

Transition towards a truly global scenario: Challenging elite opinion

Global Agenda Index: Top trends 2013, 2018, 2030

Reputation Lab Davos, January 23, 2013

- New Scenario tool merges elite polls with media-impact research, web-analysis & content analysis of official corporate documents
- International perspective identifies interrelatedness between social indicators as key to integrating stakeholders in responsible policy analysis



EXECUTIVE SUMMARY

Scenario analysis is a vital tool for policy makers, businesses and other organizations. Scenarios help us better prepare for future contingencies and events, including technological change, political shifts, business opportunities and national security threats.

However, much scenario-building suffers from various biases, including the tendency to extrapolate current trends. That is why scenario planners regularly miss game-changing developments. In the 1960s, technological advances in the Soviet Union led to widespread scenarios in which the communist bloc would eclipse the West. In the early 1980s, scenarios featured Japan soaring to unrivaled economic predominance. Not only did scenario planners miss Japan's crash in 1982 and Communism's collapse in 1989, they also failed to predict the apex of global jihadist terrorism in 2001 as well as the financial crisis of 2008.

Other frequent sources of distortion in scenario analysis include groupthink within organizations or the policy-making community, the adoption of narratives from the media (including the media's bias for negative scenarios), as well as home-country or regional bias. The much-accelerated pace of technological change complicates scenario planning further.

Media Tenor's new Global Agenda Index (GAI) breaks new ground in the

crucial field of scenario analysis. It is a multi-year project that combines elite scenario polling with proven methods of content analysis of media reports, think tank websites and corporate documents. In partnership with the United Nations Academic Impact program and Erasmus University, Media Tenor has developed a data-based methodology to uncover and minimize sources of bias and distortion in scenario-building. Offering a truly global perspective, the Global Agenda Index will be the go-to source for policymakers, business leaders, journalists and academics for scenarios and trend forecasts that are significantly more reliable than today.

For this, we have developed an innovative four-tier methodology:

1. First, we conducted a broad international and interdisciplinary survey of expert opinion in order to minimize groupthink and regional bias in scenario-building. We conducted a scenario poll among 100 former heads of state and government, CEOs of major companies, university presidents and WEF media leaders. We recorded their expectations for 2013 (one year into the future), 2018 (five years) and 2030 (18 years). As a test for past planning accuracy, we also asked them which issue they spent the most time on in the current year that in hindsight turned out to be much less important than expected.

2. We then applied Media Tenor's proven methods of content analysis to over 150,000 news reports on 23 leading television programs in the United States, Europe and South Africa. We discovered that our scenario survey results significantly aligned with media coverage in the respondent's home region. In particular, the issues that respondents identified as less important in hindsight (for example, preparing for a disastrous outcome of the euro crisis) were strongly predicted by media coverage. This points to an urgent necessity to adjust elite scenarios for media effects.
3. Next, we used Media Tenor content analysis to survey the websites of 280 leading policy think tanks on all five continents. This allowed us to document the salient issues of policy analysis worldwide. On the one hand, we discovered a greater diversity of expert opinion than in our scenario polls. But the think tanks' focus showed surprisingly little global orientation and a close mimicking of the media agenda.
4. Lastly, we applied the same rigorous content analysis to the annual reports of 137 multinational companies. This serves as a reality test of whether elite scenarios find a practical echo in the forward-looking activities of highly globalized companies. We found large discrepancies which are only partly explained by the nature of corporate reporting. Part of the discrepancy must stem from business leaders setting different priorities and/or considering many of the scenarios held by elite opinion leaders unrealistic.

The following White Paper, "Transition Towards a Truly Global Scenario: Challenging Elite Opinion," lays out the methodology for the Global Agenda Index in more detail and presents a selection of preliminary data. It is intended as a basis for further research and input by all interested parties and was written by Casey Chancellor, Researcher at Media Tenor International, Professor Frank Go of Erasmus University and Roland Schatz, founder and CEO of Media Tenor.

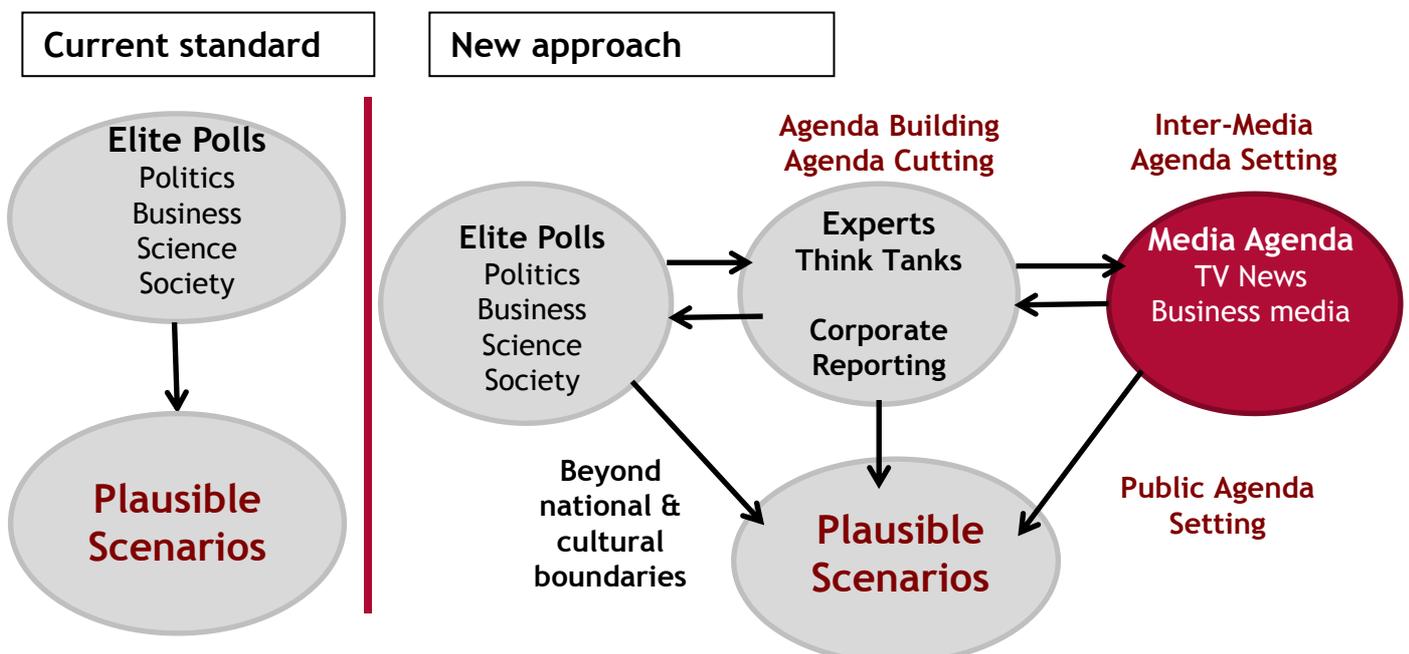
Improving scenario-building as a global tool

Taking advantage of the Agenda Setting Theory

The UNAI, Erasmus University and Media Tenor have partnered to develop a Global Agenda Index that truly evaluates future global challenges. By adding the applied Agenda Setting Theory to the current standard we are able to challenge existing “truths” and paradigms which are limited by nationalistic perspective. Via ongoing international media analysis, research of 280 think tank web-sites, and official corporate sector documents in annual reports, a more global perspective is considered in order to create a more robust future scenario.

In this new approach, the opinions about our future from 100 heads of state, parliaments, top CEOs, university presidents and media leaders have been collected. For the first time, leaders had the opportunity to not only vocalize their expectations towards 2013, 2018 and 2030, but to see how these opinions have been shaped by the Media Agenda. Thus, comparing the identification and perceived credibility and authority of the information source are vital modes to making persuasive risks and responses assessments for a future inherent with uncertainty.

Improving Scenario Building: A multi-method approach



Current scenarios lack open source check *Why even elite polls need to be monitored*

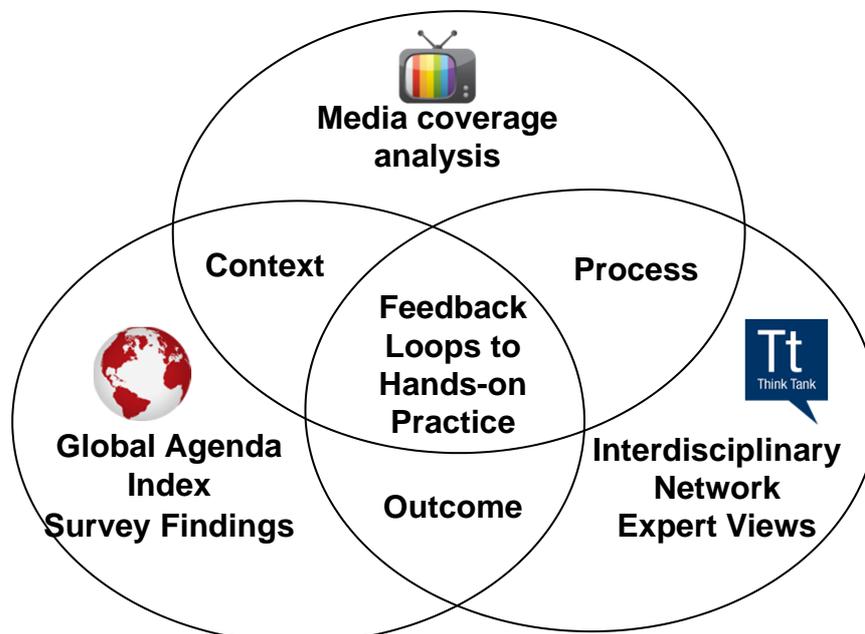
Most scenarios have failed to identify the “game changers.” Polls back in 1980 did not touch on the likelihood of system collapse in 1989. The 1990 polls did not address the impacts of the internet, energy failure in 2000, nor the “surprise” of the Arab Spring in the same decade.

Ten year elite polls proved to lack a truly international perspective and failed to identify relevant social, technological and innovative game-changers, which rendered their long term vision most unrealistic.

In contrast to previously trusted elite polls, the Global Agenda Index builds on Agenda Setting Theory and increases the validity of results through triangulating the evidence from:

- 1) Interviews of international respondents and international media analysis.
- 2) Content analysis of think tank websites
- 3) Assessment of annual reports to gain insights into corporate intentions, actions, reactions and restructuring in response to global challenges.

Agenda Setting is no longer a one-way-street: Global Agenda Index creates transparency



Challenging opinion-leading perceptions *Who is influencing whom?*

Current expert opinions exist that suggest that the United States, unlike other great powers in history, have a second chance at molding the international system. This conclusion is based on the perception that no other power is able or willing to replace the role of the U.S.

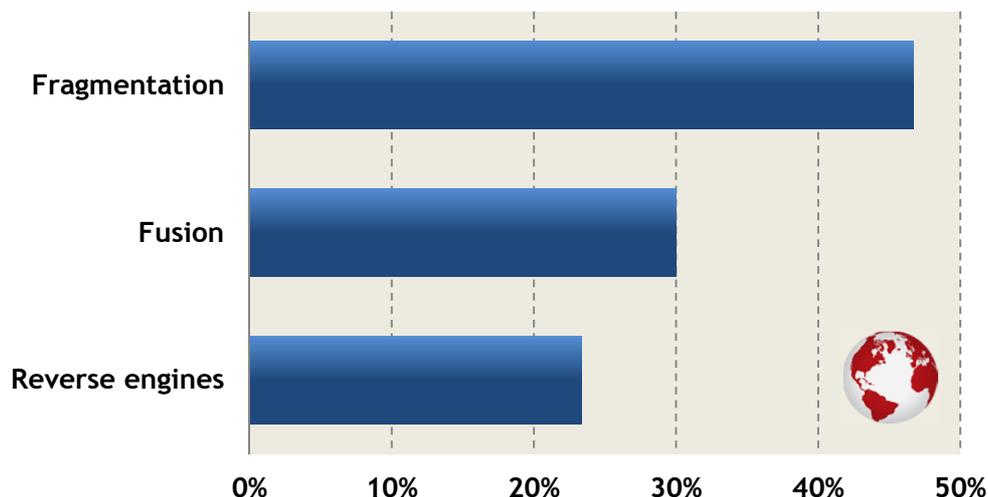
However, nearly 50% of global respondents identified fragmentation as the most likely future scenario for the world by 2030. Contemplation of this scenario leads to the question of how western economies, like the U.S., can muster the political will to solve large-scale global problems, such as

and close the widening gap with the emerging powers.

To better understand what information is shaping perceived future scenarios, we breakdown the credibility of the following trends for elites, media, academia and corporations:

- 1) The Future of the U.S. as a superpower
- 2) The rise of China and Asia
- 3) The Euro crisis
- 4) The future of accepted business and democratic practices
- 5) Education as the key to addressing future global challenges

GA survey respondents: The most likely scenario of the world by 2030



1. North Americans see U.S. on the rise *U.S. projected as most important country in 2030*

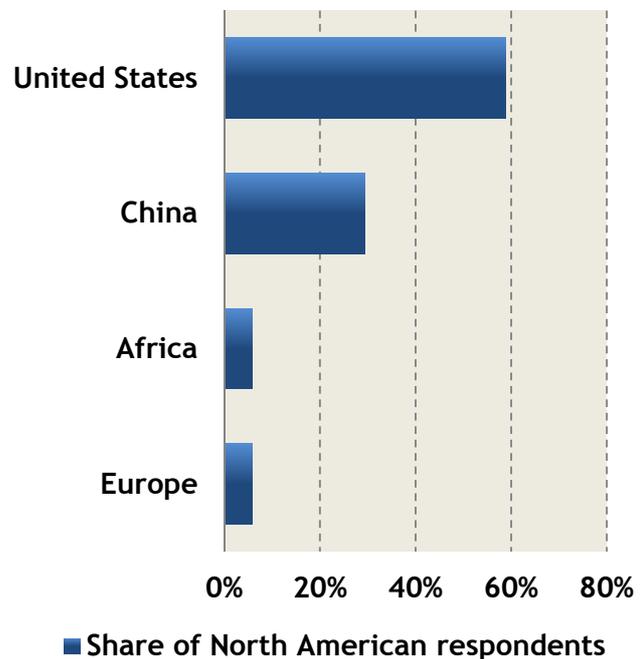
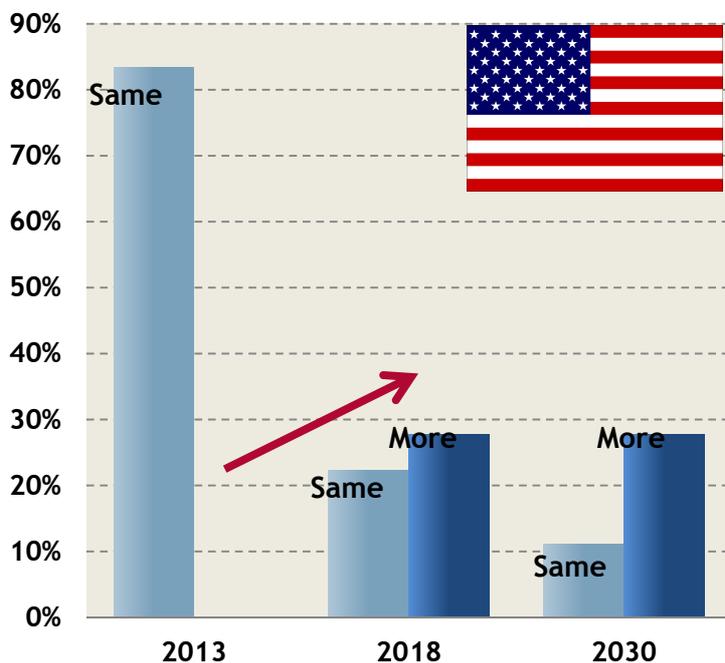
Of the 100 GAI survey respondents who identified their nationality as North American, nearly 30 percent projected that the role of the U.S. would increase in 2018 and by 2030—painting a starkly different scenario than the whole of respondents.

