



# Sustainability Strategy & Sustainable Supply Chain Strategy

Hispanic Latin America Delegation Panel



REGIONAL PRESENTATION: LATIN AMERICA  
Amsterdam, The Netherlands, May 24, 2013

Innovation.  
Integration.  
Information.

## Panelists

### **Ana Paula Fernández del Castillo Quintana**

Sustainability Director  
ICA México

### **Juan Camilo Padilla**

Sustainability Coordinator  
Independence Drilling S.A. Colombia

### **Dr. José Manuel de la Sota**

Governor  
Province of Córdoba, Argentina

## Moderators

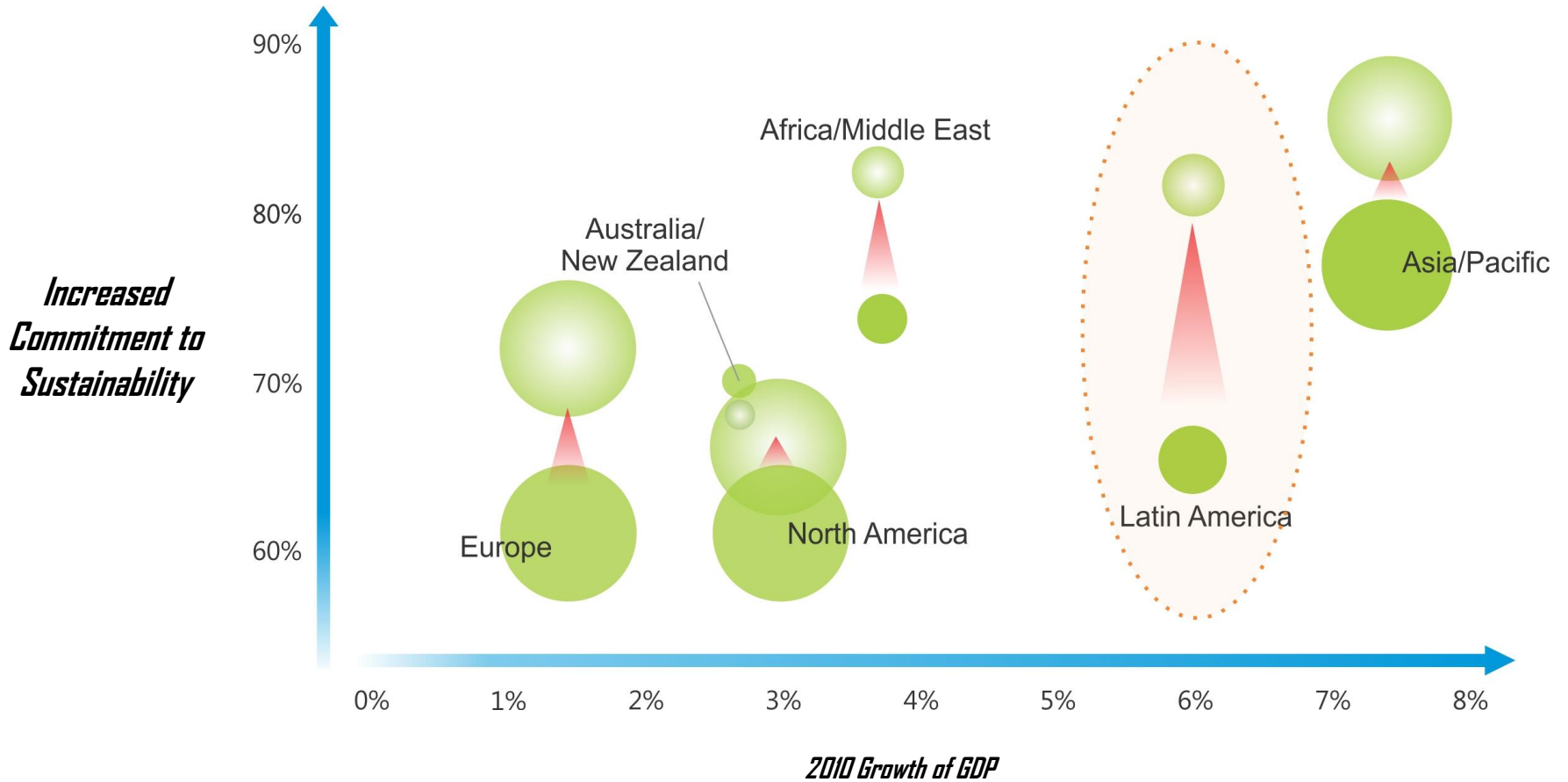
### **Tonia de Sousa-Shields**

Partner  
ES Global Consulting

### **Felipe Arango**

Global Partner  
BSD Consulting- Colombia-  
Mexico-USA

# Latin America is next!



Source: "Sustainability Nears a Tipping Point", MIT Sloan Management Review 2012 in collaboration with Boston Consulting Group

