

GLOBAL
STAKEHOLDER
2020
PANEL

What NGO
Leaders Want for
the Year 2020

Report of the Second
Survey of the
2020 Global
Stakeholder Panel

March 2004



THE ROCKEFELLER FOUNDATION

THE MILLS FAMILY FUND OF
THE VANGUARD FOUNDATION



CHARLES STEWART
MOTT FOUNDATION

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What NGO Leaders Want for
the Year 2020

*NGO Leaders' Views on
Globalization, Governance,
and Sustainability*

Report of the Second Survey of the
2020 Global Stakeholder Panel

March 2004

*Research Conducted for the 2020 Fund by:
GlobeScan Inc*

BACKGROUND

The 2020 Fund at the King Baudouin Foundation United States (KBFUS) is a philanthropic platform committed to accelerating progress toward a sustainable world.

Funding for the 2020 Global Stakeholder Panel (GSP) initiative has been provided by the Mills Family Fund of the Vanguard Foundation, the King Baudouin Foundation, the CS Mott Foundation, the Rockefeller Foundation, Canada's International Development Research Centre (IDRC), and Dow Canada.

The GSP initiative operates under the guidance and oversight of a Project Advisory Group comprised of representatives of the funding organizations together with senior advisors from the following respected organizations:

Ashoka

CIVICUS

International Confederation of Free Trade Unions (ICFTU)

Institute for Agriculture and Trade Policy (IATP)

Interfaith Center on Corporate Responsibility (ICCR)

International Planned Parenthood Federation (IPPF)

The 2020 Fund is also grateful for the assistance of the following network organizations that, like the members of the Project Advisory Group, have encouraged their members to participate in the GSP survey:

21st Century Trust

Accion Solidaria

Afro-Caribbean Education & Training Services

Ashoka

Asociacion Latinoamericana de Organizaciones de Promocion De la Iglesia Santa Teresita (ALOP)

Business for Social Responsibility (BSR)

CIVICUS

Clean Air Action Group

Community Philanthropy Initiative

Conference of NGOs (CONGO)

Consumer Unity and Trust Society (CUTS)

Dimitra Project

Earth Action Network

Empresa

Equal Access

Global Action Network

Human Rights Information Network (HURINET)

Human Rights Internet (HRI)

Indigenous Environmental Network

Institute for Agriculture and Trade Policy (IATP)

Interfaith Center on Corporate Responsibility (ICCR)

International Centre for Reproductive Health

International Chamber of Commerce

International Confederation of Free Trade Unions (ICFTU)

International Council for Local Environmental Initiatives (ICLEI)

International Federation of Journalists (IFJ)

International Federation of Organic Agricultural Movements (IFOAM)

International Planned Parenthood Foundation (IPPF)

International Union of Local Authorities (IULA)

Leadership for Environment and Development (LEAD)

Network Institute for Global Democratization (NIGD)

Network of Indian Environment Professionals

NGOs Coalition on Child's Rights (NCCR)

Plataforma Interamericana de Derechos Humanos, Democracia y Desarrollo (PIDHDD)

Proser Foundation

Save the Earth Network

Solidar

South Centre

Stakeholder Forum

Student Environmental Action Coalition (SEAC)

Synergos Institute

The Kabissa Community

The Simultaneous Policy

World Economic Forum's Global Leaders for Tomorrow

World Federation of United Nations Associations (WFUNA)

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EXECUTIVE REPORT

Introduction

During the months of May through September 2003, the second Global Stakeholder Panel (GSP) survey was conducted for the 2020 Fund by GlobeScan Inc. By the close of the survey, a total of 521 qualified respondents from 90 countries had responded to invitations that were sent out through a wide variety of stakeholders' networks and affiliated member organizations. While many responded on-line, mail and fax versions of the survey ensured the broadest possible participation. The survey was offered in Arabic, English, French, Spanish, and Portuguese, and covered topics identified in the first GSP survey, a report of which is available at <http://www.2020Fund.org>.

Of the 521 respondents who responded to the second GSP survey, three-quarters (74% or 386 respondents) do their work for non-governmental organizations (NGOs). The remaining respondents work for multilateral agencies, institutions, and think tanks (10%), in the public sector (8%), in the corporate sector (6%), or unions (1%). For a detailed description of the methodology, please see page 44.

The 386 responding NGO leaders have the following characteristics:

- All hold key leadership positions in their organizations or networks
- Three in ten (30%) are involved in NGOs focused on community development or organizational capacity building. One in four (24%) are involved in the protection of human rights.
- Twenty-two percent (22%) work for NGOs involved in environmental or resource issues and another two in ten (19%) are involved with children/youth/students.
- The majority of NGO leaders' work is done either at the state, provincial or country level (41%) or at the regional and global level (30%). Fewer work at the local (12%) level.
- One-quarter (24%) of responding NGO leaders come from North America, one-fifth from Africa (21%), one-fifth (21%) from either Western (17%) or Eastern Europe (4%), and one in ten from each of Asia (13%) and Latin America (12%). The rest come from the Pacific (3%) or the Middle Eastern / North Africa (4%).

Given the under-representation of leaders from the public and private sectors, this report focuses primarily on the views of the 386 NGO leaders who responded to the second survey. However, on select questions, attention is also drawn to the views of the 135 non-NGO leaders. Reporting these views is done to put in context the views of NGO leaders and compare them to the views of other sector leaders. These sector differences will be further explored in the next GSP survey that will have a more comparable distribution of respondents across sectors.

This report of second-wave findings is designed to encourage a great variety of global stakeholders to join in this transparent and iterative process designed to provide quantitative inputs to the global discourse on the subjects of globalization, global governance and capacity building.

To become involved in the third survey, please participate at:

www.2020Fund.org

or e-mail:

participate@2020fund.org

or fax your coordinates to:

+1 (416) 920-3510

or write to:

GlobeScan Incorporated

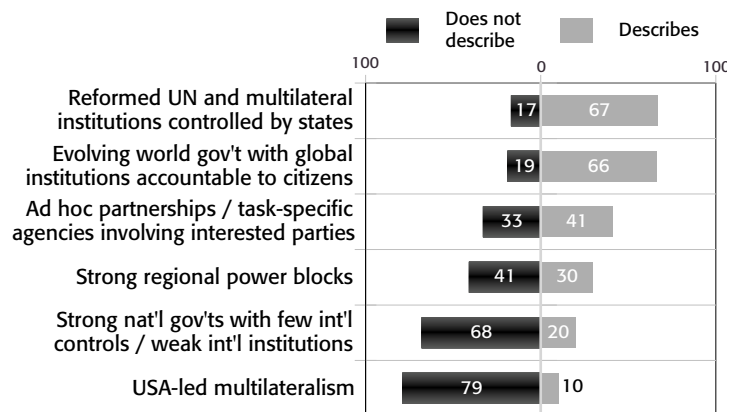
33 Bloor Street East, Suite 1005

Toronto, Canada M4W 3H1

DEAL VISION OF GLOBAL GOVERNANCE: NGO leaders strongly endorse multilateralism – either reformed and strengthened United Nations or a directly representative world government – as their preferred form of global governance in the year 2020.

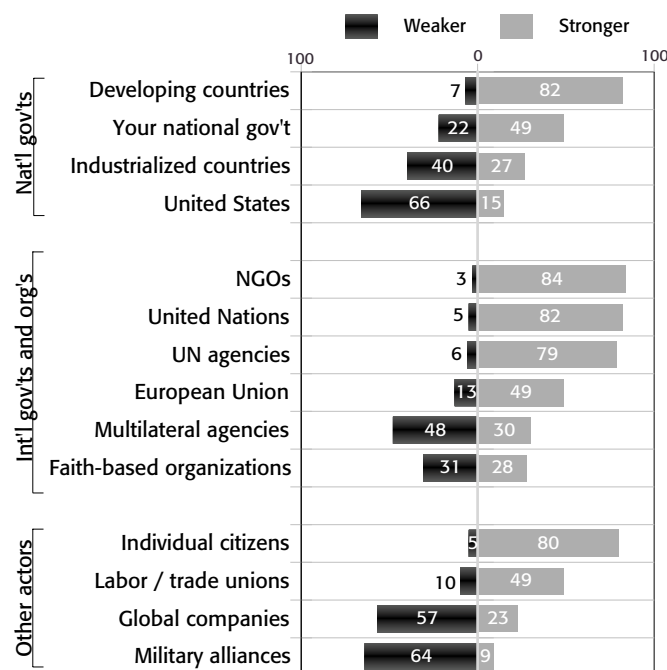
- Two-thirds of NGO leaders surveyed say that a reformed United Nations (UN) describes their ideal vision of global governance in 2020.
- A strong majority of NGO leaders say that America-led multilateralism or strong national governments with few international controls does not describe their ideal vision of governance.
- Eight in ten NGO leaders believe that developing countries should have stronger roles in the management of global affairs by the year 2020 than today.

Ideal Vision of Global Governance in 2020
 NGO Leaders, “Does Not Describe” (“1” and “2”) vs “Describes” (“4” and “5”)



Ideal Global Governance Roles in 2020

NGO Leaders, “Weaker” (“1” and “2”) vs “Stronger Role” (“4” and “5”)

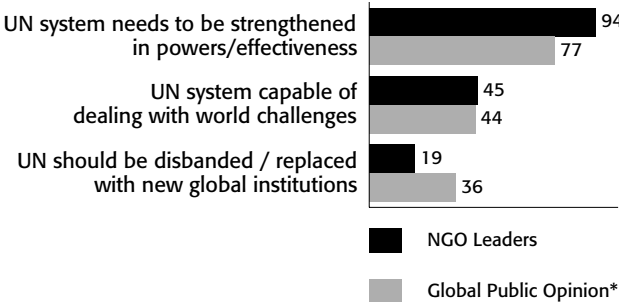


GLOBAL GOVERNANCE AND THE UNITED NATIONS: *NGO leaders are more supportive of the UN than the general public, but strongly believe the UN requires significant reforms in both its powers and effectiveness in order to deal with global challenges.*

- Fully two-thirds of NGO leaders surveyed indicate that a reformed and strengthened United Nations (UN) or, alternatively, an evolving world government that is directly accountable to citizens describes their ideal vision of global governance for the year 2020.
- Compared to global public opinion revealed in GlobeScan's Summer 2003 global poll, NGO leaders are only half as willing to contemplate disbanding the UN and replacing it; but are even more strongly in favor of significant UN reform than the public.

