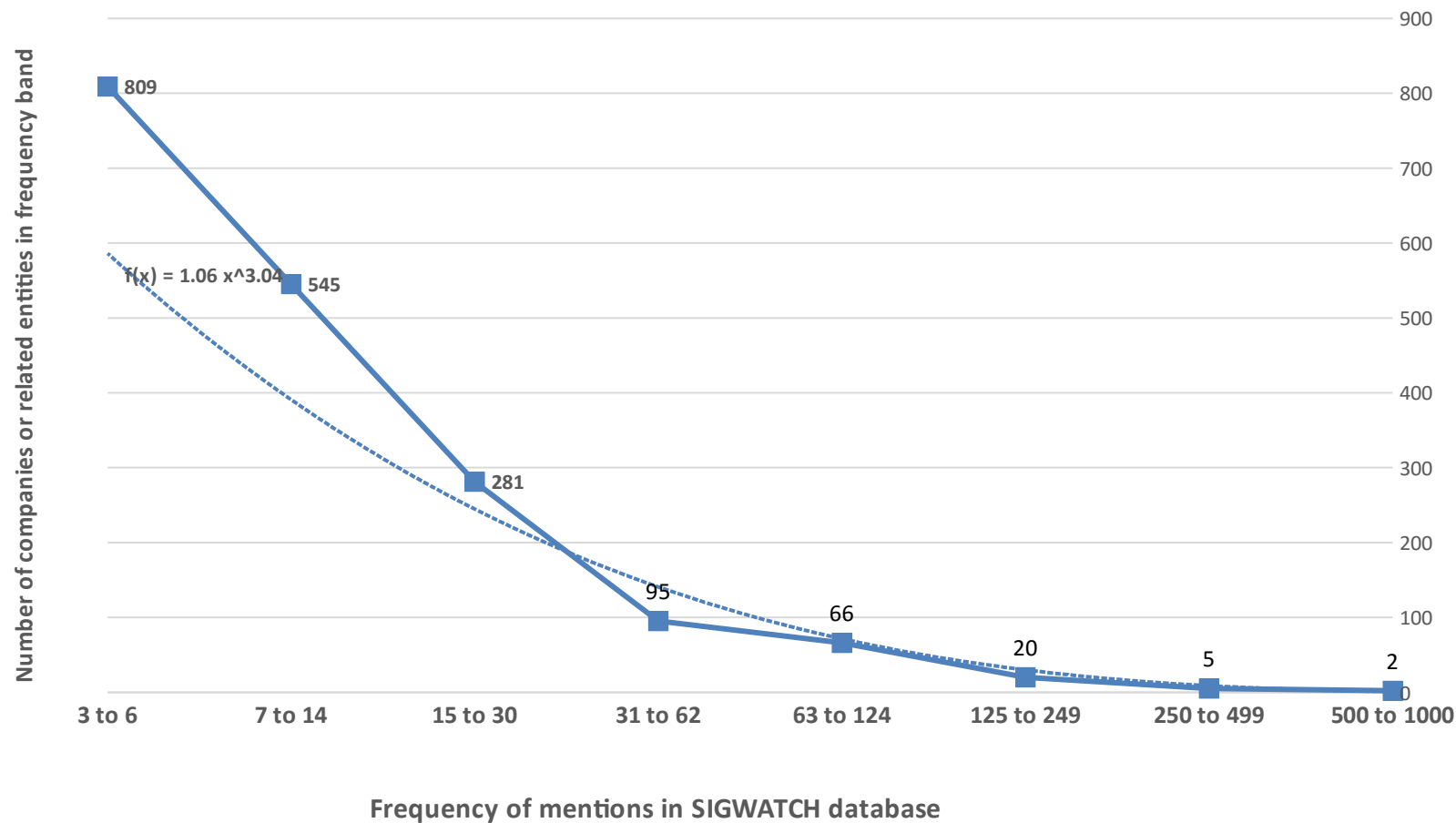


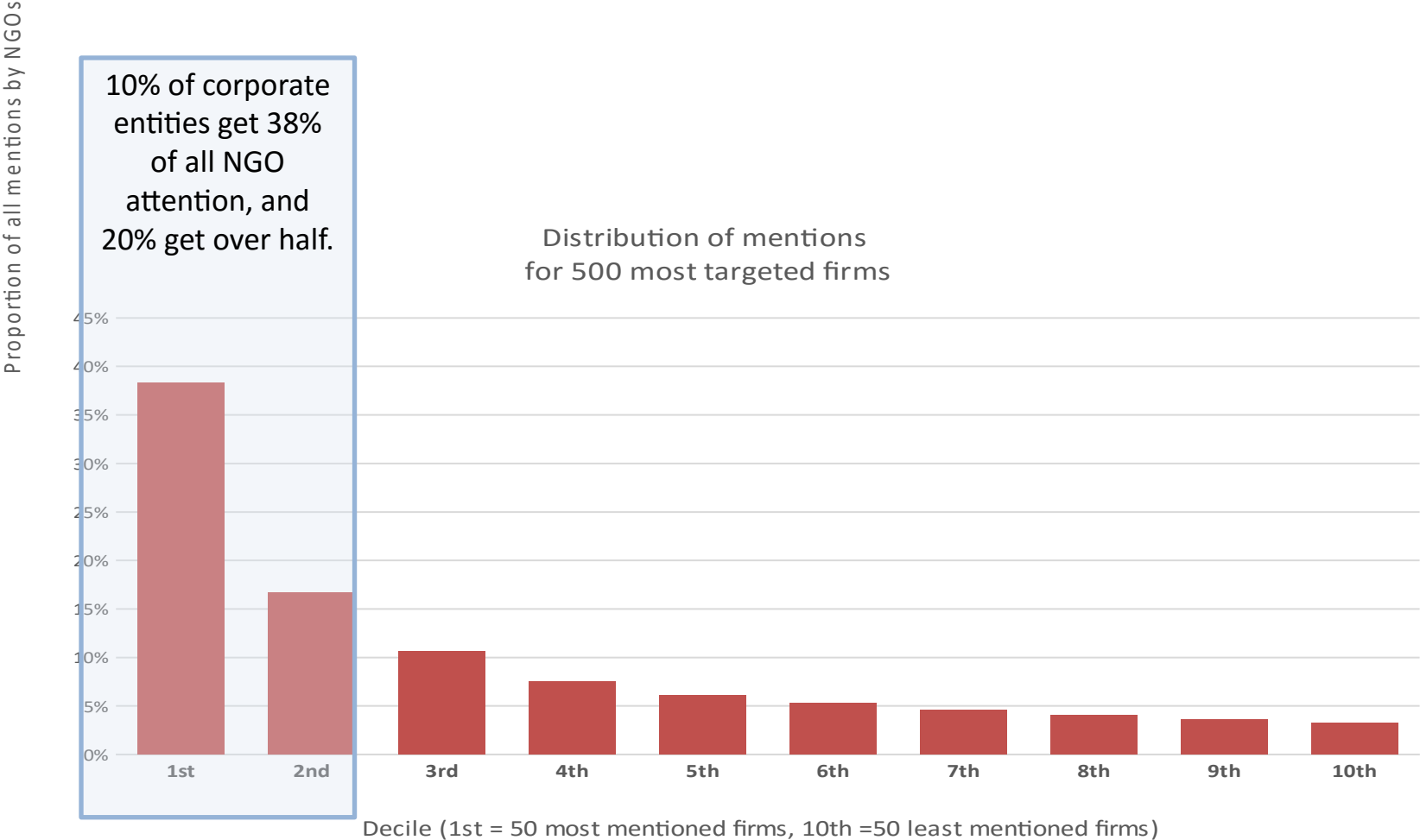
# Who NGOs target, and why

Robert Blood  
Managing Director, SIGWATCH  
[www.sigwatch.com](http://www.sigwatch.com)