# The State of Social Responsibility in Latin America 2011

## Foro Empresa

**1,279 executives**

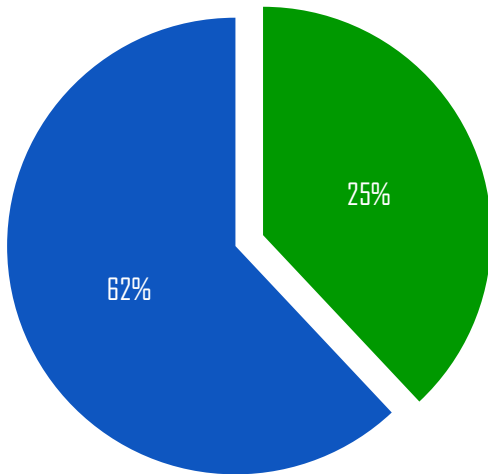
**1,927 consumers**

September, 2011.



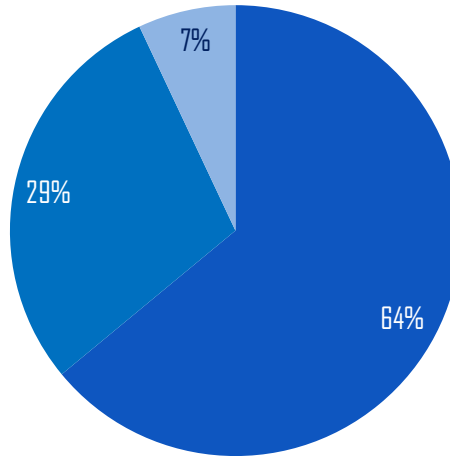
# Multinational Subsidiaries Leading but Nationals Catching Up

All Firms



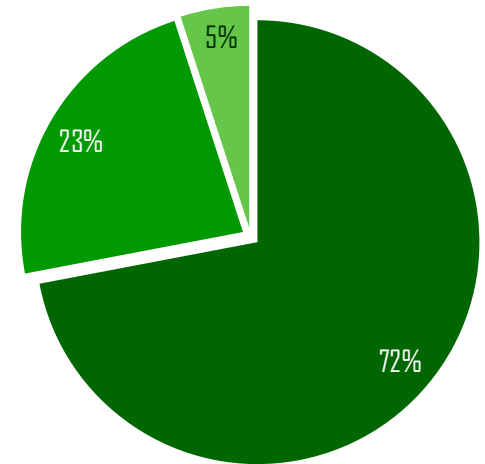
- National Firms
- Multinational Subsidiaries