Global Governance and the UN

NGO Leaders vs Global Public Opinion, "Agree" ("3" and "4")



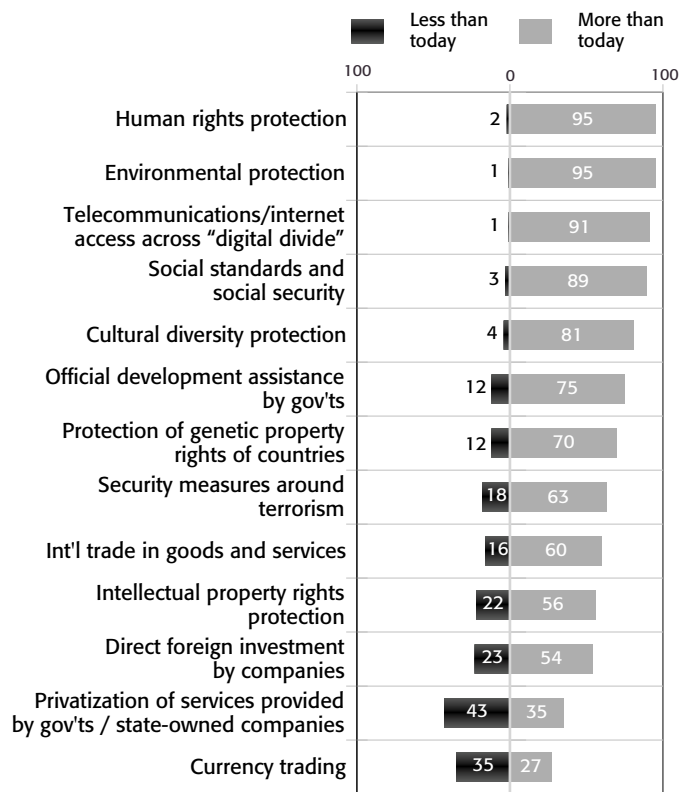
* Source: GlobeScan's global poll, fielded May-August 2003
Average of 20 countries (n=21,084)

G **LOBALIZATION:** *Most NGO leaders surveyed want fairer globalization rather than less globalization. Their focus is on a fairer distribution of wealth and a greater focus on social issues. Southern NGO leaders also support a greater emphasis on trade and investment.*

- Six in ten NGO leaders surveyed believe that globalization increases the disparity between rich and poor. Three-quarters indicate that it is very important to distribute the benefits of globalization more equitably to the poor.
- Southern NGO leaders are significantly more likely than their Northern counterparts to want more emphasis on international trade in goods and services and more likely than their Northern counterparts to believe it is very important to reduce farm and textile subsidies and import restrictions in industrialized countries.

**Achieving Globalization Ideal in 2020:
Desired Emphasis**

NGO Leaders, "Relatively Less than Today" vs "Relatively More than Today"



THE TRANSITION TO IDEAL GLOBALIZATION: *NGO leaders do not see a successful Doha Trade Round per se as important for getting to the future they want. However, they do strongly favor some of the objectives discussed in the Doha negotiations as well as other measures that they see would create more balanced globalization.*

- The initiatives that NGO leaders consider the most important are related to increasing developing countries' economic and social benefits from globalization including access to medicines.
- Completing the Doha Trade Round is considered least important by NGO leaders, suggesting they do not see the Doha Round as being able to deliver meaningful improvements in the areas they consider most important.

Ways to Achieve Ideal Vision of Globalization in 2020

NGO Leaders, "Very Important" ("5")

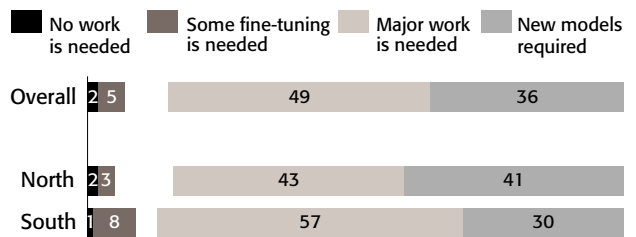


D **EVELOPMENT MODELS AND GOALS:** *A strong majority of NGO leaders think that fundamentally new thinking will be required to achieve targets set by the Millennium Development Goals (MDGs). They suggest fairness rather than growth be the priority and reject the idea that environmental protection harms the economy.*

- When asked to what extent global society needs to improve its current understanding of development in order to reduce poverty by half by the year 2015 (a Millennium Goal), one NGO leader in two say that major work is needed to improve the effectiveness of current development models. Another one-third say entirely new models are required.
- In terms of development priorities, a majority of NGO leaders surveyed think that global society should focus on reducing the rich/poor gap rather than on raising overall economic growth.
- One of the key tenants of sustainable development – that environmental protection goes hand-in-hand with sustainable economic growth – is almost universally supported by the broad range of NGO leaders surveyed.

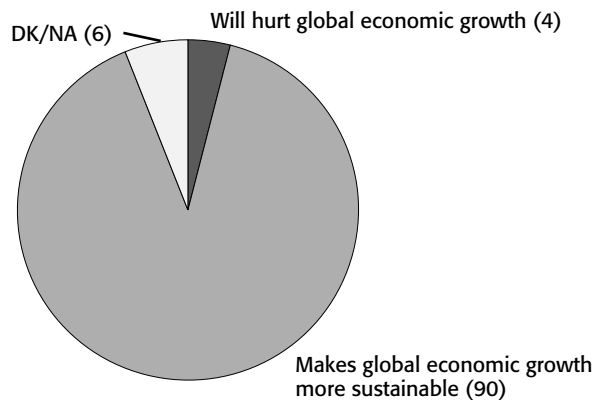
Current State of Development Models

Northern vs Southern NGO Leaders



Emphasizing the Protection of the Environment...

NGO Leaders

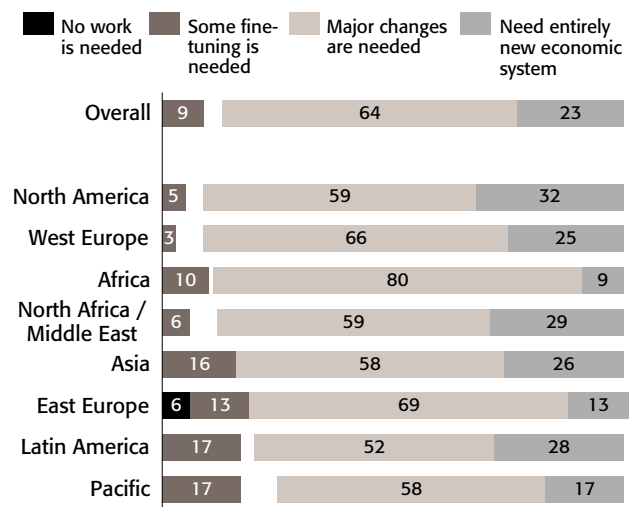


ROLE OF THE PRIVATE SECTOR: *NGO leaders are as critical of the free enterprise system as they are of existing development models, but fewer call for an entirely new model, and most value the implementation assistance private companies can provide in addressing global challenges. However, they qualify their support for public/private partnerships.*

- When asked how much work needs to be done on the free enterprise system and free market economy in order to achieve an ideal economic system by the year 2020, over six in ten NGO leaders say that “major” work is needed to improve the system. Another one in four say that an entirely new economic system is required.
- A majority of NGO leaders surveyed, especially those in the South, believe that international institutions need the support of large global companies in order to meet global challenges.
- NGO leaders do not give unqualified support to public/private partnerships. Nearly two-thirds think that a combination of partnerships and strengthening the government sector would be most effective to achieve development goals, rather than partnerships alone.

Current State of Free Enterprise System

NGO Leaders, by Region

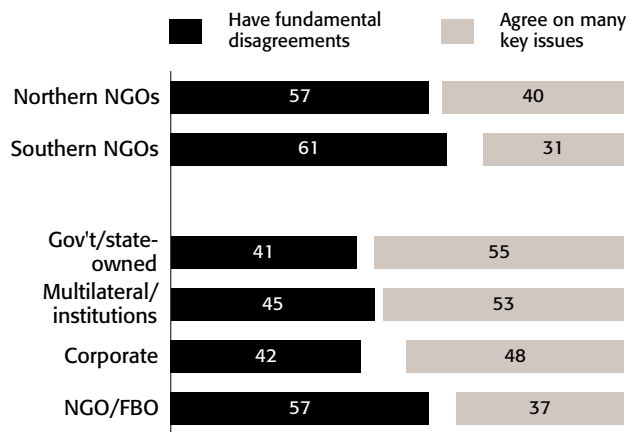


CAN A COMMON GROUND BE FOUND? Significant numbers of survey respondents do not believe that there are irreconcilable differences between stakeholders from the North and South, but NGO leaders are more likely than stakeholders from other sectors to believe there are fundamental differences between NGO, business and government stakeholders on key issues. The next Global Stakeholder Panel survey will explore whether this is true by enlisting greater participation from business and government leaders as well as NGOs.

- Asked whether they perceive fundamental agreement or disagreement on key issues between stakeholders from industrialized and developing countries, equal numbers of NGO leaders take each point of view. Leaders from Southern NGOs tend to see more disagreements than their Northern peers.
- When then asked about their perceptions of differences between stakeholders from NGOs, business and government, six in ten NGO leaders see fundamental disagreements. The accompanying chart shows the responses of not only NGO leaders but also participating stakeholders from other sectors. While the numbers of other stakeholders is small in the current sample, it appears they perceive more agreement than do NGO leaders.

Stakeholders From Government, Industry, and NGOs...

Northern vs Southern NGO Leaders and All Leaders, by Sector



INTERPRETIVE REPORT

INTRODUCTION: *The 2020 Global Stakeholder Panel (GSP) is an international research and communication initiative concerned with globalization, governance and capacity building. The GSP initiative aims to establish an inclusive, transparent process using a series of surveys, whereby a broad cross-section of stakeholders from NGO, corporate, and government sectors – a global panel – can co-evolve a compelling*

The 2020 Global Stakeholder Panel (GSP) is an international research and communication initiative concerned with globalization, governance and capacity building. The GSP initiative aims to establish an inclusive, transparent process using a series of surveys, whereby a broad cross-section of stakeholders from NGO, corporate, and government sectors – a global panel – can co-evolve a compelling vision of the priorities for action towards a sustainable world, with the results broadly shared.

