

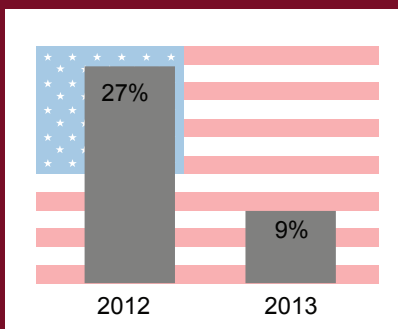
Global Agenda Index 2014

“Principle Centered Leadership - Driven Smart Alliances”: The Power of Shared Global Insight.

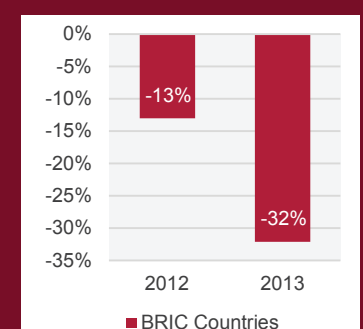
Reputation Lab Davos, January 23, 2014

- Opinion-leaders rethink power shifts in future scenarios as “smart alliances” not “fragmentation”
- For another year, the US is perceived to be losing global influence
- Analyst optimism on BRICS significantly wanes in 2013 but opinion-leaders remain optimistic

Think Tanks focus less on US



Finance Analysts on BRICS



EXECUTIVE SUMMARY

The Global Agenda Index 2014 White Paper found that existing “truths” and paradigms are constrained by a nationalistic perspective. It also found that the global perspective seems to play an inordinate role in analysis so that the impact of game changers, both at the scale of countries and business escapes the radar. The GAI is intended as a basis for further research and input by all interested parties from government and the corporate sector.

It is carried out in partnership with the United National Academic Impact program and Erasmus University; it breaks new ground in the crucial field of scenario analysis as It goes beyond conceptions based on nationally-based analysis to map and evaluate those global environmental issues that matter. By adding the applied Agenda Setting Theory to the current standard we intend to create future scenarios that are more robust.

For the second year in a row, the respondents voiced their expectations towards the next year, five and ten years hence. Moreover, respondents gained insight on how the Media Agenda shaped public opinions by viewing our data. Comparing the identification and perceived credibility and authority of the information source are vital modes to assessing persuasive risks and responses for a future inherent with uncertainty.

Scenario analysis is a vital tool for policy makers, business and other organizations. Scenarios help us better prepare for the 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. For example, 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 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.

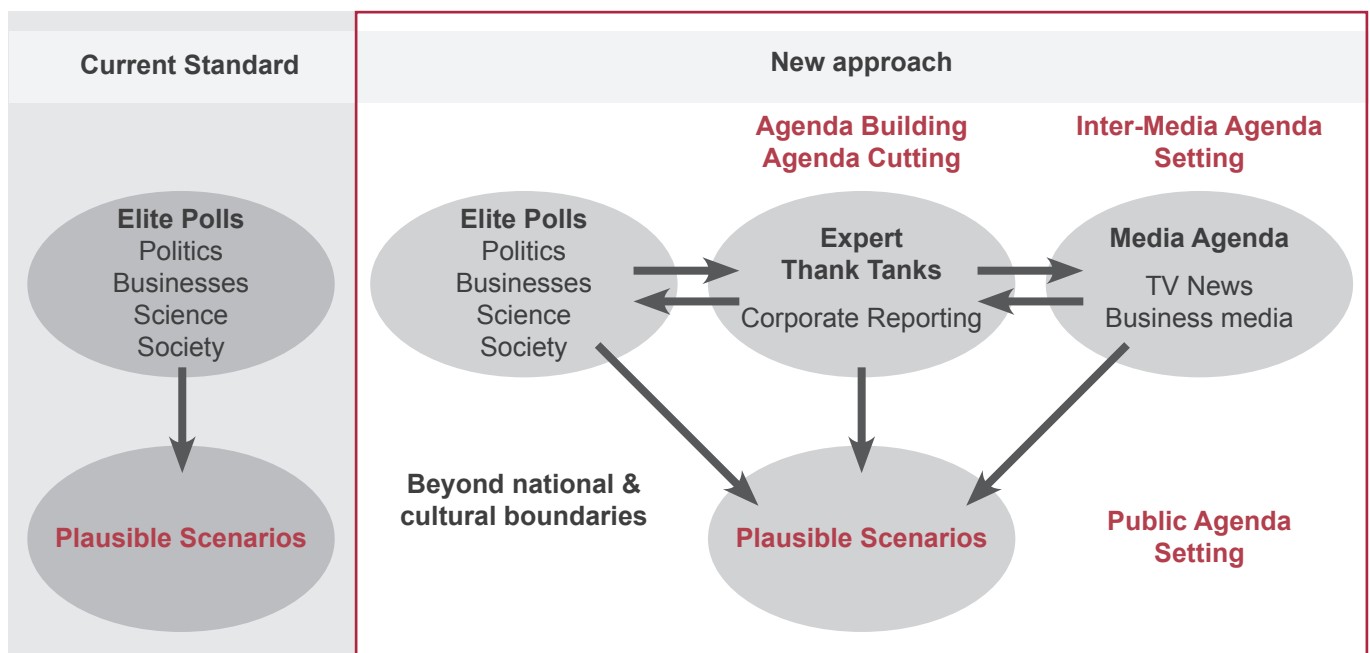
Improving scenario-building as a global tool