This perceived trend, by mostly American elites, is partly shaped by optimism with the re-election of President Barack Obama in November of 2012.

Despite the economic challenges and questions of global leadership, opinion leaders from America are confident that the U.S. will be the most important country by 2030, remaining well ahead of China.

To contextualize these nationalistic perceptions, it is vital to assess the information sources that are shaping the various nationalistic perspectives on the world.

North American respondents: The global influence of the United States and most important country by 2030



1a. Others see U.S. influence on the decline

Perceptions of power depend on perceived risks

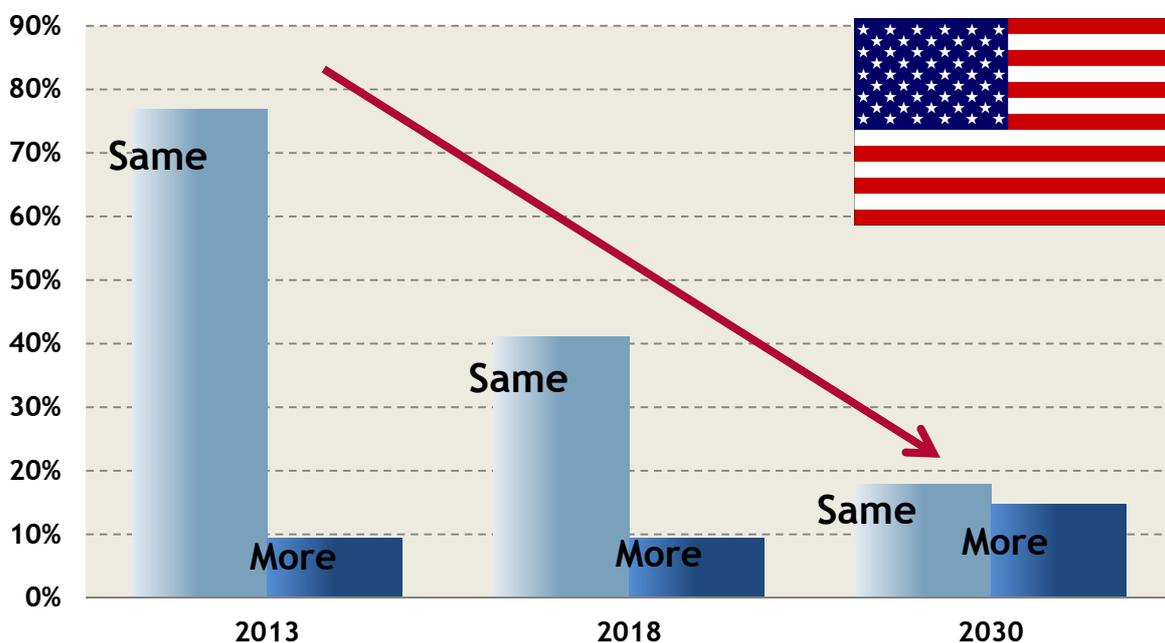
According to all global survey respondents, the United States will see a steady decline in influence from now until 2030. One-third see U.S. influence diminishing in the next five years, while an overwhelming three-fourths believe the same by 2030.

In the minds of international opinion leaders, the world is about to experience the effects of reversed globalization, heralding a dramatic shift in power towards China and East

Asia and the decreasing relevance of the United States – a scenario less anticipated or accepted by thought leaders and policy-makers in the U.S.

This also correlates to leading opinion that western economies will lag behind emerging powers like China – leaving the U.S. with less soft power to influence initiatives on climate change, education and resource development, as well as promote American values in a changing world.

GAI survey respondents: The global influence of the United States in the next year, five years, and in 2030



1 b. International media focused on the West U.S. media ignores other countries

In 2012 the top reported on country on international TV news was the United States—with issues taking up 20 percent of all countries covered. When looking into the major U.S. news stations, domestic focus took up nearly 80 percent of all media coverage, with Syria, driven by the on-going conflict, garnering less than 4 percent as the second most reported on country.

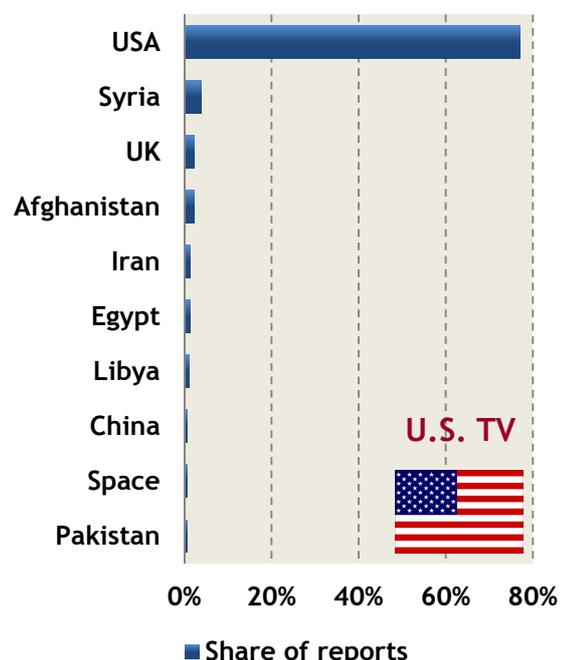
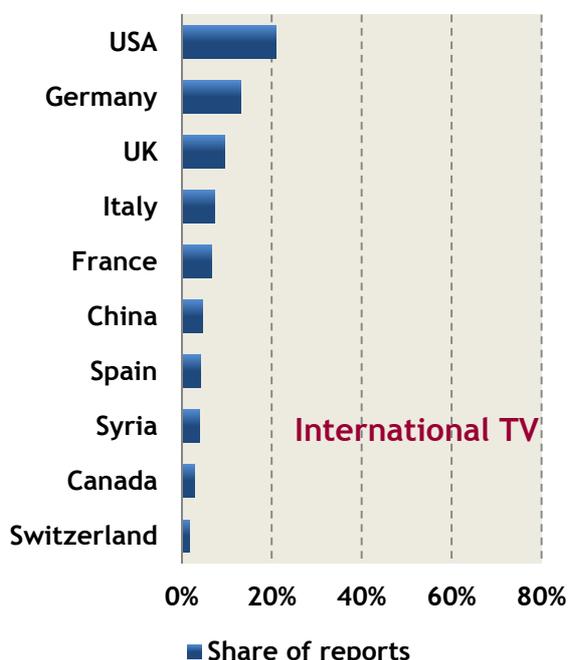
International news stations were overwhelmingly focused on the financial woes of

Europe, elections in the U.S. and conflict in China.

When opinion-leading media so narrowly focus on domestic issues and crisis regions, global leaders have a limited scope of global issues and how their home markets are responding to an increasingly interconnected world.

Understanding the topics and tonality of foreign media sources on particular regions significantly enhances elite scenario building.

International and U.S. TV: Most visible countries in 2012



1c. Foreign media mostly negative on U.S. *Media not focused on future scenarios*

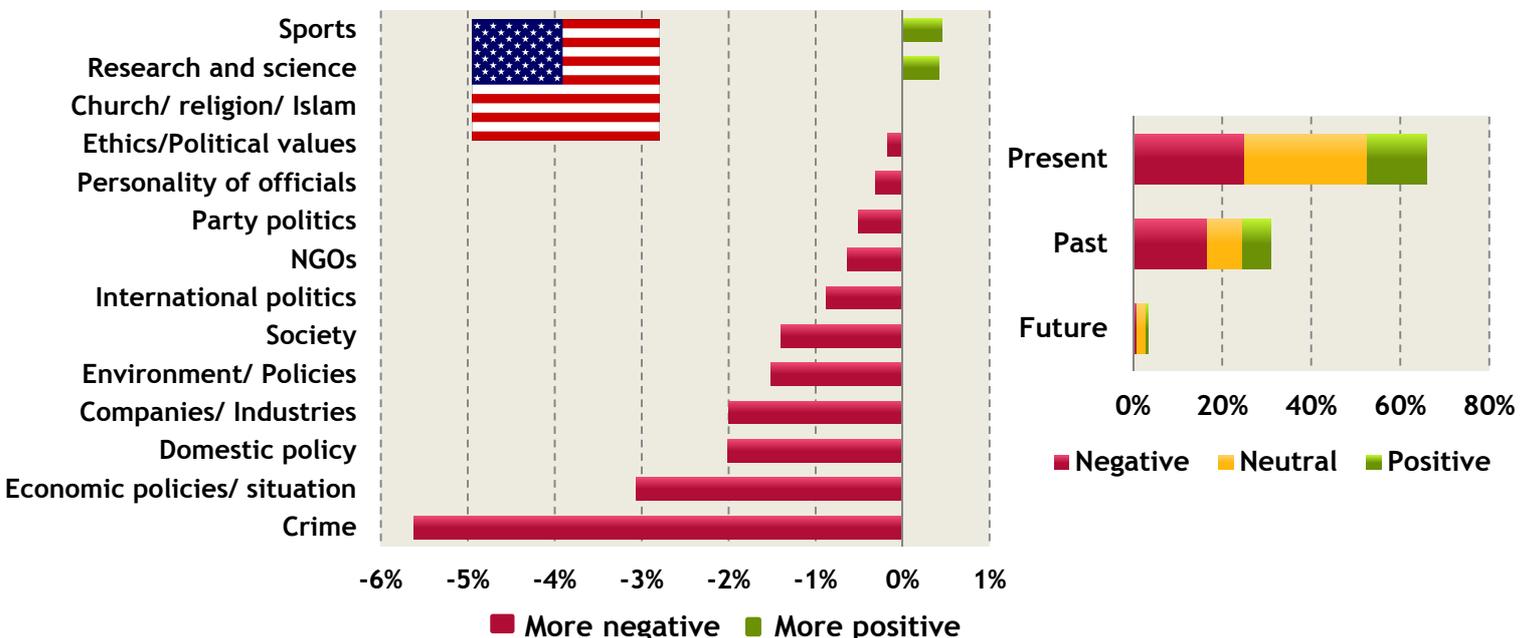
Looking one step deeper, it is evident that global perceptions of the U.S. are mostly negative. The topics and issues associated with the U.S. on international news are covered with overwhelmingly negative tonality, particularly crime and domestic security, the economic situation and policies, and company activity. Only sports, research and science are covered in a positive way.

national perceptions is vital to creating future risks and responses analysis. Of all the 25,000 news reports analyzed, only 3 percent were focused on future scenarios – with an overwhelming 66 percent of the news focused on current conditions and issues.

Reconciling national elite perceptions with contrasting inter-

Thus, on average the elite lacks willingness to develop a distinctive vision of the future and to continually elaborate and adjust that vision to capture future opportunities.

International TV: Tonality on topics associated with the United States and time frames addressed, 2012



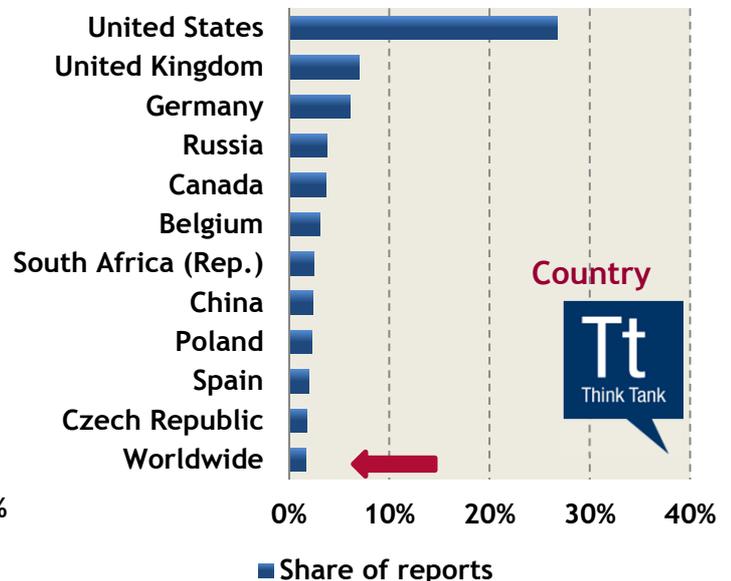
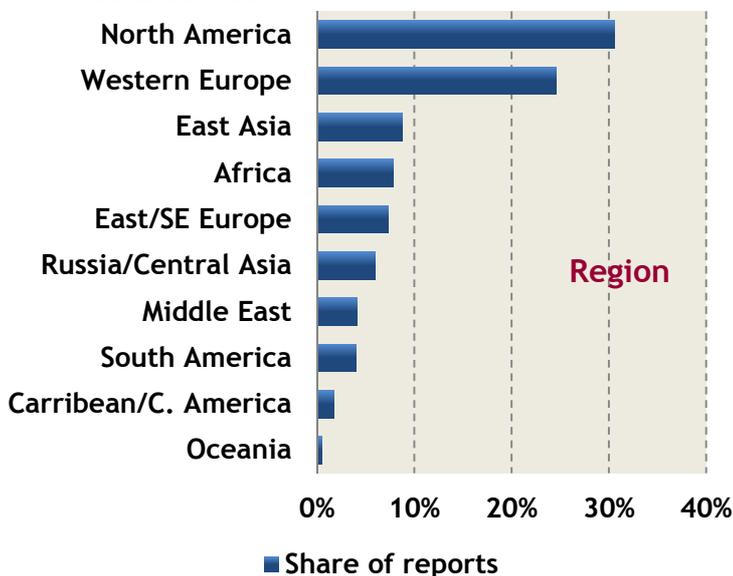
1d. Think tanks also narrowly focus on the West *Few address global impact of issues*

Another important source of information for opinion-leaders are interdisciplinary experts, or accredited think tanks. Analyzing their main website content, speeches of presidents and publication lists using international media content methodology reveals a very narrow regional focus. An overwhelming majority of focus is on North America and Western Europe, with the United States garnering nearly 30 percent of all 280 think tanks around the world. This is due to a concentration of focus on the current economic crisis.

In addition, content on the global impact of noted elite issues are also low in priority. Only 1.7 percent of topics coded on the websites were referred to on a worldwide or global scale – indicating a higher focus on the domestic implications of these issues.

When the sources of opinion-leaders are so narrowly focused, it is no surprise that speculation about the U.S. is a top priority. Getting to the core of these assumptions provides for a more global and accurate perspective.