Multinational Subsidiaries



- Have Improved
- Remain the Same
- Ha empeorado

Nationals



- Have Improved
- Remain the Same
- Have Worsened

Source: Forum Empresa, 2012

# State of Sustainability Strategy

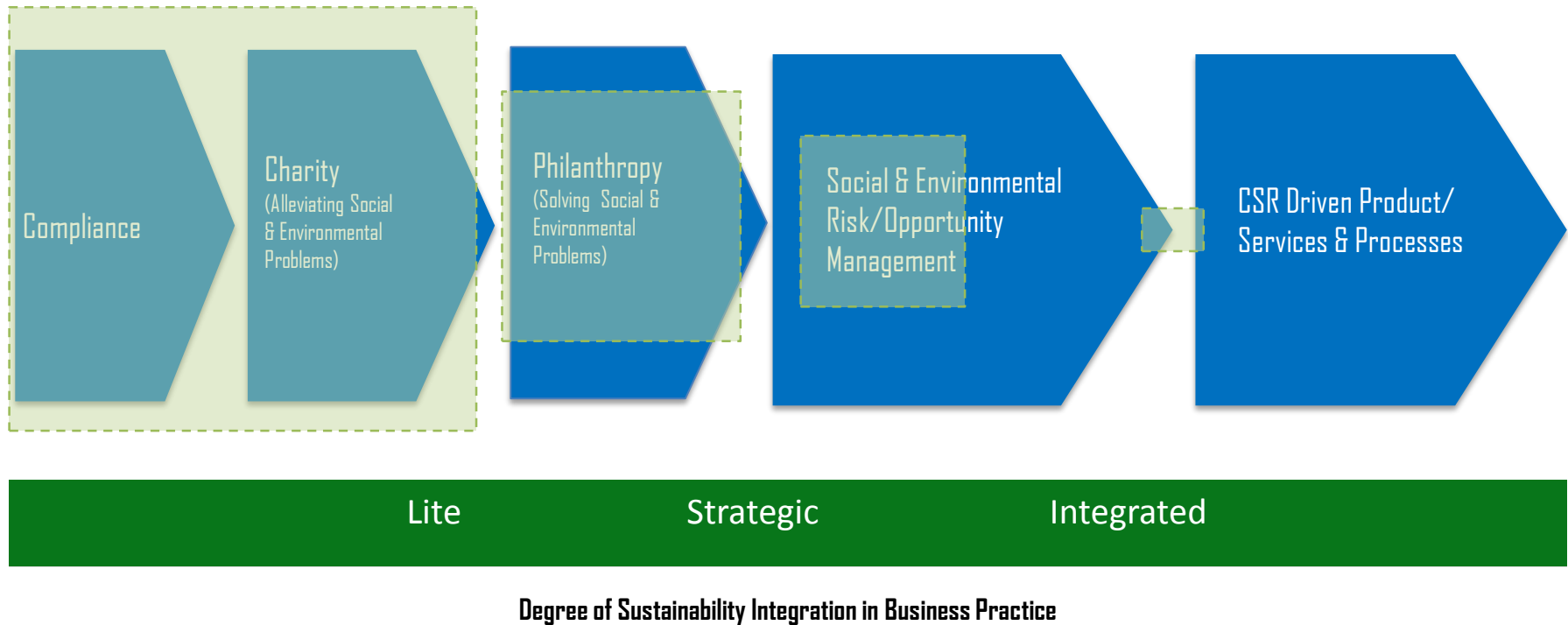
## Corporate Social Responsibility Spectrum<sup>©</sup>