Taking advantage of the Agenda Setting Theory

The UNAI, Erasmus University and Media Tenor have partnered to develop a Global Agenda Index that goes beyond conceptions based on nationally-based analysis to map and evaluate those global environmental issues that matter. 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 on-going international media analysis, research of think tank web-sites, and leading analyst quotations, a more global perspective is considered in order to create a more robust future scenario and identify the impact of game changers, both at the scale of countries and business.

In this new approach, the opinions about our future from 200 heads of state, parliaments, top CEOs, university presidents and media leaders have been collected. For the second year in a row, leaders had the opportunity to not only vocalize their expectations towards the next year, five and ten years time, but to see how these opinions have been shaped by the Media Agenda.

Improving Scenario Building: A multi-method approach

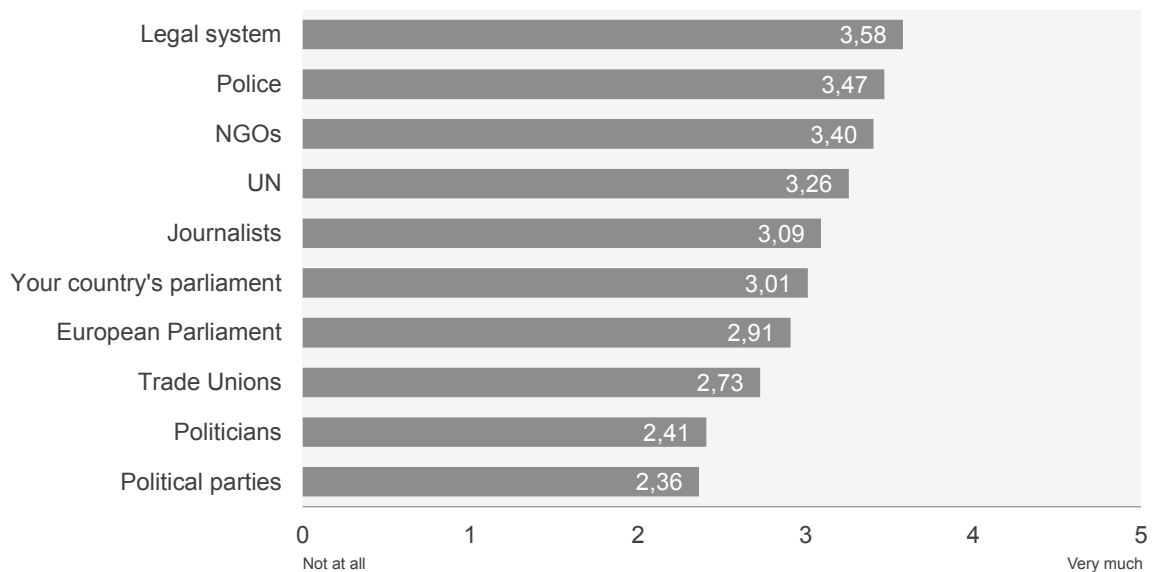


Trust in traditional institutions fading

Evaluating shifting opinions and influences

One of the most interesting finds from this year's elite survey respondents was the evident lack of trust in politicians and political parties. In general, trust in traditional spheres of influence and power seems to be low as media reports quite negatively on these institutions in general. And this lack of trust is reinforced by the elite perceptions that the shift in power may be heading down one of two paths: Either "smart alliances" where these traditional spheres of power are replaced by groups, businesses or individuals with the means to address inherent global risks, or "confrontation" leading to a power vacuum. Further investigation into the underlying structures and themes driving these perceptions reveals that opinions are shifting from year to year. To prepare for an uncertain future there is a need to map the information asymmetry, which influence the shifts in opinions.

GAI survey respondents: How much they trust traditional institutions



Basis: 202 respondents from Media Tenor GAI survey



Winners and losers: Perceptions of power shifts

Executive summary

- Think tank experts reduce focus on the US by 18 percent in one year
- Non-western leaders achieved best media image, while the US was amongst the top ten most negatively reported on countries
- Among the media only the business media focus on Japan, while think tanks have shifted focus from Europe in 2012 to Iran and India in 2013
- Opinion-leaders remain positive and analysts less optimistic about the BRICS countries

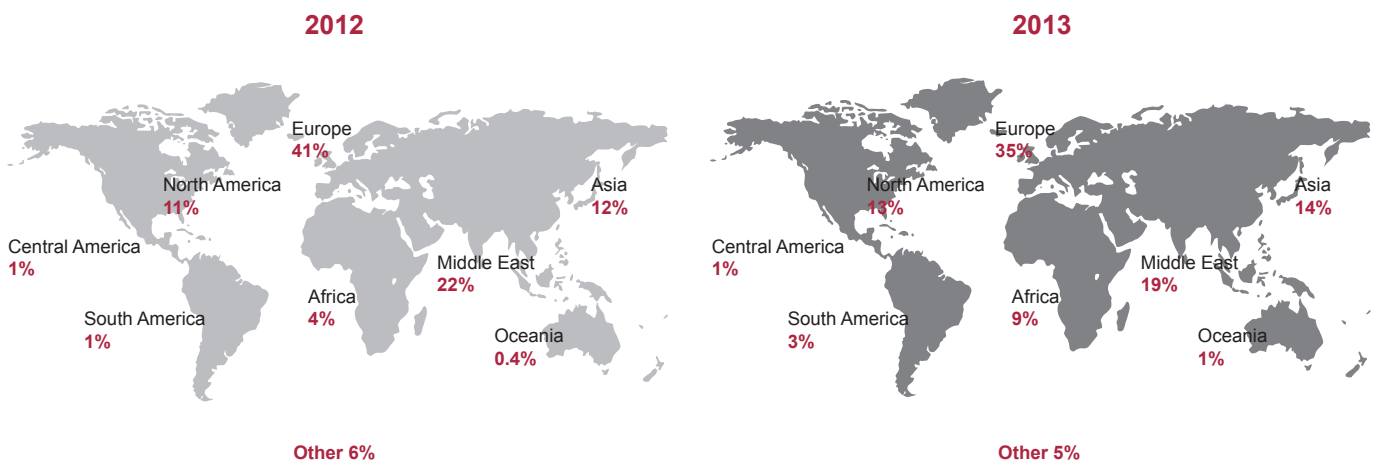
Reporting on U.S., Africa and Asia increases

Foreign reporting on Europe and ME decline

Many events have occurred in the last year, including the rebuilding of troubled euro economies, political division in the United States and change of leadership in China and Japan. This has led to a Geo-political shift in foreign reporting by global TV news programs that are likely to attract a commensurate change in the psychographic profile of media audiences.