The research is being designed and conducted on a non-profit basis for the 2020 Fund by GlobeScan Inc. (formerly Environics International Ltd.), a leading global issues research organization located in Toronto, Canada and London, England. The results presented in this report derive from the second in a series of surveys that was fielded between May 12th and September 5th, 2003.

This report, available free of charge, aims to encourage a great variety of global stakeholders to join in this ongoing iterative research process that seeks to provide quantitative inputs to the global discourse on the subjects of globalization, global governance and capacity building.

GlobeScan developed a three-dimensional sampling matrix to ensure that both the respondents to the 2020 GSP surveys and their responses are indicative of a broad range of global stakeholders: that is, leaders from a full range of organizations/networks

from NGOs through governments and companies, operating at all levels from local to global, across all geographic regions.

The matrix was used as a template to enlist a wide range of network organizations (listed in the Background section of the report) who are encouraging their global networks to participate in the full series of surveys. A full range of participation options, from mail and fax versions of the questionnaire to online versions in five languages (Arabic, English, French, Portuguese, and Spanish), ensure the fullest possible participation.

While leaders from the corporate, NGO, and public sector were invited to respond to the second survey, the early focus on ensuring good participation by stakeholders working in NGOs and living in developing countries has resulted in most respondents in the second survey still coming from NGOs. Particular efforts are now being made to encourage a much greater participation by business and government stakeholders in the next survey.

The first GSP survey served both an agenda-setting and agenda-scoping function, where stakeholders were asked to rate areas requiring the greatest attention to get to the world they want by the milestone year 2020. This second GSP survey aimed to understand the steps that stakeholders believe are most needed to get to their ideal vision of the year 2020.

Individuals responding to the first GSP survey identified a number of priorities within each topic area (global governance, globalization, and organizational capacity building) requiring the greatest attention in order to get to the world they want by the year 2020. Those findings were used to develop this second survey, resulting in this report of stakeholders' ideal visions of governance and globalization in the year 2020 and the initiatives, policies, and institutional actors that they think can best facilitate the transition to their ideal.

Survey Respondents

A total of 521 qualified respondents from 90 countries responded to this second 2020 GSP survey, a substantial increase from the 258 qualified stakeholders who responded to the first 2020 GSP survey (fielded between August and October, 2002).

To be qualified, respondents had to either hold a key leadership position in their organizations or be an influential individual (e.g., a network/community leader, politician, or journalist). A total of 134 unqualified respondents also participated in the second survey. In general, there was little difference between qualified and unqualified stakeholders' responses.

Based on respondents' self-selection:

- Eight in ten (81%) qualified stakeholders hold key leadership positions in their organizations or networks.
- The remaining 19 percent indicate that they are influential individuals (e.g., a network/community leader, politician, or journalist).

A wide range of countries is represented:

- One-third (33%) of respondents live in countries with relatively low GDP per capita (less than \$4,000).

- More than one in ten (14%) live in countries in the mid-range of GDP per capita (\$4,000-18,000).
- Just under one-half (49%) of respondents live in countries with relatively high GDP per capita (more than \$18,000).
- Overall, six in ten (59%) respondents live in the global North and the remaining 41 percent live in the global South. (These categories were based on GDP per capita.)

Of the 521 qualified respondents, three-quarters (74% or 386 people) identify themselves as doing the majority of their work for a non-governmental organization (NGO). The remaining 135 respondents work either for universities, research institutions or multilateral agencies, or in the business or government sector.

Given the under-representation of leaders from other sectors, this report focuses primarily on the views of the 386 NGO leaders. However, on select questions, attention is drawn to the views of the remaining 135 non-NGO leaders. Reporting these views is done to substantiate and put in context the views of NGO leaders and compare them to the views of other sector leaders. These sector differences will be further explored in subsequent surveys that will have a more comparable distribution of respondents across sectors.

The 386 NGO leaders have the following characteristics:

- Three in ten (30%) are involved in community development and organizational capacity building.
- One in four (24%) are involved in the protection of human rights.

INTERPRETIVE REPORT: INTRODUCTION

- Twenty-two percent (22%) work for NGOs involved in environment or resource issues and another two in ten (19%) are involved in children/youth/students.

These 386 NGO leaders are geographically diverse:

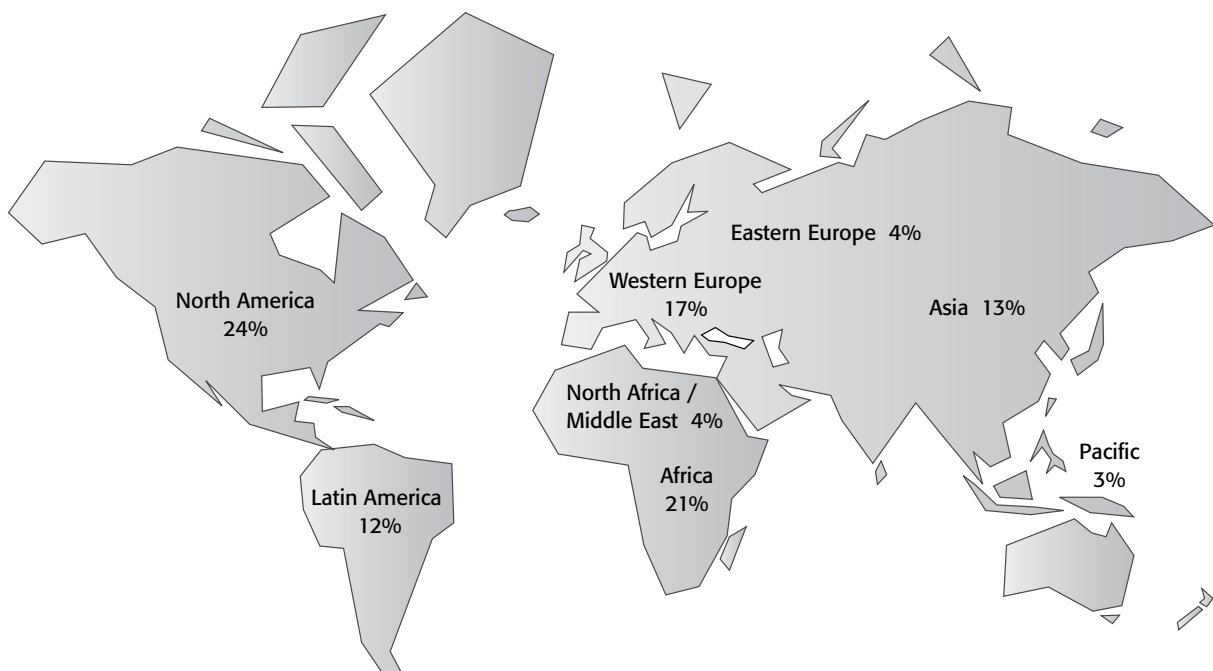
- One-quarter (24%) of NGO leaders come from North America and one-fifth from Africa (21%).
- More than one-fifth (25%) live either in Asia (13%) or Latin America (12%).
- Another one-fifth (21%) come from either Western (17%) or Eastern Europe (4%).
- The remaining NGO leaders come either from the Pacific region (3%) or from the Middle Eastern and North African region (4%).

The majority of NGO leaders' work is done either at the state, provincial or country level (41%) or at the regional and global level (30%). Few respondents say that their work is directed at the local (12%) level.

The 135 non-NGO leaders work in the following sectors (express as a percentage of the total sample of 521):

- One in ten (10%) work for a multilateral organization or an institution (e.g., academic, research institutes, or think tanks).
- Less than one in ten (8%) do the majority of their work for a state-owned company or a government (local, state/provincial, national, or European Union).

Geographical Distribution of Responding NGO Leaders



- Another 6 percent do the majority of their work for an investor-owned, for-profit company, or for a small business / farm, non-profit company, cooperative, or an alternative enterprise.

Overall, the majority of all respondents' work is directed either at the state/province/country (40%) or regional/global (30%) level. One in ten (12%) do the majority of their work at the community level, and another 14 percent work at a combination of geographic levels.

In order to differentiate views between the Global South and North, respondents' countries were categorized according to their GDP per capita. Countries whose GDP per capita was below US\$4,000 were categorized as Global South (for example, India, Nigeria, and Zimbabwe, among others). The Global North included several countries with a medium GDP per capita (greater than US\$7,000, for example Mexico, and Russia) and all high GDP per capita countries (US\$18,000+).

GLOBAL GOVERNANCE

DEAL VISION OF GLOBAL GOVERNANCE: NGO leaders strongly endorse multilateralism – either a reformed and strengthened United Nations or a directly representative world government – as their preferred form of global governance in the year 2020.

Respondents were asked to rate the extent to which various scenarios describe their ideal vision of global governance for the year 2020.

A strong majority of NGO leaders say that American-led multilateralism (79%) and the presence of strong national governments with few international controls and weak international institutions (68%) do not describe their ideal vision.

Instead, leaders are more likely to select a reformed and strengthened United Nations (UN) and multilateral institutions controlled by sovereign states (67%) or an evolving world government that is accountable directly to citizens rather than to nation states (66%) as describing their ideal vision of global governance. Overall, these NGO leaders are in less agreement that ad-hoc partnerships and task-specific agencies (41%) or strong regional

power blocks (e.g., Mercosur, EU, ASEAN, NAFTA) (30%) describe their ideal vision of governance in 2020.

NGO leaders in the global South, and especially those in Africa, are more likely than their counterparts in the North to say that a number of the given scenarios match their ideal vision, particularly the strengthening of state sovereignty (25% vs. 2%).

