that consumers are beginning to look at their individual purchasing patterns and their impacts on the planet. Behavior shifted, but that may have been due to diminished discretionary spending caused by the recession and not heightened consciousness.

Understanding of global, and local, water challenges increased, as did the public's grasp of the links among water, energy, climate and food. The Council used high-profile water meetings to explain what our members were doing on the issue and to market the WBCSD Global Water Tool.

The Development Focus Area built a new strategy to make it more nimble in dealing with the contradictory issues of rapid growth in economies and in consumer demand in countries like China and India, alongside a global population of some 4 billion poor people.

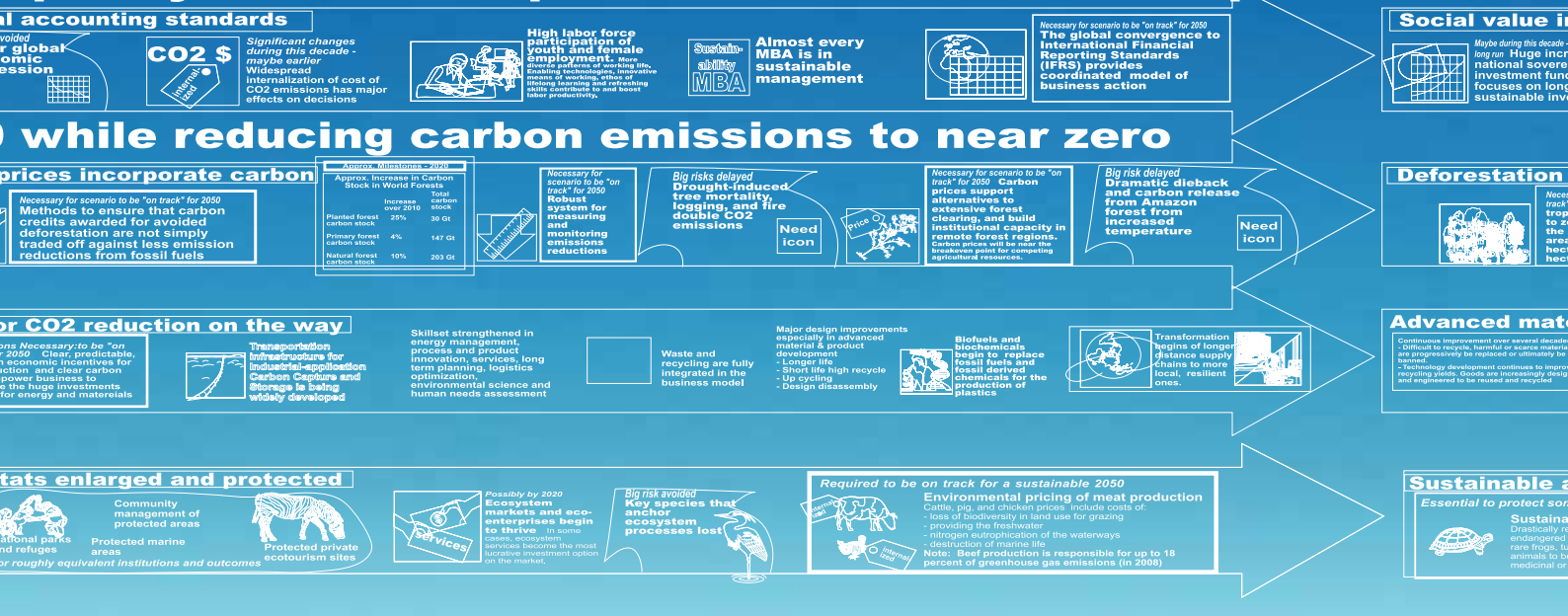
WBCSD highlights included new and well-received publications in the areas of energy efficiency in buildings, corporate ecosystem valuation, water, energy and climate change and cement.

Due to the pressing need to accelerate the development of advanced clean energy technologies in order to address the global challenges of energy security, climate change and sustainable development, the Cement Sustainability Initiative worked with the International Energy Agency (IEA) to develop the first industry-wide technology roadmap – for the cement industry. The IEA, in response to G8 ministers, is leading the effort to develop a set of 19 global technology roadmaps covering demand and supply-side technologies, under international guidance and in close consultation with industry. The overall aim is to advance global development and uptake of key technologies to reach a 50% CO₂ emissions reduction by 2050. The roadmaps will enable governments, industry and financial partners to identify steps needed and implement measures to accelerate required technology development and uptake.

The Ecosystems Focus Area renewed its partnership with the International Union for the Conservation of Nature as both work with one another and various stakeholders to explore and promote new business opportunities associated with the sustainable management and stewardship of ecosystems and the creation of market mechanisms for ecosystem services.

The Council held a Business Day at the Copenhagen climate conference of the Parties (COP), its biggest ever; it held a business event at the Stockholm Water Week and is planning an International Business and Ecosystems Day at COP 10 of the Convention on Biological Diversity in Nagoya in 2010.

Temporary industrial capitalism into sustainable capitalism



The WBCSD is putting more into, and getting more out of, its Regional Network of 60 national Business Councils of Sustainable Development and partner organizations, working with these to hold regional engagement meetings on efforts such as Vision 2050 and the Greenhouse Gas Protocol. As the network grows, it strengthens feedback loops between global and national policy work.

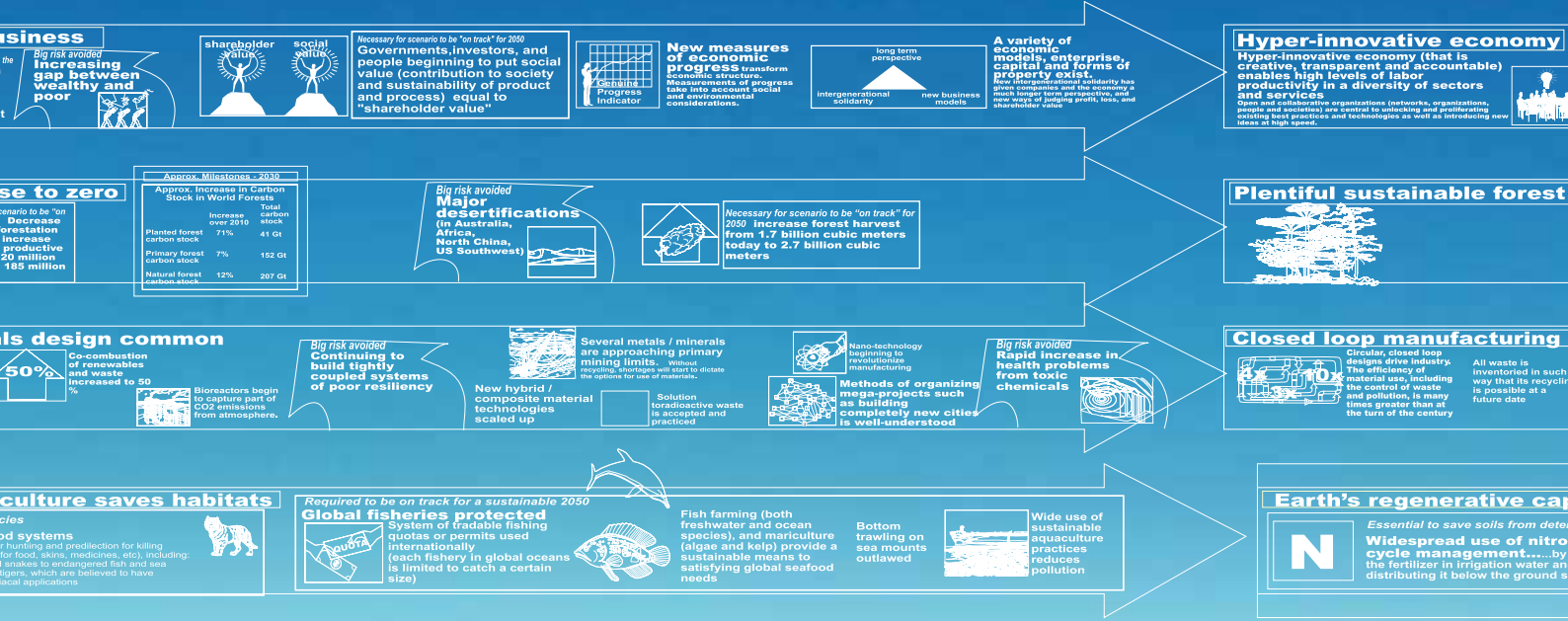
The 2009 Council Meeting was in Washington DC, and thanks to the deep engagement of our US members it attracted speakers from the administration, the Senate and the House of Representatives. A press conference by incoming WBCSD Chairman Jorma Ollila filled a main meeting room of the National Press Club and garnered extensive press coverage.

As the economic crisis unfolded at the end of 2008, we wondered how this would affect membership. We did lose some members early in the year, but not the kind of numbers we feared. Our existing members remained fully engaged, despite a tough economic situation, and the rate of enquiries regarding membership barely slowed, with 12 new members joining us in the course of the year. It has been encouraging to see how many companies clearly regard sustainable development as core to their business, and not a "nice to have" when times are good.

In summary, the *green race* is on – both among governments and companies. Sustainability is now the key driver of innovation, and the sustainability performance of a company is a measure of its management quality. Combining these company drivers with government support for green innovation and knowledge becomes a powerful business case and stimulus for the green race.

With this very much in mind, the Council is reworking its approach to developing *Strategy 2020* and taking advantage of the fact that the notion of sustainable development seems to have reached a tipping point. The new approach will highlight the Council's role as the leading business advocate for the right framework conditions for business to make an even more effective contribution to sustainable human progress.

2010 marks the 15th anniversary of the founding of the WBCSD, and we are developing many ways to celebrate. I want to thank all Members, Liaison Delegates and staff for their hard work and sharp thinking in making those 15 years the success they have been.



The Leading Business Advocate for Sustainable Development

The pursuit of sustainable development can help both companies and the planet. This is the firm belief of WBCSD members, which have a combined turnover of some US\$ 7 trillion and employ more than 15 million people. Business is a key provider of solutions; it has an opportunity and a responsibility to show that it can help lead society along sustainable paths of progress.

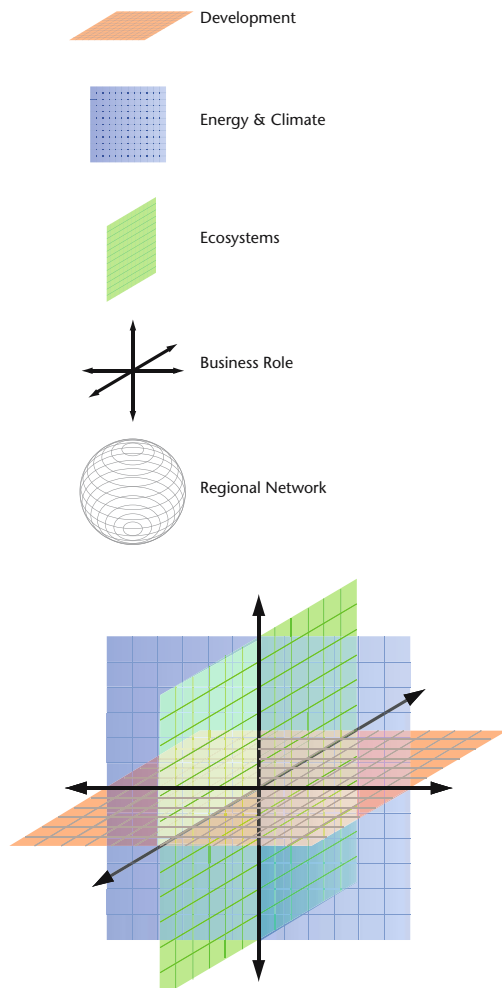
The WBCSD brings together some 200 leading international companies that share a commitment to the principles of sustainable development via economic growth, ecological balance and social progress. Members are drawn from 36 countries and 22 major industrial sectors. The Council benefits from a global network of 60 national and regional business councils and regional partners.

The Council's work is based on **Focus Areas** chosen by the members. These are The Business Role, Development, Energy & Climate and Ecosystems. Each of these has a Focus Area Core Team (FACT), working groups and workstreams. The FACTs, typically consisting of about a dozen CEOs, guide the Focus Areas and act as advisory boards. They meet at least once a year face-to-face and two to three times in telephone conferences. Each Focus Area is led by at least two co-chairs.

The **working groups** are made up of Liaison Delegates and specialists appointed by members. They develop the intellectual capital and provide content (cases, expertise, opinions), create deliverables, shape and engage in advocacy, and take results back to the companies. Each Focus Area has different workstreams examining different issues in the area.

Projects are a mix of action and advocacy, and some of their work connects with the Focus Areas. For instance, Energy Efficiency in Buildings, Electricity Utilities and the Cement Sustainability Initiative all have strong ties to the Energy & Climate Focus Area, while the Sustainable Forest Products Industry is connected to the Ecosystems Focus Area, and Mobility to the Development Focus Area.

Initiatives provide a test bed or laboratory space for the Council. They allow faster and more flexible responses to emerging issues. In 2009, the Council began an Initiative on urban infrastructure, given the rapid growth of cities to 2050. If there is a need for more extensive activity on a topic, an Initiative can evolve into a Focus Area or Project, such as the Sustainable Ecosystems Initiative, which became a Focus Area in 2007.



TOPP
Creative society in which a well educated and skilled work force rapidly absorbs best practices and new technologies, leading to significant improvements in labor productivity and efficiency.

TOPP
Top-of-the-population pyramid (TOPP) business models have emerged that aim to create opportunities for older people in both rich and poor countries.

Need icon
Big risk avoided
Decrease in financial stability

New understanding of wealth and poverty. Nations still pursue their competitive advantages, but there is a deep understanding that poverty anywhere undermines prosperity everywhere.

Big risk avoided
Low investment in transition to renewable energy before low cost carbon energy exhausted

ECONOMY

Global GDP approx. US\$ 200-300 trillion

Almost 700 million people in China moved into middle class

Almost 500 million people in India moved into middle class

Relatively full employment all around the world

products

Approx. Increase in Carbon Stock in World Forests	
Increase over 2010	Total carbon stock
Planted forest carbon stock 104%	49 Gt
Primary forest carbon stock 19%	164 Gt
Natural forest carbon stock 15%	213 Gt

Need icon
Big risk avoided
Major fuel and building wood shortages

Approx. Increase in Carbon Stock in World Forests	
Increase over 2010	Total carbon stock
Planted forest carbon stock 149%	59 Gt
Primary forest carbon stock 23%	175 Gt
Natural forest carbon stock 19%	220 Gt

FORESTS

Reduction of deforestation rates by 50% must be on way to avoiding the cumulative release of up to 50 GtC by 2100

Estimated cost of reducing deforestation at rates by 2050 approximately by U.S. \$20 per ton.

3x
Increase planted forest harvest from 2.2 billion cubic meters to 2.7 billion cubic meters

2x
Double planted forest carbon stock to 59 Gt

common

Zero
Net zero emission plants are the norm for new plants

World business continues to institute policies on eliminating toxic substances and improving design and recycling mandates

Methods of innovation well-known and wide-spread

10x
Recycling technologies are 10x more efficient than 2010

The majority of CO2-intensive industrial facilities use Carbon Capture and Storage technology. CCS also used for biofuels production

10x
Factor 10 per capita consumption of non-renewable resources does not exceed 5-6 tons per year.

MATERIALS AND MANUFACTURING

Energy efficiency (building, agriculture, transport, industry and power generation) not been evenly

Water usage is not a constraint anymore

CO2 emissions are not a constraint anymore

Energy needs are not a constraint anymore

By 2050 A world has been created whereby 'Cradle to Cradle' is the general principle for the management of natural, non-renewable materials

Many technologies efficiencies by a factor of about four, since 2000

4x
6x
10x

capacity renewed

With this set of pathways, we can decrease our over use of the Earth's regenerative capacity

In the business as usual scenario we will be using 4.3 Earths

We can decrease our overuse of the Earth's regenerative capacity to 1.2 Earths by 2050

ECOSYSTEMS AND BIODIVERSITY

Amazon rainforest basin appears to be stabilizing after near destruction

Most toxic chemicals stopper from entering biosphere

Seed banks have preserved much biodiversity

Ozone depletion continues to decrease

Steady desertification in many areas halted

Serious depletion of soil through erosion beginning to be reversed

Fish species abundance recoups

Acidification of oceans halted though still precarious

Coral reefs greatly decimated, but deterioration halted

Biodiversity reservations stabilize loss of species

Animal DNA banks begin to rejuvenate some species

Zoo-waste world: values ecosystem services and natural resources

Approx. 50% of global biodiversity has been lost in past 40 years

Global catastrophes so far avoided but lack of scientific ability to keep track of millions of species hampers realistic appraisal

Condition of biodiversity stabilizing but still a critical chance of great loss but still at significant risk as irreversible losses continue at slower rate

A New Agenda for Business

It is only in the past five years that thoughtful companies have begun to understand the vast opportunities of moving toward a sustainable world, and that science has made clear the global catastrophes inherent in un-sustainable development.