Although war is still raging in Syria and unrest is constant in Egypt, foreign news has chosen to focus on policy shifts in Asia and the fracturing of leadership in the United States. Even though foreign reporting has slightly increased on the United States, negativity on Obama's leadership and political party stalemate has shed a negative light on America's global role in the US. In addition, reporting on the Eurozone has slightly declined. Africa is one continent that gained more focus from global TV in 2013, which may be in reference to the death of Nelson Mandela more so than reports on economic growth. Latin America remains a media blind-spot. Digging deeper into coverage of these areas will provide insight into underlying perceptions of power shifts in the next one to ten years.

Global TV: Concentration of foreign reporting by region & tonality



Basis: 395,447 reports in 2012 on 30 global TV news programs and 593,214 reports in 2013 on 37 global TV news programs

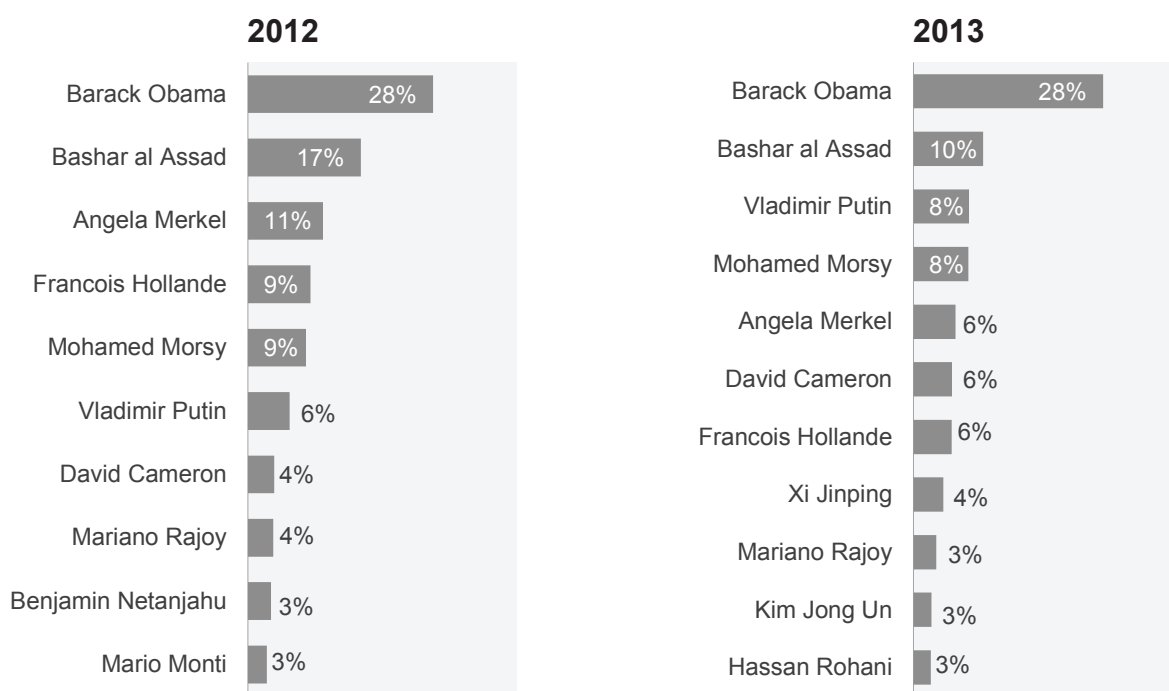
Asian leaders raise their visibility in 2013

Obama remains most mention head of state

Media attention to Heads of State give a country to opportunity to communicate to the world on issues that could help attract foreign direct investment, attract important tourism revenue and reverse pre-conceived notions of security and progress.