Think tank websites: Coverage and visibility of regions and countries



1e. Most innovative global companies 2011 Few based in the United States

Rank	Company	Change from 2010	Industry	Rank	Company	Change from 2010	Industry
1	Apple	NC	Technology & telecom	26	Siemens	↑	Industrial products & processes
2	Google	NC	Technology & telecom	27	Lenovo	↑	Technology & telecoms
3	Samsung	↑	Technology & telecom	28	HSBC	↑	Financial services
4	Microsoft	NC	Technology & telecom	29	General Motors	R	Automotive
5	Facebook	↑	Technology & telecom	30	Anheuser-Busch	R	Consumer & retail
6	IBM	↓	Technology & telecom	31	SoftBank	R	Technology & telecoms
7	Sony	↑	Technology & telecom	32	Fast Retailing Co.	↓	Consumer & retail
8	Haier	↑	Consumer & retail	33	Phillips	R	Industrial products & processes
9	Amazon	↓	Consumer & retail	34	Renault	R	Automotive
10	Hyundai	↑	Automotive	35	Shell	R	Energy & environment
11	Toyota	↓	Automotive	36	Huawei	E	Technology & telecoms
12	Ford	↑	Automotive	37	Virgin	↓	Consumer & retail
13	Kia Motors	E	Automotive	38	Boeing	R	Industrial products & processes
14	BMW	↑	Automotive	39	Nike	↑	Consumer & retail
15	Hewlett-Packard	↑	Technology & telecom	40	Caterpillar	E	Industrial products & processes
16	General Electric	↑	Industrial products & processes	41	McDonald's	↑	Consumer & retail
17	Coca-Cola	↑	Consumer & retail	42	DuPont	R	Industrial products & processes
18	Dell	↑	Technology & telecom	43	Twitter	E	Technology & telecoms
19	Intel	↓	Technology & telecom	44	China Petroleum & Chemical	E	Energy & environment
20	Wal-Mart	↑	Consumer & retail	45	Volkswagen	↓	Automotive
21	Starbucks	R	Consumer & retail	46	Airbus	↓	Industrial products & processes
22	Nissan	E	Automotive	47	Tata	↓	Industrial products & processes
23	BASF	E	Industrial products & processes	48	Inditex	R	Consumer & retail
24	HTC	↑	Technology & telecom	49	Procter & Gamble	↓	Consumer & retail
25	Audi	R	Automotive	50	3M	R	Industrial products & processes

2. China and Asia on the rise by 2030 *What factors shape this perception?*

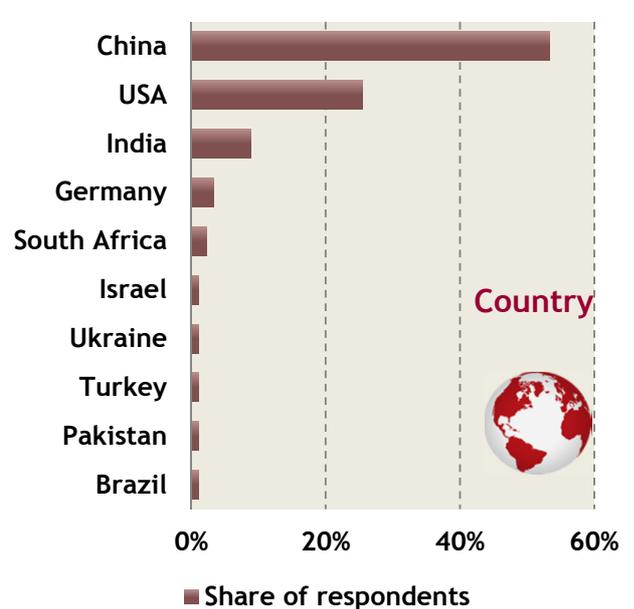
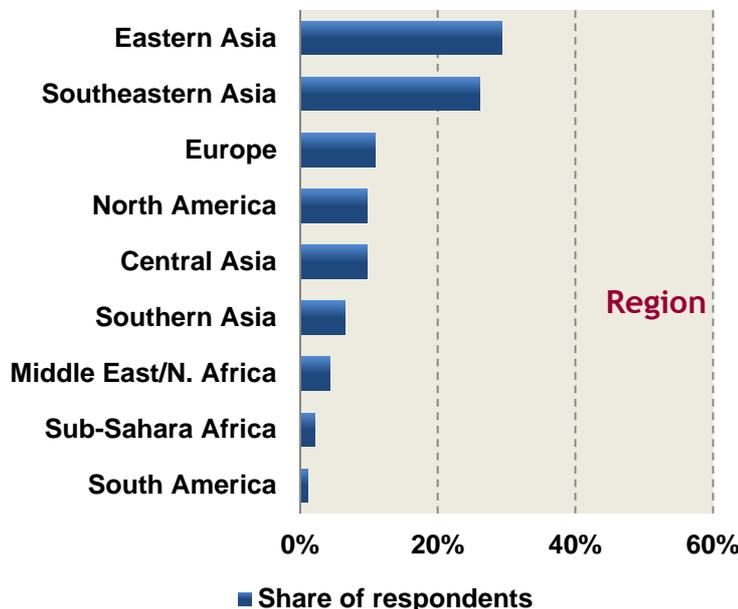
If the U.S. is thought to be on the decline, then begs the questions: Is another country ready to claim its leadership position?

Back in 2001, the BRIC economies – of Brazil, Russia, India and China – were coined the emerging markets. But in 2010 and 2011 growth in China slowed, causing analysts to question its readiness to lead. yet, elites continue to focus on strategies aligned with China’s leadership role, despite the drawbacks of its aging population and the reported shift from an export to a service

economy, which raises uncertainty about China’s future. According to the GAI survey, Asia is still projected to be the most important region globally by 2030. In addition, nearly 60 percent of opinion-leaders believe that China will be in the spotlight.

Perceptions of regional power shifts are critical to collaborative approaches addressing the global issues forecasted, as well as anticipating political challenges which may shape outcomes. Deciphering source information and tonality on China reveals alternative scenarios.

Survey respondents: Most important region and country in 2030



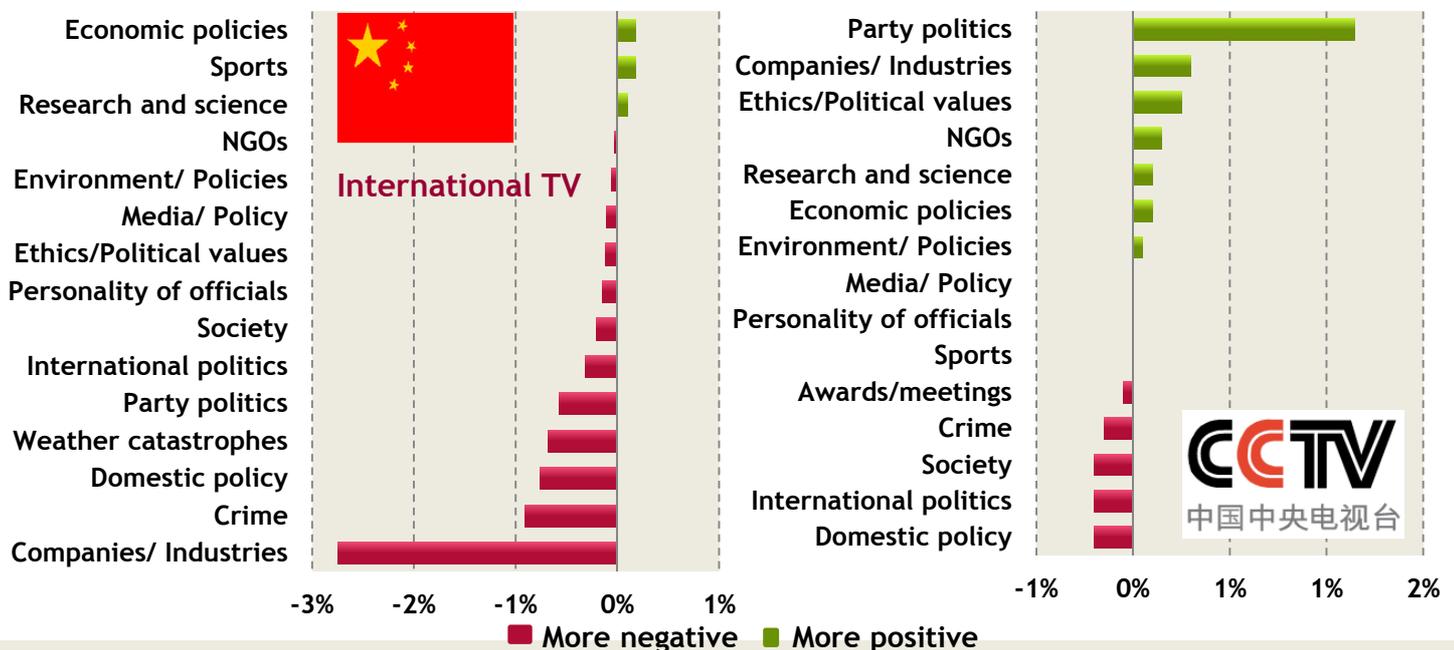
2_a. Positivity on China stems from economics *International and domestic news at odds*

According to international TV news, positive perceptions of China are driven by positive tonality on economic policies sports, research and science. However, domestic issues, such as security, social welfare and companies in China are reported on with more negative tonality. Human rights issues with workers have been negative for businesses investing in the country and attention to political shifts within the leading Communist Party have created some uncertainty about the future direction of leadership.

In contrast to international TV, China's main domestic news station, public broadcaster CCTV, radiates a more nationalistic image of China –focusing more positively on party politics and the situation of companies residing in the country.

However, the international politics of the region, namely tensions with Tibet and territorial disputes in the South China Sea, are increasingly in focus, drawing attention to the social realities that may effect China's growth going forward.

International and CCTV: Visibility and tonality on topics associated with China, 2012



2_b. Analysts not as confident about China *But commodity market in a positive mood*

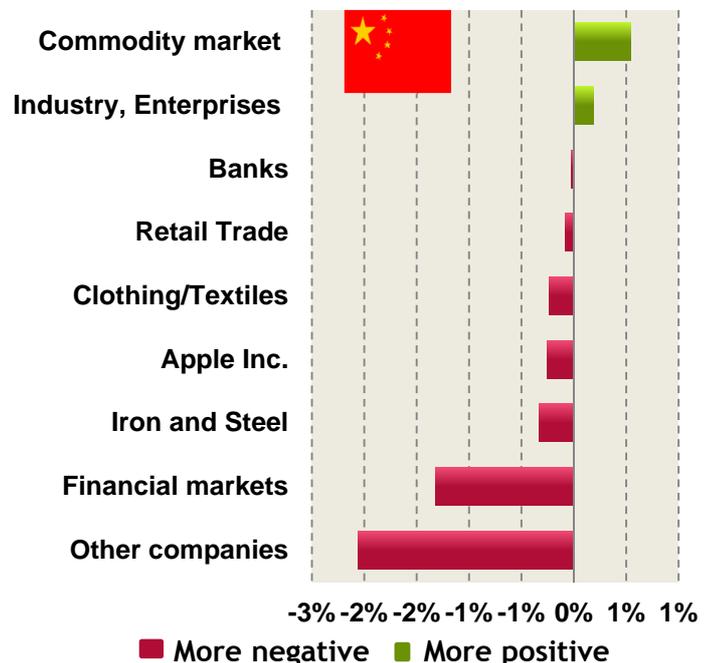
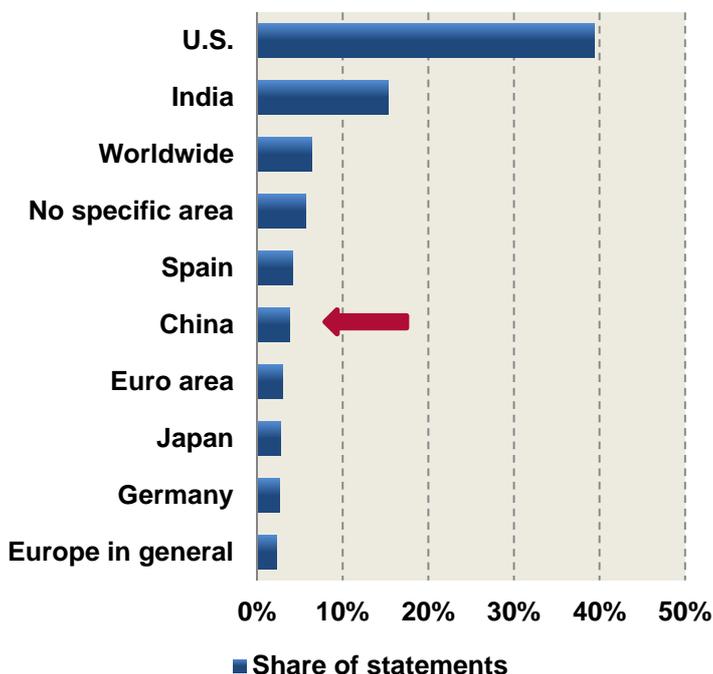
Financial and equity analysts in leading business media, such as Barron's, Financial Times and Les Echos, are mainly focused on the U.S. and India for financial investment.

Like international media, Analysts report on company investment in China with a more negative tone, along with the financial markets and other core industries. However, analysts are more positive on the commodities market of China, where raw or primary

products are exchanged. Aside from physical products, analysts must also consider the ways that services, including those of government, investments or debt are seen as commodities –services that are increasingly dependent on the political and economic functions of an increasingly inter-connected market.

The factors which underpin expert scenarios are seemingly based on perceptions of consequence to economic shifts.

Analyst quotes: Visibility and tonality on topics associated with China, May-December 2012



2c. The economy vs. technology

Is China reactive or proactive to game changers?

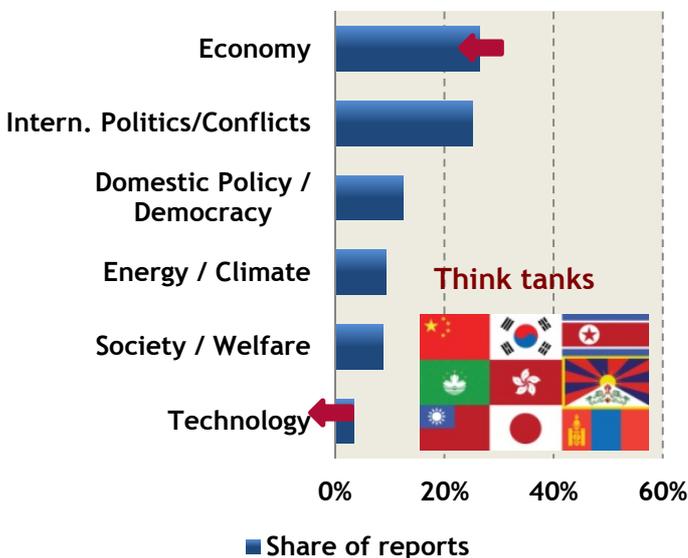
Experts from think tanks mainly focus on the regional economy and international politics of East Asia, essentially mimicking the media agenda. Analyzed aspects of the 280 think tank websites also had little future focus.