In 2005, the hundreds of scientists involved in the Millennium Ecosystem Assessment warned that two-thirds of the ecosystem services upon which life depends are being degraded or used unsustainably. In 2007, the Intergovernmental Panel on Climate Change warned of drastic, climate-related cuts in African farm yields in about a decade, and of floods and then droughts in Asia and Latin America.

Recently, many organizations have highlighted the business opportunities inherent in building, rebuilding and retrofitting infrastructure so they work within natural boundaries. Vast new built systems for energy, water and transport are needed in the developing world, along with vast retrofitting and rebuilding in the developed world.

The role of business is evident. Business is the main driving force for resource efficiency in the economy, for technology deployment and development and for infrastructure construction and providing financial services. But business can fulfill its role only if the right regulations and government institutions are in place. Maximizing the business role will require new forms of public-private partnerships and doing more business with both governments and civil society organizations.

Business leaders will have to integrate systems thinking and systemic solutions as never before, and also work more closely with governments than they are used to, taking time from leading their companies to help create the space and institutions in which those companies can be successful over the long haul in a very different global environment.

Business' time has come. It is up to business leaders to make the most of it.

"It is no longer a question of if we need to address sustainability, nor is it about what needs to be done. The issues are HOW and WHEN."

Bjorn Stigson
President, WBCSD



Advocacy

The WBCSD places a high priority on advocacy. Previously, its main task was to get sustainable development higher on government and business agendas. That has been achieved. The goal now is to accelerate sustainability actions.

The Council worked closely through the year with the Bonn Secretariat of the UN Framework Convention for Climate Change to get a business message into the Copenhagen deliberations and to host the Ministerial Breakfast in Copenhagen.

The Ecosystems Focus Area renewed its partnership with the International Union for the Conservation of Nature (IUCN) to find market approaches to enhancing ecosystem services. It launched *Building the case for Corporate Ecosystem Valuation* and also works closely with The Economics of Ecosystems and Biodiversity (TEEB) study, launched by the Environmental Ministers of the G8+5 countries. 2010 is the Year of Biodiversity and the Council has begun, in collaboration with IUCN and the Nippon Keidanren, to organize an International Business and Ecosystems Day at the 10th Conference of Parties of the Biodiversity Convention in the autumn.

The Vision 2050 Project finished its work in 2009 and launched it in early 2010. The Vision work provides a platform for dialogue with member companies and a wide range of our stakeholders — similar to what the Council did with the sustainability scenarios (FROG, Geopolity and Jazz) of 10 years ago.

The Energy Efficiency in Buildings (EEB) project published its final report in 2009 and gained the support of more than 50 companies for its Manifesto. The EEB has been planning a major advocacy drive based on these two reports.

The International Energy Agency (IEA) has the mandate from the G8 to develop sectoral technology roadmaps for 17 industrial sectors and technologies. The first industry sector roadmap was developed and launched jointly by the IEA and the WBCSD Cement Sustainability Initiative (CSI) in early December. The Cement Roadmap will be an important advocacy tool during 2010, during which the IEA and the Council will also produce a roadmap for buildings.

Much of the Council's advocacy work is done through the President's Office, as WBCSD President Björn Stigson plays a key role in a number of advisory bodies. In November, he presented to German Chancellor Angela Merkel the



conclusions of the German Peer Review on the German Sustainability Strategy, which he chairs. In the same month, he and his co-chairs on the Low Carbon Economy Task Force under the China Council for International Cooperation on Environment and Development presented to the Council and the Chinese State Council their report on “China’s Pathways to a Low Carbon Economy”, which makes tough, detailed recommendations for the 12th 5-Year Plan.

Björn Stigson is the only international member on the America’s Climate Choices panel, established by the US Congress, and at year’s end he was reviewing a report to be presented by that panel to Congress.

Much advocacy is also done through partnerships with other organizations. The Council has signed a memorandum of understanding (MOU) with the The Global e-Sustainability Initiative on the information and communications technology (ICT) sector to find ways to reduce greenhouse gas emissions through the development of appropriate ICT services and technologies.

The World Resources Institute continued to be an invaluable partner in efforts as different as advocating ways to measure greenhouse emissions to advocating the sustainable sourcing of forest products. It is also a lead partner in efforts by the Ecosystems Focus Area to develop the Guide to Corporate Ecosystem Valuation, a collaboration that also includes IUCN, PricewaterhouseCoopers and Environmental Resources Management.

The Development Focus Area works with the Inter-American Development Bank to spread sustainable business throughout Latin America and with the Asian Development Bank to spread clean and affordable energy for development in Asia. The Business Role Focus Area works with the European Business Schools Consortium to spread the sustainability agenda among both companies and business students.

In 2010, the Council began to formalize key country “roadshows” in the United States, Europe, Mexico, China, India, Australia, Japan and Brazil.

The UN plans to convene a major event in conjunction with a celebration of Rio+20 (20 years since the Earth Summit in Brazil). The original Business Council for Sustainable Development was formed to provide a business voice for that 1992 meeting, and the Council played a major role in organizing business activities at the 2002 World Summit on Sustainable Development in Johannesburg. The Council is already laying the groundwork for a strong business role in the 2012 series of meetings.

2010 marks the Council’s 15th anniversary. It will find many ways to mark those 15 eventful years.



Sustainable world

by 2050

The new business agenda

The Business Role

Business is being seriously affected by the sustainability challenges facing the world. Studies showing that it is possible to develop solutions that meet carbon and resource constraints also show that it will require massive change, starting now.

Business must therefore examine its various roles, improve them, and advocate change to other stakeholders: governments, consumers, investors, NGOs, and academia. Sustainability considerations must be implemented and integrated into business strategy and adopted as core business. The Business Role Focus Area works through three approaches: exploring the role of business, influencing stakeholders and implementation.

Vision 2050

The WBCSD's exploratory flagship is the *Vision 2050 Project*, in which member companies have set out to develop a business view on making the world sustainable by 2050 and beyond. The objective has been to create a new intellectual platform for business thought leadership, one that can also engage governments and civil society.

Twenty-nine companies, led by Alcoa, PricewaterhouseCoopers, Storebrand and Syngenta, have come together to rethink what business must do over the next few decades to help society toward sustainability. *Vision 2050* has run a Regional Engagement Program to ensure the project is informed and validated by all regions of the world. WBCSD Regional Network partners and regional representatives of participating companies were instrumental in this. The *Vision 2050* report has been launched at the February World CEO Forum in Delhi, India.

Companies will use the results of *Vision 2050* as a platform for reinventing themselves and their products and services to get where they and society want to be. In the outreach phase we will share the findings with policy-makers and other key actors, through dedicated *Vision 2050* CEO and policy-maker roundtables, and broader outreach by the WBCSD, its member companies and media.

Influencing stakeholders

Business can better provide goods and services that promote sustainability if market mechanisms are designed to promote sustainable development. The Focus Area is trying to influence two key stakeholders – investors and consumers – whose “framework setting” is crucial for how, and to what extent, Council members and other companies can develop and deliver sustainable business.

The financial crisis created more scrutiny, more disclosure, and more transparency in the market. This has emphasized the importance of businesses and financial institutions incorporating systemic environmental, social and governance factors into fundamental financial analysis and business planning; it has forced businesses and investors to rethink the basis for sustainable economic performance.

The 2008 *Sustainable Consumption Facts & Trends* report confirmed that sustainable consumption issues have become core business issues. In 2009, the consumers and consumption workstream developed a framework of the roles of various actors in “enabling sustainable consumption”. It also developed a learning laboratory workshop format to explore sustainable lifestyles in the context of a sustainable world in 2050. Using results from the *Vision 2050* project, the workshops were designed specifically for marketing, communications and sustainability professionals at WBCSD member companies.

“The Vision 2050 project has increased my understanding of the magnitude of the challenges that the world needs to manage, and of the multitude of business opportunities that this will bring.”

Idar Kreutzer
CEO, Storebrand

Consumer influence



Lifestyle change



Multimedia communication kiosk



This all feeds into work to develop the business case for demand-side management and the consumer agenda. The Focus Area has been working with the relevant teams across the WBCSD work program to understand and coordinate efforts on demand-side management. The Focus Area will continue to advocate the WBCSD Sustainable Consumption report at retailer industry associations and on other dialogue platforms.

The Focus Area has been working to provide input into the 2010 UN Commission on Sustainable Development's focus on Sustainable Production & Consumption with the International Chamber of Commerce, the separate task forces of the Marrakech Process, and UNEP. It has also been scoping new ways to explore the consumer behavior shifts being revealed, the known triggers to behavior change and their relevance for sustainability.

Implementing Sustainable Development

The WBCSD's Future Leaders Team (FLT), run by the Business Role Focus Area, helps younger business leaders become effective ambassadors for sustainable development through experiential learning, knowledge creation, and the building of networks and skills. Now in its eighth year, the FLT in 2009 worked closely with the Development Focus Area to explore the business contribution to development. They embarked on individual projects inside their companies using the WBCSD's Measuring Impact Framework.

After participating in a stakeholder dialogue training event in India, the team built the Inclusive Business Challenge, a tool for companies and organizations to raise awareness of how to do inclusive business. Designed for adaptation and customization by individual companies and organizations, it has already been picked up by a number of companies and NGOs.

Over the past several years, the WBCSD has developed tools and training elements - including Chronos, an e-learning tutorial on the business case for sustainable development - to improve the capabilities of stakeholder groups. Companies continue to customize Chronos, with total licenses now at 300,000 plus.

In 2009, the WBCSD broadened the focus on capacity building to look strategically at issues around talent, skills and sustainability through a new workstream named "People Matter". It first developed a deeper understanding of company priorities in the area. The Focus Area found that companies are concerned with short-term issues around integrating sustainability into the



Touch tele monitoring diagnosis

business of people and understanding how sustainable development can enhance the way they recruit, engage, incentivize, train and manage employees.

In the longer term, companies want to ensure future talent needs are met and understand how companies can best influence stakeholders such as governments and education institutions to build skills for a sustainable future.

Companies agreed to build a network of business experts to share experience and develop thought leadership. In 2010 the network will help build the business case for action while also providing companies with an opportunity to profile their experience and collaborate with others. The key deliverable will be four thought pieces on thematic issues around engaging and training employees; aligning incentives, performance, recruitment and retention; identifying future talent and leadership needs; and managing and measuring organizational change.

Focus Area Core Team 2010

FACT members

Mohammad A. Zaidi *Co-Chair*
Kreutzer *Co-Chair*
Michael Diekmann
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 Henkel
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 Nokia
 Pakistan State Oil
 PricewaterhouseCoopers
 Sony
 Umicore

Country

USA
 Aldar
 Norway
 Germany
 France
 Germany
 UK
 Finland
 Pakistan
 USA
 Japan
 Belgium



Geo-political shift



Development



Demographics



Population growth

Development

The complex, rapidly changing developing world has overtaken the developed countries as the generator of economic growth and opportunity. This is a trend that is expected to accelerate. Almost all future population growth will happen in the former.

In 2009, the Development Focus Area reorganized its priorities and structure, continuing its efforts on doing business with poor communities while expanding its scope to address the broader business role in sustainably improving the living standards of the growing and increasingly urbanized populations of the developing world.

This new structure offers members and partners more flexibility in developing leading-edge thinking and messages; profiling best practices; engaging in specific initiatives; accessing and influencing international processes and initiatives; applying innovative WBCSD tools; and cooperating with the WBCSD's Regional Network partners in developing countries and emerging economies

The Focus Area's role is to:

- Create awareness among business of risks and opportunities in the development context
- Define the business role in sustainably addressing key development challenges and advocate business perspectives to policy-makers and other relevant stakeholders
- Demonstrate leadership by promoting business-led action on the ground.

Bridging divides, promoting inclusive business and measuring impacts

The Mobility for Development initiative raised awareness in three areas: the importance of mobility as a driver for economic development; the urgent need to narrow the mobility divide, and the search for sustainable mobility solutions for rapidly growing cities in developing economies. Led by BP, Brisa, General Motors, Michelin, Petrobras and Toyota, the group studied mobility in four such cities: Bangalore, Dar es Salaam, São Paulo, and Shanghai. The final report concluded that although mobility opportunities are increasing, overall mobility systems are not sustainable and are deteriorating for poorer residents. The report's findings and messages are being disseminated at key international and regional events.

The Focus Area continues to be a member of the Steering Committee of the Asian Development Bank's Energy for All Partnership. Formally launched in June 2009, the initiative links private and public sectors in Asia to improve access to energy by sharing information, resources and the flow of financing to projects with appropriate technologies and proven business cases. It aims to provide access for 100 million new users in Asia by 2015. The Focus Area is also part of the Energy Poverty Action alliance, along with the World Economic Forum, the World Energy Council, Vattenfall, Eskom and BC Hydro.

The Latin American Network of Inclusive Business Leaders, launched in 2009, is led by Roberto Salas of GrupoNueva. Working in close collaboration with its Regional Network partners, it is engaging forward-thinking CEOs across Latin America, encouraging companies to get involved in business that benefits both poor populations and companies. Six CEO-level gatherings were organized in 2009 in Colombia, Argentina, Ecuador, Chile, Brazil and Peru. The Focus Area is also on the advisory board of the UNDP Growing Inclusive Markets initiative, which aims to demonstrate the benefits of doing business with the poor and to clarify the ways that businesses, governments and civil society organizations can create value for all and inspire the private sector to action.

“My co-chairmanship of the Development Focus Area has helped me make inclusive business a strategic, profitable part of GrupoNueva's core operations. It is also helping me to reach out to my fellow CEOs in Latin America to spread inclusive business throughout the region. As it spreads, it can benefit our nations, our people and our businesses.”

Roberto Salas
CEO, GrupoNueva





The Alliance for Inclusive Business, with SNV Netherlands Development Organization and the WBCSD's Regional Network partners in nine Central American and Andean countries, has 40 inclusive business ventures being implemented. The Alliance is producing a publication profiling its achievements over its three-year history, capturing lessons learned for the business community, governments and development agencies. The goal is to build on this successful alliance by starting similar activities in Asia, Africa and the Middle East. Awareness-raising activities have been held in Mozambique, Zimbabwe and Vietnam.

The Measuring Impact Framework (launched in 2008) helps companies understand their contribution to society and use this understanding to make better operational and long-term investment decisions and to have better-informed conversations with stakeholders. The Focus Area spent 2009 supporting the Framework's uptake among companies, organizing capacity-building workshops with partners and presentations at key external events, and compiling a summary of existing impact measurement initiatives. As the only global business organization to develop a measurement framework built by business for business, the WBCSD has become an important voice on the issues around measuring business impacts. It has received requests to provide input into external frameworks developed by the Business Call to Action on the Millennium Development Goals and Oxfam, among others.

The WBCSD's 2009 Future Leaders Team worked closely with the Development Focus Area to explore the business contribution to development. Team members applied the Measuring Impact Framework in their respective companies, providing valuable insight into redefining measures of success and demonstrating the contribution of business. The second phase of the program was spent developing a simulation tool called *The Inclusive Business Challenge*. (See also The Business Role Focus Area.)

Publications and case studies in 2009

- *Mobility for Development*
- The Inclusive Business Challenge – simulation tool developed by WBCSD Future Leaders Team
- *Sustain* magazine – Energizing development in a changing climate
- Allianz case study – Reducing the risks of the poor through microinsurance
- Newmont case study - Supporting local economic growth in Ghana
- EcoSecurities case study - Measuring the development benefits of emissions reduction
- Some 50+ blog entries at www.inclusivebusiness.org
- Monthly Business & Development e-newsletter (subscriptions grew by 2,000 to 14,000 total recipients).



Moving forward

The Focus Area will publish an advocacy document that builds on the intellectual capital it has accumulated over the last few years and reflects its new, broader scope.

It also intends to enhance its inclusive business initiatives in Latin America by creating a public web platform and a “project management tool for the Latin American Network of Inclusive Business Leaders, and by publishing a report of cases and lessons learned from the WBCSD–SNV Alliance for Inclusive Business in Latin America. The Focus Area will offer an e-learning program in cooperation with the Argentine Base of the Pyramid Laboratory, and it plans to host two CEO-level gatherings in Mexico and Panama. Efforts will also be made to promote the replication of the inclusive business work in Africa and Asia.

Under the leadership of BG Group, the Focus Area has launched an initiative on local content that aims to increase understanding of how to unlock the benefits of large-scale investments for local socio-economic development. It will support collaboration among companies and governments to maximize opportunities for shared benefit from local content delivery.

The Focus Area will continue to promote the application of the Measuring Impact Framework and other relevant WBCSD tools by publishing more case studies on the use of the Framework, compiling a summary of existing measurement tools and approaches, and completing and distributing the Inclusive Business Simulation tool developed by the Future Leaders Team.