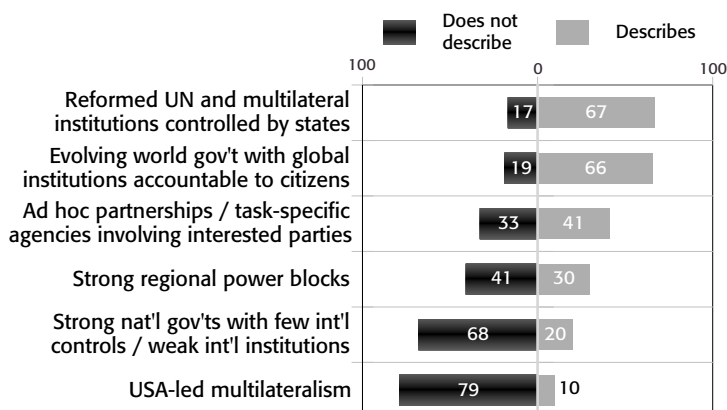
NGO Views in Context

Despite the relatively low number of respondents from other sectors (e.g., from the corporate and public sector), it is useful to highlight the views of non-NGO leaders as they help substantiate and put in context the views of NGO leaders. In future GSP surveys, with more respondents from the corporate and government sector, these sector differences can be explored in greater depth.

NGO leaders (66%) are more likely than leaders from other sectors to say that a world government directly accountable to citizens describes their ideal vision, while corporate stakeholders (48%) are most inclined to say that ad-hoc partnerships and task-specific agencies reflect their ideal vision.

Ideal Vision of Global Governance in 2020

NGO Leaders, “Does Not Describe” (“1” and “2”) vs “Describes” (“4” and “5”)



KEY ACTORS IN THE TRANSITION TO IDEAL GLOBAL GOVERNANCE

In the management of global affairs, NGO leaders think that a transition of power from incumbent to emerging actors is needed in order to realize their ideal vision of global governance in the year 2020.

Respondents were given a list of local, national, and international institutions, and asked if each should have a stronger, weaker, or identical role as today in order to achieve their ideal vision of global governance in 2020.

NGO leaders believe that NGOs (84%), developing countries (82%), and individual citizens (80%), as well as the UN (82%) and its agencies (79%) should all have stronger roles in the management of global affairs by the year 2020.

Conversely, weaker roles for the United States (66%), military alliances (64%), global companies (57%), multilateral agencies (48%), and industrialized countries (40%) are called for by these leaders.

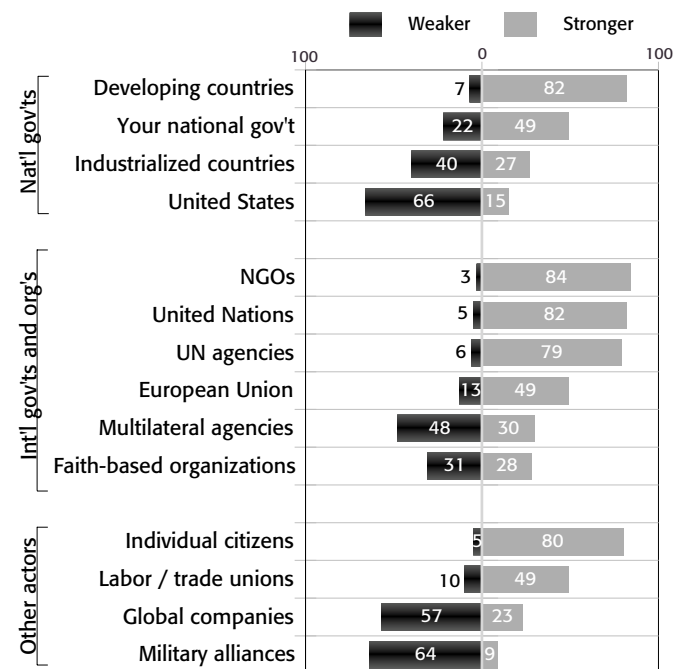
There is significant North/South variation in opinion. Southern NGO leaders are more likely than those in the North to think that NGOs (62% vs. 40%, respectively), national governments (52% to 12%), multilateral agencies (32% vs. 8%), industrialized countries (29% vs. 7%), and global companies (27% vs. 6%) should have “much stronger” roles in the year 2020 than today.

Western European (53%) and North American (42%) NGO leaders think that the American government should have a “much weaker” role, ahead of all others, and particularly African (26%) and Asian (32%) leaders.

The substantial differences across regions is indicative of the many obstacles facing global governance reforms.

Ideal Global Governance Roles in 2020

NGO Leaders, “Weaker” (“1” and “2”) vs “Stronger Role” (“4” and “5”)



NGO Views in Context

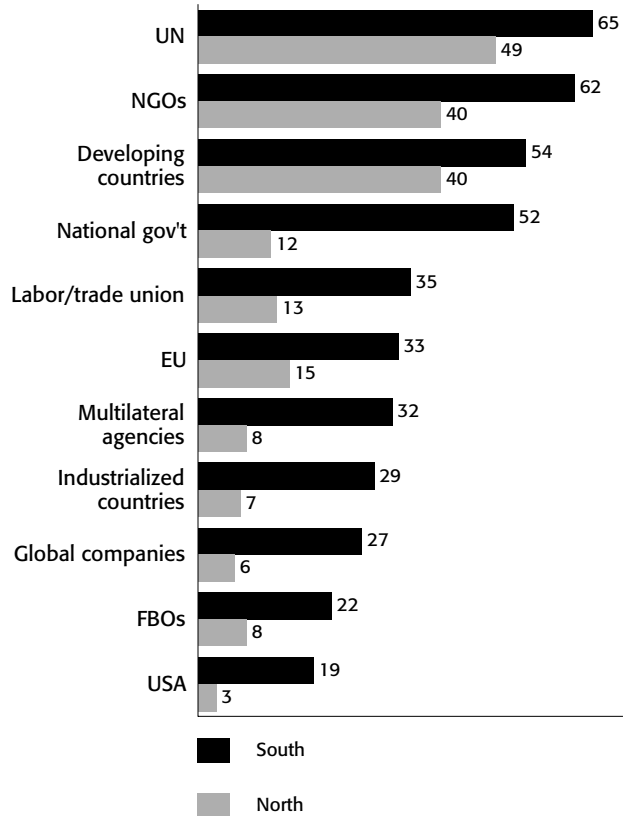
Results from other sector leaders are compared to NGO leaders' views.

Corporate stakeholders think that global companies and the USA should have stronger roles in 2020 (27%) and are the least inclined to believe NGOs and labor unions should have stronger roles (58%). Conversely stakeholders working for NGOs are the most likely to believe that NGOs should have stronger roles in the year 2020 than today (84%).

Results from the limited number of respondents from other sectors suggests a difference in views between the sectors. In subsequent GSP surveys, these differences will be more fully explored with a larger sample from the corporate and the public sector.

Ideal Global Governance Roles in 2020

Selected Actors, "Much Stronger Role" ("5"), Southern vs Northern NGO Leaders



BEST SUPPORTING ACTORS: *NGO support is perceived to be fundamental in helping international institutions deal with current world challenges.*

Respondents were asked if the active support of NGOs and other civil society organizations, large global companies, and the United States of America (USA) are needed to help international institutions deal with current world challenges. Perhaps not surprisingly, a very strong majority of NGO leaders (97%) agree that NGO support is needed.

Significantly fewer, but importantly, a majority of NGO leaders also agree that the support of large global companies (63%) and the USA (53%) is needed. In spite of their rejection of USA-led multilateralism, it is evident that NGO leaders recognize the need for American support in the management of global issues.

GlobeScan's comparative public opinion research reveals that there is no significant difference between the views of NGO leaders and the global public regarding the importance of the USA's support (53% vs. 51%), or global companies' support (63% vs. 69%) for multilateral agencies.

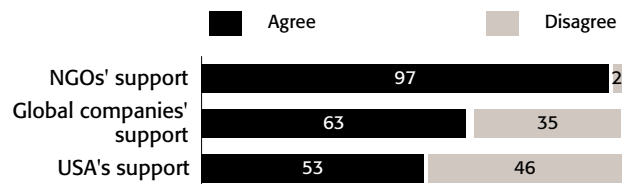
Unqualified GSP survey respondents (that is, individuals who indicate that they play a technical or support role in their organization) (47%) are less likely than qualified GSP respondents (63%) to believe that the support of global companies is needed.

NGO Views in Context

NGO leaders are more likely than all others to strongly agree that the help of NGOs and other civil society organizations is needed by multilateral agencies. Corporate leaders and those living in low GDP per capita countries are more likely than others to agree that the support of large global companies is needed.

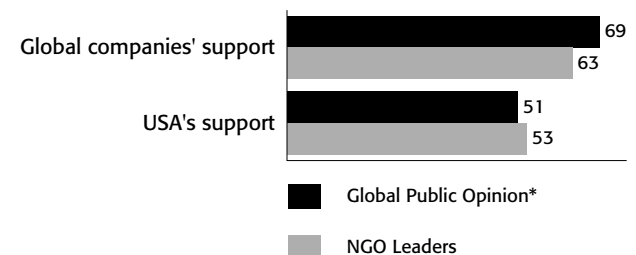
International Institutions Need Their Support to Deal with World Challenges

NGO Leaders, "Agree" ("3" and "4") vs "Disagree" ("1" and "2")



International Institutions Need Their Support to Deal with Global Challenges

NGO Leaders vs Global Public Opinion "Agree" ("3" and "4")



* Source: GlobeScan's global poll, fielded May-August 2003
Average of 20 countries (n=21,084)

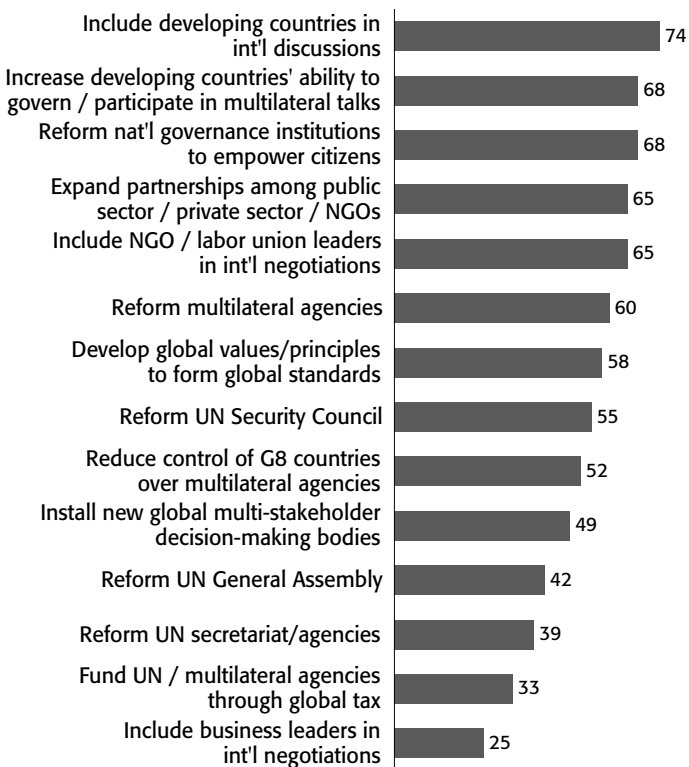
FACILITATING THE TRANSITION TO IDEAL GOVERNANCE: *NGO leaders believe that an equitable distribution of power between industrialized and developing countries is most needed to facilitate the transition to their ideal vision of global governance in 2020.*

Respondents were asked to rate the importance of a number of initiatives in helping to achieve their ideal vision of global governance in 2020.