Although foreign reporting across the globe continued to focus on Obama in 2013, leaders in the Middle East, including Assad and Morsy became less relevant, while Asian and Russian leaders Putin, Jinping, and Kim Jong Un raised their media profile. This helps explains why foreign reporting has shifted more to Asia. New Iranian leader Hassan Rohani has also been the center of attention as leaders hash out deals on nuclear power deals and sanctions.

Global TV: Most visible heads of state in foreign reports



Share of foreign reports on heads of state

Basis: 395,447 reports in 2012 on 30 global TV news programs and 593,214 reports in 2013 on 37 global TV news programs

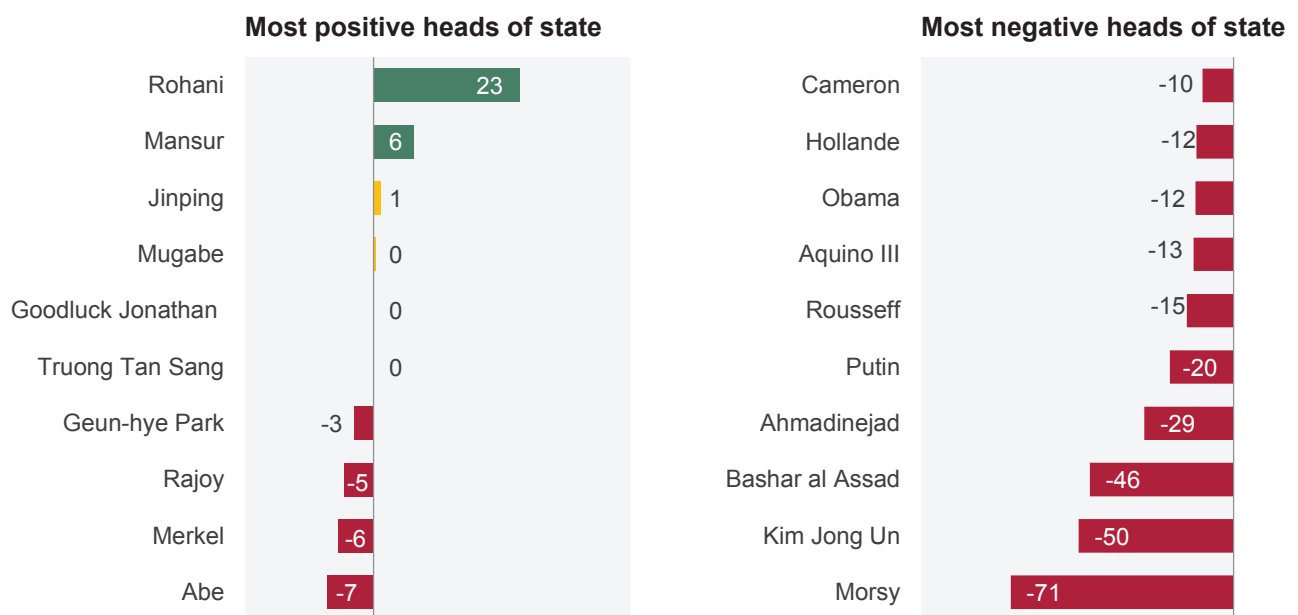
Non-western leaders in positive spotlight

Global media most positive on Iran's new leadership

When analyzing the most visible heads of state on influential global TV news programs in the last year, non-western leaders have been reported on the most positively. Leaders such as Cameron, Hollande and Obama were reported with negative sentiment on the levels of more conflict-ridden countries.

With the election of Iran's new president who is engaging in diplomatic talks over a nuclear arms deal, Rohani, is generating more positive coverage than his predecessor, indicating international consensus in favor of lifting economic sanctions may progress, significantly changing the influential power structures in the Middle East and Asia.