Overall, the high volume of focus on the regional economy indicates that opinion-leaders and experts are basing their future projections on the economic potential, perhaps not accounting for other social influences. For example, results from the Global Agenda Index show that elites think that the

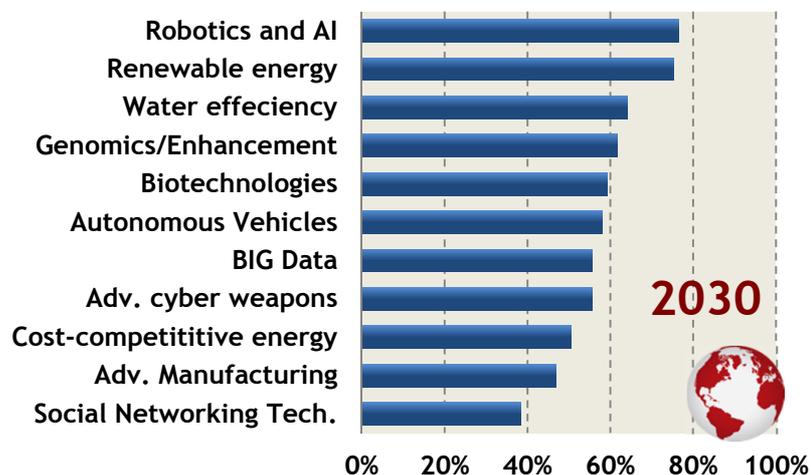
influence of technology will significantly increase in scope by 2030. Factoring in this underlying trend in the context of perceived global issues and risks lends substance to understand the ability of countries to capture the potential to develop these technologies. Technological development in China is largely uncovered by experts.

As evidenced, current reporting has many 'blind spots'. Therefore, the scope and depth of information shaping elite perceptions about China must be challenged.

Think Tanks: Topics associated with East Asia



GAI: Game-changing technology



3. The “unknown” fate of Europe

Euro crisis dominates the media agenda

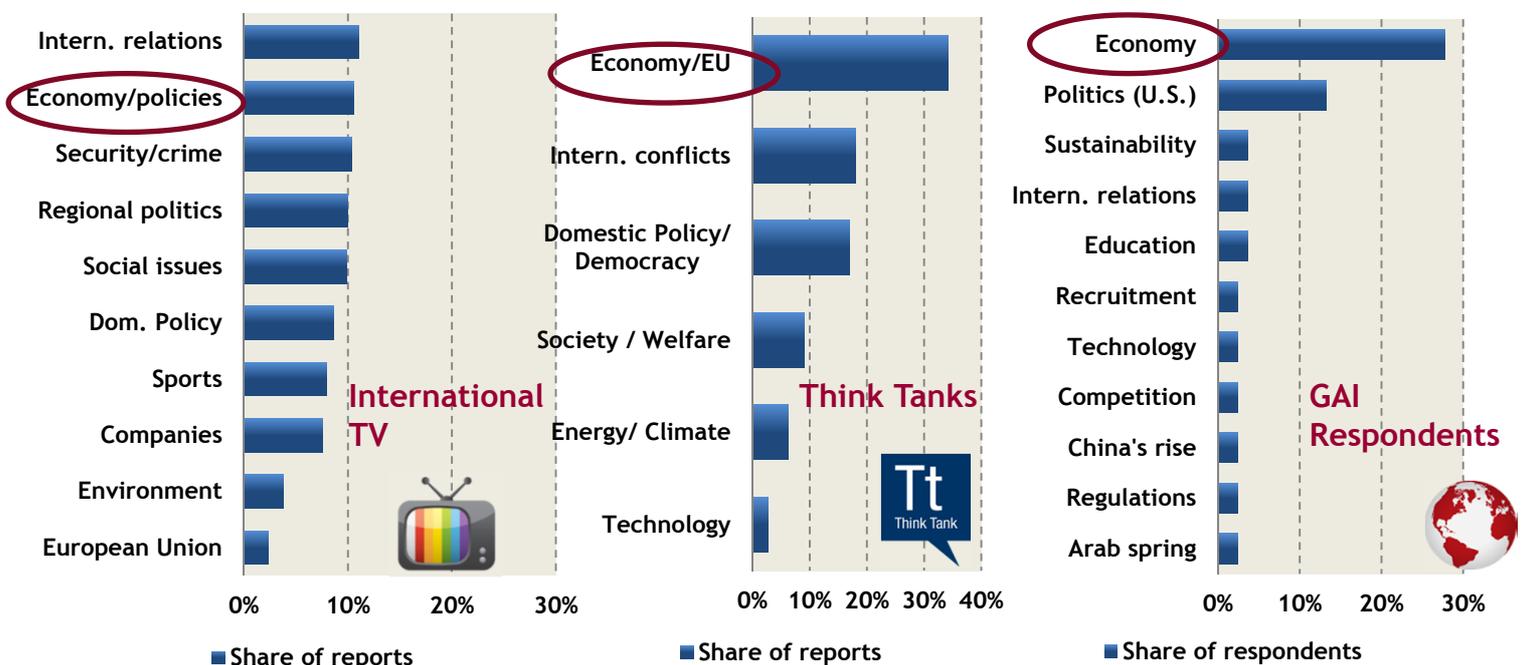
From July 2011 through November 2012, international issues such as the Euro crisis and regional politics were the most covered stories on international TV. Economic issues in the EU were also a top concern for leading think tanks.

It’s evident that the issues the media chose to cover have had an effect on leaders’ focuses during the past year. When asked “*What issue has taken up a lot of your time in the last 12 months and looking back now*

seems less relevant?” an large number of respondents named the European debt crisis – an isolated regional event.

Due to dominant focus on the current economic crises, the *patterns*, or pathways for communicated solutions, are underrepresented in the media content. So are the root causes that can be identified by digging deeper into the underlying *structures* of conflict with a more international lens.

Top topics on international TV and on think tank websites, and listed issues by survey respondents that seem less relevant



3a. Economic issues shape future scenarios Social issues low on experts' agenda

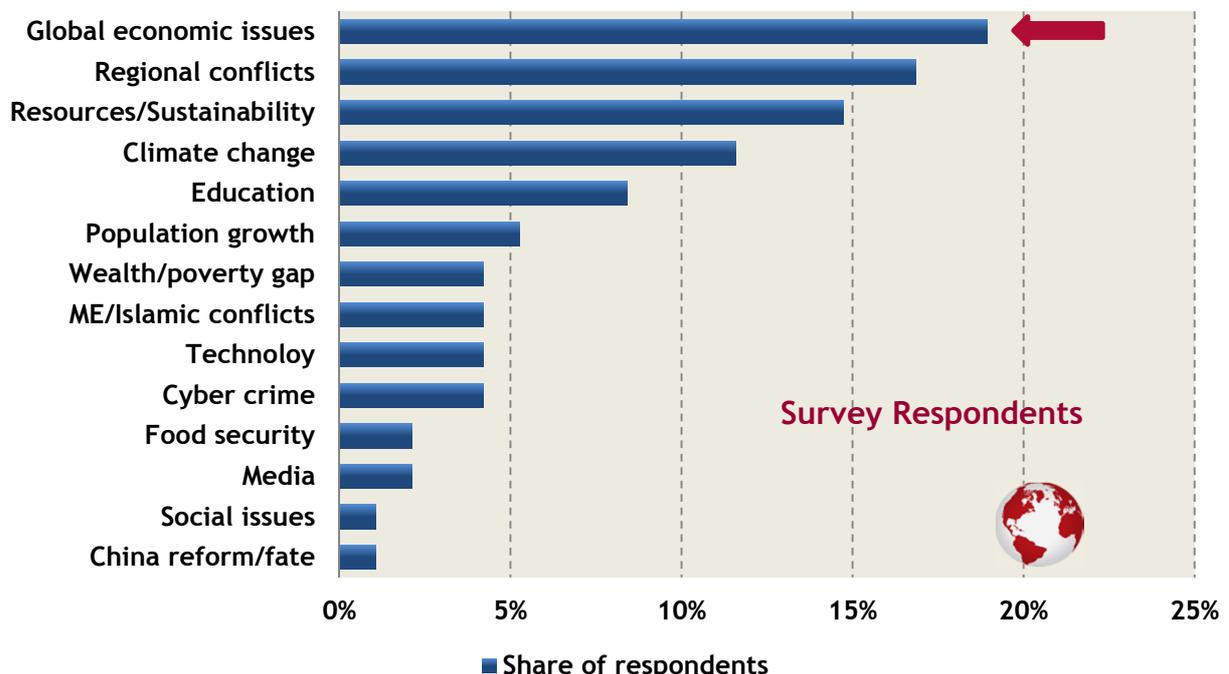
Despite respondents from the GAI identifying that the Euro crisis seems less relevant, when asked to identify the top global trends to have the most impact through 2030, global economic issues were listed by 19% of elites – indicating long term effects on society.

The concern over conflicts from regional restructuring (in essence globalization) and questions about sustainability are still listed in the top three trends. These issues reflect

perceived variables of consequence from current global issues, which correlate with the findings of the Risk Response Network (2011).

At the root of economic concerns are assumptions of a deepening cultural and political crisis on a global scale. How Europe and the U.S. are perceived to recover will significantly shape perceptions of defining shifts which are restructuring markets and society.

Top global trends by 2030 cited by survey respondents and most mentioned topics on think tank websites



3b. Europe will rebound from Euro crisis East Asia perceived to face conflict in the future

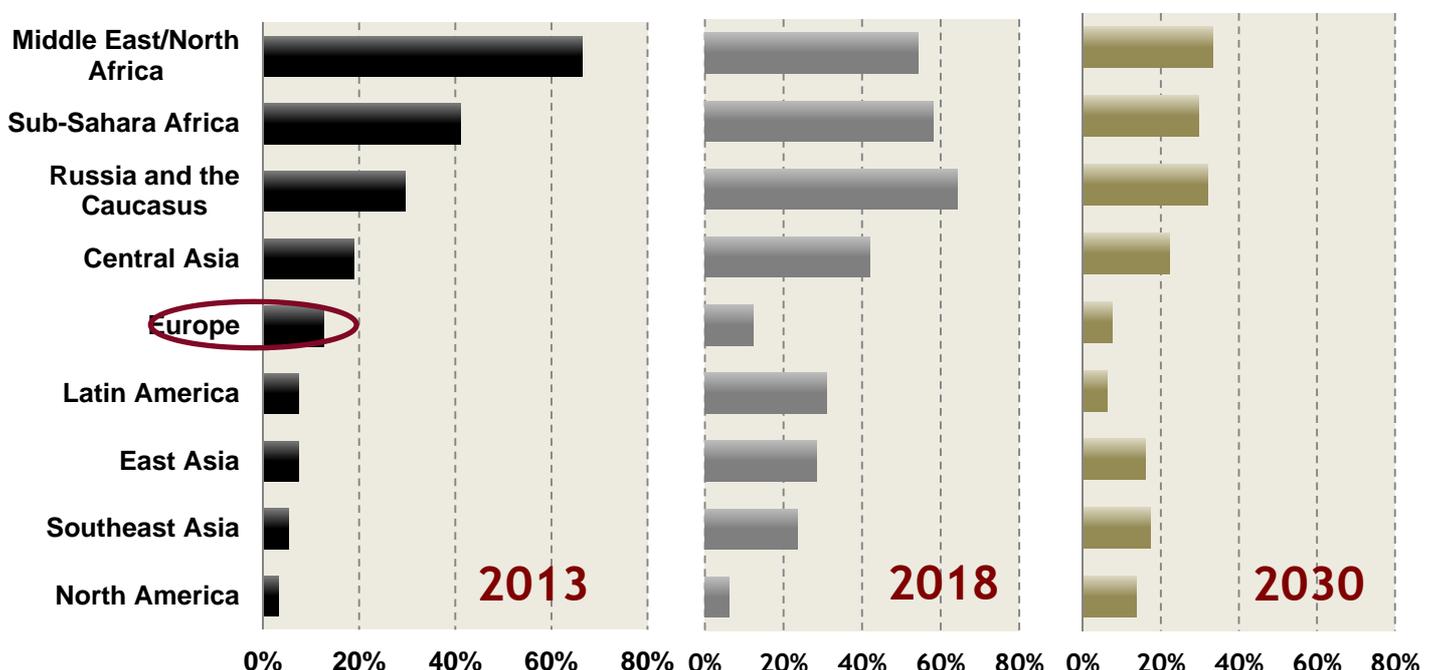
Respondents contemplate a less unstable Europe is forecasted by 2030, indicating a perceived recovery from the current uncertainty over the hyped-up Euro crisis; also increasing conflict in the MENA region, Sub-Sahara Africa and Asia within the next 5 years.

Although Europe is projected to be slightly more conflict-ridden within the next year, conflict is projected to increase more in East Asia in the next 5 to 15 years, despite opinion-leaders

forecasting East Asia as the most important region by 2030. Media focus on land disputes and other conflicts in the region may contribute to this perception, along with anticipated consequences from the global economic crisis.

Overall, international media coverage of these regions will highly affect planned foreign investment, development and innovation from influential forces in the coming years, shaping the future.

Survey respondents: Regions of the world that will likely be unstable and conflict-ridden in the coming years



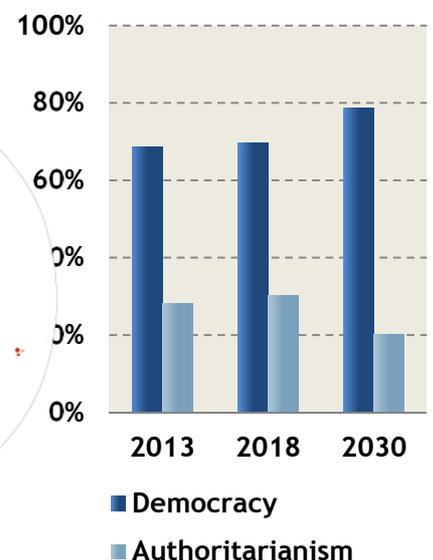
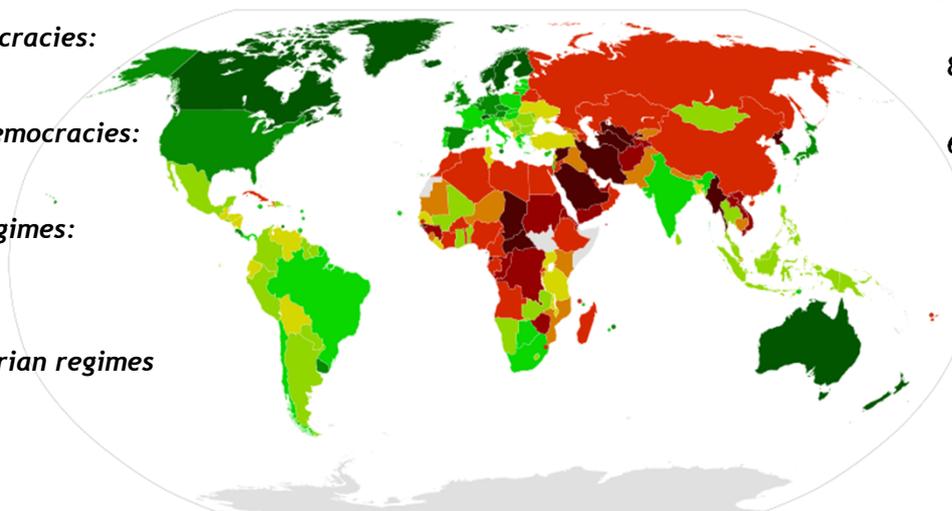
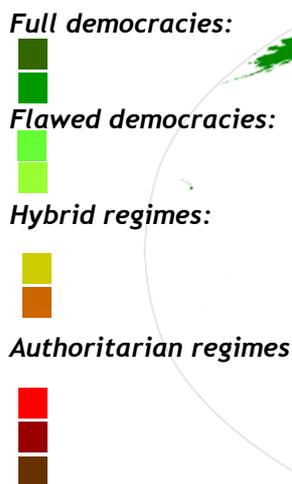
4. Dominance of democracy unclear *Accepted business models put into question*

Conventional wisdom in international relations and development studies fields has been that democracy is the best political system to grow an economy. According to the Global Agenda Index, opinion-leaders are somewhat uncertain about the dominance of democracy as the a driving force by 2030 with nearly 30 percent of respondents identifying the role of Authoritarianism in future global scenarios.