The two most important of the 14 initiatives surveyed are 1) including representatives from developing countries in international discussions on economic, environmental, and social affairs (74%) and 2) increasing the capacity of developing countries to govern and participate in multilateral processes (68%).

Ways to Achieve Ideal Vision of Global Governance in 2020

NGO Leaders, "Very Important" ("5")



More than six in ten NGO leaders (65%) also consider the expansion of partnerships between public sector, private sector, and NGOs as very important, along with including NGOs and trade union leaders in international negotiations. Funding the UN and multilateral agencies directly through a new global tax (33%) and including business leaders in international negotiations (25%) are considered the least important.

It is evident that action-oriented strategies, through empowerment and capacity building, rather than policy reform are preferred strategies.

While respondents in the South and North agree on the importance of many issues, Southern NGO leaders (86%) are significantly more likely than their Northern counterparts (57%) to think that reforms in their own country's governance institutions are very important. For Southern leaders, domestic reform is clearly salient.

NGO Views in Context

In general, there is little difference in opinion among leaders from various sectors on most initiatives surveyed. While NGO leaders (65%) are more likely than others to think NGO and labor union leaders should be included in international negotiations, leaders from the corporate sector are no more likely than others to think that including business leaders in international negotiations is important.

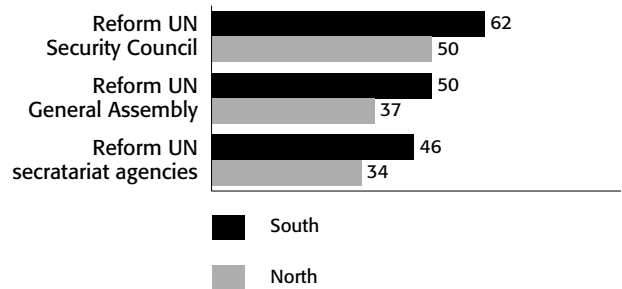
GLOBAL GOVERNANCE AND THE UN: *According to NGO leaders surveyed, while the UN requires significant reforms in its capacity to resolve world challenges, it should not be disbanded and replaced with new global institutions.*

Respondents were asked a number of questions dealing specifically with the UN and its leadership capacity. Over nine in ten (94%) NGO leaders agree that the UN system needs to be significantly strengthened in both powers and effectiveness. Further, pluralities of NGO leaders think it is “very important” that the UN Security Council (55%), the UN General Assembly (42%), and the UN secretariat and its agencies (39%) are reformed to achieve their ideal vision of global governance. Fully six in ten (60%) say the same about multilateral agencies. In all cases, Southern NGO leaders are more strongly in favor of UN reform than their Northern peers.

Less than one in two (45%) NGO leaders agree that the UN is capable of dealing with current world challenges. Despite this, only two in ten (19%) believe that the UN should be disbanded and replaced with new global institutions.

**Global Governance and the UN:
Desired Reform**

Southern vs Northern NGO Leaders, “Very Important” (“5”)



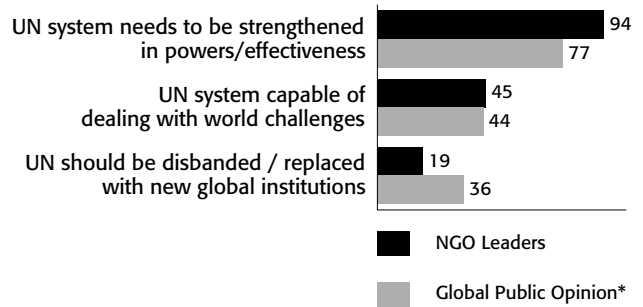
The desire for UN reform is evident among Northern and Southern NGO leaders. However, Southern leaders (25%) are slightly more likely than those in the North (14%) to believe that the UN should be disbanded and replaced with new global institutions.

This finding, which is consistent with global public opinion,* is particularly important given that a large part of the UN's work is directed toward the developing world.

While NGO leaders are as skeptical as the global public regarding the UN's capacity to manage world challenges (45% vs. 44%) in the wake of the Iraq conflict, they are much more likely than the global public to believe that the UN system needs to be strengthened in both powers and effectiveness (94% vs. 77%). As a whole, however, NGO leaders are less likely than the global public to believe that the UN should be disbanded (19% vs. 36%). This suggests that while leaders believe reforms are needed, the UN continues to have a relevant and necessary role in their ideal vision of global governance, more so than the general public.

Global Governance and the UN

NGO Leaders vs Global Public Opinion, "Agree" ("3" and "4")



* Source: GlobeScan's global poll, fielded May-August 2003
Average of 20 countries (n=21,084)

* From a GlobeScan global poll, fielded May–October, 2003

CAN A COMMON GROUND BE FOUND? *NGO leaders are divided on whether there are fundamental disagreements between stakeholders in the global North and South and between stakeholders from different sectors.*

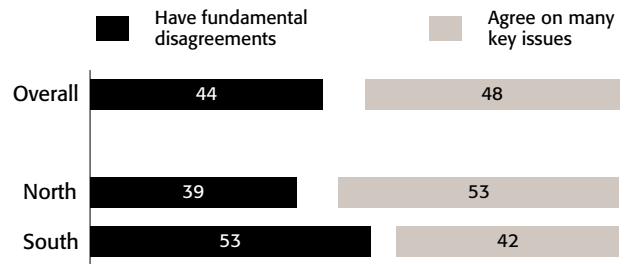
When asked whether there is fundamental agreement or disagreement on many key issues between stakeholders from industrialized and developing countries, respondents are clearly divided. One-half (48%) of NGO leaders believe that stakeholders from industrialized and developing countries agree on many key issues and a similar proportion (44%) believe that fundamental disagreements exist.

Southerners (53%) appear slightly more likely than Northerners (42%) to perceive differences, reflecting the caution that categorizes many global meetings.

Regionally, Western European (55%) and North American leaders (53%) are more optimistic than Latin Americans (37%) or Africans (40%) that there is common ground between the North and South. The survey suggests that the truth lies somewhere between these views.

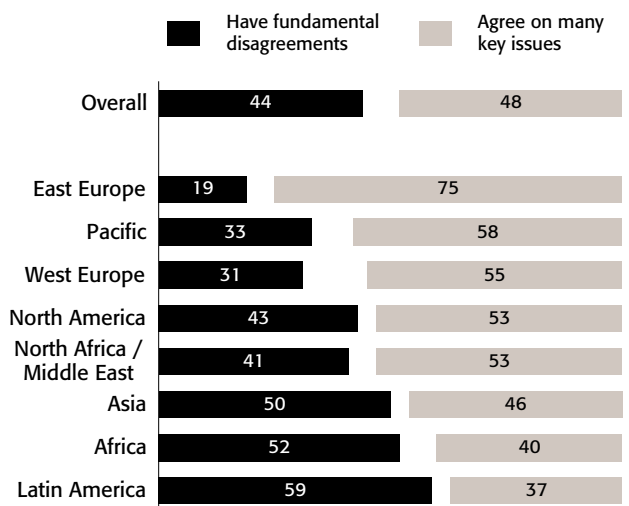
Stakeholders From Industrialized and Developing Countries...

Northern vs Southern NGO Leaders



Stakeholders From Industrialized and Developing Countries...

NGO Leaders, by Region



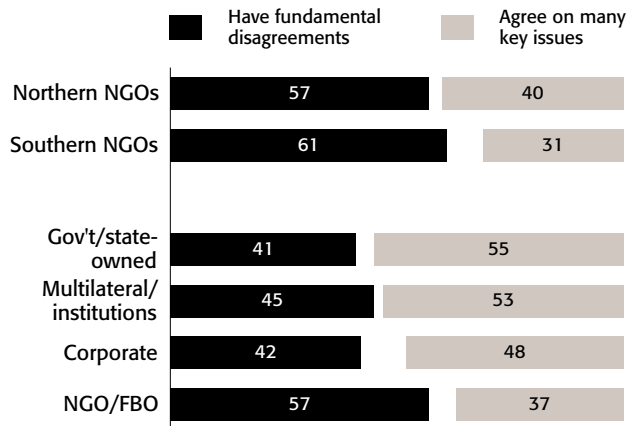
NGO leaders do not perceive as great a difference between Northern and Southern stakeholders as they do among stakeholders from business, NGOs, and government.

When asked whether there is fundamental agreement or disagreement between stakeholders from different sectors of society (e.g., industry, government, and NGOs), Northern and Southern leaders both see divisiveness, with more than one-half (57% and 61%, respectively) saying that there are fundamental disagreements between stakeholders from government, industry, and NGOs.

While differences do exist between Northern and Southern NGO leaders, it is important to stress that the findings of this survey demonstrate that broad agreement does exist on many key themes. As the number of respondents from the corporate and public sector increases on the next GSP survey, the magnitude of sectoral differences will become clearer. Current findings suggest that sectoral differences are generally greater than actual North/South differences, suggesting respondents' perceptions are accurate in this respect.

Stakeholders From Government, Industry, and NGOs...