To advocate business messages and solutions, the Focus Area is organizing business roundtables at the annual meeting of the IDB, supporting the Business Call to Action on the Millennium Development Goals, providing input into the Asian Development Bank’s Energy for All Partnership and the Energy Poverty Action initiative, and offering business input to the United Nations Financing for Development process and Development Cooperation Forum.

Focus Area Core Team 2010

FACT members

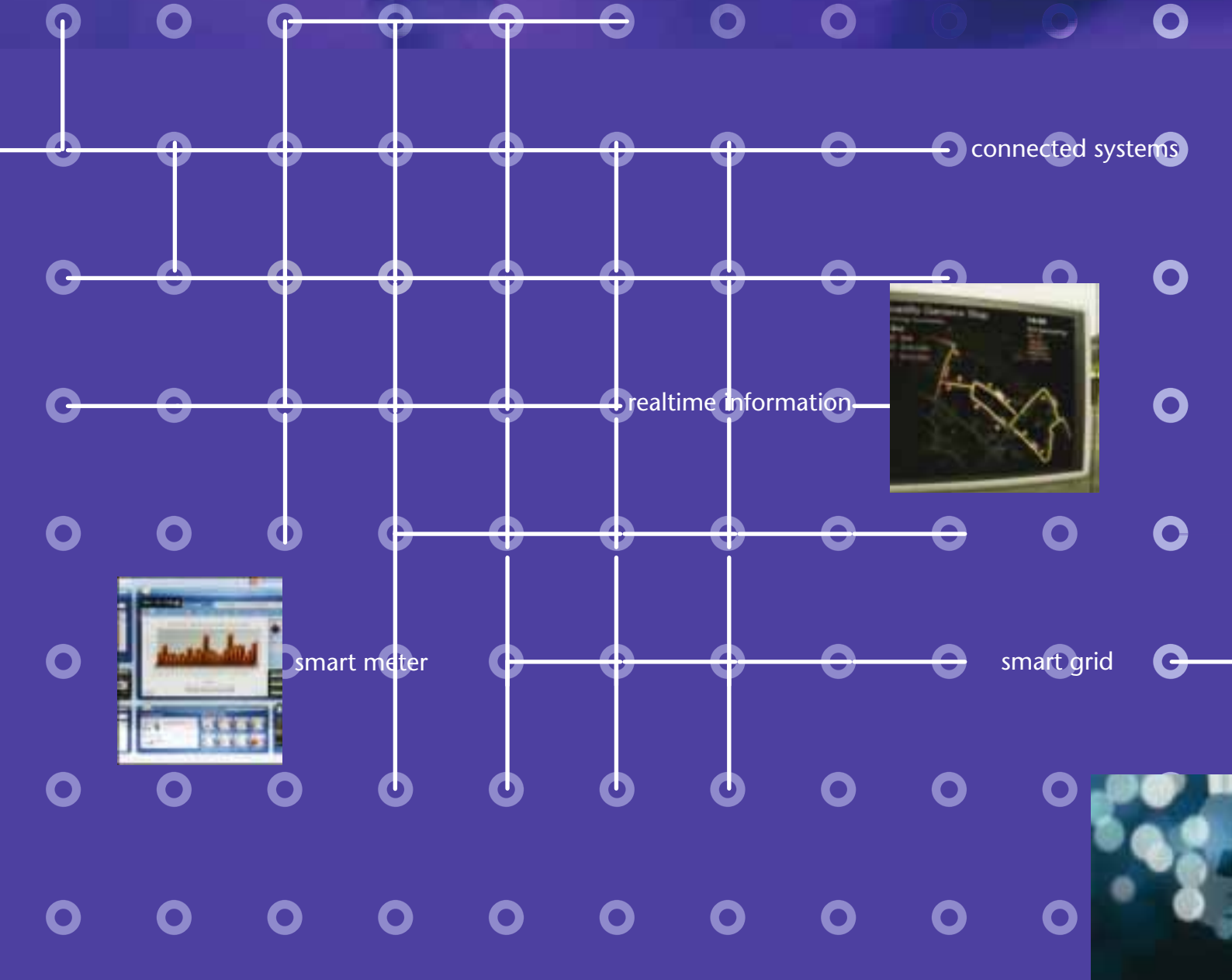
Robin Bidwell *Co-Chair*
Roberto Salas *Co-Chair*
Iain Conn
Vasco de Mello
José Pablo Arellano
John Rice
Steven Stanbrook
Dr. Fujio Cho

Company

ERM
 Masisa
 BP
 Brisa Auto-Estradas de Portugal
 Codelco
 General Electric
 S.C. Johnson
 Toyota Motor Corporation

Country

UK
 Chile
 UK
 Portugal
 Chile
 USA
 USA
 Japan



connected systems

realtime information



smart meter



smart grid



Energy & Climate

The economy of the future will be a low-carbon economy, and it is in business' best interests to guide society toward an economy that makes business sense – one where business is able to efficiently provide the solutions that will enable the necessary transition.

This transition requires solutions for the developed and developing world alike. The next few years are critical for establishing policies, mechanisms and institutions that address greenhouse gas (GHG) mitigation and adaptation to climate impacts, but that also deal with the challenges of energy security and competitiveness. Delay in establishing a global framework that supports national legislation will needlessly endanger the global society, exacerbate the societal challenge and increase the costs of dealing with climate change.

Solutions to adapt to this new dynamic will include international cooperation, new forms of public-private partnerships and clear roles for government, business, consumers and civil society. An objective of the WBCSD energy and climate work has been to develop an understanding of what business can do on its own and what it can do with government and civil society to enhance its role.

Focusing on the negotiations

Efforts in 2009 centered on providing a business contribution to the UN climate change negotiations and particularly the major milestone of the Copenhagen meeting in December. The WBCSD has provided a business voice and knowledge input to this process and an interpretation of what a new agreement might mean for business. In parallel there has been a focus on ensuring that business has the tools necessary to deliver the solutions.

The Focus Area identified four key areas of the negotiations for business focus: energy efficiency and demand-side management, technology, carbon markets and financing and sectoral approaches. In February, the Focus Area provided a formal submission of the key recommendations from business in these four areas to the United Nations Framework Convention on Climate Change (UNFCCC) through official channels. This identified the issues that business believes to be the most important elements of a future agreement. The submission was supported in March by a public document, *Towards a Low-carbon Economy: A business contribution to the international energy and climate debate*, aimed at the broader business community as well as government negotiators.

The Focus Area developed a close engagement with negotiators on technology and related financing issues through the Expert Group on Technology Transfer (EGTT), the platform for detailed discussions on technology issues under the UNFCCC negotiations. This has helped the Council build momentum for the idea that business should be a formal partner in these discussions. The EGTT has approached the WBCSD about formalizing the engagement to ensure that business knowledge and expertise are best represented in the development of new frameworks and institutions for addressing technology diffusion.

The WBCSD has been awarded a contract by the European Commission to deliver a project that will define options for the formal engagement of the private sector in the UNFCCC process. It builds on the call that the WBCSD has been making publicly for many years for greater business engagement in the negotiations and reflects the sort of engagement the Focus Area is building with the EGTT. The process will require engagement and workshops with government, private sector, and other stakeholders in Europe, the US, China and Brazil. It will also cooperate with a parallel Japanese study on a similar topic.

“It is important for TEPCO that business input to the negotiations has a focus. As an electricity company, technology is our lifeblood. Working with the WBCSD has helped us develop a relationship with the Expert Group on Technology Transfer, which provides our company with a fantastic opportunity to contribute to an agreement that enables greater technology diffusion and creates greater business opportunities.”

Teruaki Masumoto
Executive Advisor

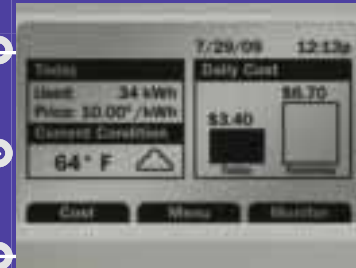
The Tokyo Electric Power Company Inc.





Intelligent systems

Smart meter



Solar energy fed back into the grid



At December's UN meeting in Copenhagen, the Focus Area organized the Copenhagen Business Day with the International Chamber of Commerce and Danish Industries. This event, attended by over 400 participants and involving 25 CEOs, highlighted business' role in defining the low-carbon future and its readiness to provide the right technologies, but also the challenges of delivery and the need to find effective ways to cooperate with governments.

Other international activities

The Focus Area played a leading role in supporting the organizers of the World Business Summit in Copenhagen in May, a major business gathering on climate change, where the WBCSD led discussions on technology and adaptation. It also led a high-level forum on low-carbon technologies around this year's G8 meeting, and was closely involved in the G8 Business Forum and the G8 Environment Ministers' meeting.

The Energy and Climate Focus Area led the Council's continuing involvement in international dialogues, such as the OECD Roundtable on Sustainable Development. One roundtable focused on the potential implications for new national legislation and the possible effects of border tariffs.

The WBCSD continued its collaboration with the World Resources Institute (WRI) to develop internationally accepted standards for product life cycle and corporate supply chain (Scope 3) GHG accounting and reporting. These two new standards are due to be completed by December 2010. The initiative provides a global, inclusive, multi-stakeholder process to design, disseminate and promote the use of the two new protocols. This currently includes over 1,000 participants from business, government, NGOs and academia, representing many countries and sectors.

The World Bank invited the WBCSD to manage the selection of private sector observers to the World Bank's Clean Investment Funds. These multibillion dollar funds are part of the international contribution to supporting clean technology diffusion, adaptation and forestry. The WBCSD has been invited to continue its role as the focal point for the private sector with the World Bank in 2010 and beyond.

The WBCSD was instrumental in creating the Voluntary Carbon Standard, founded 3 years ago with the Climate Group, the International Emissions Trading Association and the World Economic Forum. It provides a robust, new global standard and program for the approval of credible voluntary offsets. It aims to standardize and provide transparency and credibility to the voluntary offset market, enhance business, consumer and government confidence in



Offshore wind power



New technology

voluntary offsets, and create a trusted and tradable voluntary offset credit: the voluntary carbon unit. The first voluntary carbon units were issued in March 2009, and by December over 20 million had been issued.

International climate negotiations post-Copenhagen

While a legally binding climate agreement was the ambition of Copenhagen, failure to achieve this was widely anticipated. Even so, the Copenhagen Accord that was the fruit of two years of negotiations fell shorter than many of the most pessimistic predictions. It leaves business without the clarity and stability that it needs for a transformation to a low-carbon world.

As international negotiators continue to seek an agreement in Mexico at the end of 2010 and national legislation becomes increasingly important and more clearly defined, the Focus Area has refocused attention from policy recommendations to business actions and solutions. Much of this work still falls within the context of the international negotiations. Business has an important and valuable role in contributing to the design and functionality of the institutions and mechanisms that will be developed, particularly in the areas of technology and related financing. This will require increased engagement with developing countries, as well as building on existing relations with developed countries.

There is also an increasing need for business to find solutions as systems and not as piecemeal or sector-specific problems and risks. The multi-sector engagement in the Energy and Climate Focus Area provides an opportunity to work on some of these systems solutions.

Focus Area Core Team 2010

FACT members

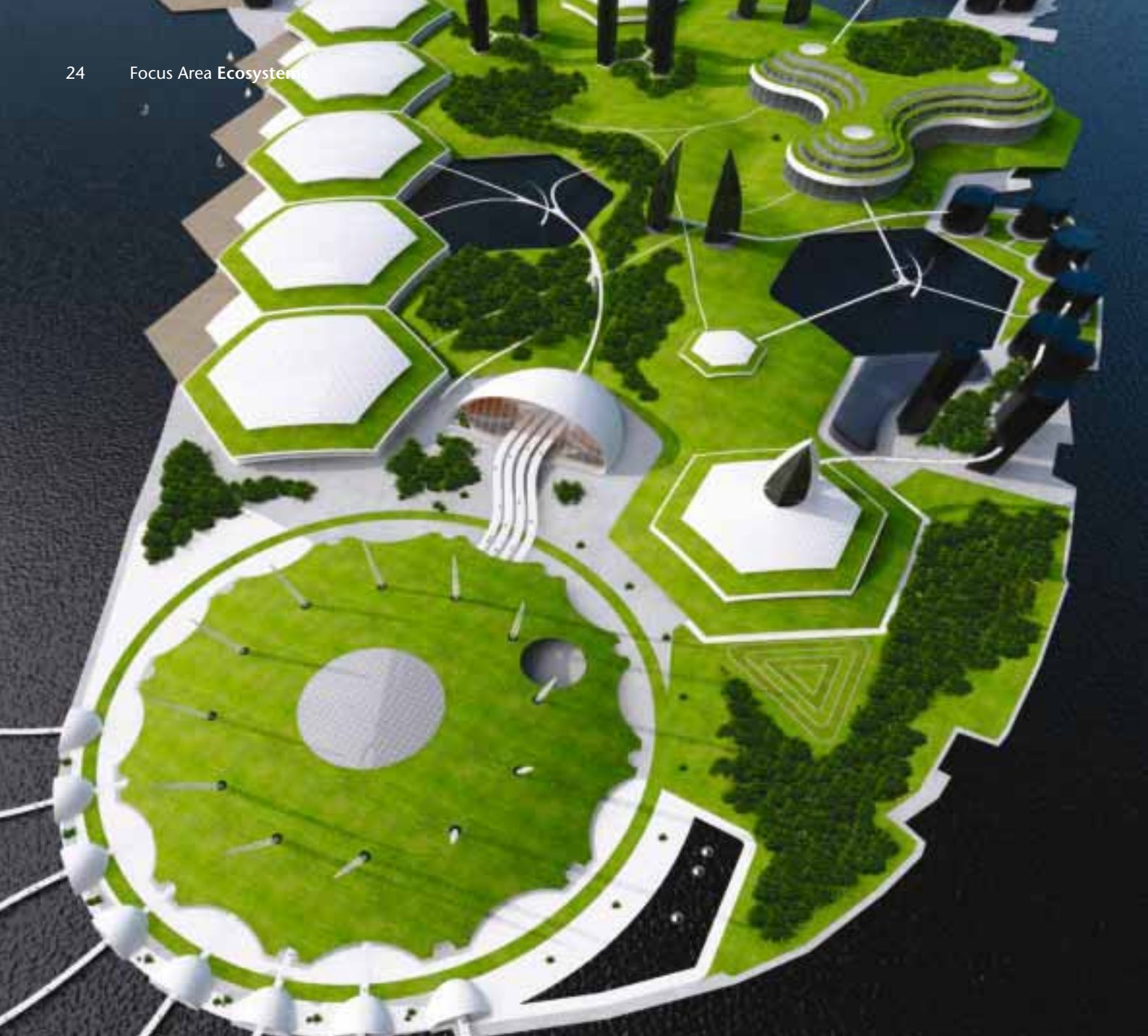
Mike Morris *Co-Chair*
Anne Lauvergeon
Lee McIntire
Charles Taylor
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Henrik Madsen
Dave Kepler
Christoph Dänzer-Vanotti
Svein Richard Brandtzaeg
Jorma Ollila
Wang Jiming
Richard George
Teruaki Masumoto
Peter Bakker
Ditlev Engel
Ernesta Ballard

Company

American Electric Power
 Areva
 CH2M Hill
 Chevron
 CLP Holdings
 Det Norske Veritas
 DOW Chemical
 E.ON
 Norsk Hydro
 Royal Dutch/Shell
 Sinopec
 SUNCOR
 TEPCO
 TNT
 Vestas Wind Systems
 Weyerhaeuser

Country

USA
 France
 USA
 USA
 SAR Hong Kong (China)
 Norway
 USA
 Germany
 Norway
 Holland/UK
 China
 Canada
 Japan
 Netherlands
 Denmark
 USA



greening

ecosystem services

Urban ecosystem



Ecosystems

All sectors of society — including business — must recognize the real benefits of ecosystems and the need to account for and enhance ecosystem services. Valuing and sustainably managing ecosystems must become a more integral part of economic planning and decision-making by society; otherwise nature will always lose out to social and economic development.

The Ecosystems Focus Area is working to achieve these aims by forming alliances with other stakeholders that champion the positive role of business and the capacity of the marketplace, technology, and innovation in supporting the sustainable management and use of ecosystems. Our main partners are the World Resources Institute (WRI) and the International Union for Conservation of Nature (IUCN), with which we signed a new four-year memorandum of understanding in 2009.

The Focus Area also leverages, supports and informs existing WBCSD work that is associated with ecosystems management and use. It leads the development of new decision support tools and focuses on consolidating and integrating existing business and ecosystem processes to facilitate learning between companies and across sectors by promoting the uptake of proven solutions and tools.

More specifically, the Focus Area and its member companies work to:

- Assess, measure and value the ecosystem impacts, dependence and assets of member companies and broader business
- Reduce business impacts on ecosystems by scaling up mitigation, offsetting or finding sustainable-use solutions
- Explore and promote new business opportunities associated with sustainable management and stewardship of ecosystems and the creation of markets and payments for ecosystem services
- Advocate for ecosystem governance and policy frameworks that include flexible, innovative market-oriented approaches
- Promote the actions of leading member companies in addressing their ecosystems impacts and mobilizing their ecosystem assets.