# NGOs are very selective in the firms they target

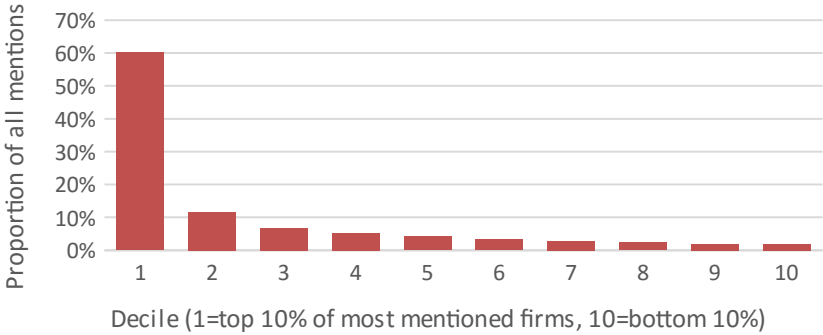


# Hence a few firms get most of the NGOs' attention

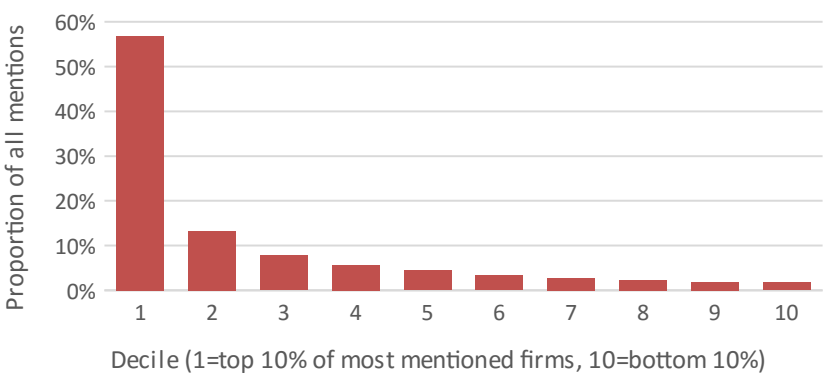


# NGOs' campaigning preferences can be seen at sector level too

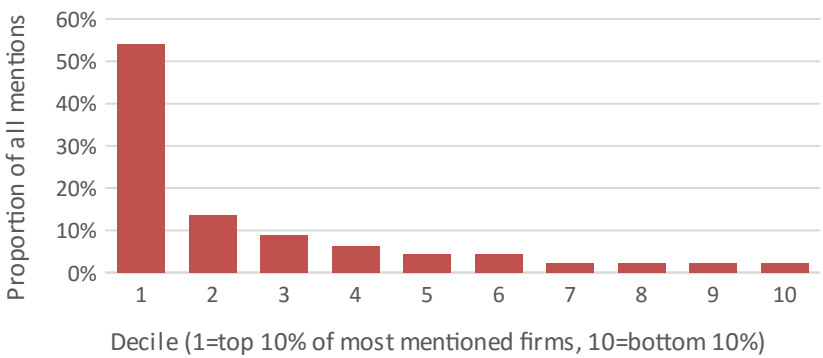