Northern vs Southern NGO Leaders and All Leaders, by Sector



PERCEIVED DRIVERS AND EFFECTS OF GLOBALIZATION: *NGO leaders think that global society needs to focus on a more balanced distribution of wealth and on social issues rather than allow globalization to be driven mainly by corporate interests.*

Drivers

NGO leaders are more likely to think that globalization is primarily driven by the interests of global companies (61%) than it being the natural evolution of the economy (32%).

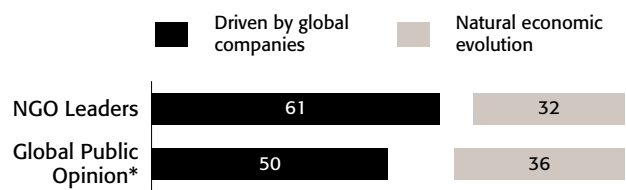
In comparison to GlobeScan’s public opinion research findings, NGO leaders (61%) are somewhat more likely than the global public (50%) to believe that globalization is driven by global companies.

NGO Views in Context

Leaders from multilaterals and institutions (38%) and from NGOs (32%) are much less likely than their corporate (55%) and government (52%) counterparts to think that globalization is the natural evolution of the economy.

Globalization is...

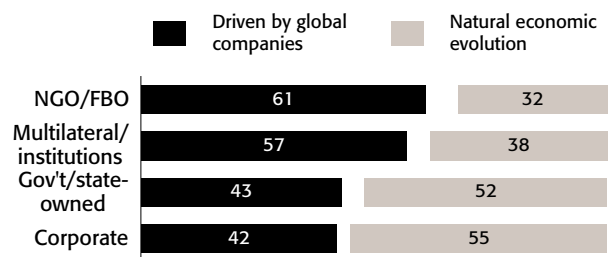
NGO Leaders vs Global Public Opinion



* Source: Global Issues Monitor 2003. Average across 22 countries (n=22,006)

Globalization is...

By Sector



Effects

Regarding the perceived economic effects of globalization, more NGO leaders think it concentrates wealth (59%) rather than bringing economic opportunities to all (26%).

There are notable regional differences. NGO leaders in Africa (41%) and Asia (34%) are among the most likely to think that globalization brings economic opportunities to all while Latin (17%) and North American (14%) leaders are the least inclined to think this way.

Comparative public opinion research shows that people in urban areas of developing countries tend to see globalization as bringing opportunities to all, while citizens in wealthy countries think that it concentrates wealth.*

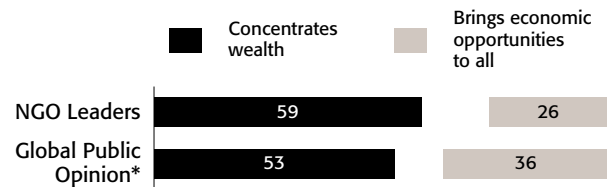
NGO Views in Context

Comparing the views of NGO leaders with those of respondents from other sectors, it appears their views on the wealth concentration effects of globalization are shared by those in multilateral agencies and institutions, while corporate and government respondents are more equally split on the issue.

In comparison to global public opinion, NGO leaders surveyed are somewhat more likely to believe that globalization is both driven by global companies (61% vs. 50%) and that it concentrates wealth among the rich (59% vs. 53%).

Effect of Globalization on Distribution of Wealth

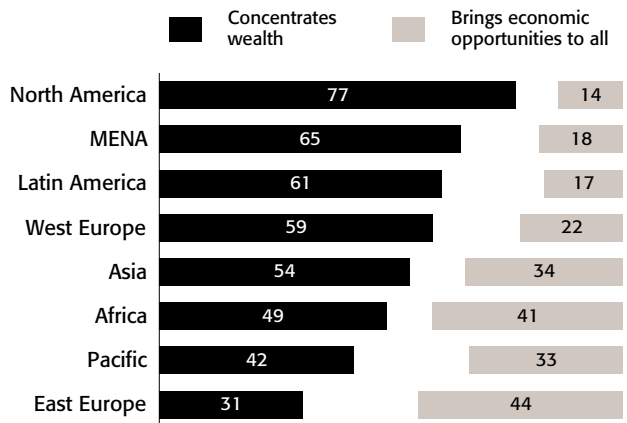
NGO Leaders vs Global Public Opinion



* Source: Global Issues Monitor 2003. Average across 22 countries (n=22,006)

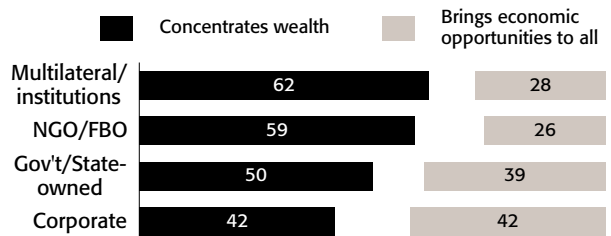
Effect of Globalization on Distribution of Wealth

NGO Leaders, by Region



Effect of Globalization on Distribution of Wealth

By Sector



*Source: GlobeScan's Global Issues Monitor 2002

DEAL VISION OF GLOBALIZATION IN 2020: *While NGO leaders wish to see greater social and environmental protection in order to realize their ideal vision of globalization in the year 2020, Southern NGO leaders also support a greater emphasis on trade and investment aspects.*

In order to understand ideal visions of globalization in the year 2020, respondents were asked to indicate whether a number of factors should be focused upon more, less, or about the same as today.

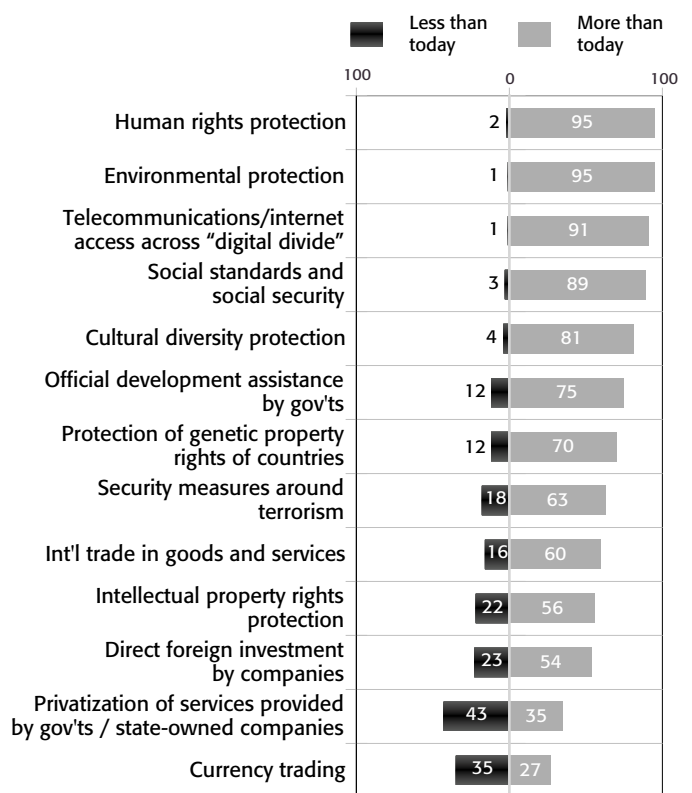
A very strong majority of NGO leaders surveyed indicate that they wish to see a greater focus on the protection of human rights (95%) and the environment (95%), as well as greater telecommunications and Internet access across the “digital divide” (91%), and social standards and social security (89%).

Of all factors surveyed, the smallest proportion of NGO leaders surveyed want more privatization (35%) and currency trading (27%). In fact, pluralities wanted less of these two activities in the future.

While there is little North/South variation on the social dimensions (such as the protection of human rights, the environment, or cultural diversity), Southern NGO leaders are significantly more likely than their Northern counterparts to want a greater focus on economic factors, such as international trade (61% vs. 27%, respectively), direct foreign investment by companies (49% vs. 16%), currency trading (25% vs. 5%), and privatization (41% vs. 8%). Mitigating terrorism is clearly also more salient to Southern stakeholders than to Northerners.

**Achieving Globalization Ideal in 2020:
Desired Emphasis**

NGO Leaders, “Relatively Less than Today” vs “Relatively More than Today”



INTERPRETIVE REPORT: GLOBALIZATION

When asked specifically whether an emphasis on environmental protection hinders economic growth or makes global economic growth more sustainable, nine in ten NGO leaders (90%) think that such an emphasis will make economic growth more sustainable.

The strength of this view, plus the fact there is little difference in opinion either regionally or by sector, suggests that all stakeholders do not see opportunity costs associated with protecting the environment.

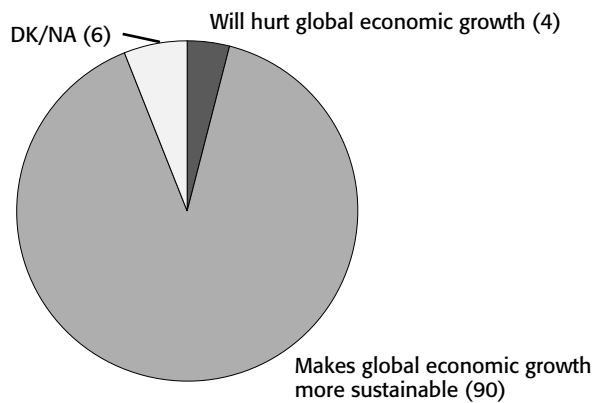
**Achieving Globalization Ideal in 2020:
Desired Emphasis on Selected Attributes**

Southern vs Northern NGO Leaders, "More than Today" ("5")



Emphasizing the Protection of the Environment...

NGO Leaders



THE TRANSITION TO IDEAL GLOBALIZATION: *NGO leaders do not see a successful Doha Trade Round per se as important for getting to the future they want. However, they do strongly favor some of the objectives discussed in the Doha negotiations as well as other measures that they see would create more balanced globalization*

Respondents were asked to rate the importance of a number of initiatives in helping to achieve their ideal vision of globalization in 2020. The initiatives that NGO leaders consider the most important are related to increasing developing countries' economic and social capacity.

These include improving developing countries' access to medicines and medical research (82%), distributing the benefits of globalization more equitably to the poor (79%), and improving the transfer of technology to developing countries (74%).