The Focus Area has five workstreams: Ecosystem Valuation Initiative, Corporate Ecosystem Services Review, Convention on Biological Diversity, communication tools, and land use and climate change.

Ecosystem Valuation Initiative

Throughout the year the Focus Area built the business case for its Ecosystem Valuation Initiative (EVI). Centered on corporate ecosystem valuation, both ecosystem degradation and the benefits provided by ecosystem services are explicitly accounted for with the intention of informing and improving business decision-making.

In March a detailed scoping study on corporate ecosystem valuation was discussed with members. In May an Issue Brief was released and the Focus Area Core Team endorsed preparation of a *Guide to Corporate Ecosystem Valuation* to be launched at the Convention on Biological Diversity meeting in Nagoya in October 2010. To undertake this significant new initiative, the Focus Area developed a partnership with IUCN, WRI, PricewaterhouseCoopers (PwC), and Environmental Resources Management (ERM).

At the Washington DC meeting, the Focus Area released a comprehensive advocacy publication — *Corporate Ecosystem Valuation — Building the business*

“Being a member of the Ecosystem Focus Area Core Team, and working on decision support tools like the Corporate Ecosystem Services Review and road testing the Corporate Guide to Ecosystem Valuation, has highlighted the importance of ecosystems to our company. It is leading us to new ways of thinking about how we manage ecosystem risks in our operations and, most importantly, how we make new business decisions.”

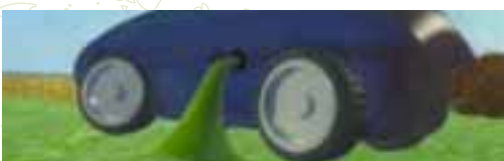
Antonio Mexia
CEO, EdP



Vertical farming



food miles



Biofuel using enzymes



case — and by year end 16 member companies had signed up as “road testers” to support development of the guide during 2010.

The Focus Area established close ties with The Economics of Ecosystems and Biodiversity (TEEB) study, launched by the Environmental Ministers of the G8+5 countries in 2007. This is a major international initiative assessing the global economic benefits of biodiversity and ecosystems as well as the growing costs of biodiversity loss and ecosystem degradation. The WBCSD was chosen as a chapter editor of the TEEB report for business.

Corporate Ecosystem Services Review

The *Corporate Ecosystem Services Review* (ESR) was launched in 2008, and efforts in 2009 focused on conducting training sessions for member companies, translating the guidelines into additional languages, and working with Regional Network partners to champion ESR uptake at the local level.

Over 300 companies are thought to have used the tool, which is now available in Spanish (supported by Telefonica and Holcim), Portuguese (Brisa and BCSD Portugal), Japanese (Hitachi Chemical), French (EDF, Veolia, GDF SUEZ), and Chinese. Demand for ESR training has accelerated, with sessions being held in 2009 in Tokyo, Argentina and Washington DC (the latter involving 15 Regional Network partners).

Advocacy

The Focus Area scaled up its engagement with the Convention on Biological Diversity (CBD), most notably by preparing for the 10th Conference of the Parties to the Convention to be held in Nagoya in October 2010. The CBD Secretariat has endorsed a proposal for an International Business and Ecosystems Day sponsored by the WBCSD, IUCN and the Nippon Keidanren. The Day would be embedded in the formal agenda of COP 10, and focus on substantive actions by business and “smart” policy frameworks and mechanisms by governments to reverse ecosystem degradation and loss of critical ecosystem services.

The Ecosystems Focus Area established close links with other areas of work of the WBCSD, such as the Water Project (a number of the EVI road tests will look at water-related ecosystem services) and the Energy & Climate Focus Area, on collecting member case studies on links between land use and climate change.



Members were surveyed on tools to assess the use and value of three recent tools (Global Water Tool, the ESR, and the Sustainable Procurement of Wood and Paper-Based Products Guide) associated with corporate use of critical ecosystem services, and to get guidance on how the WBCSD can better support its members to address corporate impacts on ecosystems.

The Focus Area helped launch the Ecosystem Services Experts Directory, led by WRI, with IUCN and Earthwatch Institute. This is a public online directory that allows business leaders and governments to locate and contact specialists in ecosystem services. It is free and easy to use, allowing searches for country-specific experts in a wide range of ecosystem disciplines.

Moving forward

The Focus Area plans to provide business leadership on the expanding ecosystems and business agenda through effective partnerships, advocacy at key events and the development of policy positions reflecting member company needs and capacities. Critical themes over the next few years include:

- Ecosystem impact assessment and mitigation strategies by business, including assessing trade-offs that might exist between ecosystems and other sustainability issues
- Ecosystem valuation as an effective risk management and business development strategy
- The role of market mechanisms as a supplement to current policy frameworks and regulatory approaches to biodiversity conservation and ecosystem management.

The Focus Area will continue to promote the uptake and use of the *Corporate Ecosystem Services Review* as the primary assessment tool to be used by member companies.

It will, with support from PwC, ERM, IUCN, WRI and member companies, implement the Ecosystems Valuation Initiative and develop and release the Guide on corporate ecosystem valuation.

It will organize with IUCN and Nippon Keidanren an *International Business and Ecosystems Day* at the CBD COP 10. The Focus Area is currently scoping out two new publications: an issue brief on best practice public policy, regulatory frameworks and market mechanisms for ecosystems and an electronic document showcasing how companies are responding to the three core objectives of the CBD.

The Focus Area is also providing an e-publication of WBCSD member case studies on links between land use and climate change, which will be updated regularly.

“WBCSD member companies have the vision and the means to bring new technological solutions to the market that increase productivity while minimizing the impact on our limited natural resources. For Syngenta, the work with the WBCSD is a way to improve the dialogue among all stakeholders for a sustainable future.”

Michael Mack
CEO, Syngenta

Focus Area Core Team 2010

FACT members

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Antonio Mexia
Yasuji Nagase
Markus Akermann
David Hathorn
Tom Albanese
Christopher Kirk
Michael Mack

Company

BC Hydro
EdP – Energias de Portugal
Hitachi Chemical
Holcim
Mondi
Rio Tinto
SGS
Syngenta

Country

Canada
Portugal
Japan
Switzerland
South Africa
UK
Switzerland
Switzerland

Associate members 2010

Associate members

Luis Rochartre Alvares
Christina Garcia-Orcoyen

Organization

BCSD Portugal
BCSD Spain

Country

Portugal
Spain



Hydro power

Water

“The Global Water Tool gives a comprehensive picture of our operations’ water risks and projected exposure. It provides the basis for a sustainable management of our water footprint.”

Mark Garrett
Chief Executive Officer, Borealis

Water is a critical sustainable development issue, right alongside energy, food and land security, and climate change. The fifth World Water Forum, held in March 2009 in Istanbul with over 30,000 participants, pushed water higher up the political agenda. The WBCSD has helped bring the issue firmly onto the corporate radar screen over the past 10 years, and is helping make it a higher priority for governments and civil society.

The WBCSD was at the Forum because it believes business must be part of the solution to the world’s water crisis, and it worked closely with other business organizations such as AquaFed, the International Chamber of Commerce and Regional Network partner BCSD Turkey. The Council provided a strong business voice by facilitating corporate participation in many sessions, including Ministerial Roundtables, and having a pavilion. Business’ participation and messages were officially recognized.

Action

The Water Project launched the report *Water, Energy and Climate Change: A contribution from the business community* in early 2009 to encourage the linking of water and energy in the global climate negotiations. It demonstrates, through 25 case studies from such members as ITT, Royal Dutch Shell, Suncor Energy and GHD, that companies are already connecting these issues across their operations. From dry cooling in water-scarce power plants to sewage heat recovery, business is already tapping into the innovations and opportunities these challenges present.

The WBCSD co-convened the Water and Climate days at the Stockholm World Water Week in August and supported the closing statement urging experts to consider water at the Copenhagen climate meetings. Water has a role to play in adaptation to climate change, as well as in mitigation as it is required to produce all forms of energy and will become the limiting factor in energy generation. The water intensity of energy must be included in energy selection.



About 30 member companies attended the Istanbul Forum and the Stockholm World Water Week, including Kimberly-Clark, PricewaterhouseCoopers, Procter and Gamble and The Dow Chemical Company.

More companies are more stringently accounting for and reporting on their water use and impacts. Many new global initiatives have emerged to take on the water challenge, driven by civil society groups, governments and business. To facilitate business engagement and promote joint action, the WBCSD launched *“Water for Business: Initiatives guiding sustainable water management in the private sector”* with the International Union for Conservation of Nature (IUCN) in Stockholm. It identifies 16 approaches, ranging from guidelines and measurement methodologies to reporting and stewardship schemes or standards. One of these is the WBCSD’s Global Water Tool, developed by CH2M HILL, which helps companies manage their water-related risks.

As a founding partner of the Water Footprint Network, the WBCSD co-convened a workshop to share experience from business applications and explore links with policy development. A handful of members — Borealis, PepsiCo, The Coca-Cola Company and Unilever — are already trying out the methodology. Simultaneously, the International Organization for Standardization (ISO) has launched a process to develop a new water standard.

Moving forward

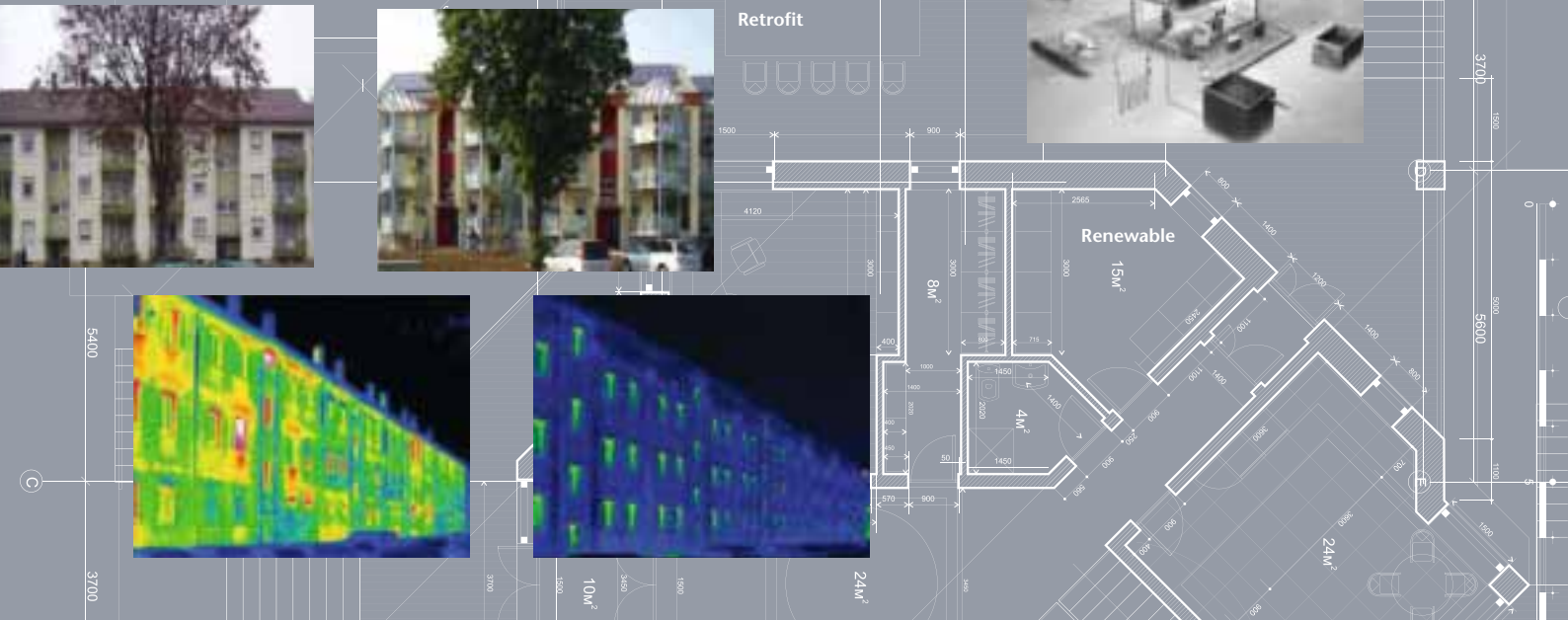
The Water Project will be playing a critical role in bringing members’ needs and inputs to these strategic, political and technical debates in 2010. The project will help collect and consolidate learnings from Water Footprint pilot testers to ensure that tools are applicable for the business community at large, and will promote a holistic approach to water, carbon and other ecological “footprinting” methods.

It will continue to advocate for water to be better included in the global energy and climate negotiations (related to both mitigation and adaptation) and demonstrate the importance of water’s links with other sustainable development issues, in particular food security and land use.

The Stockholm Industry Water Award recognizes best practice in sustainable water management from all business sectors. As a founder of the award, the Water Project will market the tool so that it becomes more globally recognized as the business water award. (See www.industrywateraward.org for more information.) And the group will, as usual, take on leading roles in the Stockholm World Water Week in September 2010.

Co-chair 2010
Mark Garrett
Steven Loranger

Company
Borealis
ITT Corporation



Energy Efficiency in Buildings

“Inside UTC the results of the work had a favorable impact on our company’s awareness of building energy and CO₂ emissions and our understanding of market perceptions for efficient buildings, has increased the emphasis of the topic in our communications and advocacy efforts, and has reshaped certain aspects of our strategic thinking.”

George David
United Technologies Corporation

Buildings represent nearly 40% of final energy used globally. If the energy consumed in building construction is included, this number grows to more than 50%.

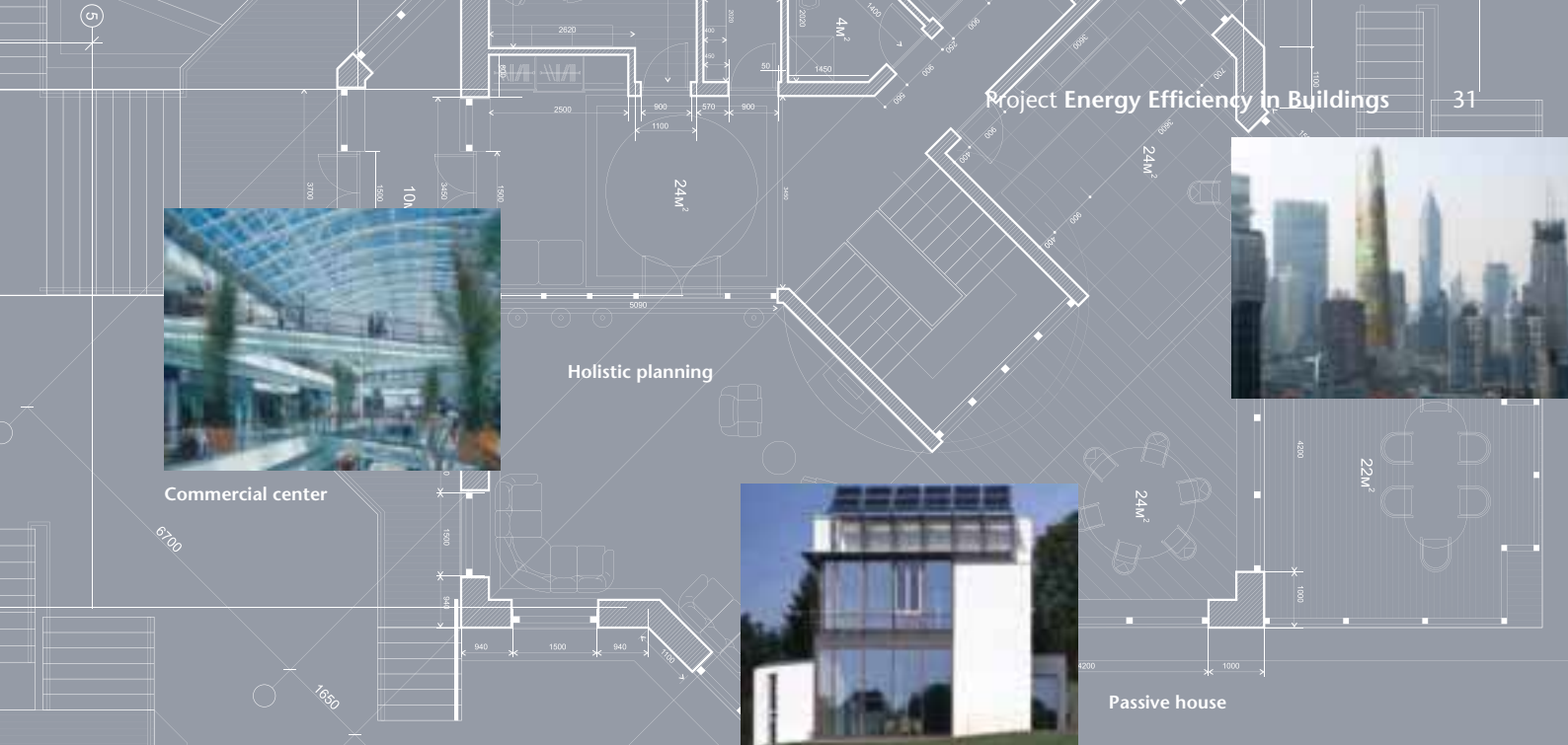
However, large and attractive opportunities exist to reduce buildings’ energy use, at a lower societal cost and a higher return than in other sectors. Many of these are favorable investment opportunities even over the short term. The International Energy Agency (IEA) estimates in its *World Energy Outlook 2009* that energy efficiency could account for more than 60% of global CO₂ emissions reductions until 2030. A significant part of this will need to come from buildings.