Global TV: Most visible heads of state and tonality, foreign reports



Average reporting tonality on heads of state with at least 40 reports

Basis: 593,214 reports in 2013 on 37 global TV news programs

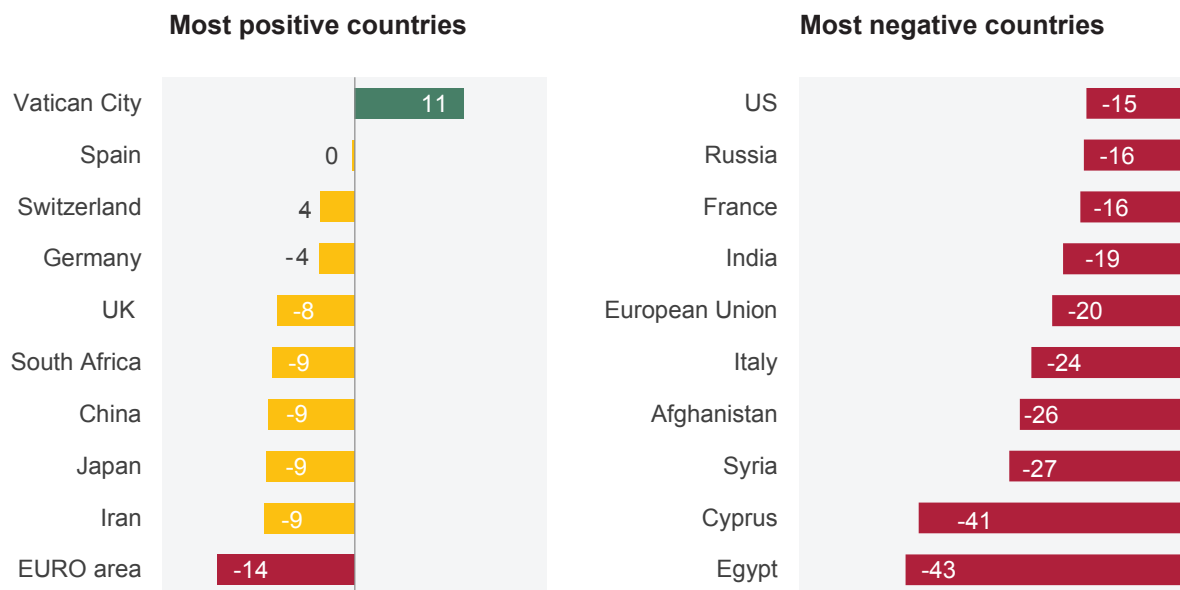
Media image of Spain above that of the US

Emerging economies capture more positive coverage

Spain's media image has drastically shifted from previous years when Spain's failing economy and EU bail-outs were in focus. Just two years ago, one could not imagine Spain, a "devastated state", gaining more positive sentiment than the US. But alas, 2013 demonstrates a shift in media focus which has the potential to drastically influence opinions about which countries are proven more resilient than more traditional economic centers, such as the US. It is evident from the high visibility and tonality of Spain's leader, Rajoy, that honest efforts were made by Spain to communicate recovery.

Overall, emerging economies such as South Africa, China and Japan were amongst the more positive countries reported on compared to seemingly still troubled European nations like France and Italy.

Global media: Most visible countries and tonality, foreign reports



Average reporting tonality on most visible countries

Basis: 593,214 reports in 2013 on 37 global TV news programs

Think tanks drastically shift focus

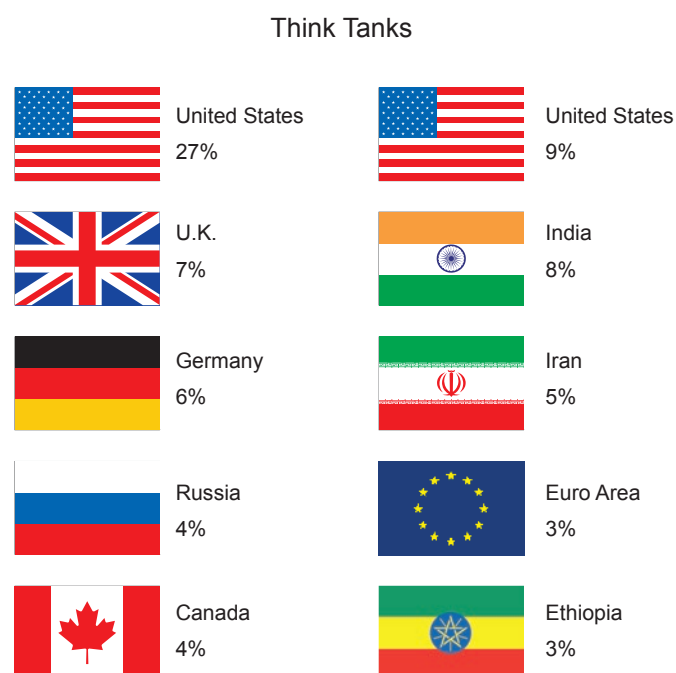
Content on the US declines by 18% in one year