The countries in the world facing the most uncertainty, according to elites are those identified by the Economist

Democracy Index as full or flawed democracies. Yet, East Asia, primarily Authoritarian, is perceived as up and coming. These perceptions beg questions of how trending shifts cast doubt on the effectiveness of the attitudes, organizational structures, and management approaches that are accepted in the past as standard. Diffusions of power and shifts in economic centers will reshape corporate landscapes and the capability of companies to deal with turbulent business conditions throughout the world.

Survey respondents: The importance of democracy or authoritarianism as a driving force in the future



4a. Speed of change and innovation increasing Top listed innovative companies in Asian market

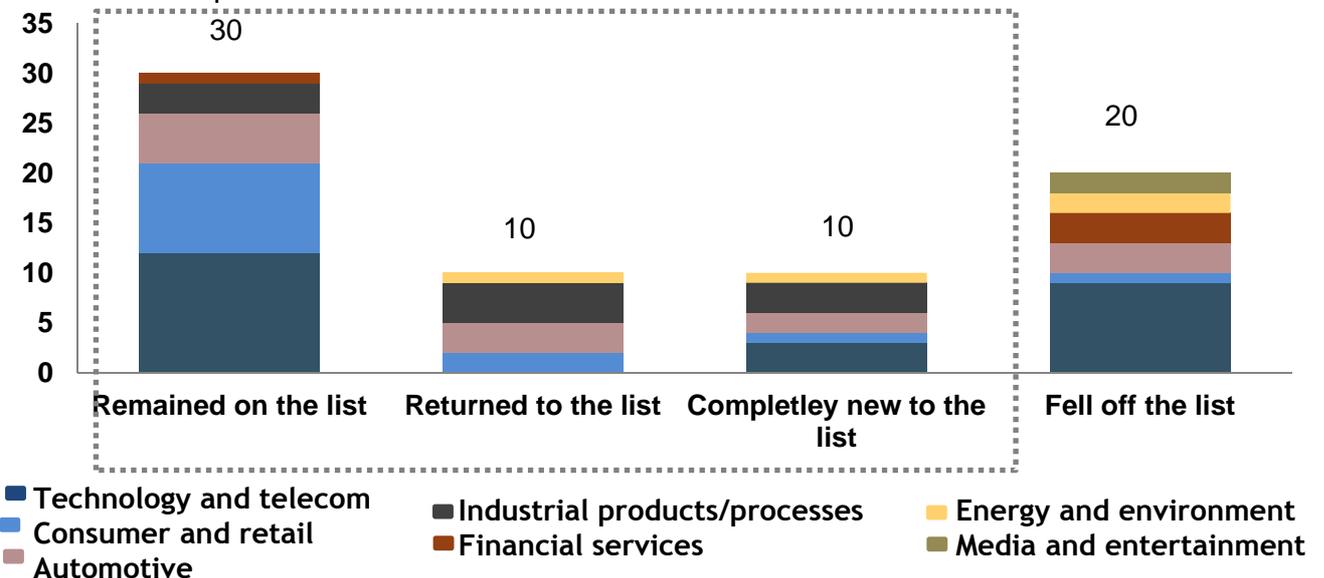
According to business experts, innovation is an important driver of the organic growth necessary to generate sustained, above-average returns in a turbulent economic environment. Among the many indicators of the current and future robustness of the innovation environment, two of the most critical include the relative priority of innovation and the outlook for increased innovation spending in the future, as communicated by the company executives.

In a world that is exponentially changing due to the speed of

technological innovation, companies in various industries are facing the pressures of adaptation. According to surveyed CEOs around the world, companies experienced sharp shifts from 2010 to 2012, with 20 companies in various industries falling from the list of “most innovative”. Ten were new to the list all together, showing how new companies are rising to challenge old standards, while most of top 100 companies are residing in Asia. Some industries are more vulnerable than others, especially in the technology and telecoms sector.

Boston consulting Group: 2012 Most innovative companies

Number of companies

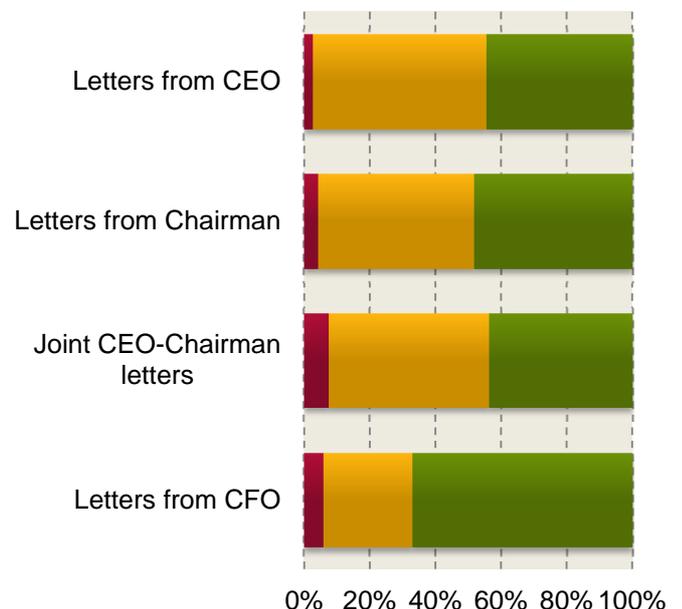
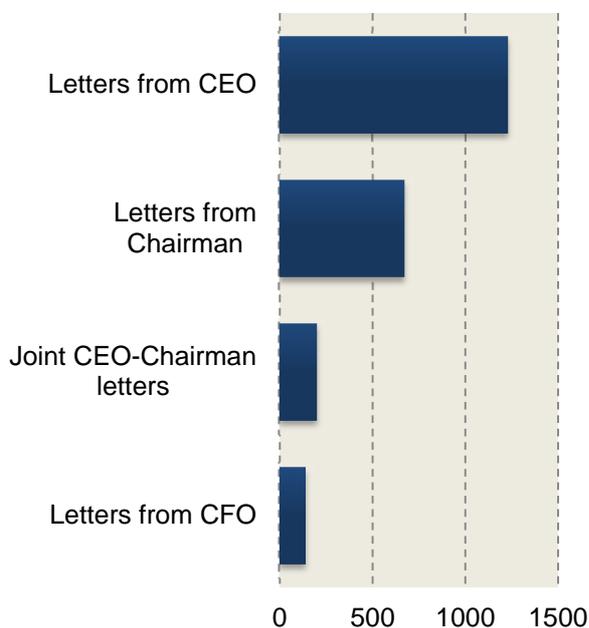


4b. Business leader communication varies *Letters from CFOs most positive and under-used*

Most annual reports are introduced with one or more letters from key executives reviewing the year the company faced. Aside from being front and center in annual reports, this content is often the most readable for non-expert audiences, including journalists. Despite the importance of the selection of these letters to effectively communicate challenges and successes, analysis shows that most companies rely only on a letter from the CEO. These letters, while strongly positive, do not offer the even greater

shares of positivity seen from letters by chairmen and, most importantly, in letters from chief financial officers. In fact, of those leading companies whose annual reports were examined for this analysis, CFO letters were the least frequently employed communications tool in annual reports even though they offered the most significant positive contribution. Communicating awareness and adaptability will be a key in managing identified challenges to build valuable and realistic scenarios.

Volume and tone of statements in executive letters, 2011 annual reports



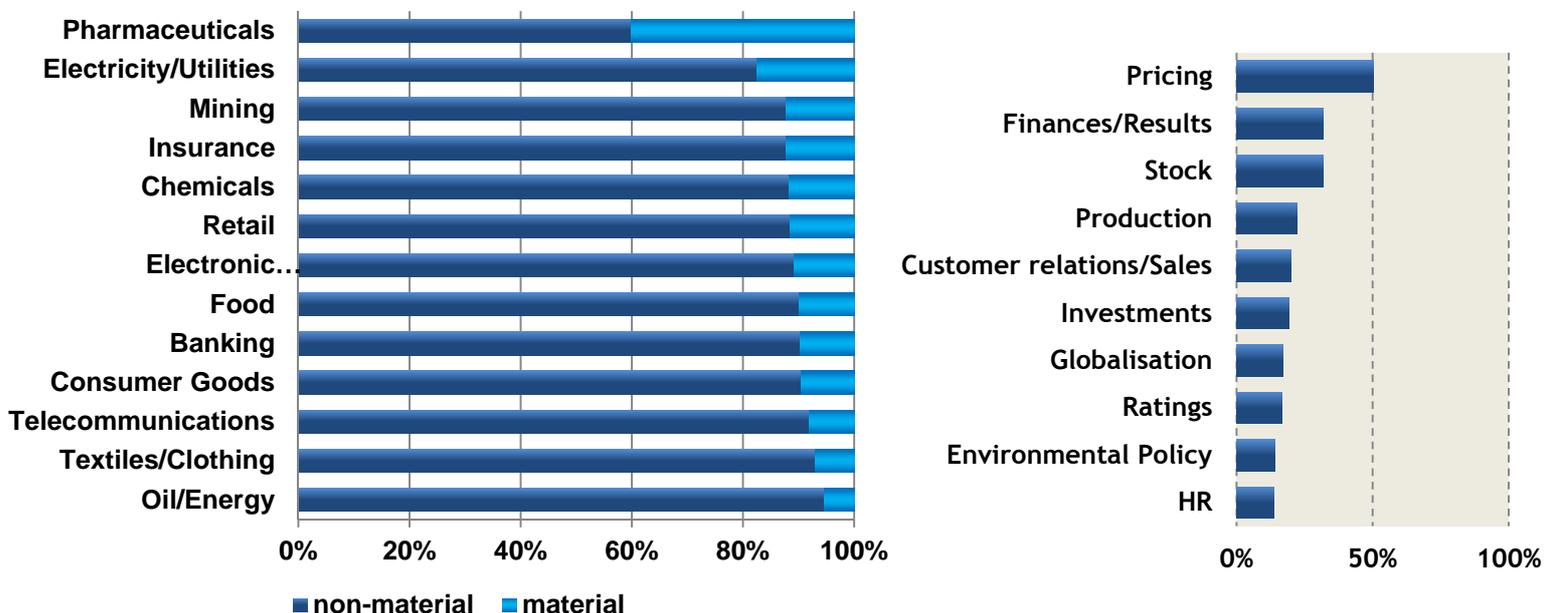
4c. Companies focus on numbers not strategy *Little acknowledgment of broader material impacts*

The quality of corporate communication which focuses on their operating practices and the consequences of those operating practices (materiality) differs by industry. With the exception of the pharmaceutical industry, most industries shy away from impactful issues. Different topics covered in annual reports contained different shares of material statements. For example, discussion of pricing policies and what price increases and strategies different markets were able to bear contained material statements slightly

more than half the time. Similarly, other statements on financial elements, such as those about finances, results, and the stock, also contained notable shares of materiality.

Topics that were not always explicitly linked to financials, such as globalization, human resources, and environmental policy, offered much lower levels of materiality, suggesting that many companies have a limited, and potentially risk-inducing, vision of what issues can have critical operating impacts.

Share of materiality by industry and share by topics in 2011 annual reports

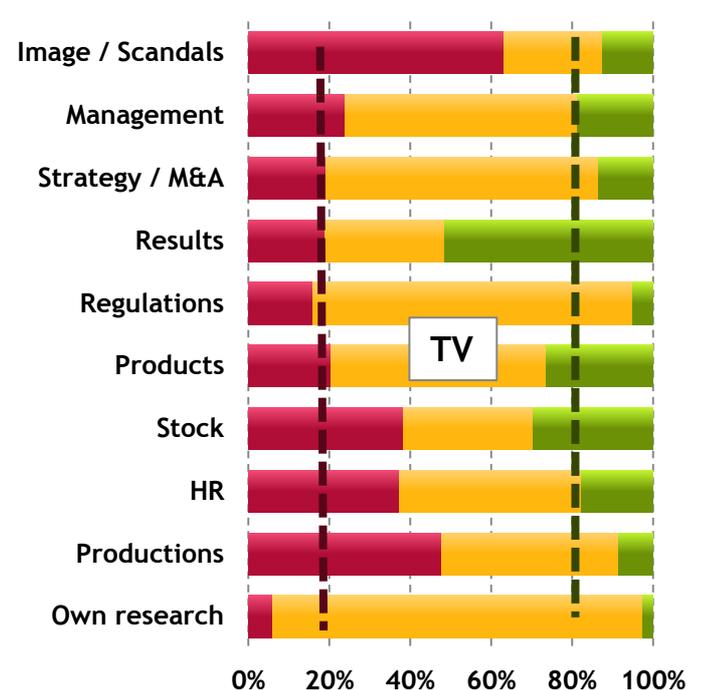
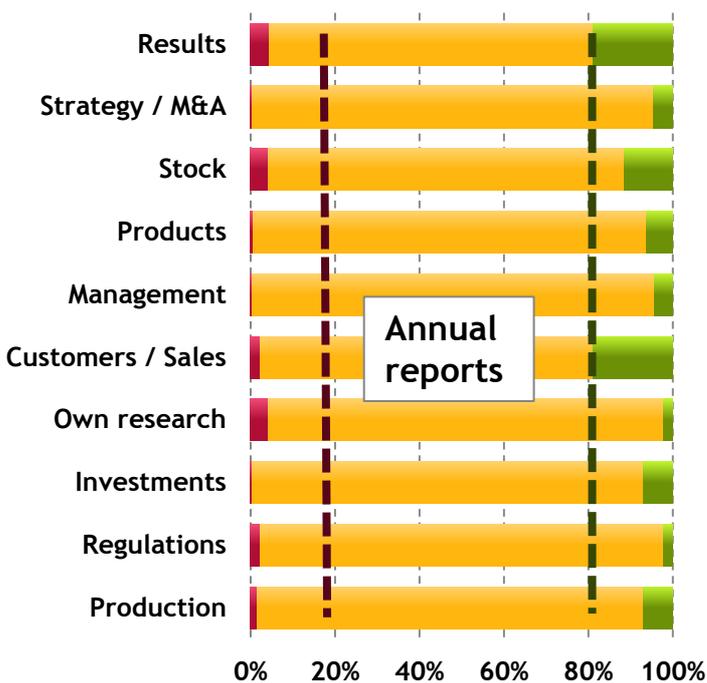


4d. TV news ignores corporate assessments *Annual reports not making convincing argument*

Overall, companies were cautious in the tone of content presented in their annual reports. Negativity was almost non-existent, with risks mentioned only when it was unavoidable. Even positive statements were included on a fairly limited basis, often under the target thresholds. This was a marked contrast compared to the coverage tone from international TV news, which was sharply negative on almost all visible topics. Financial

results were the one clear exception. This difference in tone highlights that companies are not making a convincing case about who they are and how they operate in annual reports. TV news media are forming their own opinions, and the lack of clear tone on successes and failures in annual reports has created a situation where TV feels free to ignore these documents which could be central to corporate image building.