Food



Energy



Mining

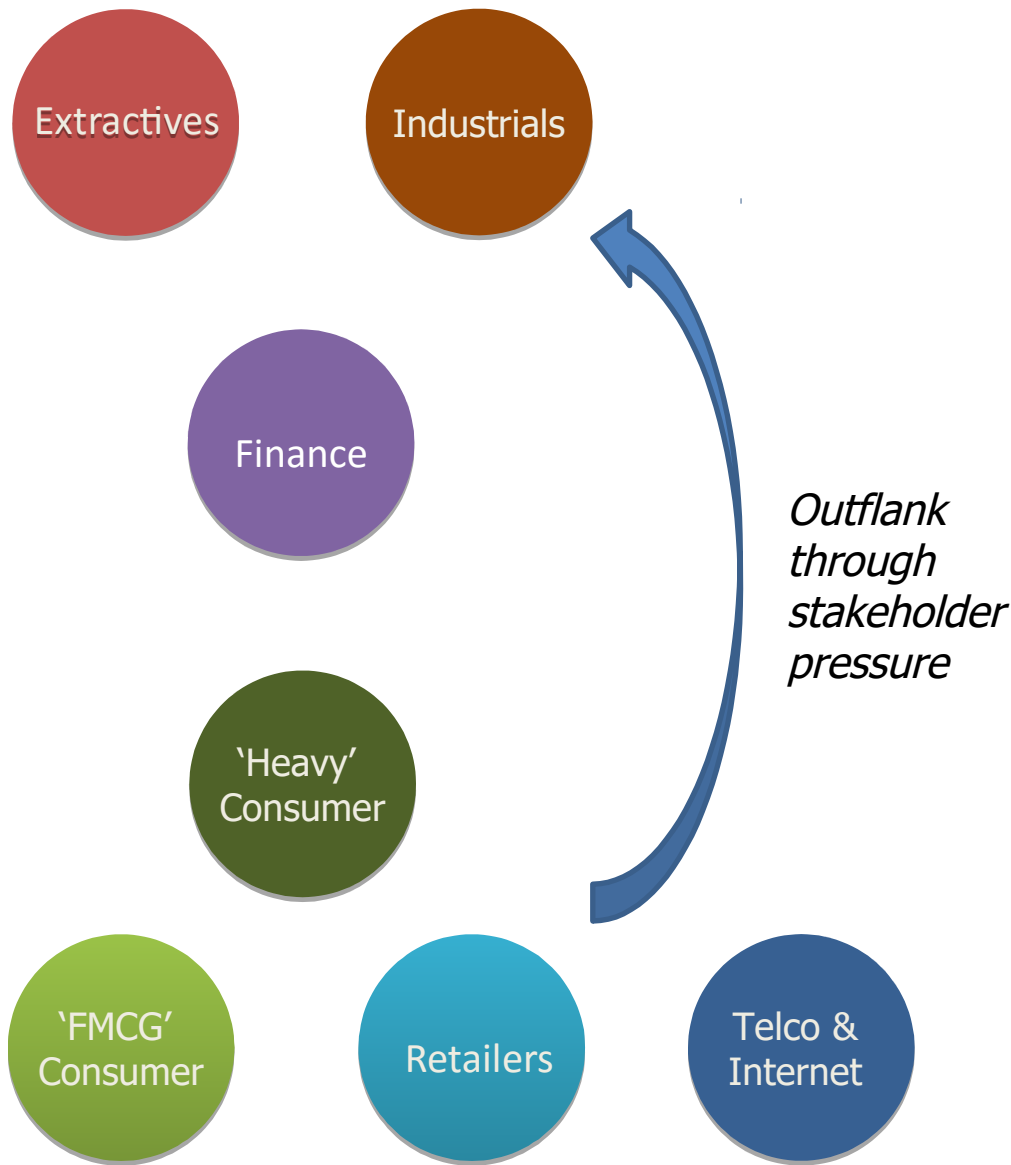


Charts based on 500 most targeted companies in each sector

NGOs' targeting strategy depends on sector

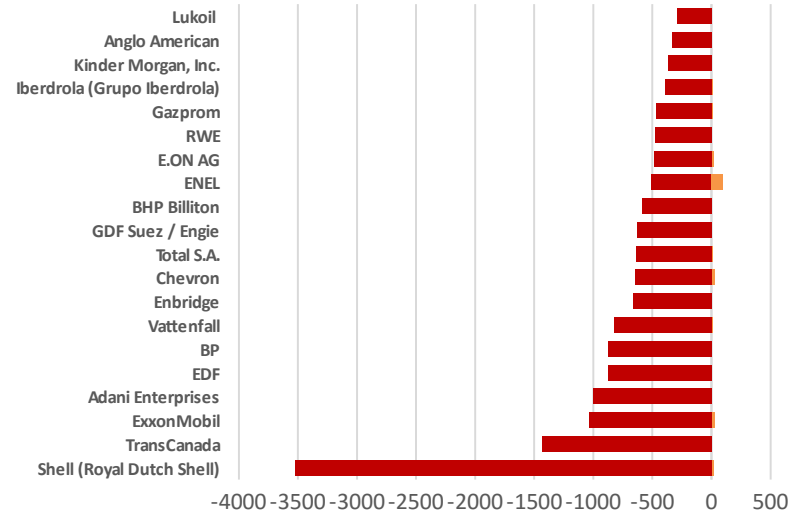
'Attack and outflank'