Completing the Doha Trade Round (19%) is considered least important by NGO leaders, suggesting they do not see the Doha Round as being able to deliver meaningful improvements in these areas.

Southern NGO leaders are more inclined than their Northern peers to consider "very important" those initiatives that build developing countries' capacity and further their interests.

Such initiatives include improving the transfer of technology to developing countries (84% vs. 66%), ensuring developing countries can develop policies

Ways to Achieve Ideal Vision of Globalization in 2020

NGO Leaders, "Very Important" ("5")



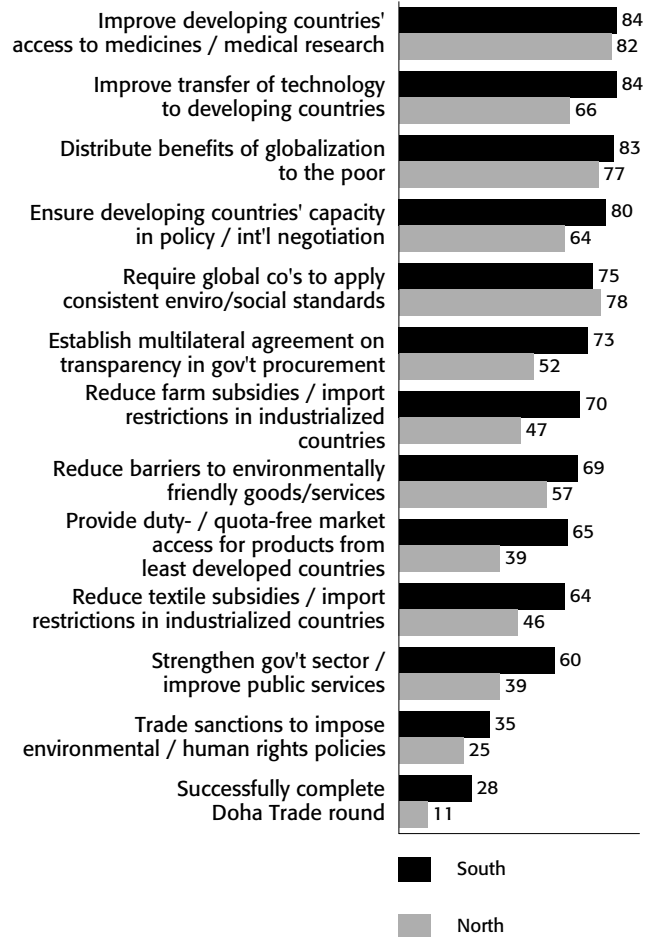
and negotiate international agreements (80% vs. 64%), and the reduction of farm (70% vs. 47%) and textile (64% vs. 46%) subsidies and import restrictions in industrialized countries.

NGO Views in Context

Corporate leaders are more likely than others surveyed to consider the successful completion of the Doha Trade Round (48%) and the reduction of farm (88%) and textile (91%) subsidies and import restrictions in industrialized countries as important to achieving their ideal vision of globalization.

Ways to Achieve Ideal Vision of Globalization in 2020

Southern vs Northern NGO Leaders, Very Important" ("5")



DEVELOPMENT MODELS

EFFICACY OF CURRENT DEVELOPMENT MODELS: *NGO leaders believe that current development models require major work, if not a complete re-invention, in order to achieve such goals as reducing poverty by half by 2020.*

Respondents were asked to what extent global society needs to improve its current understanding of factors and conditions leading to development.

Almost one-half (49%) of NGO leaders surveyed think that major work is needed to improve the effectiveness of current development models, and one-third (36%) believe that entirely new models of development are needed. Very few NGO leaders believe that either no work (2%) or only some fine-tuning is needed (5%).

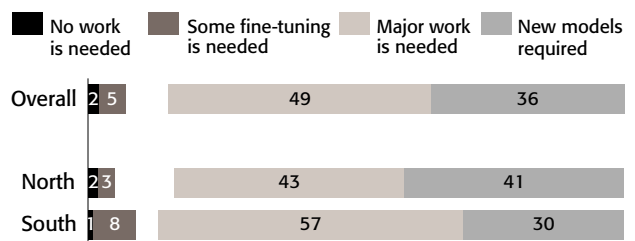
Results indicate a widespread call for innovation in the area of development.

While there are no significant differences in opinion between NGO leaders and those from other sectors, NGO leaders in the South (57%), and particularly in Africa (66%), are more likely than their Northern counterparts (43%) to believe that major work is needed in order to reduce poverty and achieve other development goals; but they are less likely to call for fundamentally new models of development (30% and 22%, respectively, compared to 41%).

Respondents were also asked whether economic growth in developing countries should be stimulated mainly through direct foreign investment by companies, or through Official Development Assistance (ODA) offered by governments. One-half (51%) say that ODA will better stimulate the economy, while one-third (33%) prefer direct foreign corporate investment.

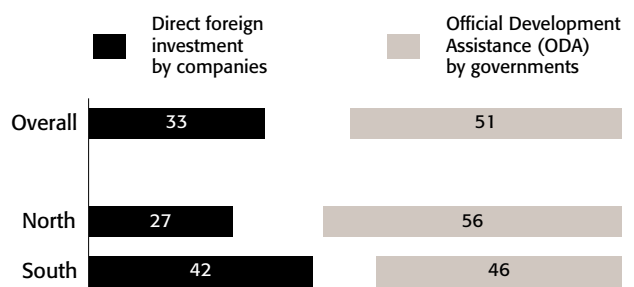
Current State of Development Models

Northern vs Southern NGO Leaders



Stimulate Economic Growth in Developing Countries by...

Northern vs Southern NGO Leaders



NGO Views in Context

Corporate leaders stand out from their counterparts in other sectors, as a majority of them (55%) choose direct foreign investment by private companies over ODA. Here, corporate leaders share similar views to leaders in the South (42%), as each are more inclined than Northern NGO leaders (27%) to prefer direct foreign investment over ODA.

PRIORITIES FOR DEVELOPMENT: *NGO leaders believe the focus of development must change from simply focusing on raising overall economic growth to focus on reducing disparities between rich and poor.*

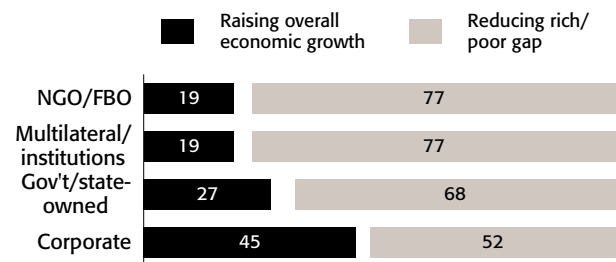
A strong majority (77%) of NGO leaders believe that global society should focus on reducing the gap between rich and poor than on raising overall economic growth and income levels (19%).

NGO Views in Context

The corporate stakeholders surveyed (45%) are more likely than those from NGOs, multilaterals and institutions (19%) to want to focus on raising overall economic growth.

Global Society Should Focus on...

By Sector



When asked whether global society should first focus on social or economic issues, a strong majority of NGO leaders choose social issues (74%) over economic issues (13%). Southern NGO leaders (18%) are only slightly more likely than Northerners (8%) to think that economic growth should be prioritized ahead of social issues.

Overall, NGO leaders are more likely than the global public to believe that global society should focus on social issues ahead of economic growth, yet a majority of the general population across 22 of the largest economies agree with NGO leaders on this priority of a social focus over an economic focus.

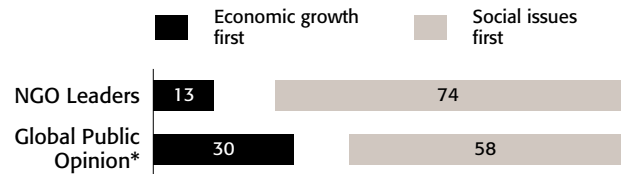
NGO Views in Context

Leaders from multilaterals (77%) and NGOs (74%) are the most inclined of all leaders to say that global society should prioritize social issues ahead of economic growth.

Conversely, corporate leaders are slightly more inclined than others to say that global society should focus on economic growth (36%), which is consistent with their view that economic growth rather than reducing the rich/poor gap should be a priority.

Global Society Should Focus on...

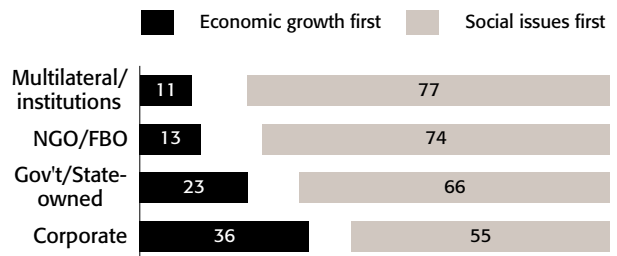
NGO Leaders vs Global Public Opinion



* Source: Global Issues Monitor 2003. Average across 22 countries (n=22,006)

Global Society Should Focus on...

By Sector



PARTNERSHIPS AND DEVELOPMENT GOALS: *NGO leaders think a combination of both partnerships and strengthening governments is the most effective way to achieve development goals.*

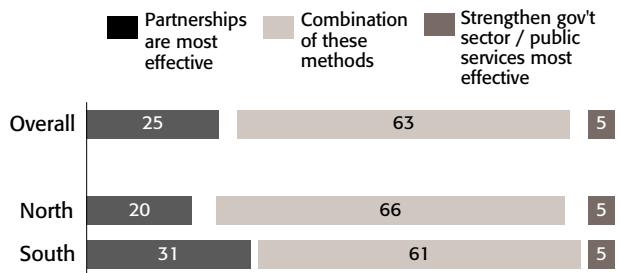
Respondents were asked whether strengthening government or establishing cross-sector partnerships is the most effective method to achieve development goals.

Few NGO leaders think either approach would be effective in its own right. Instead, a majority (63%) believe that a combination of partnerships and stronger government is most effective.

Southern NGO leaders (31%) are slightly more likely than their Northern counterparts (20%) to give credence to partnerships alone, while Northerners (66%) are most likely to support a combined approach.