Tone of statements in annual reports (2011) and on TV news(2011)



4e. Companies not telling a clear CSR story

Fear of globalization drives focus on home markets

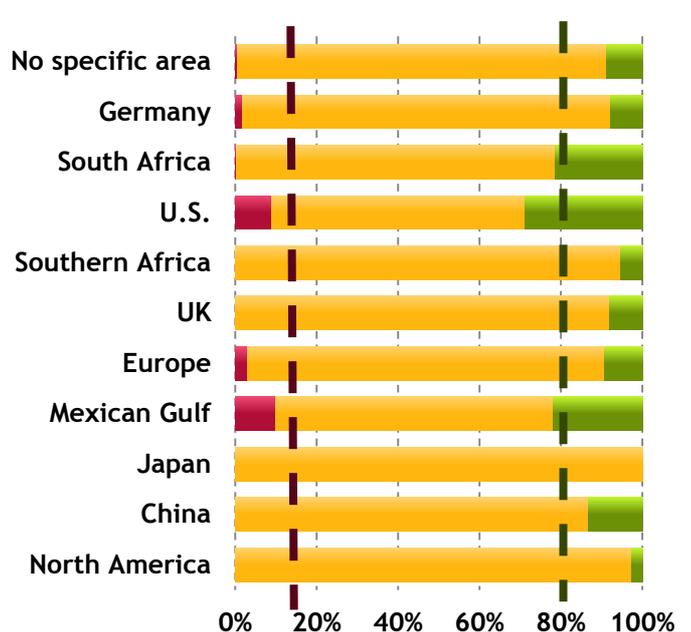
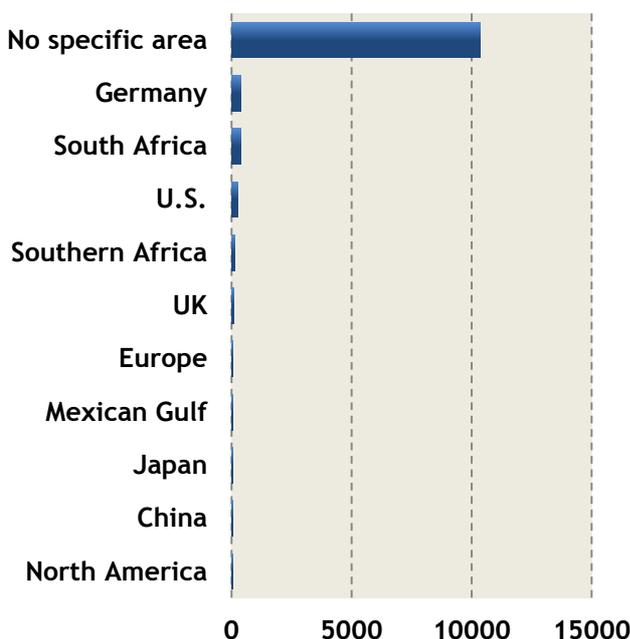
Specificity in annual report content represented a struggle for many companies. CSR activities provided a clear example of this across the data set as companies were rarely specific as to where their CSR activities occurred. This lack of specificity risks creating less compelling and credible examples.

When location was specific, it was often the same as the home country. While CSR activities in the home market

are absolutely key, this is an era of globalization. For this reason many stakeholders that are concerned about CSR want to know what responsible activities corporations are taking on in developing markets or other potentially, where they are at risk.

The data also showed that companies were often reluctant to speak positively about their CSR activities, while in some locations risks had to be acknowledged.

CSR efforts as described in 2011 annual reports by region of activity, volume and tone



4f. Think tanks shy away from specificity

Global business activity not in focus

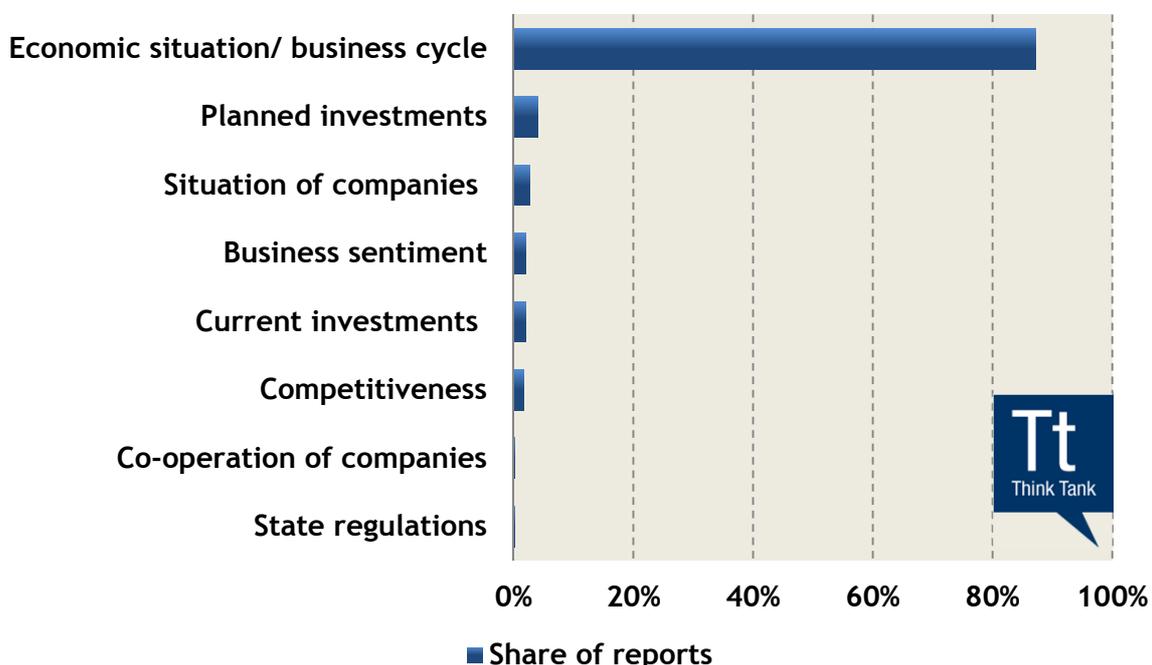
Think tanks are also shying away from more targeted discussion on the activities of global and domestic businesses in their content.

Out of all topics analyzed, less than 4 percent of topics were devoted to business issues. Of these topics, nearly 90 per cent were focused on the business conditions in relation to economic crisis, but with little specificity.

More targeted focus was minimal in regards to planned investments, business sentiment and competitiveness, which was mainly concentrated for domestic markets.

Overall, narrow think tank focus on the Euro crisis and international conflict are driving elite perceptions about future business conditions, without specifically addressing the targeted risks.

Think tanks: Visibility of business topics



5. Global positioning key to organizations

Sustainability and education also top challenges

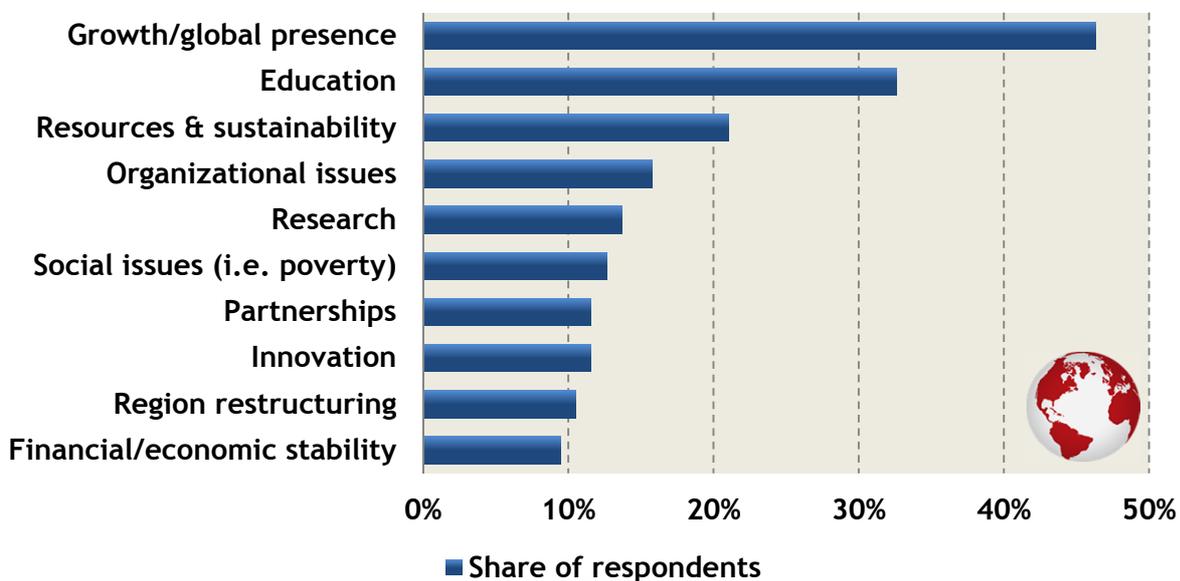
According to the identified trends that will likely differ from past scenarios, opinion leaders have identified the top challenges that will necessitate the creation of different perspectives, requirements and attitudes for success.

CEO's and civic leaders, which significantly contribute to narratives, will need to adapt in order to have a global presence. This increases the need for research and education to identify and manage the top challenges in a world not only more crowded,

more volatile and more unstable, but also increasingly disconnected.

Addressing these needs starts with raising awareness and reputation for the institutes that are vital for contributing to the public discussion – amongst them universities, think tanks and companies – which play a significant role in influencing scenario building. Understanding the various incentives of these subsystems is the first step to identifying impediments to effective innovation.

Survey respondents: Challenges most important for their organizations to be better positioned by 2030



5a. Global risks are drastically changing

Civil conflicts, cyber warfare & climate change a risk

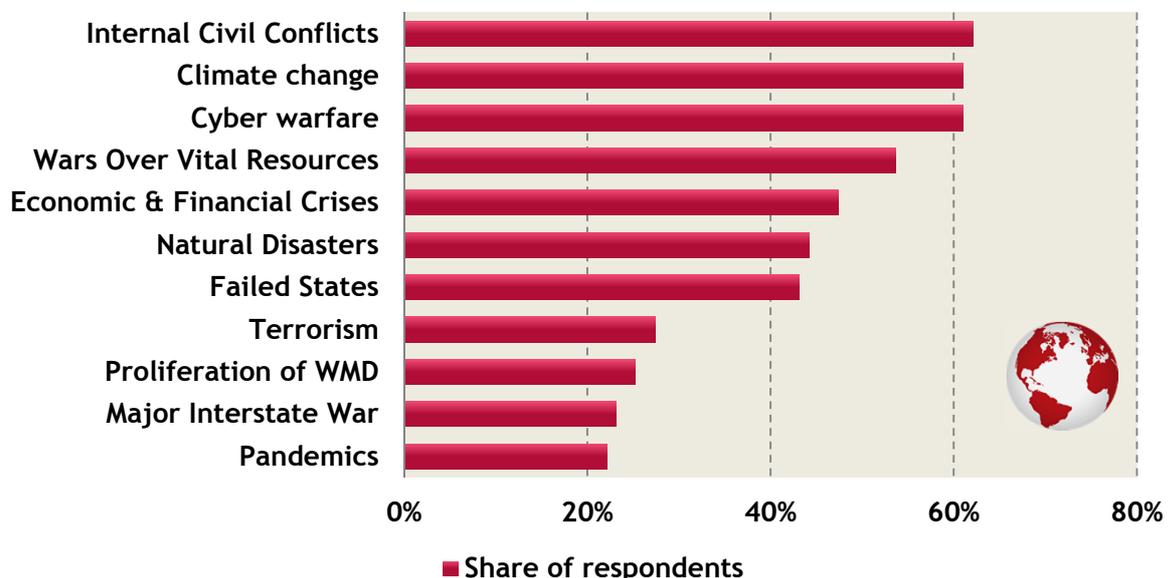
Strategic evaluation of future scenarios also includes awareness of perceived risks and the underlying structures which generate them. When asked to list the pernicious risks to security by 2030, opinion leaders agreed that internal civil conflicts, cyber warfare and climate change represent the new challenges.

Despite the global focus on terrorism from the early 2000s, fewer opinion leaders feel this will be as relevant compared to the consequential risks of

technological development and regional restructuring. As noted earlier, cyber warfare, technology and climate change, identified as critical social indicators of change, did not receive as much visibility in international TV news in the last year.

Consistent media focus on global economic issues and global leaders' concerns for their impact have left these risks largely unaddressed, despite the interconnectedness of these underlying structures.

GAI survey respondents: Perceived risks to security in the next 1-5 years



5b. Sustainability on global agenda for experts But focus is minimal compared to domestic issues

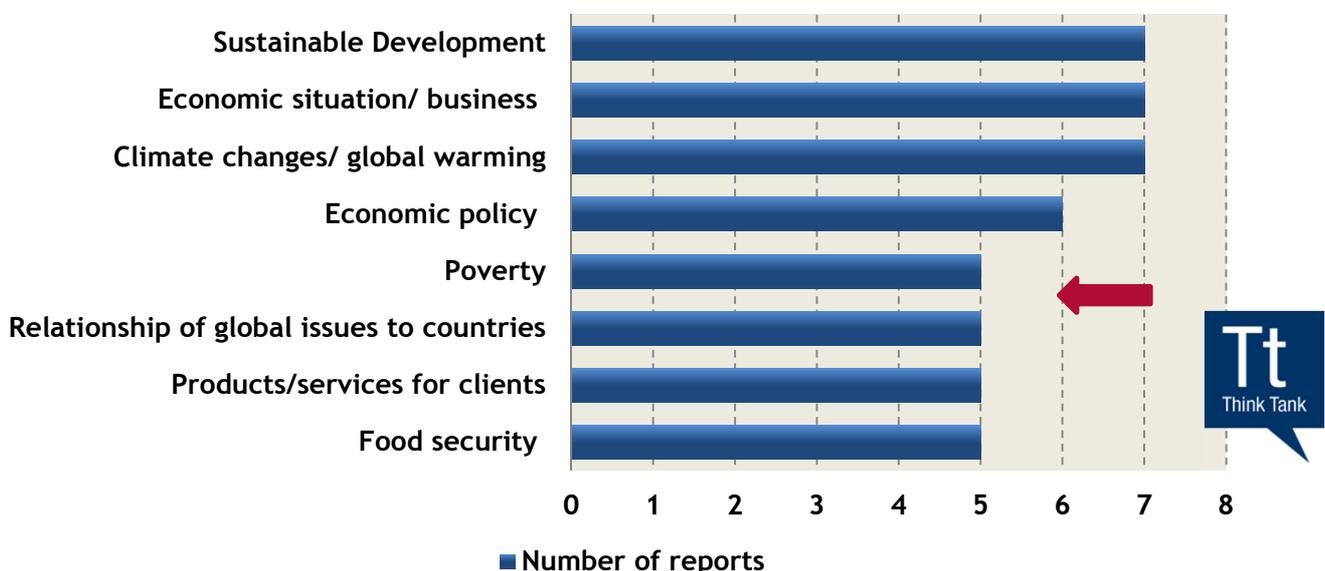
When think tanks address issues on a global scale, sustainable development, the economic situation and climate change top the list of topics addressed, but their overall visibility is generally low.