Last year, leading inter-disciplinary experts, represented by web-content focus of leading global think tank websites revealed that the United States dominated policy analysis and concerns, along with focus on Euro countries and their role in the on-going euro crisis. However, in 2013, focus on the US dropped by 18 percent. Amongst the countries that have risen into expert focus

are India and Iran. India, mostly on issues of rape, crime, security and reform while nuclear deals with Iran have a leveraged position in think tank policy analysis over nuclear talks with the west.

These indicators serve as a signal interpreted by experts as a recognition that alternative power shifts are likely to be at hand in the near-to-medium future.

Think tanks: Share of content by country



Basis: 10,626 reports on 280 think tanks in 2012 and 2,373 reports on 166 think tanks in 2013

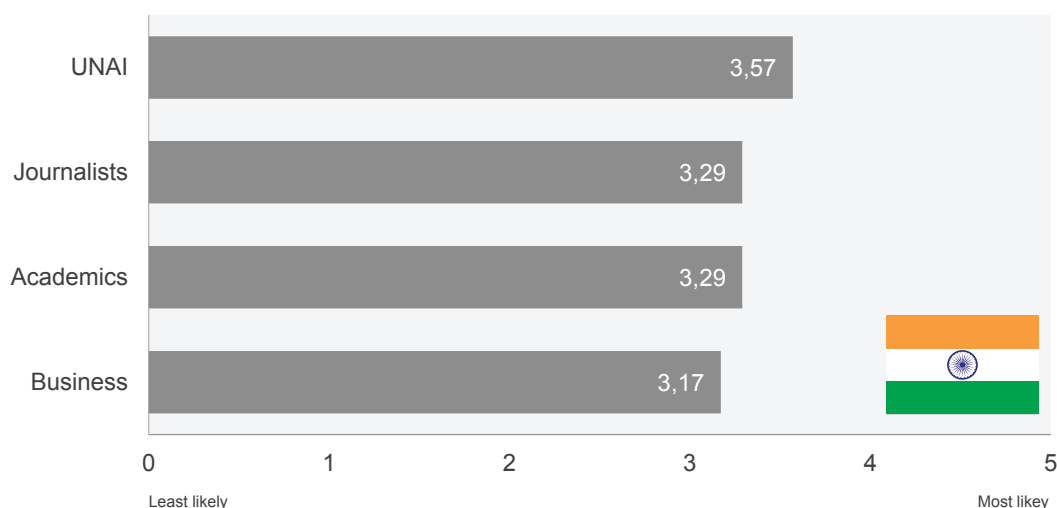
Opinion-leaders hesitant on India's reform

But confidence in regional leadership is evident

Last year's GAI analysis revealed that India was one of the most mentioned countries in opinion-leading TV and business media. Quoted analysts were also heavily focused on India. When asked the likelihood of India's recent efforts at economic reform and bilateral talks with the EU and Vietnam in boosting their regional leadership in the next ten to fifteen years, this year's survey participants seemed optimistic but not fully convinced. This may indicate that media focus on corruption, crime and security, specifically the rape incidents have resulted in negative tonality in news coverage, thereby creating a climate wherein India's image suffered from intangible damage a process that affect the leaders' opinions about India's capacity to overcome complexity towards future progress.