'Carrot and stick',  
leading to co-option

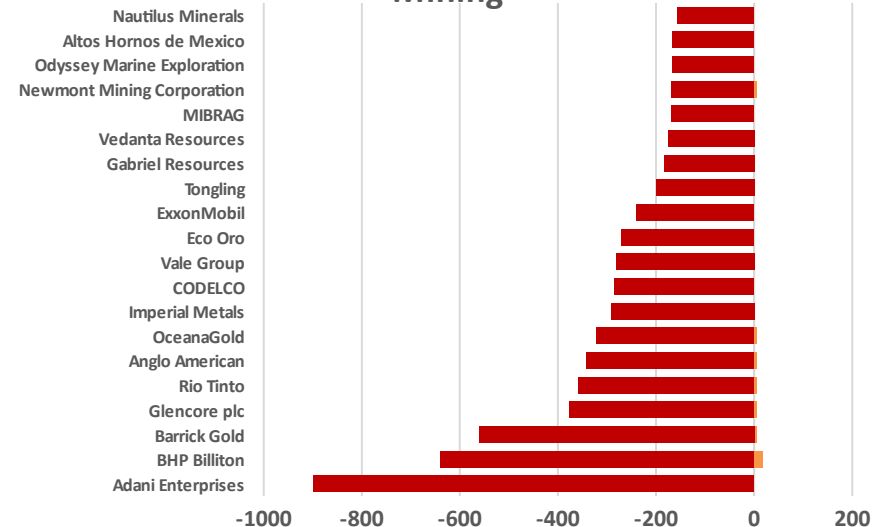


# NGOs' strategy reflected in how leading companies are treated

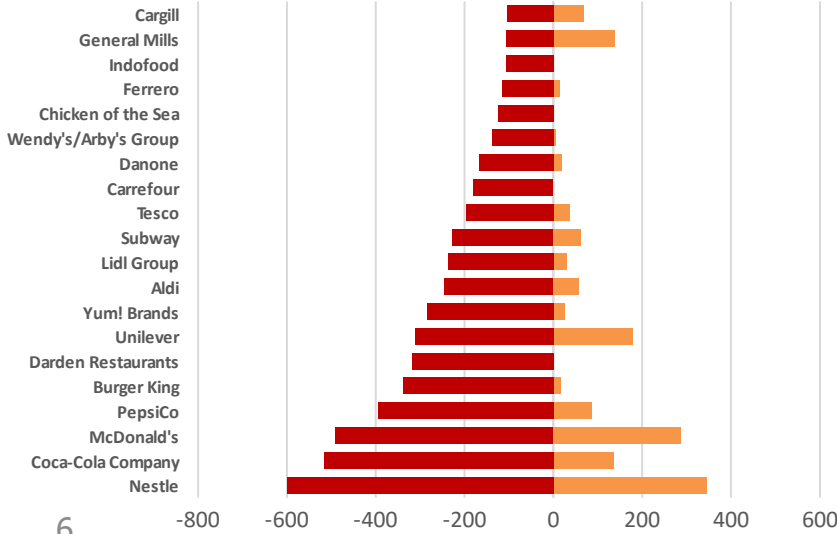