When it comes to addressing the relationship of global issues to specific countries, think tanks fall short of making these concerns more visible on their websites. Only five out of 182 reports drawn from analyzed think tank websites stated their concerns in a visible way about

global issues and their potential impact on countries. A majority failed to report on the urgent issues that warrant greater attention from policy makers and business leaders.

Overall, the trends in visibility on global issues in international media and leading organizations reflect the concerns of thought leaders, but largely fail to address the challenges that these leaders en-vision for the world of 2030. Technology, energy and cyber security, are also absent from the agenda.

Think tank websites: Coverage of topics mentioned by think tanks when “worldwide” is the focus



5c. Academic institutions lack communication *The role of research in effective scenario building*

Prime educational sources that are largely under used are universities. Media essentially shape the perception of the world, thus even universities and academic institutions, which significantly contribute to the public debate on global issues, are dependent on an increasing degree of sustainable media coverage.

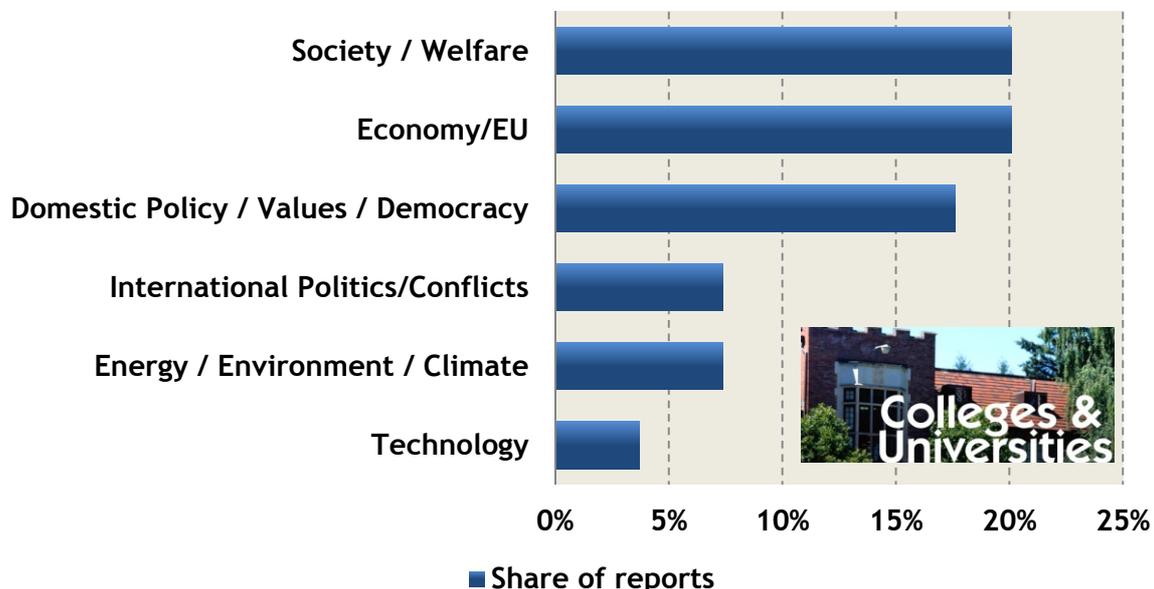
In 2012, the highest share of topics in relation to university activity and research related to social concerns and global economic issues. Sustainability issues, such as energy and

climate change, were lower on the agenda, while topics like technology garnered less than 5 percent of total coverage.

Overall, media focus on the research of academic institutions made up only 4 percent of topics discussed, leaving the expertise of researchers and institutions largely absent from public debates on current and future issues.

Universities, as a valuable information and resource tool, are lacking a communication strategy that effectively influences the media agenda.

Universities in international TV news: Share of topics, 2012



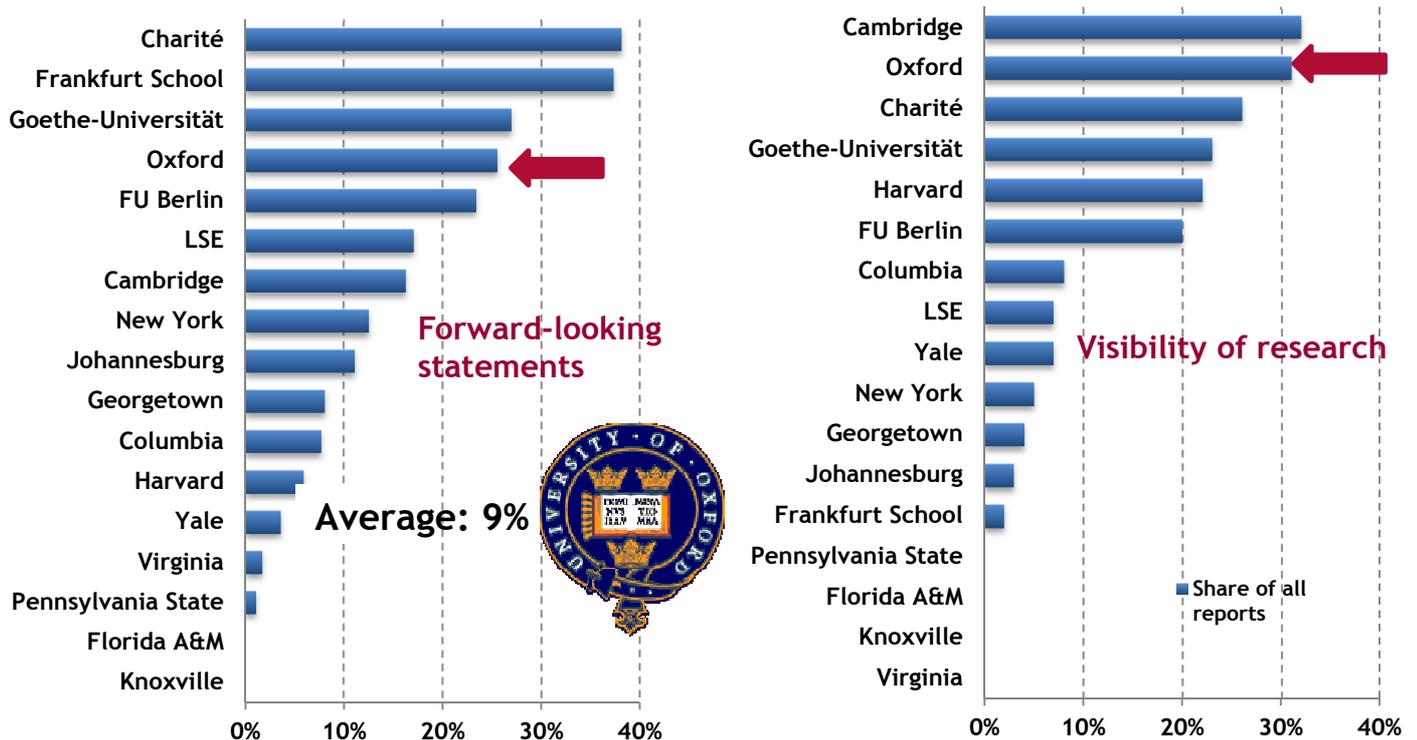
5d. Oxford is looking ahead in research *An example of effective communication strategy*

As noted, Input from academics and scientists on fore-casts, predictions and forward thinking research significantly con-tributes to perceptions of global uncertainty. Thus, how the media portrays educational organizations is vital to identifying which forces will influence future change.

Oxford University is one institution that has raised its

visibility and successfully highlighted its research and strategies for future challenges. By enhancing their media presence Oxford has increased public trust in their activities and responded to public debates on pressing global challenges and development, essentially improving its position in competition for public funding, researchers, teachers and students.

Universities in international TV: Share of forward-looking statements and visibility on research



Conclusions

The reliability and validity of leaders' perceptions

Applying the proven Agenda Setting Methodology Media Tenor has drawn on data from multiple sources, international TV news, think tank websites and corporate Annual Reports. Subsequently, the collected evidence was triangulated with survey findings of opinion leaders so as to enhance the validity and reliability of the Global Agenda Index (GAI) results. The GAI aims to question the credibility of elite polls by debunking a number of myths that condition future scenarios and how these influence public opinion on issues. Here follow our main conclusions:

- **The myth of the heroic quest and initiation being embedded in Western practices.** These condition elite future scenarios and, in turn, public opinion on issues. Our findings indicate the urgent need for CEOs and civic leaders to adopt new attitudes and perspectives to make a painful rite of passage towards a new socio-ecological production/consumption model, including more transparent communication strategies.
- **The myth of continuity in regard to the rise of Asia.** Instead our study shows that Asia's growth will be hampered seriously by the increasing scarcity of natural resources. This is likely to raise tensions and conflicts within Asia's 'network capitalism' model. Simultaneously, the planet is becoming more vulnerable with significant geo-strategic consequences, leading to discontinuity in the form of fragmentation, potentially armed conflict, and for the unequal distribution of these resources among the countries of Asia, where by 2030 two-thirds of the world population will live.

Conclusions

The reliability and validity of leaders' perceptions

- **The myth that entrepreneurial capitalism is the solution to sustainable growth.** Instead our findings suggest that poverty and carbon emissions are on a path toward climate catastrophe posing a serious risk to global growth forecast. Therefore, the GAI seeks to draw attention to the idea that knowledge about the underlying structure, particularly the interrelatedness between social indicators, is key to integrating stakeholders in responsible policy analysis which can have a significant impact on the conditions that drive sustainable growth.
- **The myth of independent adaptation to changing situations-** limited to narrow visions of protectionism, climate change, biodiversity and poverty. Instead our findings indicate that a multi-polar world serves as a wake-up call for a politico-cultural transition toward a new universalism.
- **The myth of connectedness.** The Global Agenda Index underscores that education and sustainability are top challenges in a world not only more crowded, more volatile and more unstable, but also increasingly disconnected. The various subsystems are driven by different incentives and funding is insufficient to connect them for appropriate knowledge transfer. Our study shows that universities lack a sound communication strategy which impact the media, causing disconnect, in turn impeding learning and effective innovation. By raising the visibility of its research output Oxford demonstrates understanding of the interdependent nature of our global commons. This is a first step towards building the capacity and competences to connect within the wider system of education, science and innovation to bridge the gap between research and praxis through partnerships linking the private, public sectors with civil society.

Examining think tank websites

Assessing leading views on future trends

Website analysis of leading Think tanks revealed insights, in addition to the Global Agenda Survey, on how experts address actual and future trends like climate change, economic crises, and terrorism, which is vital for the multi-analysis approach.

The analysis of nearly 300 globally leading think tanks is based on the rankings of James G. McGann's "2011 Global Go To Think Tank Ratings."

The same sections of each webpage were analyzed to keep the analysis comparable.

The sections coded were:

- Homepage (first section)
- Key speech of the president
- Research
- News
- Events
- Publications

Only text blocks with five or more lines were coded according to the Media Tenor criteria – taking note of persons, institutions and topics. Overall results reflect the same issue agenda of the media, with think tanks focusing largely on the economic crisis at the expense of other issues.



Examining narrative data

Evaluating how businesses are adapting to trends

Media Tenor has applied its proven methodology to examining narrative data. The multi-step process involves human coders evaluating narrative content in non-legally mandated portions of annual reports on what is a statement-by-statement basis to determine the key theme, tonality, materiality and time frame of each statement. This data, which amounts to thousands of data points per annual report, is then analyzed by Media Tenor’s researchers for

statistical trends. The significance, impact, and utility of these findings is then further enhanced by comparing them to analyzed media data.

This comparison allows Media Tenor to pinpoint which corporate messages on CSR, materiality, and other topics are being picked up effectively as well as where gaps exist. These gaps suggest where companies can do better, in their activities or in communicating them to the public.

Gaining insight: Methodology for analyzing narrative data

Search

- The full content of all documents that companies produce (Annual Reports, CSR Reports, MC&A etc.) are analyzed.

Methodology

- Every piece information is captured at the “statement” level. All information given about the company or its senior executives is coded as a new and individual statement.

Coding Procedure

- Each coded statement contains: a person or company, the line of business they are in, the topic at hand, a positive or negative rating, and the source of the statement or rating. As the data is analyzed, if any part of a statement changes (for instance, if a new topic is introduced), a new statement is coded.