Achieving Development Goals

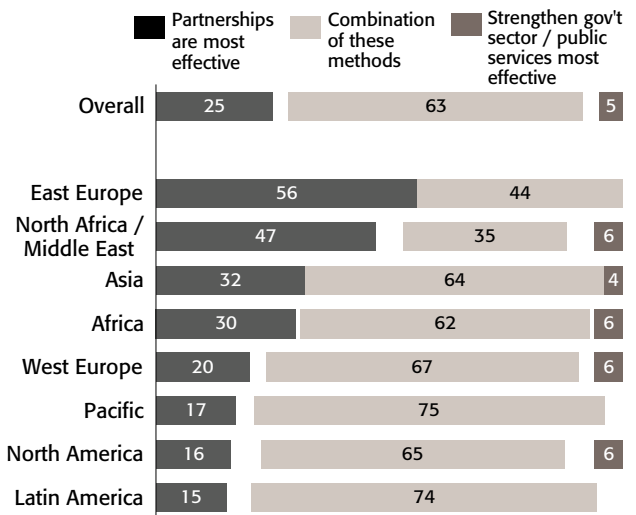
Northern vs Southern NGO Leaders



The white space in this chart represents "DK/NA" and "neither of these methods."

Achieving Development Goals

NGO Leaders, by Region



The white space in this chart represents "DK/NA" and "neither of these methods."

S **TATE OF THE FREE ENTERPRISE SYSTEM:** *NGO leaders believe that major changes are needed in the current free enterprise system.*

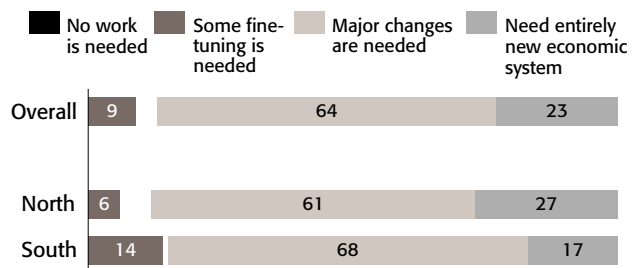
When asked to what extent work on the free enterprise system and free market economy is needed in order to achieve their ideal economic system in 2020, a majority of NGO leaders (64%) say that major changes need to be made, and two in ten (23%) believe that an entirely new economic system is needed. One in ten (9%) say that only fine-tuning is needed, and less than 1 percent of all NGO leaders surveyed say that no work is needed.

While there is little North/South variation, Latin American (34%) and North American (27%) NGO leaders are among the most likely to want an entirely new economic system.

When asked for suggestions of new economic systems, some stakeholders think that focus should be directed to individuals' rights and a greater social focus, with a more equitable distribution of benefits to developing countries. Others call for new metrics that describe a country's economic growth and performance.

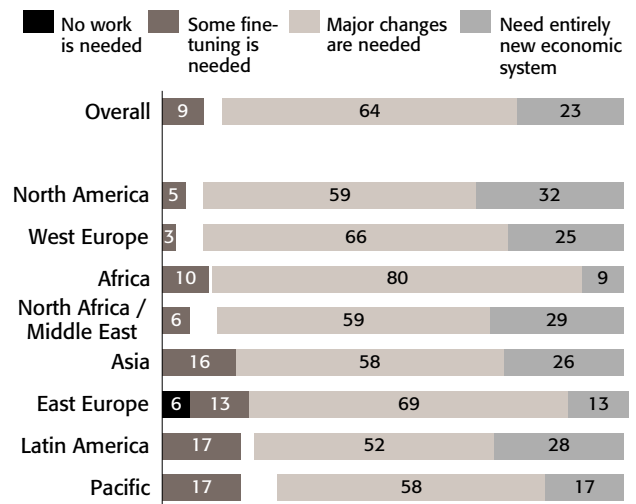
Current State of Free Enterprise System

Northern vs Southern NGO Leaders



Current State of Free Enterprise System

NGO Leaders, by Region



IMPROVING ORGANIZATIONAL CAPACITY

C HARITABLE FOUNDATIONS: *A plurality of leaders surveyed believe private charitable foundations should make their funding processes more systematic and transparent, and should focus their funding on strengthening the core organizational capacity of the groups funded.*

Respondents were asked, unprompted, to offer open-ended advice to private charitable foundations on how such foundations could be more effective in helping NGOs build their organizational or networking capacity.

Top-of-mind, the advice offered most frequently is for foundations to make their funding more simple, more systematic, transparent, client (grantee)-focused, and equitable (28%). Another two in ten (19%) indicate that foundations should focus their funding to strengthen the core organization rather than just projects, and 16 percent provided specific topic areas in which they think foundations should prioritize their funding, ranging from youth, indigenous people, and education and health.

Advice to Charitable Foundations



Additional advice, though less frequently mentioned, was that foundations should go beyond their financial support role and provide training or leverage funding via partnerships and alliances (8%). Leaders also mention that foundations should improve accessibility, outreach and communications to NGOs (6%), and become more risk-taking in their funding by supporting non-traditional models of development or provide flexible funding for immediate NGO action (4%).

Respondents were also asked to indicate whether their organization or network has ever received funding for one of their projects from a private charitable foundation. Nearly six in ten (57%) leaders have received funds either directly (46%) or indirectly (11%). Four in ten (40%) say they have not received any funds.

NGO leaders working in the social development (57%) and environment (51%) are less likely than those working in other areas (68%), such as migrant rights, nuclear abolition, or disarmament, to have received funds directly. Those whose levels of work focus on the community level (47%) or at the country, state, or provincial level (32%) are the least likely to say they have received such funds directly.

RESPONDENT FEEDBACK ON THE SURVEY: *Respondents were asked, unprompted, to provide comments on any aspect of the survey. The most frequent feedback focused on the structure of the survey, specifically, a lack of space available for respondents to elaborate and/or qualify their responses.*

Given the complexity of the topics surveyed (e.g., global governance structures and drivers and effects of globalization), it is not surprising that many stakeholders wanted additional room to elaborate their thoughts.

Many respondents felt that the second GSP survey was a good forum through which to advance discussion on topics of such critical importance. Several felt that the coverage and command of the issues was commendable.

Leaders felt that, at times, the survey oversimplified the topics of globalization and governance, and that key topic areas, such as children's and women's rights and health care, were important omissions. Some also believed that the survey tended to privilege one ideology over another, evident in the range of responses offered.

Methodologically, respondents generally had positive comments on the overall design of the survey, with a few exceptions. In question 3.3, respondents were asked to choose between several sets of opposing statements. A small proportion felt that several of these statements were not mutually exclusive and that the questions were therefore invalid. Others indicated that they would sometimes like the opportunity to say "Don't have the authority to respond."

These comments provide excellent feedback that will help inform the design and structure of subsequent GSP surveys. To view the verbatim comments from respondents, please visit:

<http://www.2020Fund.org>

METHODOLOGY

THE GLOBAL STAKEHOLDER PANEL: *Enlisting a large, well-distributed Global Stakeholder Panel – that is, a panel of leaders and decision-makers not only from non-governmental organizations (NGOs) but also from the private sector and government agencies – is very much a work in progress. Readers are invited to help ensure that their sector and networks shape this evolving agenda-building exercise by responding to the next survey now available at <http://www.2020Fund.org> or by e-mailing: participate@2020fund.org.*

Methodology

A broad invitation through a wide range of networks and self selection by individual respondents with later vetting defines the methodology for this series of stakeholder surveys. In addition to helping keep project costs down, this methodology was judged to be reasonable given the unique scope of the surveys and the opportunity they offer respondents to add their voice in defining the world they want by the year 2020, and in developing an action agenda for achieving it.

The initiative aimed at first securing the participation of NGO leaders mainly from the global South, where problems are most acute and the credibility of the initiative would be most tested. In this, the project has succeeded in large measure, suggesting the methodology is an appropriate one for building common NGO agendas on a range of global topics.

However, the initiative is very much a work in progress when it comes to attracting a similar level of participation from leaders working in companies or governments. The project team will be working very hard to attract much greater participation from these sectors for the third survey in this series.

Since a comprehensive global inventory of civil society (including all non-state actors) is not cur-

rently available, a truly representative sample is theoretically impossible. However, GlobeScan Inc. developed a three-dimensional matrix to ensure that both the respondents to the Global Stakeholder Panel (GSP) surveys and their responses are indicative of a broad range of global stakeholders. The three factors used to define the three dimensions of this matrix were the types of stakeholders (from NGOs to government and business leaders), stakeholders' level of focus (from local to global), and their geographical region.

The matrix was used as a template to enlist a wide range of network organizations (listed in the Background section of the report) who are encouraging their global networks to participate in the full series of surveys. A full range of participation options, from mail and fax versions of the questionnaire to online versions in five languages (Arabic, English, French, Portuguese, and Spanish), ensure the fullest possible participation.

This second (GSP) survey was fielded between May 12th and September 5th, 2003. A total of 655 respondents completed the survey. Respondents were screened so that only organizational leaders and/or influential individuals were included in the analysis. From these 655 respondents, a total of 521

qualified respondents were identified. The data from the remaining 134 unqualified respondents were analyzed and generally, their views are mostly aligned with qualified stakeholders' views; the few substantive differences are noted in the interpretive report.

A cell analysis employing the dimensions of the matrix was then used to test how evenly respondents were distributed across the desired attributes (e.g., geographical, sector distribution), and to note stakeholder categories that were under-represented.

The most obvious areas of under-representation in the present sample, in part because of the initial emphasis on NGOs, are stakeholders from the government and business communities as well as from trade unions. Because of this under-representation, this report focuses primarily on the views of NGO leaders. On select questions, the views of non-NGO leaders are described to put in context the views of NGO leaders. Subsequent surveys will more fully describe sector differences with a greater representation of leaders in the corporate and government sector.

Distribution of All Respondents

Region	Total	NGO / FBO	Corporate	Gov't/ State-owned	Multilateral Org/Inst.
Africa	88	82	0	2	4
Asia	61	50	1	5	5
Eastern Europe	21	16	0	2	3
Latin America	65	46	5	5	7
North America	133	93	13	9	17
Middle East /North Africa	24	17	1	3	3
Pacific	31	12	2	14	2
Western Europe	90	64	11	2	12
DK/NA	8	6	0	2	0
Total	521	386	33	44	53