The Energy Efficiency in Buildings (EEB) project, established to respond to these realities, had four major results:

- It provided a market assessment of the challenges, opportunities, and perceptions of energy efficiency in buildings
- It performed a thorough qualitative and quantitative assessment of how the market could respond to energy issues in buildings based on various market and regulatory mechanisms, including codes and regulations, finance and price signals, technology and behavior
- It gained commitment from the WBCSD members to do more to improve energy use in their own buildings.
- The work of the Energy Efficiency in Buildings project was reviewed by the prestigious, Washington-based Peterson Institute for International Economics.

Action

The project launched its key report, *Transforming the Market*, in April 2009. It contains recommendations for various building segments, with an interactive Roadmap addressing most stakeholders. EEB translated its report into Chinese, French, Japanese, Korean, Russian and Spanish, and launched it through a communications strategy that included a press conference led by member company CEOs and chairpersons. This strategy resulted in more than 140 published articles worldwide on the project, and 22,000 website downloads.



EEB developed a unique simulation model and commissioned universities to gather input data to demonstrate the effects of policy changes and other mechanisms on creating energy-efficient buildings in different markets.

The scope includes new and existing buildings in Brazil, China, India, Western Europe, the US and Japan, a combination of countries and regions that covers about 80% of the world's energy used in existing buildings and about 80% of all expected new construction.

For the time horizon used, now to 2050, the project calculated the global energy use and CO₂ emissions from the sector based on the most likely implementation and adoption of energy-efficiency measures.

EEB focused attention on the huge amount of energy used in buildings during their operations, making them the largest sector emitting CO₂ worldwide. In 2009, it shared its findings with the US Department of Energy, the Chinese Ministry of Construction, the European Parliament and the European Commission. The European Commission is considering recasting the European Directive on Energy Performance in Buildings (requesting zero net energy buildings by 2019).

The EEB encouraged actions by WBCSD member companies through a Manifesto and an Implementation Guide, sent to Council members in late 2009. By agreeing to the Manifesto, the companies will help push major increases in the energy efficiency of their buildings and have an impact on local building markets.

Moving forward

The project is moving into an "advocacy and implementation phase". Interested WBCSD member companies, including former EEB core group members and partner organizations will call for action on its findings.

The Manifesto initiative will be actively promoted and its implementation at company level will be supported by a "help point". The EEB database and simulation model will be used by the core group companies and WBCSD members in their own business strategy development. They will be available to other organizations on certain conditions.

Finally, the WBCSD is planning to produce a joint roadmap for the building sector together with the International Energy Agency in early 2011.

"The conclusions of the Energy Efficiency in Buildings project have confirmed the importance of the decision made many years ago by LAFARGE to increase our effort on energy efficiency in the manufacturing process and to develop new products and construction systems that make buildings more energy efficient during their life time. Within LAFARGE, many more people have now a better understanding on how our materials contribute today and will contribute tomorrow to saving energy in buildings"

Bruno Lafont
Chairman and CEO, LAFARGE



Reforestation



Sustainable Forest Products Industry

Forests cover 30% of the world's land area, are powerful symbols of nature and biodiversity, and provide a wide range of goods and services to meet essential needs, such as climate regulation and water quality, and everyday needs such as timber and paper.

Deforestation and the permanent loss of forest cover – mainly clearing forest for farmland in developing countries – is the opposite of sustainable development. Global forestry and forest product companies can lead innovation in sustainable forest management and the sustainable production, use and reuse of forest products, including wood and paper products, renewable energy and ecosystem services.

Action

The recession hit the forestry industry hard, so the Sustainable Forest Products Industry (SFPI) working group implemented a focused program for 2009 that targeted four stakeholder groups: customers, investors, non-business forest stakeholders and climate change negotiators.

The group, with the World Resources Institute (WRI), completed the first online update of the *Sustainable Procurement Guide* to the purchase of wood and paper-based products and website. These materials cover more than 30 approaches to the responsible procurement of sustainably sourced forest products.

Promoted by the WBCSD and WRI, the guide and resource kit were downloaded nearly 28,000 times. The Guide is also available in Chinese and Spanish and has been downloaded some 1,500 times. The WBCSD and WRI will update these materials annually.

Led by PricewaterhouseCoopers (PwC), the SFPI prepared a Sustainable Forest Finance Toolkit targeting the banking and finance sector. The toolkit, which will be available online in early 2010, provides banks with decision support

tools and investment filters to help them screen investment proposals for forestry and processing operations.

The SFPI continued to resource, support and participate in events organized and led by The Forests Dialogue (TFD), including processes focused on:

- Reducing emissions from deforestation and forest degradation (REDD) in developing countries - TFD organized four dialogues to develop recommendations around REDD finance mechanisms and implementation for climate change negotiators and the Informal Working Group on Interim Finance for REDD.
- REDD Readiness - launched six events, starting in Brazil in October and Ghana in November, looking at capacity building and governance issues in REDD candidate countries
- Investing in Locally Controlled Forestry - dialogues held in Belgium, Nepal and Panama to look at investment constraints and opportunities associated with small private forest owners and forests managed by communities and indigenous people.
- A TFD Review on company-led approaches to conflict resolution in the forest sector, with the International Institute for Environment and Development, which featured several WBCSD member best practice examples.



To ensure that the UNFCCC optimizes climate mitigation and adaptation opportunities afforded by sustainably managed forests, the SFPI assisted in the release of the TFD's recommendations on investment in REDD projects during the UNFCCC Bangkok Climate Change Talks in October.

These recommendations encourage negotiators to take a "REDD plus" approach to encourage a broader range of forest management activities, and they argue for a phased approach to implementation, with three distinctive steps: 1) preparation, 2) policy changes leading to 3) performance-based payments. SFPI companies also helped promote these messages at the Copenhagen climate talks.

Working with the International Council of Forest and Paper Associations, the SFPI developed recommendations for negotiators to include the carbon benefits of harvested wood products in the texts considered in Copenhagen.

Moving forward

The SFPI will continue its involvement in all REDD Readiness dialogues organized by the TFD, including the further development of key messages. It will support a new TFD workstream looking at the free, prior and informed consent of indigenous peoples involved in forest management.

The SFPI will roll out the PwC WBCSD Sustainable Finance Tool kit, and continue to work with WRI to promote and update the sustainable procurement guides.

The Copenhagen Accord clearly recognized the crucial role of reducing emissions from deforestation and forest degradation (REDD) in addressing climate change and confirmed the establishment of a "REDD plus" mechanism to provide positive financial incentives for forest conservation, sustainable management of forests and enhancement of forest carbon sinks in developing countries.

The SFPI will continue its advocacy work on international framework conditions and regional and national policy measures that will enable the sector to maximize its contribution to tackling climate change by: expanding sustainable forest management practices; growing markets for wood, paper and biomass energy from sustainably managed, renewable sources; increasing its capture and use of recycled fiber for products and energy; and improving energy efficiency and the uptake of new low-carbon and carbon-neutral processing technology solutions throughout its value chain. This will be done directly with climate and forestry policy-makers and via multi-stakeholder processes such as The Forests Dialogue.

"The strong partnership between the WBCSD's Sustainable Forest Products Industry working group and the World Resources Institute has enabled the development of a highly credible, easy-to-use sustainable procurement guide for wood and paper-based products, which has quickly become the state-of-art information source on responsible procurement within our sector. Updated on an annual basis to keep pace with developments, this sales support tool allows customers to buy forest products with even greater confidence by selected existing approaches that meet their geographic location, product mix and company values."

John Luke Jr.
Chairman and CEO, MWV



Cement Sustainability Initiative

The Cement Sustainability Initiative (CSI) brings together 21 leading cement producers with operations in more than 100 countries. Collectively, these companies account for about 40% of the world's cement production. Over its 10-year history, the CSI has focused on understanding, managing and minimizing the impacts of cement production and use by addressing issues such as climate change, fuel use, employee health and safety, airborne emissions, concrete recycling and quarry management.

The CSI explores what sustainable development means for the cement industry and identifies actions cement companies can take, individually and as a group, to accelerate progress toward sustainable development. It provides a framework for other cement companies to become involved, and it creates the content and context for further stakeholder engagement. More recently, the initiative has started looking at the sustainability of the industry's main end-product, concrete.

Action

The CSI has worked to expand its membership to emerging markets, particularly China and India, where more than half of cement production takes place. In 2009 three Chinese cement companies joined the CSI - CNBM, Tianrui, Sinoma. Two Indian companies, Grasim and Shree Cement, have been CSI members for several years.

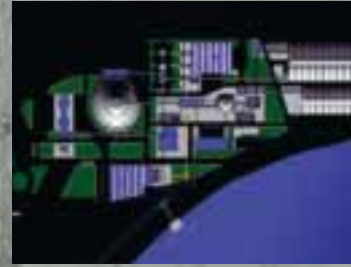
The year also saw much CSI work on climate with the publication of the report on the *Getting the Numbers Right* (GNR) database (CO₂ and energy performance of the sector), the sectoral approach modeling results, the International Energy Agency technology roadmap, and the submission of a new Clean Development Mechanism (CDM) benchmarking methodology. The CSI shows how an industry sector can help develop policy for climate mitigation; it is increasingly solicited to share its views at industry events, as well as with other audiences outside of the sector.

The sectoral approach has to do with the cement industry taking part in the global climate regime as a unified industrial sector (albeit with different



implementation practices determined by national governments). The modeling project helped improve understanding of the impacts of different carbon policies on potential emissions reductions, global trade and regional market shares in the cement sector. The CSI presented the study at the United Nations climate change meetings in Copenhagen last December.

The CSI's formulation of how a sectoral approach could work in practice, backed by data and modeling of alternative policies, has been praised by key stakeholders, notably the European Commission. Yet substantial misunderstanding of the term "sectoral approach" remains, with developing countries in particular seeing it as requiring them to adopt emission caps, which could limit their growth. In fact, this is not the case, because the sectoral approach envisions developing economies taking up emissions efficiency goals, not absolute caps on emissions.



In June, the CSI published a report on its CO₂ and energy performance database for the cement industry, in which over 50 producers worldwide participate and contribute data into the system, covering more than 800 cement installations. The CSI has also published regional breakdowns, in part as a response to a request by the United Nations Framework Convention on Climate Change (UNFCCC) Clean Development Mechanism (CDM) Executive Board.

In April, the CSI submitted a new sectoral CDM benchmarking methodology to the Board. It uses simple, standardized sector-specific benchmarks to improve the CDM's transparency and credibility while maintaining environmental effectiveness and sound business incentives to participate.

In partnership with the International Energy Agency, the CSI launched a cement technology roadmap, the first industry-specific roadmap, in December. It outlines all existing and potential technologies in the cement sector that could contribute to CO₂ emissions reductions.

The CSI's safety task force published guidelines to improve the safety of drivers and contractors, an issue identified as a particular risk for the industry. Companies have signed up to a 5-year implementation plan.

The CSI published its report on concrete recycling in July 2009, expanding its scope beyond cement production. The report, the vision of which is "zero landfill" of concrete, recommends improved data collection on construction and demolition waste and better policy incentives for recycling.

The CSI launched a new task force on concrete sustainability. It is preparing a work plan to investigate the sustainability benefits of concrete in construction.

Moving forward

In 2010 the CSI will help the new Chinese members integrate into the Initiative, including capacity building for emissions measurement and reporting. The CSI aims to expand the coverage of the GNR database to over half of global cement production by 2012 (from about 30% currently).

The CSI will refine the sectoral approach proposal, continue monitoring the climate change debate and, where necessary, develop positions on relevant topics such as standardization and offsets. It will encourage the implementation of the safety initiatives by its members, and it will develop a work program on concrete sustainability.

It plans to review its mission and structure after 10 years of successful work, in order to set the right priorities and appropriate working modalities for the next decade, particularly taking into account its increasingly global membership base.

Co-chairs 2010
Albert Manifold
Bruno Lafont
Kan Trakulhoon

Company
 CRH
 Lafarge
 Siam Cement Group



Power cuts



“As part of the WBCSD Electricity Utilities project, we have the opportunity to engage with international power generation companies to collectively move forward in addressing climate change. We cannot solve this challenge in isolation - it is after all, global warming - and we need to work with our peers around the world to find effective solutions.

By engaging in international dialogues with multiple stakeholders, we have had the opportunity to debate the necessary technology solutions and policy needs to decarbonize the electricity utilities sector within the US and globally. The involvement of the WBCSD has promoted the credibility and acceptance which allows stakeholders to participate in such an excellent exchange.”

Mike Morris Chairman, President & CEO
American Electric Power Co.

Electricity Utilities

Electricity is at the heart of the global energy challenge. Its share of overall energy use is rising as it brings crucial societal value to the economies of all countries. It is a driver of development and productivity; yet significant sustainability issues face the sector, from cutting greenhouse gas emissions to reaching those without electricity.

The Electricity Utilities Project brings together nine leading utilities from around the world to develop a deeper and more concrete understanding of these challenges and explore policy needs and the potential business contribution to solutions.

Action

The report, *Power to Change: A business contribution to a low-carbon electricity future* was released in December 2008 and was well received by international climate negotiators as providing a good example of the solutions that can be delivered by a sectoral approach, with the level of detail of the steps necessary to achieve this. It has served as a centerpiece for the project's work. The companies have refined the topics of the report, ranging from securing investments in infrastructure and increasing end-use efficiency to diversifying and decarbonizing the fuel mix, accelerating R&D, and reinforcing and smartening the grids.

In April 2009, a successful dialogue was convened in Washington DC based on the report. Over 100 energy and climate experts, including senior business executives, key policy-makers, experts and NGOs, were engaged. Participants shared their insights on the technology and financial policies needed to address climate change, as well as the challenges of dealing with global trade and competitiveness.



The Project members also worked with the International Energy Agency to contribute to its publication on *Sectoral Approaches in Electricity*.

Moving forward

Ideas for the next work phase have been discussed with the member companies and consolidated into a work plan. Further cooperation has been identified with the International Energy Agency Climate Change team around sectoral approaches. Project members also agreed to work on projects focused on implementation, such as smart grids.



Tire Industry Project

The Tire Industry Project (TIP) has been evaluating potential health and environmental impacts of chemicals commonly used in tire making and also looking at the impacts of tire wear particles generated during normal tire use.

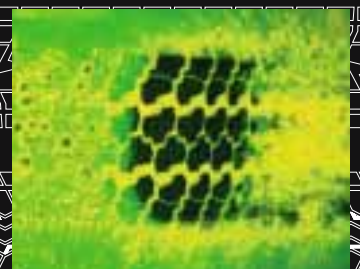
The first phase of field research – collecting tire wear particles (TWP) and analyzing their physical and chemical properties - was completed in mid-2008, and this preliminary sampling identified no significant health or environmental risks from TWP.

The group has also worked on the management of end-of-life tires (ELTs). In 2008, TIP companies developed a summary brochure and extended web brochure on ELTs, outlining current management practices around the world.

Action

ELT work continued during 2009, in consultation with trade associations and others working in this area, to try to bring together global experiences around ELT management systems, learning and then sharing lessons in countries or regions where little or no ELT management exists. The working group developed an overview of ELT management processes in major mature markets and in key emerging markets.

The TWP group completed in 2009 its third year of a planned six-year effort (up to 2012). The member companies provided resources and internal expertise to work with a toxicology specialist on TWP testing. When completed, this research is expected to provide comprehensive data for industry and stakeholders on the human and environmental impacts of tires.



Moving forward

In early 2010, the investigations into the human and ecological risks related to TWP finer particles (less than 10um) will conclude. The effectiveness of a marker to quantify TWP in the environment will be determined, enabling the tire industry to establish reliable analytical techniques for future TWP research. The project intends to develop an understanding of potential human toxicity of TWP relative to other particles in the air, allowing the tire industry to develop a platform for dialogue regarding the risk management measures of TWP and other particles.

The project will move into its next phase: field monitoring to quantify the amount of TWP in the environment, a necessary step for any credible risk assessment. It will work to identify and fill major remaining data gaps for human health risk assessment, enabling the industry and its stakeholders to set future research priorities.