Media Set

International TV news / Quoted analysts

Europe	ARD Tagesthemen
	ZDF heute journal
	RTL Aktuell
	ARD Tagesschau
	ZDF heute
	TF 1
	RAI Uno
	SF DRS Tagesschau
	TVE 1
UK	BBC 1 10 o'clock news
	ITV News at Ten
	BBC World
	BBC 2 Newsnight
US	CNN
	NBC Nightly News
	ABC World News Tonight
	CBS Evening News
	Fox News
South Africa	SABC 3 News @ One
	SABC 2 Afrikaans News
	SABC 3 English News
	E-TV News
	SABC Sotho New
	Summit TV

Quoted analysts	Financial Mail
	Financial Times
	Les Echos
	The Wall Street Journal

Corporate Data Set

Annual reports for year 2011

3M Company	Deutsche Telekom	MTN Group Limited
ABB Limited	E.ON	Munich Re
Absa Group Limited	Enbw Energie Baden-Wurttemberg	Nedbank Group Limited
Adecco SA	AG	Nestle SA
Adidas	Exxon Mobil Corp.	Nike
Allianz	Firststrand Limited	Novartis AG
Amerisourcebergen Corp.	Ford Motor Company	Novo Nordisk
Anglo American Platinum Limited	Fresenius Medical Care	Pepsico Inc
Anglogold Ashanti Limited	Fresenius SE	Pfizer Inc
Apple Inc	GEA Group AG	Philips
Archer-Daniels-Midland Company	General Electric Company	Reckitt Benckiser Group PLC
Associated British Foods PLC	General Motors	RIM
Audi AG	Glaxosmithkline PLC	Roche Holding AG
Barry Callebaut AG	Gold Fields Limited	Rolls-Royce Holdings PLC
BASF	Great-West Lifeco Inc	Royal Dutch Shell PLC
Bayer	Hannover Rueckversicherung AG	RWE
BCE Inc	Heidelbergcement AG	Sainsbury (J) PLC
Beiersdorf	Henkel	Sanlam Limited
Berkshire Hathaway Inc	Holcim Limited	SAP
Bidvest Group Limited	Home Depot Inc	Sasol Limited
BMW	HP	Schindler Holding AG
BP PLC	Husky Energy Inc	SGS SA
Brenntag AG	IBM	Shoprite Holdings Limited
British Sky Broadcasting Group PLC	Imperial Oil Limited	Siemens
Cardinal Health Inc	Imperial Tobacco Group PLC	State Street
Carnival PLC	Infineon	Steinhoff International Holdings Limited
Carrefour SA	Johnson & Johnson	Suncor Energy Inc
Centrica PLC	Johnson Matthey PLC	Swatch Group
Citigroup Inc	JP Morgan Chase & Company	Swisscom
Coca Cola Enterprises Inc	K+S	Syngenta AG
Commerzbank	Kingfisher PLC	ThyssenKrupp
Compagnie Financiere Richemont SA	Koninklijke Ahold NV	UBS AG
Compass Group PLC	Koninklijke KPN NV	Unilever NV
Conocophillips	Kumba Iron Ore Limited	Unilever PLC
Continental AG	Landesbank Berlin Holding AG	Verizon Communications
Credit Suisse Group AG	Lanxess AG	Vodacom Group Limited
CVS Caremark Corp.	Linde	Vodafone Group PLC
Daimler	Loblaw Companies Limited	VW
DBS Group Holdings Limited	Magna International Inc	WalMart Inc
Deutsche Bank	MAN	Walgreen Company
Deutsche Börse	Marks & Spencer Group PLC	ZFS
Deutsche Lufthansa	Merck Kgaa	
Deutsche Post	Metro	
Deutsche Postbank AG	Microsoft	
	Morrison (WM) Supermarkets PLC	

Think Tank Data Set: Websites

Institutions analyzed

Brookings Institution	Urban Institute	East West Institute
Conucil on Foreign Relations	Center for a New American Security	Competitive Enterprise Institute
Carnegie Endowment for International Peace	German Marshall Fund of the United States	Manhattan Institute
Center for Strategic and International Studies	James A. Baker III Institute for Public Policy	Reason Foundation
RAND Corporation	Belfer Center for Science and International Affairs	Center for Transatlantic Relations
Cato Institute	New America Foundation	East-West Center Honolulu
Heritage Foundation	Earth Institute	Center for Budget and Policy Priorities
Woodrow Wilson International Center for Scholars	World Resources Institute	Center for the National Interest
Peterson Institute for International Economics	Carnegie Council for Ethics in International Affairs	Mercatus Center
American Enterprise Institute for Public Policy Research	Hudson Institute	Aspen Institute
Center for American Progress	Center on Budget and Policy Priorities	Chatham House
National Bureau of Economic Research	International Food Policy Research Institue	Amnesty International
Pew Research Center	Foreign Policy Research Institute	Transparency International
Hoover Institution	Freedom House	Stockholm International Peace Research
Atlantic Council of the United States	Pew Center on Global Climate Change	International Crisis Group
United States Institute for Peace	Resources for the Future	Center for European Policy Studies
Open Society Institute New York	Stimson Center	International Institute for Strategic Studies
Human Rights Watch	Inter-American Dialogue	Bruegel
Center for International Development	Acton Institute	Adam Smith Institute
Center for Global Development	Economic Policy Institute	World Economic Forum

Think Tank Data Set: Websites

Institutions analyzed

Friedrich Ebert Foundation	Instituto Affari Internazionali	Center for Social and Economic Research
French Institute of International Relations	Centro de Estudios y Documentación Internacionales Barcelona	Moscow State Institute of International Relations
German Institute for International and Security Affairs	Centre for European Studies	Institute of World Economy and International Relations
Clingendael	Norwegian Institute of International Affairs	Center for Policy Studies
German Council on Foreign Relations	Heinrich Böll Stiftung	Center for Eastern Studies
Center for Economic Policy Research	Ecologic Institute	Prague Security Studies Institute
European Council on Foreign Relations	Egmont Institute	Center for Economic and Financial Research
Konrad Adenauer Foundation	Timbro	Center for Liberal Strategies
Kiel Institute for World Economy	Friedrich Naumann Foundation	Center for Security and Defense Studies
IDEAS	Demos	Institute of International Relations
Civitas: Institute for Study of Civil Society	Center for European Reform	Lithuanian Free Market Institute
Carnegie Europe	Center for Policy Studies	Europeum-Institute for European Policy
Overseas Development Institute	European Policy Center	Center for Economic and Social Development
Peace Research Institute Oslo	Fundación para el Análisis y los Estudios Sociales	Institute for the USA and Canadian Studies
Centre d'Études et de Recherches Internationales	Institute for Public Policy Research	Center for Liberal-Democratic Studies
European Union Institute for Security Studies	German Development Institute	Adriatic Institute for International Studies
Royal United Services Institute	Real Instituto Eclano	Center for Democracy and Human Rights
Bertelsmann Foundation	Fondation pour l'Innovation Politique	PRAXIS Center for Policy Studies
Danish Institute for International Studies	Instituto Bruno Leoni	Razumkov Center
Fundación para las Relaciones Internacionales y el Diálogo	Carnegie Moscow Center	New Economic School
European Centre for Development Policy Management	Polish Institute of International Affairs	Hungarian Institute of International Affairs

Think Tank Data Set: Websites

Institutions analyzed

Council on Foreign and Defense Policy	Centre for Public Policy Studies	African Economic Research Consortium
Adam Smith Center	The Energy Research Institute	Center for Policy Analysis
Slovak Foreign Policy Association	Centre for Civil Society	IMANI Center for Policy and Education
Institute of Public Affairs	Centre for International and Strategic Studies	Centre for Development and Enterprise
Institute for Market Economics	Taiwan Foundation for Democracy	Free Market Foundation
Independent Institute for Social Policy	Institute of Southeast Asian Studies	Institute for Democracy in South Africa
Chinese Academy of Social Sciences	East Asia Institute	Centre for Democratic Development
Japan Institute of International Affairs	Hong Kong Centre for Economic Research	Kenya Institute of Public Policy Research and Analysis
Centre for Strategic and International Studies	Institute for Defense Studies and Analyses	African Technology Policy Studies Network
Centre for Policy Research	Centre for Economic Research	Economic Policy Research Centre
Lowy Institute	Institute of Strategic and International Studies	Institute of Global Dialogue
China Institutes of Contemporary International Relations	Cathay Institute for Public Affairs	Initiative for Public Policy Analysis
Australian Institute for International Affairs	Carnegie-Tsinghua Centre for Global Policy	Centre for Research and Technology Development
Shanghai Institute for International Studies	Bangladesh Institute for Development Studies	Economic and Social Research Foundation
Institute of Policy Studies	Institute for International Policy Studies	Makerere Institute of Social Research
S. Rajaratnam School of international Studies	South African Institute of International Affairs	Centre Ivoirien de Recherche Economique et Sociale
Korea Development Institute	Centre for Conflict Resolution	Centre des Etudes, de Documentation et de Recherches Economique et Sociale
Asia Forum	Institute for Security Studies	Centre for Development Studies
National Institute for Defense Studies	Conseil pour le Developpement del la Recherche en Sciences Sociales	South African Institute of Race Relations
Singapore Institute of International Affairs	African Centre for the Constructive Resolution of Disputes	Nigerian Institute of International Affairs
Indian Council for Research on International Economic Relations	Africa Institute of South Africa	Institute for Economic Affairs

Think Tank Data Set: Websites

Websites

Institute of Statistical, Social and Economic Research	Instituto de Pensamiento Estrategico Agora	Consejo Uruguayo para les Realaciones Internacionales
Botswana Institute for Development Policy Analysis	Centro de Estudios en Calidad de Vida y Desarrollo Social	Corporacion de Estudios para Latinamerica
Ethiopian Development Research Institute	Conference Board of Canada	Centro de Estudio de Realidad Economica y Social
Fraser Institute	Queen's Centre for International Relations	Instituto de Pesquisa Economica Aplicada
International Development Research Centre	Center of Research for Development	Fundacion de Investigaciones Economicas Latinoamericanas
Centre for International Governance Innovation	Instituto para la Seguridad y la Democracia	Consejo Latinoamericana de Ciencias Sociales
International Institute for Sustainable Development	Institute of Politics	Centro Brasileiro de Analise e Planejamento
Consejo Mexicano de Asuntos Internacionales	Public Policy Forum	Fundacion Chile XXI
North-South Institute	Colectivo de Analisis para la Seguridad con Democracia	Facultad Latinoamericana de Ciencias Sociales
Centro de Investigacion y Docencia Economica	Frontier Centre for Public Policy	Fundacion Salvadorena para el Desarrollo Economico y Social
C. D. Howe Institute	Centro Espinosa Yglesias	Centro de Investigaciones Economicas Nacionales
Montreal Economic Institute	Canadian Defense and Foreign Affairs Institute	Fundacion para el Avance de las Reformas y las Oportunidades
Canadian international Council	Fundacao Getulio Vargas	Consejo Argentino para las Relaciones Internacionales
Colegio de Mexico	Centro de Estudios Publicos	Grupo de Analisis para el Desarrollo
Macdonald-Laurier Institute	Centro Brasileiro de Relacoes Internacionais	Nucleo de Estudios de la Violencia de la Universidad de Sao Paulo
FUNDAR, Centro Analisis e Investigacion	Fundacion para la Educacion Superior y el Desarrollo	Centro Latinoamericano de Economica Humana
Institute for Research and Public Policy	Centro de Implementacion de Politicas Publicas para la Equidad y el Crecimiento	Instituto Ecuatoriano de Economica Politica
Centro de Investigacion para el desarrollo	Instituto Fernando Henrique Carodoso	Asociacion de Investigacion y Estudios Sociales
Atlantic Institute for Market Studies	Economic Commission for Latin America and the Caribbean	Instituto Libertad y Democracia
Instituto Mexicno para la Cempetividad	Center for the Study of State and Society	Fundacion Ideas para la Paz
Centro de Investigaciones Sobre la Libre Empresa	Centro de Divulgacion del Conocimineto Economic para la Libertad	Fundacion Libertad

Think Tank Data Set: Websites

Institutions analyzed

Carnegie Middle East Center	Dubai Institute of Government
Gulf Research Centre	Rabin Centre for Israeli Studies
Al-Ahram Center for Political and Strategic Studies	Israel-Palestine Center for Research and Information
Institute for National Security Studies	Egyptian Center for Economic Studies
Turkish Economic and Social Studies Foundation	Israel Democracy Institute
Centre for Economics and Policy Studies	European Stability Initiative
Begin Sadat Center for Strategic Studies	Amadeus Center
Al Jazeera Centre for Studies	Harry S. Truman Institute for Advancement of Peace
Brookings Doha Center	Jerusalem Center for Public Affairs
Centre des Etudes et Recherches en Sciences Sociales	Centre of Arab Women for Training and Research
Center for Strategic Studies	Egyptian Council for Foreign Affairs
RAND-Qatar Policy Institute	Kuwait Center for Strategic Studies
Association for Liberal Thinking	Arab Thought Forum
Moshe Dayan Center for Middle Eastern and African Studies	Lebanese Center for Policy Studies
Emirates Center for Strategic Studies and Research	Issam Fares Center for Public Policy and International Affairs

Testimonials on Media Tenor

Business Experts on the Importance of Reputation Issues

“Without the support of Media Tenor our work would not have been understood by the world leaders on one hand and the general public on the other.”

PETER EIGEN, Former President Transparency International

“Journalists have an extreme impact on what is going on in the world. Therefore we need a watchdog for us watchdogs. I am grateful that Media Tenor serves this need from a scientific approach but with a strong journalistic understanding.”

FRED KEMPE, Former Editor in Chief, Wall Street Journal, Current President at The Atlantic Council of the United States

“Strategic Media Relations needs a clear and independent seismograph telling us in advance where the weaknesses of our external communications are. Media Tenor serves on a global level with their continuous qualified analysis of traditional media as well as monitoring the internet.”

RICHARD GAUL, Head of Corporate Communications 1985-2006, BMW

“Daily reports on the media coverage, and expert analysis of the areas of our strengths and weaknesses allowed us to tailor our coverage accordingly; to refocus our efforts on the desired messages and on the sections of the media where we were not being so successful. Without the fine work of Media Tenor that could never have been done effectively.”

DR. MICHEL OGRIZEK, International Communications Consultant, Paris

“Media Tenor International provides a unique way for a company to compare the message it is intending to send with the message that is getting heard. Those companies who are committed to greater transparency will find Media Tenor an invaluable tool for improving communications to their shareholders and other stakeholders. Media Tenor is also a useful tool for investors since it enables them to assess the risks to reputation and brand of their portfolio companies.”

PROF. DR. ROBERT G. ECCLES, CEO Perception Partners, Inc.

Methodology: Content measurement

Statement coding, passages, reports

STATEMENT CODING analyzes every single piece of information in an article separately (subject, topic, rating, source, etc.). It is the most sophisticated way of analyzing content and helps to track whether single messages are covered by the media, or negative/positive tone is changing with regard to headlines, etc.

Information entities designed to grab the overall picture of a company and its senior executives in an article.

Every description of either a company or a senior executive (min. 5 lines) results in a coded passage. A report on a company announcing earnings without the presence of senior executives would be coded as a single passage. The rating is coded according to the dominant tone of coverage (e.g. more positive/neutral/negative).

THE SINGLE STORY on a certain topic. Report-based coding is used to analyze the main topic of a story (e.g. old-age provision) compared to other stories (e.g. war, catastrophes).

1) “Allianz triplica sus beneficios en España...”
(Allianz triples its profits in Spain)

CODING (CODE):

company: Allianz Spain (46)
Line of Business: Not mentioned (0)
Country described: Spain (221)
Chronological Structure: Present (1)
Topic: Business results (100)
Rating explicit: None (0)
Rating contextual: Positive (1)
Source of Information: Journalist (1)



1) “Allianz Seguros, la filial española del grupo alemán...”
(Allianz Seguros, the Spanish subsidiary of the German group)

CODING (CODE):

company: Allianz Spain (46)
Line of Business: Not mentioned (0)
Country described: Spain (221)
Topic: Existing holdings (406)
Chronological Structure: Present (1)
Rating explicit: None (0)
Rating contextual: None (0)
Source of Information: Journalist (1)

> A total of 20 statements were coded.

3) “...un 7,1 por ciento más”
(7,1 per cent more)

CODING (CODE):

company: Allianz Spain (46)
Line of Business: Insurance in general (1)
Country described: Spain (221)
Chronological Structure: Present (1)
Topic: Results, profits (101);
Rating explicit: None (0)
Rating contextual: Positive (1)
Source of Information: Journalist (1)

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