Energy



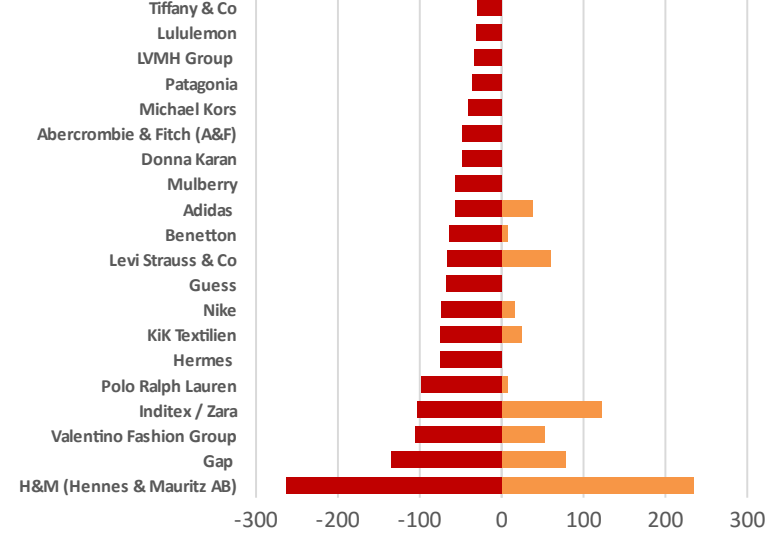
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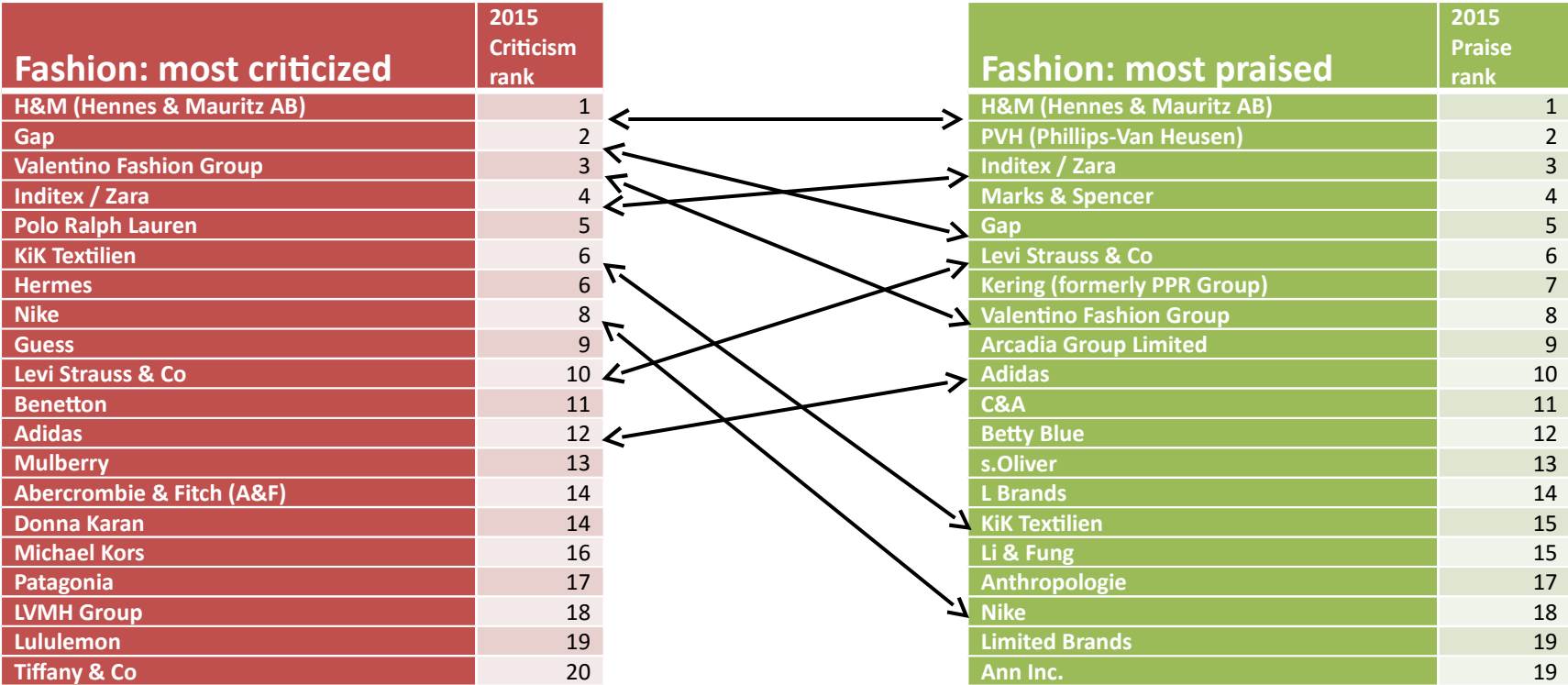
Food