The TIP CEOs will meet in May 2010 to review progress and to discuss future work areas, for example potential joint work on nanomaterials in tire manufacture. The ELT Working Group will complete an ELT management manual and will put a proposal to CEOs for TIP collaboration on initiating an ELT management system in one of the BRICS countries (Brazil, Russia, India, China and South Africa).

Co-chairs 2010
Shoshi Arakawa
Robert Keegan
Michel Rollier

Company
Bridgestone
Goodyear
Michelin



Electric car



Sustainable Mobility

Mobility in all of its forms gives rise both to sustainability issues – emissions, carbon, energy use – and plain old efficiency issues; in some places transport appears to be grinding to a halt. The Sustainable Mobility Project was established to consider how global mobility can be made more sustainable, efficient and equitable by 2030 and beyond. What strategies exist, and what is required to enable these strategies to succeed?

The Project was guided by 12 companies representing 75% of global car manufacturing capacity. It released a comprehensive report, *Mobility 2030*, that proposed seven goals to make mobility more sustainable (see www.wbcd.org/web/mobility.htm).

Action

These goals continue to inform the efforts of our member companies, which now drive sustainable mobility as an advocacy project. Members are working on the development of hybrids, clean diesel and fuel cells, as well as on fuel-efficiency improvements. One specific goal is to significantly reduce the total number of road vehicle related deaths and serious injuries. The companies are pursuing this goal through their participation in the Global Road Safety Initiative.

Members are also contributing to transport sustainability by their participation in our Energy & Climate Focus Area, which has marked transport a megatrend. They completed work on how governments can get the best out of the mobility sector, but transport sector emissions and energy trends to 2050 remain particularly alarming. Up to half again more energy will be required in the sector to sustain economic growth.

Years of strong economic growth have strengthened transport demand in the rapidly developing world. The Mobility for Development workstream of the Development Focus Area addressed the challenges of making mobility in developing countries more efficient and more accessible to all. Its regional



i car

dialogues in four cities, results of which were published in 2009 in the report *Mobility for Development*, and case studies help to underscore the ways in which mobility helps all nations develop.

Moving forward

Business and governments must work together to establish a long-term framework now to drive mobility resource allocations, with business providing management and technology skills. The Council prepared negotiating points on such issues for the climate negotiations leading to the Copenhagen climate change meetings at the end of 2009.

Today members are not only advocating those goals, but are working on the development of hybrids, all-electric cars, clean diesel and fuel cells, as well as on fuel-efficiency improvements.

Note: The Sustainable Mobility Project is now in an advocacy phase. The WBCSD draws on the messages and recommendations arising from this body of work.



Mining, Minerals and Sustainable Development

Until the economic downturn, mining and minerals were enjoying their part of the commodities boom – all the more reason to assure their social and environmental sustainability. This global sector can create sharp local impacts. It also creates opportunity, employing more than 30 million people; some 34 countries rely on minerals for at least one-quarter of all their exports.

Action

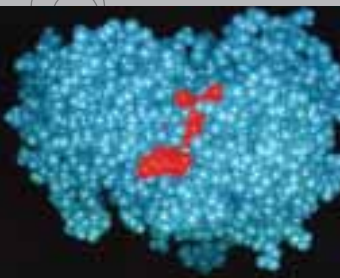
Nine mining and minerals companies originally approached the WBCSD to create the Mining, Minerals and Sustainable Development (MMSD) Project in 1999 to better understand their sustainability challenges.

They presented their final report, *Breaking New Ground: Mining, Minerals, and Sustainable Development*, at a conference in Toronto, Canada, in May 2002. In it, they offer an agenda for change and outline key sustainable development challenges facing the sector: ensuring the long-term viability of the minerals industry; control, use and management of land; using minerals to assist with economic development; making a positive impact on local communities; and managing the environmental impact of mines.

Their report recommends the creation of clear spheres of rights and responsibilities for NGOs, indigenous people, labor and commercial players. It advises firms to develop a consistent system of reporting guidelines to ensure that key aspects of company practices and performance are publicly reported and verified.

The International Council on Mining & Metals (ICMM) was established to continue leadership on improving the industry's sustainable development performance. Its work plan includes a partnership with the International Union for Conservation of Nature (IUCN) on biodiversity issues and with the World Bank on community concerns, and ongoing research support from the International Institute for Environment and Development.

Note: The Mining and Minerals and Sustainable Development project is now in an advocacy phase. The WBCSD draws on the messages and recommendations arising from this body of work and ongoing ICMM work.



Chemicals

What would a sustainable, global chemicals regime look like in a globalized market, with appropriate testing and cradle-to-grave management of chemicals and all the ingredients and processes that go into making them? Over the years, front-page stories of contaminants have made companies, the public and regulatory agencies more sensitive to the need for such a regime.

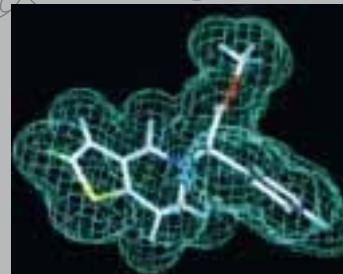
Developments in science and technology have improved our understanding of the sources, pathways and implications of particular chemicals. Combined with growing sensitivity to environmental and health issues within the public at large, the consequences of these shifts are profound. What were once environmental issues are becoming health and safety issues. And what were once compliance issues for companies have become reputational risk issues.

Action

During 2007 members of the project completing a scoping study, analyzing over 30 chemical sector initiatives and have been discussing opportunities to use the findings. The study helps companies better understand existing sector initiatives and stakeholder concerns.

The findings have provided new insights that will be used by the industry, its members and associations to further improve efforts for a more sustainable chemical industry. Chemicals are essential to sustainable development, and the sustainability agenda represents a huge opportunity for the industry. Only a fraction of chemicals are seen as an issue, and most global chemical companies operate with international standards consistent with the highest regulatory standards, often outperforming local requirements.

However, problems exist with hazard control from chemical production and transport, both in the developing world and pockets of the developed world. Where is the boundary of responsibility for large, multinational chemical companies?



Most stakeholders thought that global companies could make a stronger effort to develop solutions for the major problems and that they need to find ways to assist small and medium enterprises and state-owned enterprises around the world to implement better processes. Member companies and associations are taking the results of this work and integrating it into their actions as they continue their deliberations.

Note: The Chemicals project is now in an advocacy phase. The WBCSD draws on the messages and recommendations arising from this body of work.

Eco-Patent Commons

The Eco-Patent Commons Initiative, launched in early 2008, started slowly but rapidly gained momentum in 2009. It provides a method for companies to place environmentally beneficial patents into the public domain, and it creates a space for companies to identify areas of common interest and may promote cross-fertilization among business.

Founder member companies were IBM, Nokia, Pitney Bowes, and Sony, in partnership with the WBCSD. Initiative members pledge not to assert selected patents from their portfolios when others use them to address environmental concerns. Anyone who wants to bring environmental benefits to market can use these patents to protect the environment.

The objectives of the Eco-Patent Commons are to:

- Provide an avenue by which innovations and solutions may be easily shared to accelerate and facilitate implementation to protect the environment and perhaps lead to further innovation
- Promote and encourage cooperation and collaboration between businesses that pledge patents and potential users to foster further joint innovations and the advancement and development of solutions that benefit the environment.

Action

Four leading companies – Ricoh, Taisei, Dow, and Fuji Xerox – joined the Eco-Patent Commons in 2009. Thus a total of 11 companies – Bosch, DuPont and Xerox, having joined in 2008 – have pledged 100 eco-friendly patents. In the two years since its launch, the Initiative has tripled both membership and patents pledged.

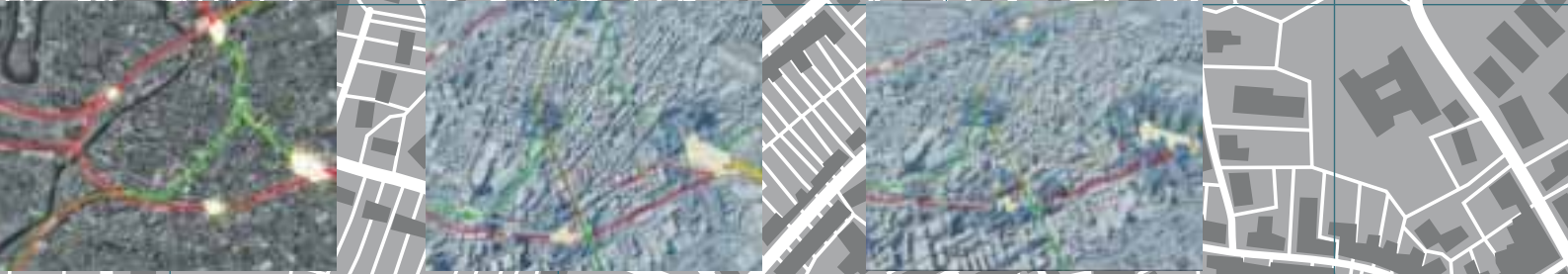
During the past two years, many of the patent holders have been contacted directly to enquire about their patents, and at least three patents have already been used by others.

Moving forward

The Eco-Patent Commons is seeking more members and a critical mass of environmentally beneficial technologies. We are seeking the support of more of our regional partners in promoting the use of the pledged patents. In 2010, members will continue to explore ways to broaden the appeal of the Commons. The WBCSD and the Eco-Patent Commons members hope the Commons can contribute to sharing innovative solutions that will help the environment.



Real-time information



Urban Infrastructure Initiative

Today more than half of the world's population lives in cities, and most of the projected population increase of around 3 billion up to 2050 is expected to be urban.

Virtually all of this urban growth will be in the developing world, while developed world cities must be retrofitted and rebuilt to manage climate change and new energy and water systems. Today cities already consume more than 75% of the world's resources. Clearly the battle for global sustainability will be won or lost in the cities, and clearly business has a bigger role in systematically tackling this new urban agenda.

Action

The WBCSD's members feel that the urban environment can benefit from systems thinking and integrated approaches. Thus a group of companies has come together to develop the Urban Infrastructure Initiative (UII). This initiative builds upon the conviction that business should get involved earlier in a city's decision-making processes. It combines work the Council has already done in areas such as energy and climate, development, energy efficiency in buildings, water electricity, and mobility, along with the capacities of individual companies.

The Energy Efficiency in Buildings project taught the Council that focusing on and even subsidising subsystems in the building sector have little effect on the overall performance of the sector stock. Transformation requires new types of instruments linked to the overall performance.

UII's holistic approaches are not restricted to technology and policy development. They will promote cooperation among the business community and cities' governments, networks and stakeholders. The WBCSD can make a difference by starting with the needs of the cities and adopting an integrated approach and seeking cross-sectoral solutions.

During 2009, the UII attracted the interest of over 90 member companies. At year's end the initiative team was working out a UII approach with 15-20 member companies forming a core group representing urban planning, buildings, infrastructure, transport, energy, water, communications technology and ecosystems. The WBCSD is also recruiting new members to create a balanced group.

UII will focus on cities' needs. The objective is to get involved at the beginning of the strategy discussion to explore how to solve the varied sustainable urbanization challenges: urban mobility, resource efficiency, socio-economic and environmental challenges. It will involve various stakeholders, including mayors, urban planners, community representatives, architects, property developers, local business, etc.

It is clear that no one company can manage the many different disciplines involved in a systemic approach, which explains why so many companies are coming together in this initiative, focusing on complementary expertise, but seeking to develop uniting, over-arching business responses to the needs of the cities.

“The WBCSD Urban Infrastructure Initiative provides the opportunity to combine the expertise of diverse industries and contribute integral solutions to promote the sustainable development of cities. This new effort will help improve the quality of life of the people who live in these communities, and it offers an innovative path to continue moving forward towards an increasingly sustainable future”

Lorenzo Zambrano

Chairman and Chief Executive Officer, CEMEX





Public transport



The WBCSD infrastructure initiative will play three different roles:

- 1 As a trusted advisor, acting as a bridge between business and cities at various levels
- 2 As a transformer, offering recommendations to transform cities effectively and propose pragmatic business operations to meet urban challenges
- 3 As an activator, offering cost-efficient sustainable urban solutions.

Member companies expect to use the initiative to work directly with implementation and to develop new business responses, with cities becoming, in effect, UII customers.

The UII will create an Assurance Group: a third party that secures the highest level of project integrity, quality, independence and accountability.

Co-chairs 2010

Armando García-Segovia
Gérard Mestrallet
Andreas Schierebeck

Company

CEMEX
GDF SUEZ
Siemens



Maritime Initiative

About 90% of world trade, measured in tonne-miles, goes by sea, and almost all products contain some sea transport in their value chain. Many studies show that ocean shipping is a comparatively environmentally friendly form of transport, but there is substantial room for improvement and the industry faces increased pressure to reduce CO₂ emissions.

Action

This initiative aims to:

- Lead a sector transformation that increases energy efficiency and reduces CO₂ emissions from ship transport
- Stimulate innovative thinking and new business models affecting market demand and the supply chain
- Communicate this transformation widely.

Analysis shows that the world fleet can increase energy efficiency by at least 15-20%, thereby reducing CO₂ emissions, at no net cost through various intermodal structural, operational and technical adaptations. As new ships are being built and phased into service, the potential for energy saving increases. However, the most efficient way of triggering substantial energy efficiencies and corresponding emission reductions is to engage in a business-driven initiative where sea transport providers and leading transport users partner to identify where and how savings can be realized.

Moving forward

This initiative, although still in its scoping phase, seeks to position its work in the broader context of the carbon challenges within the full value chains of products. Workstreams being scoped include:

- An information platform on best practices and latest research focused on energy efficiency and greenhouse gas reduction measures from maritime transport and related logistics
- A business solutions platform that identifies bottlenecks currently hindering more energy-efficient maritime transport solutions, and explores how best to address these at a commercial level.

“Within the shipping fleet, we can reduce energy use and hence CO₂ by 15%.... The WBCSD Maritime Project helps companies like ours integrate the thinking around the full operational and logistics value chain into operations, thereby saving valuable time and money.”

Henrik Madsen
CEO, Det Norske Veritas

Co-chairs 2010

Henrik Madsen
Thor Jørgen Guttonsen

Company

Det Norske Veritas
Leif Høegh

designed a program for young, high-potential employees. Fundación Entorno-BCSD **Spain** established a similar program, which focused on “Corporate solutions to sustainable development”. Other capacity building examples include AccionRSE **Chile** and **Peru2021**, which provide intensive courses in Corporate Social Responsibility (CSR). Similar initiatives were being explored with the BCSDs in **Turkey** and **Malaysia**.

The successful pilot project with SNV (Netherlands Development Organization) and the BCSDs in **Bolivia, Colombia, Ecuador, El Salvador, Panama, Honduras, Nicaragua** and **Peru** is being expanded. The goal is to expand the project, which promotes business ventures with high socioeconomic benefits, into Africa and Asia. The BCSDs in **Zimbabwe** and **Mozambique** are cooperating with the local SNV offices in introducing inclusive business as a collaborative approach for companies, governments, donors and NGOs to reduce poverty sustainably. The concept is also being replicated in **Vietnam**, where a national BCSD is being established.

In **France**, Entreprises pour l’Environnement (EpE) developed scenarios for transition toward a low-carbon world in 2050. The study explores how major industrial sectors will be affected by stabilizing atmospheric CO₂ concentrations at 450 ppm.

Building on the existing information portal, the Demographic Risk Map, econsense in **Germany** launched its “Demographic Risk Atlas”, a tool that provides detailed information on the demographic location of risk in the European Union.

BCSD **Turkey** launched “Sonra”, the first publication uniquely about sustainable development in Turkey, which aims to push the issue higher up the agenda for Turkish business.

The Responsible Business Forum in **Poland** gathered in its annual report the 88 most interesting corporate good practices in four areas: workplace, marketplace, community and environment.

The **Argentine** BCSD is promoting the implementation of WBCSD’s Measuring Impact Framework among a group of member companies.

In the area of cooperating with smaller enterprises, RespACT BCSD **Austria** produced handbooks on the implementation of CSR for SMEs. Likewise, BCSD **Mongolia** promoted energy efficiency among SMEs.

Issues related to sustainable consumption have gained in relevance this year among the regional partners. Fundación Entorno-BCSD **Spain**, the Spanish Environmental Ministry and the British Embassy organized a joint Seminar on Sustainable Products and Services. AccionRSE **Chile** and some company representatives came together to discuss sustainable consumption.

Focus on the BRICS

Due to their economic, geopolitical, and environmental significance for the sustainability of the planet, Brazil, Russia, India, China and South Africa (BRICS) are of particular importance to the WBCSD. This is reflected in a continued emphasis on enhancing cooperation with our partners in these countries.