Fuente: ES Global Consulting

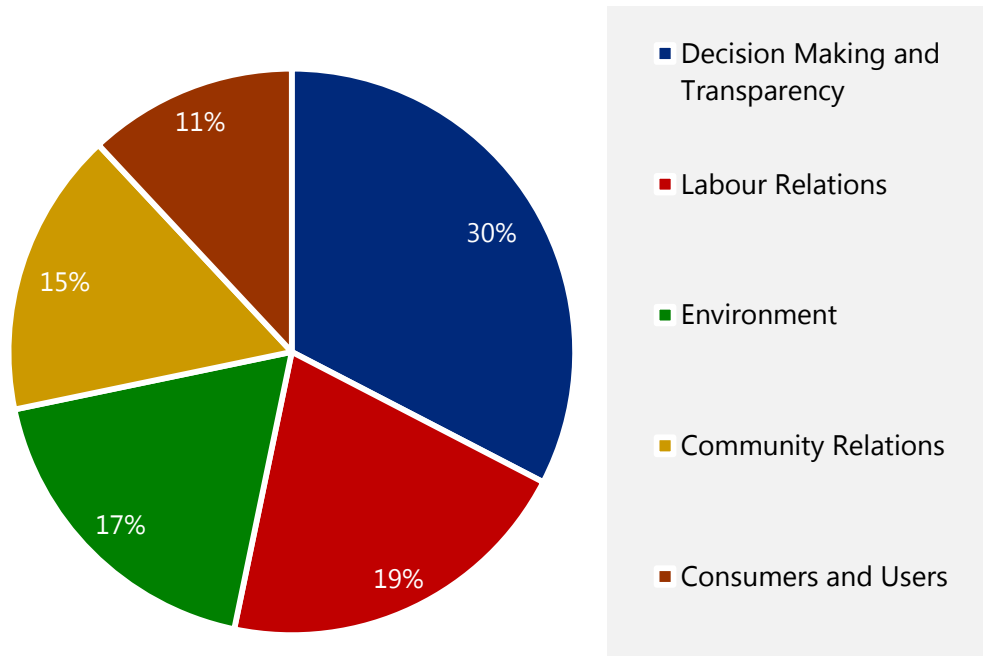
# State of Sustainability Strategy

## Corporate Social Responsibility Spectrum<sup>©</sup>



Fuente: ES Global Consulting

## Sustainability Themes for Latin American Consumers

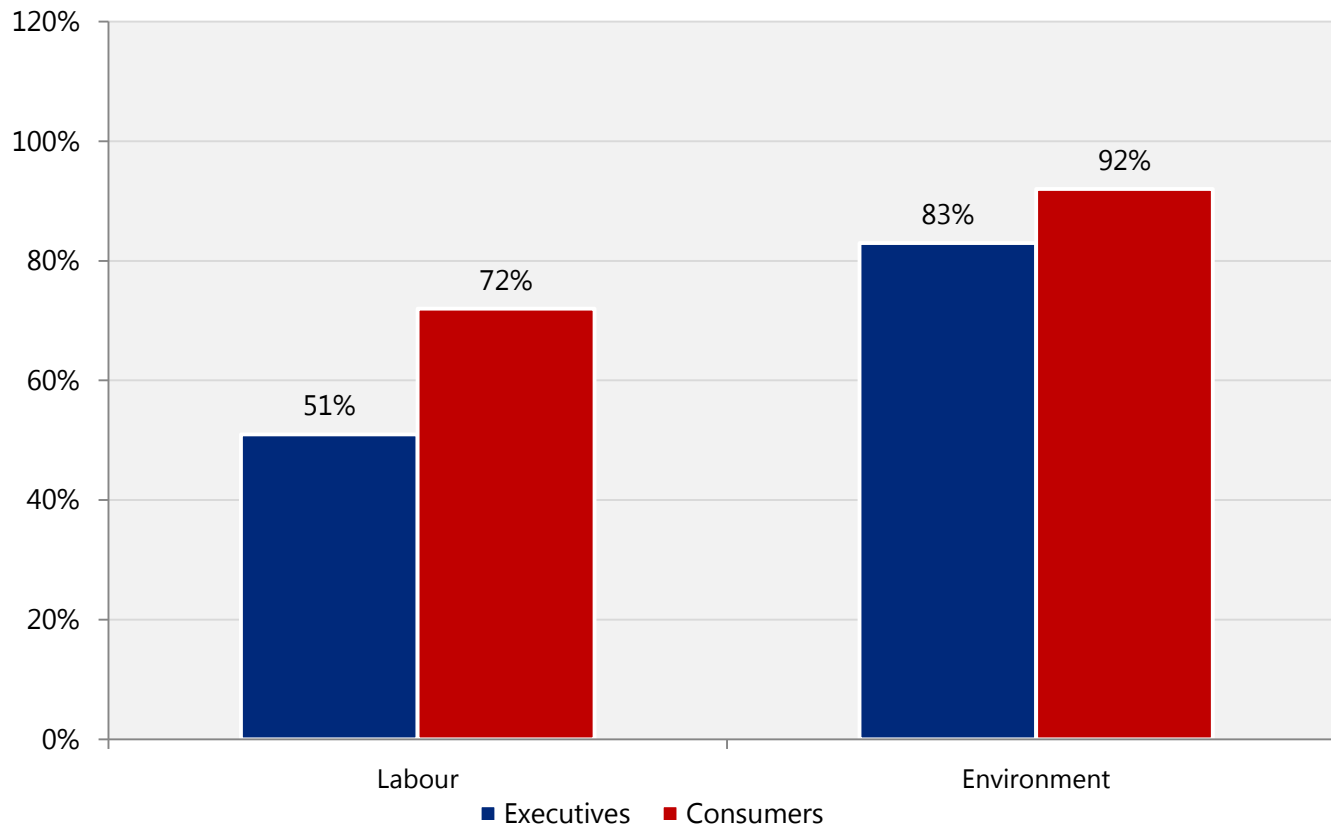


Source: Foro Empresa, 2012

30% of Latin American Consumers consider Decision Making & Transparency the most relevant Sustainability Theme.



# Executives and Consumers believe there should be regulatory change





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# Deep Dive with Panelists

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