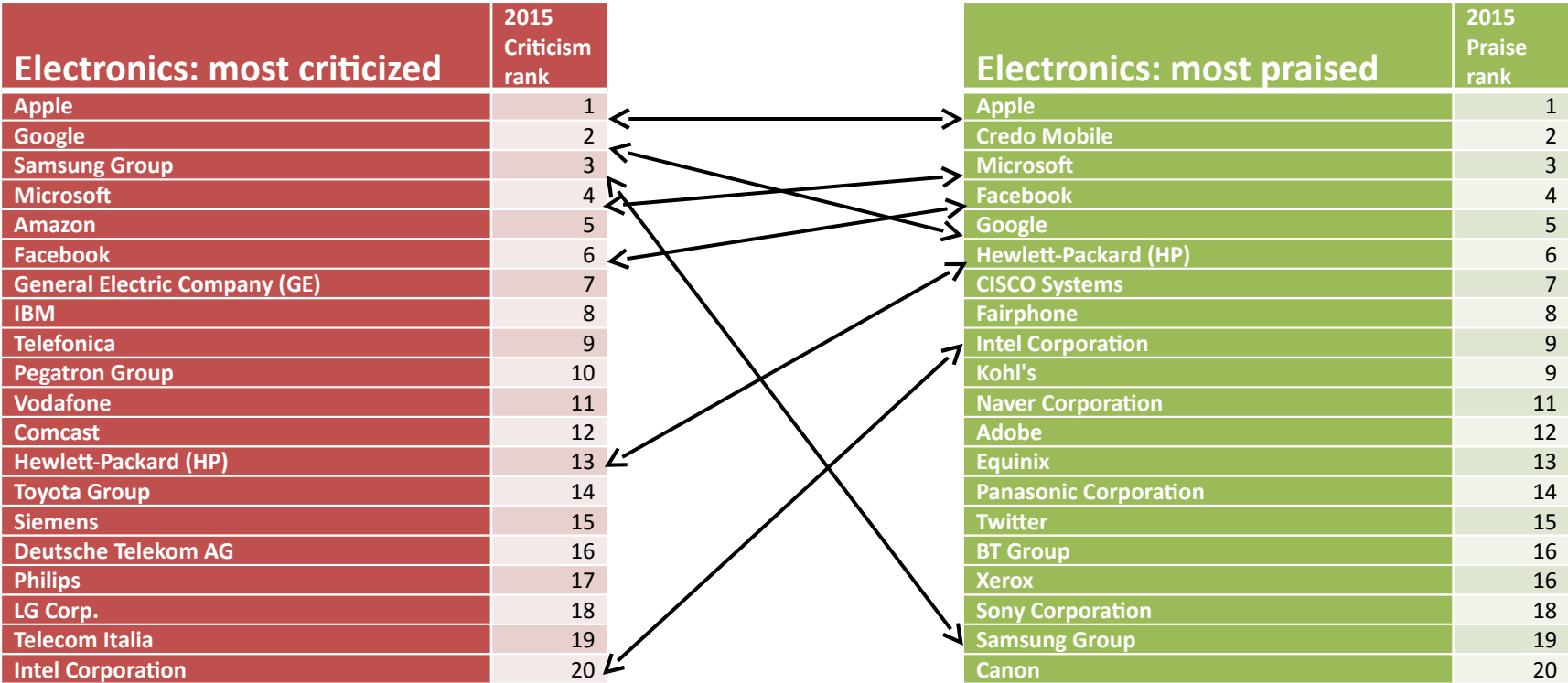
Fashion



# 'Carrot and stick' strategy against consumer-facing brands

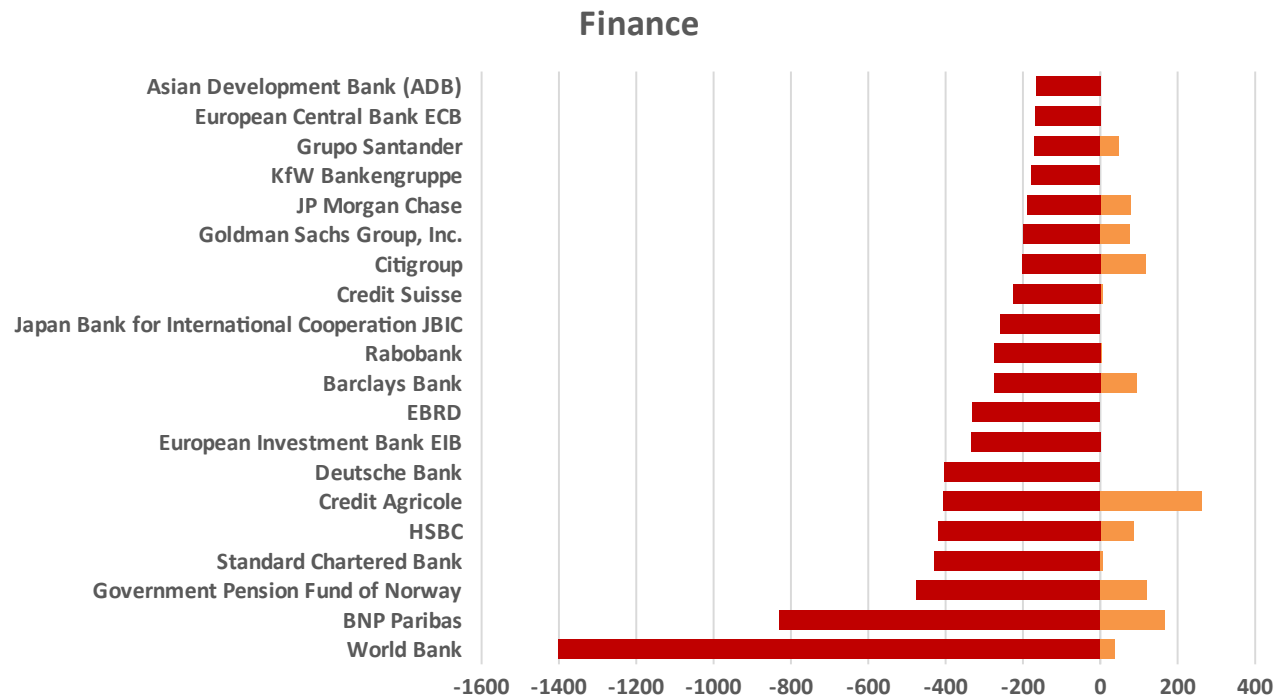


# 'Carrot and stick' strategy against consumer-facing brands

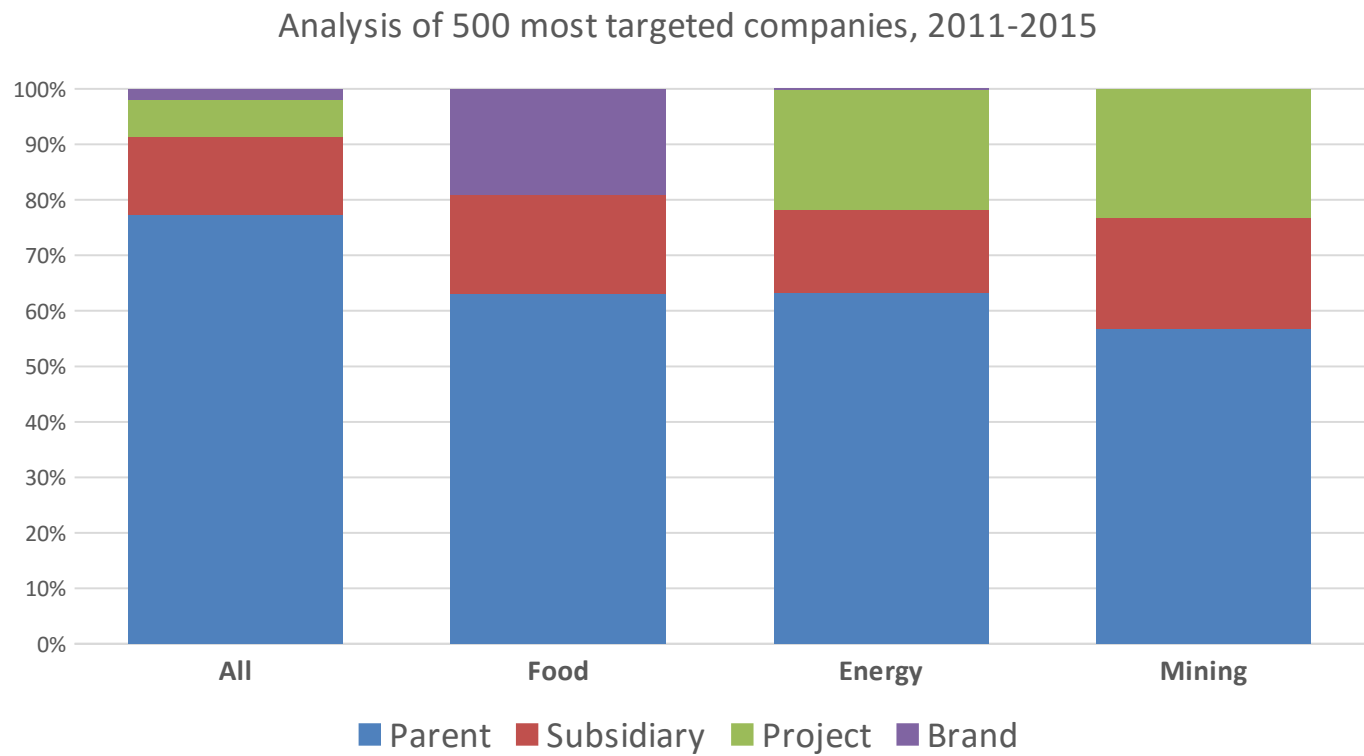




# Meanwhile, finance is transitioning from ‘baddie’ to ‘friendly’



# NGOs frequently target subsidiary entities, especially brands



# How specific firms end up in NGOs' cross-hairs

Global: most criticized	Wrong sector	Wrong activity	Wrong firm	2015 Criticism rank	2014 Criticism rank	Reasons for ranking in 2015
Shell (Royal Dutch Shell)				1	1	Arctic drilling, but also longstanding target
Monsanto				2	3	Longstanding target (ag biotech/GMOs)
World Bank				3	7	NGOs trying to exploit its global influence over banking sector
TransCanada				4	2	Keystone XL pipelines, oilsands
ExxonMobil				5		Longstanding target, also accused of hiding climate science
Adani Enterprises				6		Queensland coal field development
Volkswagen Group				7		'Dieselgate'
Dow Chemical				8	4	Longstanding target but also new GM crops
EDF				9		Link to nuclear power in France
BP				10	9	Longstanding target since Gulf of Mexico blowout
Wilmar International				11		Palm oil in Indonesia
BNP Paribas				12		Pressure to stop funding coal and nuclear power
Vattenfall				13	15	Reliance on coal-fired power
BHP Billiton				14	13	Longstanding target but mainly because of coal
Bayer				15	17	Longstanding target (chemicals, ag biotech)
Enbridge				16	10	Pipelines in Canada, oilsands
GDF Suez / Engie				17	6	Fossil fuels but also longstanding target
Chevron				18	5	Fossil fuels, shale gas but also longstanding target
Total S.A.				19		Fossil fuels, but also longstanding target
Walmart				20		Longstanding target over foreign sourcing, wage levels.

## Conclusions

- Any corporate can be an NGO target, but market leaders are the most exposed by far.
- The 'wrong' firms, and firms in the 'wrong' sector, will always have a difficult relationship with NGOs, at least in public.
- NGOs may target consumer-facing businesses to undermine their suppliers and partners. NGOs call this 'market strategy'.
- Consumer businesses are especially vulnerable through their brands. NGOs know this.
- In deciding how to respond to NGO pressure, the key test should be, 'What do our *core* stakeholders think?'