In **India** and **China**, the WBCSD participated in high-level advisory bodies: the India Council for Sustainable Development and the China Council for International Cooperation on Environment and Development (CCICED). In the latter, the WBCSD’s president co-chaired a taskforce that came up with recommendations to the government on how to embark on a path toward a low-carbon economy that were handed over to Premier Wen Jiabao following the annual meeting of CCICED in November 2009.

A WBCSD flagship advocacy event in the BRICS is the CEO Forum organized as the official curtain raiser of the Delhi Sustainable Development Summit (DSDS), in cooperation with TERI BCSD **India**. The DSDS 2009, entitled “Towards

Copenhagen: an equitable and ethical approach”, explored framework options for a future climate regime and addressed adaptation and mitigation challenges. The WBCSD also participated in the 4th Sustainability Summit organized by its other Indian partner organization, the Confederation of Indian Industry (CII).

Several other WBCSD projects operated in the BRICS. The Cement Sustainability Initiative has been focusing on **China** and **India**, which account for approximately 60% of the world’s cement consumption. The Energy Efficiency in Buildings project held seminars in **China, Brazil, India** and **Russia**. In addition, dialogues were conducted on mobility challenges and on how to sustainably satisfy the demand for energy in **China, India, Brazil** and **South Africa**.

The National Business Initiative in **South Africa**, the Vernadsky Foundation in **Russia**, the CII in **India** and the BCSDs in **China** and **India** organized local workshops on the WBCSD’s Vision 2050 Project. The final report will be launched at the CEO Forum prior to the DSDS 2010.

The WBCSD participated in BCSD **Brazil’s** bi-annual Sustentavel congress and conducted a CEO Forum on Inclusive Business and a seminar on Energy and Climate in that country.

The WBCSD continued promoting the Greenhouse Gas (GHG) Protocol, a tool jointly developed with the World Resources Institute to measure GHGs in a standardized way, in cooperation with the BCSDs and partners in **Brazil, China, India, Mexico** and the **Philippines**.

Moving forward

Priorities for the Regional Network in 2010 include strengthening the cooperation with G20 partner organizations, including a series of WBCSD “roadshows” in key countries such as **China, India, Brazil, Mexico, Australia, Japan, South Africa** and the **US**. It will engage more with the business community in the **Middle East**, given the importance of the region for global stability and energy supply.

The Regional Network will also replicate successful pilot projects, such as the **Latin American** inclusive business initiatives, and will promote worldwide application of WBCSD tools, including the GHG Protocol, the Corporate Ecosystems Services Review, Measuring Impact Framework, and the Global Water Tool.

Regional Network contact list (by region, as at January 2010)

AFRICA

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Business Council of Australia
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www.bca.com.au



Communications

2009 may well be remembered as the year that sustainable development captured the attention of the world's news media. The confluence of concerns about the world's changing climate, and its ailing economy, brought a flurry of news reports and articles about the green economy and how to achieve it. This, of course, means that the need for clear, consistent communications is more important than ever.

The WBCSD's communications team works not only to communicate but also to help the Council's Focus Areas, Projects and Initiatives advocate solutions, reaching out to governments, civil society, business leaders and the general public. To oversee this advocacy, and provide strategic guidance, the WBCSD has established an Advocacy Team. This team complements the Communications Department, the staff of which continues to manage the publications, reports and documents, including the writing, editing, design, printing and distribution of documents, as well as a comprehensive website, seven e-newsletters of diverse and informative content, and an active media relations outreach.

Getting the messages out

Another 24 reports and other documents were added to the list of publications the WBCSD has produced, some in partnership with other organizations, such as the *Cement Technology Roadmap 2009: Carbon emissions reductions up to 2050* with the International Energy Agency.

Among other new publications were:

- *Towards a Low-Carbon Economy*: A business contribution to the international energy & climate debate, aimed at sharing business experience in technology development and deployment, finance and carbon markets, cooperative sectoral approaches and adaptation and proposes policy recommendations for a future agreement
- *Transforming the Market: Energy Efficiency in Buildings*, the final report of the Energy Efficiency in Buildings project
- *Corporate Ecosystem Valuation*, which builds the business case for companies to employ corporate ecosystem valuation as a decision-support tool.

We also released an updated interactive CD-ROM cataloguing all of the Council's publications from its founding in 1995, including all available translations.

Sustain

In cooperation with the Energy and Climate and Development Focus Areas we produced another special double issue of *Sustain*, our flagship magazine. With the theme "Energizing Development in a Changing Climate", the magazine highlights the important links between energy, climate and development, and includes case studies showing how companies are supporting development while spurring a move toward a global low-carbon economy.

Elevating our media profile

The WBCSD has been in the news throughout the year; indeed, our media monitoring service tracked more than 5,000 mentions of the Council, its staff or work. The strategy through the year has been to maintain our strong links with trade publications, business publications, environmental and business websites, and policy journals. However, we also embarked upon sustained outreach to mainstream news media and have been rewarded with mentions in the *Wall Street Journal*, the *Financial Times*, the *New York Times*, the *Guardian*, *Time*, *Forbes*, *Fortune*, *Reuters*, *Bloomberg*, *Dow Jones Newswire*, the *International Herald Tribune*, *CNN*, *CNBC*, *BBC*, *Le Monde*, *Agence France Presse*, the *People's Daily*, *Business Week*, *Europe's World*, the *Sunday Times*, and many others, including a significant amount of media in languages other than English.

www.wbcsd.org

The leading resource on business and sustainable development, www.wbcsd.org informs about the WBCSD's activities, publications and tools. It also portrays WBCSD member achievements against the backdrop of a rich selection of international media news related to sustainable development. WBCSD electronic newsletters continue to enjoy double-digit growth with some 115,000 total subscriptions.

To build on the website's success and further its outreach, a comprehensive re-development and re-design was initiated in 2009 and is due for completion in 2010. Other channels, such as the WBCSD's YouTube channel and our blogs, The President's blog, the EEB (Energy Efficiency in Buildings) blog and the Inclusive Business blog, also contribute to expanding and reinforcing the WBCSD's messages.

WBCSD and Com+

The Com+ Alliance, a grouping of professional communicators who work for sustainable development around the world, was co-founded by the WBCSD in 2003. The WBCSD hosts and manages the COM+ website, and was instrumental in the site's redesign this year.

News and content partnerships 2010

AFP - Agence France Presse	Paris, France
Africa Renewal	New York, United States
CSR China	Hong Kong, China
E&E Publishing	Washington, D.C., United States
ENDS Europe Daily	London, United Kingdom
Environmental Finance	London, United Kingdom
EurActiv.com	Brussels, Belgium
Financial Times	London United Kingdom
GreenBiz.com	Washington, DC, United States
GLOBE-Net	Vancouver, Canada
ICTSD	Geneva, Switzerland
International Trade Forum	Geneva, Switzerland
IPS - Inter Press Service Europa	Berlin, Germany
IRIN - Integrated Regional	Geneva, Switzerland
Information Networks	
Lexis Nexis	Munster, Germany
PointCarbon	Washington D.C., USA
Science and Development Network	London, United Kingdom
Socialfunds	Brattleboro, VT, United States
Sustainable Development International	London, United Kingdom
Thomson Reuters	London, United Kingdom

Partnerships and Alliances

Business organizations

Aquafed	Paris, France
Arab Union for Cement & Building Materials	Damascus, Syria
Business Action for Water	Paris, France
Business and Industry Advisory Committee (BIAC)	Paris, France
Business Europe	Brussels, Belgium
Confederation of European Paper Industries	Brussels, Belgium
European Chemical Industry Council (CEFIC)	Brussels, Belgium
European Roundtable	Brussels, Belgium
Fundación Latinoamérica Posible	San José, Costa Rica
Global e-Sustainability Initiative	Brussels, Belgium
International Aluminum Institute (IAI)	London UK
International Business Leaders Forum (IBLF)	London, UK
International Chamber of Commerce (ICC)	Paris, France
International Council of Forest and Paper Associations (ICFPA)	Sao Paulo, Brazil
International Emissions Trading Association (IETA)	Geneva, Switzerland
World Energy Council (WEC)	London, UK
World Steel Association	Brussels, Belgium

Forums

Copenhagen Climate Council	Copenhagen, Denmark
The Conference Board	New York, USA
United Nations Forum on Forests (UNFF)	New York, USA
World Economic Forum (WEF)	Geneva, Switzerland

Governmental and intergovernmental organizations

Asia-Pacific Partnership	Washington, DC, US
European Union	Brussels, Belgium
Intergovernmental Panel on Climate Change (IPCC)	Geneva, Switzerland
International Energy Agency (IEA)	Paris, France
International Finance Corporation (IFC)	Washington, DC, USA
Inter-American Development Bank (IDB)	Washington, DC, USA
Organization for Economic Cooperation & Development (OECD)	Paris, France
SNV Netherlands Development Organization	The Hague, Netherlands
United Nations Convention on Biological Diversity (UN CBD)	Montreal, Canada
United Nations Development Programme (UNDP)	New York, USA
United Nations Environment Programme (UNEP)	Geneva, Switzerland
United Nations Framework Convention on Climate Change (UNFCCC)	Bonn, Germany
United Nations Global Compact	New York, USA
UN-Water	Rome, Italy
The World Bank	Washington, DC, USA
World Health Organization (WHO)	Geneva, Switzerland
World Trade Organization (WTO)	Geneva, Switzerland

Institutes, universities and initiatives

Com+ Alliance	Moravia, Costa Rica
The German Marshall Fund of the United States	Washington, DC, USA
Global Footprint Network (GFN)	Oakland, USA
Global Reporting Initiative (GRI)	Amsterdam, Netherlands
International Institute for Environment and Development (IIED)	London, UK
International Institute for Sustainable Development	Winnipeg, Canada
International Organization for Standardization (ISO)	Geneva, Switzerland
International Risk Governance Council (IRGC)	Geneva, Switzerland
Lawrence Berkeley National Laboratory	Berkeley, USA
Peterson Institute for International Economics	Washington, DC, USA
Stockholm International Water Institute (SIWI)	Stockholm, Sweden
United Nations Foundation	New York, USA
Voluntary Carbon Standard	Washington, DC, USA
Water Footprint Network	Enschede, Netherlands
World Resources Institute (WRI)	Washington, DC, USA
Yale University School of Forestry and Environmental Studies	New Haven, USA

Non-governmental organizations

AccountAbility	London, UK
Conservation International	Arlington, USA
Earthwatch Institute	Oxford, UK
The Forests Dialogue (TFD)	New Haven, USA
The International Union for the Conservation of Nature	(IUCN)
The Nature Conservancy (TNC)	Gland, Switzerland
Oxfam	Arlington, USA
WWF International	Oxford, UK
	Gland, Switzerland



Membership and Governance

As a global CEO-led business coalition of some 200 companies, our mission is to catalyze the kind of change that will move us to a sustainable path and thereby support the business licence to operate, innovate and grow.

Member companies work with governments and civil society to create the framework conditions that will enable business to develop innovative solutions with the speed and scale needed. Encompassing a wide range of industries, the WBCSD is perfectly positioned to explore the intersections between some of the world's toughest problems and to seek integrated, systemic solutions to complex sustainability challenges.

In addition to providing a business perspective on sustainable development, members also work with other companies and sectors to better integrate sustainability into their strategy and operations. They look at a broad spectrum of solutions: at the product and company level, within and across sectors, including the full value chain from suppliers to customers.

Membership

Membership in the WBCSD is by invitation of the Executive Committee, comprising 13 member company CEOs and 3 honorary members. They seek a rich geographic and sectoral mix of companies to help us tap a deeper seam of understanding and solutions to sustainability challenges. At an individual company level, they look for a clear commitment to sustainable development and the capacity to advance our agenda and enhance our reputation.

As economic, demographic and geopolitical shifts from the G8 to the G20 gain momentum, we continue to focus on strengthening the membership in key emerging economies, with a particular emphasis on the BRICS (Brazil, Russia, India, China and South Africa), together with the Middle East and Asia.

Members collaborate by contributing time, brains and experience, driving our agenda through hands-on engagement and through initiating new areas of investigation and advocacy. They do this through active involvement in working groups, or by providing secondments and associates to the WBCSD on a full or part time basis.

Our work is shaped by the personal commitment of Council Members (CEOs or equivalent), who influence policy positions and steer the strategic direction of each focus area and project. They meet once a year to assess the vital issues linking business and sustainable development and to fine-tune our priorities.

They are supported by Liaison Delegates, senior executives who implement the work program and ensure that ideas, tools and practices generated by the WBCSD are taken up and used by the company.

Governance

The WBCSD is governed by the Executive Committee, elected by Council Members from among their peers, including a Chairman and Vice Chairmen.

Responsibility for the management of the WBCSD and the implementation of its strategy and work program lies with the President and the secretariat staff of 46 people, including one part-time and one full-time secondment and three part time associates from member companies, and one full-time secondment from IUCN.

Executive Committee 2010

Honorary Committee

Charles O. Holliday, Jr. USA
Stephan Schmidheiny Switzerland
Dr. Shoichiro Toyoda Japan

Chairman

Jorma Ollila UK
Chairman, Royal Dutch Shell

Vice Chairmen

Markus Akermann Switzerland
Chief Executive Officer, Holcim Ltd

Mukesh Ambani India
Chairman and Managing Director, Reliance Industries Limited

James E. Rogers USA
Chairman, President and Chief Executive Officer, Duke Energy Corporation

Masataka Shimizu Japan
President, Tokyo Electric Power Company

Members

Fujio Cho Japan
Chairman & Representative Director, Toyota Motor Corporation

José Manuel Entrecanales Spain
Chairman and CEO, ACCIONA

Anne Lauvergeon France
Chairman of the Executive Board, AREVA

Jacob Maroga* Rep. of South Africa
Chief Executive, Eskom Holdings Ltd.

Michael Morris USA
Chairman, President and CEO, American Electric Power

Julio Moura Brazil
Chairman, Natura International Committee

Paul Polman UK
Chief Executive Officer, Unilever

Wang Jiming China
Vice Chairman, China Petrochemical Corporation (Sinopec)

Ex officio

Rajat Kumar Gupta France
Vice-Chairman, International Chamber of Commerce

* In transition to the new chief executive



Member Companies and Council Members

by region and country, January 2010

AFRICA

South Africa

Eskom Holdings Limited
Mondi

To be announced
Hathorn, David

ASIA

China

Baosteel Group Corporation
China Ocean Shipping (Group) Company
China Petrochemical Corporation (Sinopec)
CLP Holdings Limited

Madame Xie Qihua
Capt. Wei Jiafu
Wang Jiming
Brandler, Andrew

Chinese Taipei

Chunghwa Telecom Co., Ltd.
CPC Corporation

Lu, Shyue-Ching
Chu, Shao-Hua

India

Infosys Technologies Limited
Reliance Industries Limited

Gopalakrishnan, Kris
Ambani, Mukesh

Indonesia

APRIL Group

Devanesan, A.J.

Japan

AGC Group
Bridgestone Corporation
Canon Inc.
Chubu Electric Power Co., Inc.
DENSO Corporation
Hitachi Chemical Co., Ltd.
Honda Motor Co., Ltd.
Kikkoman Corporation
Mitsubishi Chemical Holding Corporation
Mitsubishi Corporation
Nippon Paper Group, Inc.
Nippon Telegraph & Telephone Corporation
Nissan Motor Co., Ltd.
Osaka Gas Co., Ltd.
Seiko Holdings Corporation
Sompo Japan Insurance Inc.
Sony Corporation
Sumitomo Chemical Company, Ltd.
Sumitomo Rubber Industries, Ltd.
Taiheiyo Cement Corporation
The Kansai Electric Power Co., Inc.
The Tokyo Electric Power Company Inc.
The Yokohama Rubber Co., Ltd.
Toyo Tire & Rubber Co., Ltd.
Toyota Motor Corporation

Ishimura, Kazuhiko
Arakawa, Shoshi
Mitarai, Fujio
Miyaike, Yoshihito
Fukaya, Koichi
Nagase, Yasuji
Fukui, Takeo
Mogi, Yuzaburo
Kobayashi, Yoshimitsu
Ueno, Yukio
Nakamura, Masatomo
Uji, Noritaka
Shinohara, Minoru
Ozaki, Hiroshi
Hanaoka, Seiji
Sato, Masatoshi
Chubachi, Ryoji
Yonekura, Hiromasa
Mino, Tetsuji
Sameshima, Fumio
Fujii, Masumi
Shimizu, Masataka
Nagumo, Tadanobu
Nakakura, Kenji
Cho, Fujio

Korea

GS Caltex Corporation
Hankook Tire Co., Ltd.
Kumho Tire Co., Inc.
POSCO
Samsung Electronics Co.

Hur, Dong-Soo
Cho, Choong Hwan
Kim, Jong-Ho
To be announced
Lee, Yoon-Woo

Pakistan

Pakistan State Oil Company Limited

Qureshi, Irfan K.

Thailand PTT Public Company Limited Siam Cement Group (SCG)	Bunsumpun, Prasert Trakulhoon, Kan
EUROPE	
Austria Borealis AG Swarovski	Garrett, Mark Langes-Swarovski, Markus
Belgium Umicore	Leysen, Thomas
Denmark DONG Energy Grundfos Novo Nordisk A/S Novozymes A/S Vestas Wind Systems A/S	Eldrup, Anders Bjerg, Carsten Kingo, Lise Riisgaard, Steen Engel, Ditlev
Finland Fortum Corporation KONE Oyj Metsäliitto Group Nokia	Brunila Anne Alahuhta, Matti Jordan, Kari Aho, Esko
France Alstom AREVA Dassault Systèmes EDF Group GDF Suez Havas Group Lafarge SA L'Oréal Michelin Veolia Environnement	Kron, Patrick Lauvergeon, Anne Charlès, Bernard To be announced Guichard, Françoise Rodes, Fernando Lafont, Bruno Dautresme, Béatrice Rollier, Michel Proglio, Henri
Germany adidas AG Allianz SE BASF SE Bayer A.G. Continental AG Deutsche Bank AG Deutsche Post DHL E.ON AG Evonik Industries AG HeidelbergCement Henkel AG & Co. KGaA Robert Bosch GmbH Siemens AG Volkswagen AG	Dassler, Frank A. Diekmann, Michael Schwager, Harald Wenning, Werner Setzer, Nikolai Ackermann, Josef Appel, Frank Dänzer-Vanotti, Christoph Engel, Klaus Scheifele, Bernd Weinberger, Christian-Andre Marks, Peter J. Kux, Barbara Lehold, Jürgen
Greece Public Power Corporation (PPC S.A.) Titan Cement Company S.A.	Zervos, Arthouros Papalexopoulos, Dimitri
Ireland CRH plc	Manifold, Albert
Italy Eni S.p.A Italcementi Group Pirelli Tyre S.p.A. Telecom Italia S.p.A.	Scaroni, Paolo Pesenti, Carlo Tronchetti Provera, Marco Galateri di Genola, Gabriele
Luxemburg ArcelorMittal S.A.	Mittal, Lakshmi
The Netherlands Akzo Nobel nv DSM N.V. Royal Philips Electronics N.V. TNT N.V.	Wijers, G.J.(Hans) Sijbesma, Feike Provoost, Rudy Bakker, Peter

Norway

Det Norske Veritas
DnB NOR ASA
Grieg International
Leif Höegh & Co. AS
Norsk Hydro ASA
Statkraft AS
StatoilHydro
Storebrand ASA

Madsen, Henrik O.
Bjerke, Rune
Grieg, Elisabeth
Höegh, Westye
Brandtzæg, Svein Richard
Mikkelsen, Bard
Nes, Helga
Kreutzer, Idar

Portugal

Brisa Auto-Estradas de Portugal, S.A.
CIMPOR
EDP - Energias de Portugal, S.A.
Portucel Soporcel Group
Sonae SGPS, SA

de Mello, Vasco
Bayão Horta, Ricardo
Mexia, Antonio
Queiroz Pereira, Pedro
Bianchi de Aguiar, Carlos

Russia

Basic Element
JSC Gazprom

Deripaska, Oleg V.
Rusakova, Vlada V.

Spain

ACCIONA S.A.
Repsol YPF

Entrecanales, José Manuel
Brufau Niubó, Antonio

Sweden

Skanska AB
Stora Enso Oyj
Vattenfall AB

Karlström, Johan
Björklund, Elisabet Salander
Josefsson, Lars G.

Switzerland

ABB Ltd.
F. Hoffmann-La Roche AG
Firmenich SA
Holcim Ltd.
Novartis
SGS S.A.
Syngenta International AG

Steel, Gary
Humer, Franz B.
Firmenich, Patrick
Akermann, Markus
Jimenez, Joseph
Kirk, Christopher
Mack, Michael

Turkey

Borusan Holding
ECZACIBASI HOLDING

Uğur, Agah
Karamercan, Erdal

United Kingdom

Anglo American plc
BG Group plc.
BP plc.
Environmental Resources Management Group
KPMG
PA Consulting Group
Royal Dutch Shell plc.
Rio Tinto plc
Unilever N.V.
Vodafone Group Plc

To be announced
Bland, Charles
Conn, Iain C.
Bidwell, CBE, Robin
Hastings, Michael
Middleton, Alan
Ollila, Jorma
Albanese, Tom
Berger, Geneviève
To be announced

LATIN AMERICA

Brazil

Abril Group
Cimentos Liz
Fibria
Natura Cosméticos S.A.
Petrobras - Petroleo Brasileiro S.A.
Suzano Papel e Celulose SA
Vale
Votorantim Group

Civita, Roberto
Ramos Vasconcelos, Paulo Alexandre
Penido, José Luciano
Moura, Julio
Gabrielli de Azevedo, José Sergio
Maciel Neto, Antonio
Batista da Silva, Eliezer
Ermírio de Moraes, Fabio

Chile

Codelco
Masisa

Arellano, José Pablo
Salas, Roberto

Mexico

CEMEX

Zambrano, Lorenzo H.

Panama

Panamá Canal Authority

Alemán Zubieta, Alberto

MIDDLE EAST

Saudi Arabia
ALJ Co. Ltd. Jameel, Mohammed Abdul Latif

NORTH AMERICA

Canada
BC Hydro Elton, Bob
Suncor Energy Inc George, Richard L.

United States
3M Palensky, Frederick J.
Accenture Green, William
AECOM Technology Corporation Dionisio, John M.
Alcoa Zaidi, Mohammad A.
American Electric Power Morris, Michael
Caterpillar Inc. Owens, James W.
CH2M HILL McIntire, Lee A.
Chevron Corporation Taylor, Charles (Chuck) A.
ConocoPhillips To be announced
Constellation Energy Group Inc Shattuck III, Mayo A.
Cooper Tire & Rubber Company Armes, Roy V.
Deloitte Touche Tohmatsu Raimi, Amadou
Duke Energy Corporation Rogers, James E.
DuPont Kullman, Ellen
EcoSecurities Ltd To be announced
Entergy Corporation Leonard, J. Wayne
Ernst & Young LLP Turley, Jim S.
Exelon Corporation Rowe, John W.
General Electric Company Rice, John G.
Greif, Inc. Gasser, Michael J.
IBM Corporation Kern, Frank
ITT Corporation Loranger, Steven R.
Johnson & Johnson To be announced
Kimberly-Clark Corporation Spencer, Jan B. C.
MeadWestvaco Corporation Luke, Jr., John A.
Newmont Mining Corporation O'Brien, Richard
Oracle Corporation Le Guisquet, Loic
PepsiCo, Inc. Nooyi, Indra
PricewaterhouseCoopers LLP Powell, Ian
S.C. Johnson & Son, Inc. Stanbrook, Steven
SunGard Conde, Cristóbal
The Boeing Company Hill, Shephard
The Boston Consulting Group Heuskel, Dieter
The Coca-Cola Company To be announced
The Dow Chemical Company Liveris, Andrew N.
The Goodyear Tire & Rubber Company Keegan, Robert J.
The Procter & Gamble Company Geissler, Werner
United Technologies Corporation David, George
Weyerhaeuser Company Ballard, Ernesta

OCEANIA

Australia
BHP Billiton Limited To be announced
Commonwealth Bank of Australia Chapman, Barbara
GHD Pty Ltd Shepherd, Ian
Insurance Australia Group Wilkins, Michael
Lend Lease Corporation McCann, Steve
Woodside Energy Ltd. Voelte, Donald R.

New Zealand
The Warehouse Group Limited Tindall, Stephen

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Margaret Flaherty
Per Sandberg
Marcel Engel
Matthew Bateson
James Griffiths

President
Chief of Staff
The Business Role
Development, Regional Network
Energy and Climate
Ecosystems

President's Office

Anne-Catherine Werner, Philip Reuchlin,
Carolyne Cyr

Programs

Focus Areas

The Business Role

Development
Energy & Climate

Ecosystems

Projects

Water
Energy Efficiency in Buildings
Sustainable Forest Products Industry
Cement Sustainability Initiative
Electricity Utilities Project
Tire Sector Project
Sustainable Mobility Project
Mining, Minerals & S.D.
Chemicals

Initiatives

Eco-Patent Commons
Urban Infrastructure Initiative
Maritime Initiative

Regional Network

Regional Network

Communications

Communications

Member Relations

Member Relations
Member Administration

Finance & Administration

Finance & Administration

IT Management

Program Management

Per Sandberg

Marcel Engel
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James Griffiths
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James Griffiths
Howard Klee
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Christian Kornevall
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Béatrice Paccard (HR & Accounts)
Salih Brysam

Member companies provide an additional and highly valued contribution in the form of personnel resources. We have the benefit of full-time secondments, joining us at the WBCSD offices in Geneva, as well as part-time associates, working primarily from their company offices.

Work activities can include short-term assignments with dedicated outputs, as well as assignments involving longer term strategy and thought leadership.

Secondments (as of January 2010)

E.ON	Bernhard Grünauer	Energy and Climate Focus Area
Pakistan State Oil	Amjad Parvez Janjua	Regional Network

In addition, Mikkel Kallesoe has been seconded to the WBCSD from IUCN, working with the Ecosystems Focus Area.

We would also like to thank Li Li Leong from PricewaterhouseCoopers for her contributions to the Business Role Focus Area/Vision 2050 project during 2009.

Associates (as of January 2010)

Eskom	Mandy Rambharos	Energy and Climate Focus Area
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We would also like to recognize the contributions of the following Associates during 2009:

- Nijma Khan from Accenture on the work of the Business Role Focus Area/Vision 2050
- Emmanuelle Muhlenhover from Boston Consulting Group on the work of the Energy and Climate Focus Area
- Markus Wanko from Boston Consulting Group on the work of the Energy and Climate Focus Area

Publications released in 2009

General

WBCSD Annual Review 2008 - What a way to run the world

“What a way to run the world” is the title of the WBCSD’s Annual Review 2008. The theme was chosen almost a year ago, well before the financial meltdown proved just how badly the world was being run. As WBCSD’s Chairman, Samuel DiPiazza Jr. points out: “economic crises must remind us that sustainable development is not just about environmental or social issues but also about sound economic development.”



Publications catalogue

This interactive CD-ROM catalogues all of the Council’s publications from its founding in 1995. Regularly updated, the CD-ROM also includes all available translations.



Sustain #31 – Energizing Development in a Changing Climate

The WBCSD recognizes the urgent need for companies to support development while spurring a move toward a global low-carbon economy, the economy of the future. This edition of Sustain highlights the important links between energy, climate and development.



Regional Network

The Regional Network - Thinking globally, acting locally

The Regional Network is an alliance of some 60 CEO-led partner organizations around the world, united by a shared commitment to promoting the business contribution to sustainable development in their respective countries and regions.



Focus Areas

The Business Role

Inclusive Business Challenge

This presentation and simulation tool, developed by WBCSD Future Leaders Team, aims to help companies and non-business stakeholders understand, identify and implement inclusive business models.



Development

Inclusive Business Challenge

This presentation and simulation tool, developed by WBCSD Future Leaders Team, aims to help companies and non-business stakeholders understand, identify and implement inclusive business models.



Mobility for Development

Today’s mobility systems in rapidly developing cities are not sustainable and the situation is deteriorating, although opportunities are increasing and are an important driver of economic development, concludes the WBCSD’s Mobility for Development final report.





Mobility for Development - Executive summary

The WBCSD studied the state of mobility in four rapidly growing cities in the developing world – Bangalore, Dar es Salaam, São Paulo and Shanghai. Its final report concludes that although mobility opportunities are increasing and are an important driver of economic development in all cities, overall mobility systems are not sustainable and for poorer residents the mobility situation is deteriorating.

Energy & Climate



Tackling climate change on the ground: Corporate case studies on land use and climate change

Land-use activities are a major source and sink of global greenhouse gas (GHG) emissions. Curbing deforestation and applying sustainable land-use management practices can reduce GHG emissions, while planting trees and managing forests can help remove GHGs (mainly CO₂) from the atmosphere by sequestering them in plants and vegetation. This publication highlights the relationship between land use and climate change and uses corporate case studies to show how business is contributing solutions to address these challenges.



Towards a Low-carbon Economy - A business contribution to the international energy & climate debate

This publication aims to share business experience in technology development and deployment, finance and carbon markets, cooperative sectoral approaches and adaptation and proposes policy recommendations for a future agreement.

Ecosystems



Corporate Ecosystem Valuation: Building the business case

The world's ecosystems are under threat. Most types of natural habitats are showing signs of severe degradation, wild populations of fauna and flora are declining, and land, air and water are all becoming more and more polluted. This publication builds the business case for companies to employ corporate ecosystem valuation as a decision-support tool to improve operational efficiency and/or develop new business opportunities while reducing their environmental impacts or ecological "footprint" or building up their ecosystem assets.



Corporate Ecosystem Valuation: A scoping report

This scoping study report reaches the conclusion that any attempt to advance corporate ecosystem valuation should focus on new ways of valuing ecosystem dependencies and impacts and incorporating these values within existing financial and business planning tools, drawing where relevant on the existing methods that have been developed specifically to value ecosystem services.



Corporate Ecosystem Valuation: Issue brief

All businesses, regardless of their location on the value chain, both impact and depend on ecosystems and ecosystem services. Any attempt to advance corporate ecosystem valuation should focus on new ways of valuing ecosystem dependencies and impacts and incorporating these values within existing financial and business planning tools, drawing where relevant on the existing methods that have been developed specifically to value ecosystem services.



Tackling climate change on the ground: Corporate case studies on land use and climate change

Land-use activities are a major source and sink of global greenhouse gas (GHG) emissions. Curbing deforestation and applying sustainable land use management practices can reduce GHG emissions, while planting trees and managing forests can help remove GHGs (mainly CO₂) from the atmosphere by sequestering them in plants and vegetation. This publication highlights the relationship between land use and climate change and uses corporate case studies to show how business is contributing solutions to address these challenges.

Projects

Water

Water for Business: Initiatives guiding sustainable water management in the private sector

"Water for Business: Initiatives Guiding Sustainable Water Management in the Private Sector", jointly developed by the World Business Council for Sustainable Development (WBCSD) and the International Union for Conservation of Nature (IUCN) identifies 16 initiatives or tools, driven by business leaders, civil society and governments, which have emerged since 2006.



Water, Energy and Climate Change

Water, energy and climate change are inextricably linked. The paper lists five important policy recommendations from business to climate negotiators and policy-makers and includes 25 case studies showing how business is already linking water, energy and climate across their operations.



Water Facts and Trends - Updated

This working document provides an overview of some basic facts and societal challenges related to water. It has been developed by the WBCSD secretariat and is intended to support the ongoing dialogue within the WBCSD membership and with other stakeholders in civil society and government.



Energy Efficiency in Buildings

Transforming the Market: Energy Efficiency in Buildings

Modeling by the WBCSD shows how energy use in buildings can be cut by 60% by 2050 – essential to meeting global climate change targets – but this will require immediate action to transform the building sector. This is the central message of the report from the WBCSD's four-year, US\$ 15 million Energy Efficiency in Buildings (EEB) research project, the most rigorous study ever conducted on the subject.



Cement Sustainability Initiative

Cement Industry Energy and CO₂ Performance "Getting the Numbers Right"

The Getting the Numbers Right (GNR) system is a sector-wide global information database that provides accurate, verified data on the cement industry's CO₂ emissions and energy performance. In addition to Cement Sustainability Initiative members, CEMBUREAU, the European Cement Association, collects information from non-CSI cement plants in Europe, ensuring nearly complete coverage of all cement installations there.



Cement Technology Roadmap 2009 - Carbon emissions reductions up to 2050

This report calls for strong national policies to activate known CO₂ mitigation actions that the cement industry can take now to reduce its emissions. It also issues a call to action to develop commercially viable carbon capture and storage technologies as a method for further reducing global CO₂ emissions from the cement industry.



Recommended Good Practice for Contractor Safety

Cement Sustainability Initiative member companies are committed to giving contractor safety and employee safety equal priority. This document sets forth the commitment of Cement Sustainability Initiative members to setting an example for contractor safety management through their own activities and contract management and offers good practices that are effective in reducing contractor incidents within the cement and other industries.





Recommended Good Practice for Driving Safety

CSI member companies are committed to giving contractor safety and employee safety equal priority. This document sets forth CSI member company commitment to eliminating driving-related injuries and fatalities and offers good practices that are effective in reducing road incidents within and outside the cement industry.



Recycling Concrete - Full report and summary report

This report argues that recycling concrete reduces natural resource exploitation and waste going to landfill. It asks for an ultimate goal of "zero landfill" of concrete.



A Sectoral Approach: Greenhouse gas mitigation in the cement industry

This economic and policy modeling project is designed to improve understanding of the impacts of different carbon policies on emissions reductions, global trade and regional market shares in the cement sector. The results of the study show that cement production is likely to more than double by 2030, based on current demand forecasts.

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