However, India remains in the spotlight and therefore, its government faces a formidable challenge to tackle the question how to apply country marketing as a social –public mechanism to influence opinion-leading media to represent the nation's progress in a more positive light.

GAI Survey participants: Likelihood India's economic and democratic policy reform will boost India's regional leadership by 2030



Basis: 202 respondents from Media Tenor GAI survey

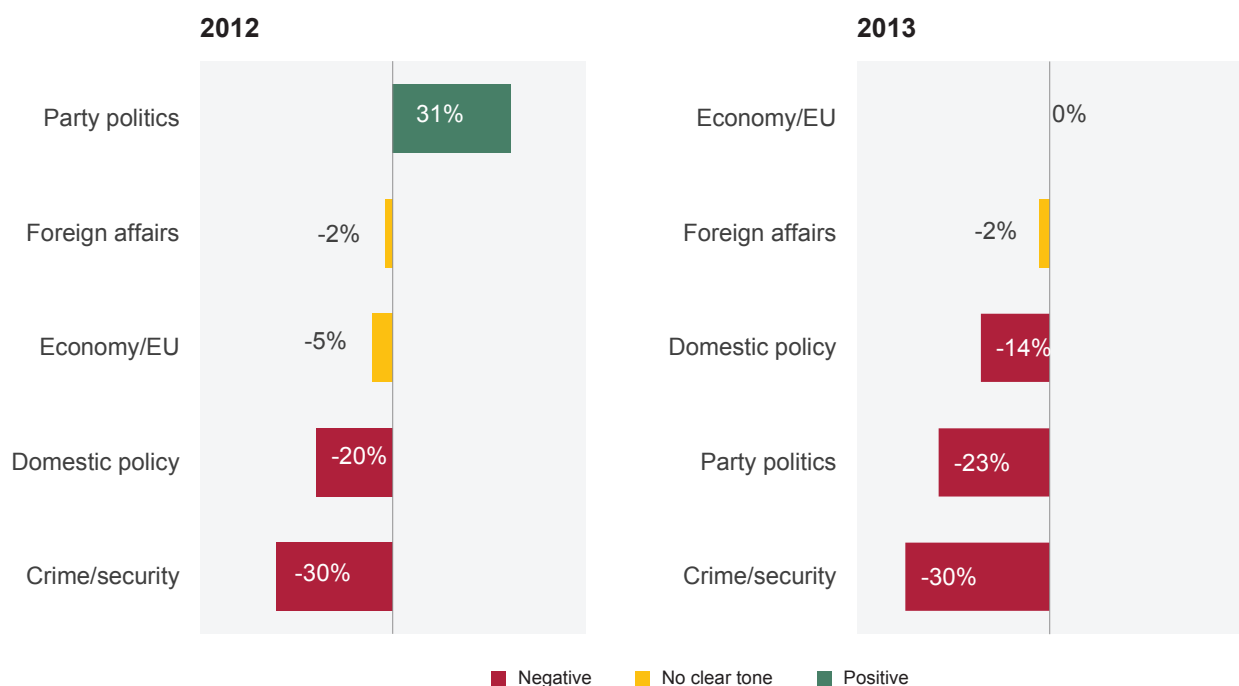
Global TV paints dire domestic image of India

drastic shift in sentiment towards politics

Economically, the international media have been more neutral on India's situation and reported only slightly more positively in 2013 compared to 2012. Reporting on foreign affairs and India's involvement in the Asian region has also been reported on more positively, potentially swaying opinion-leaders to view India as an up-and-coming leader in the region. However, the rape crimes, stemming from a high profile incident in 2012, which received intense and prolonged press coverage may deter business leaders' positive opinions regarding India's capability to reform.

Opinion-leading media have not been as positive on India's domestic issues, with sentiment on party politics witnessing the most dramatic shift in tonality in 2013 in comparison to 2012.

Global TV: Tonality on most reported on issues associated with India



Basis: 395,447 reports in 2012 on 30 global TV news programs and 593,214 reports in 2013 on 37 global TV news programs

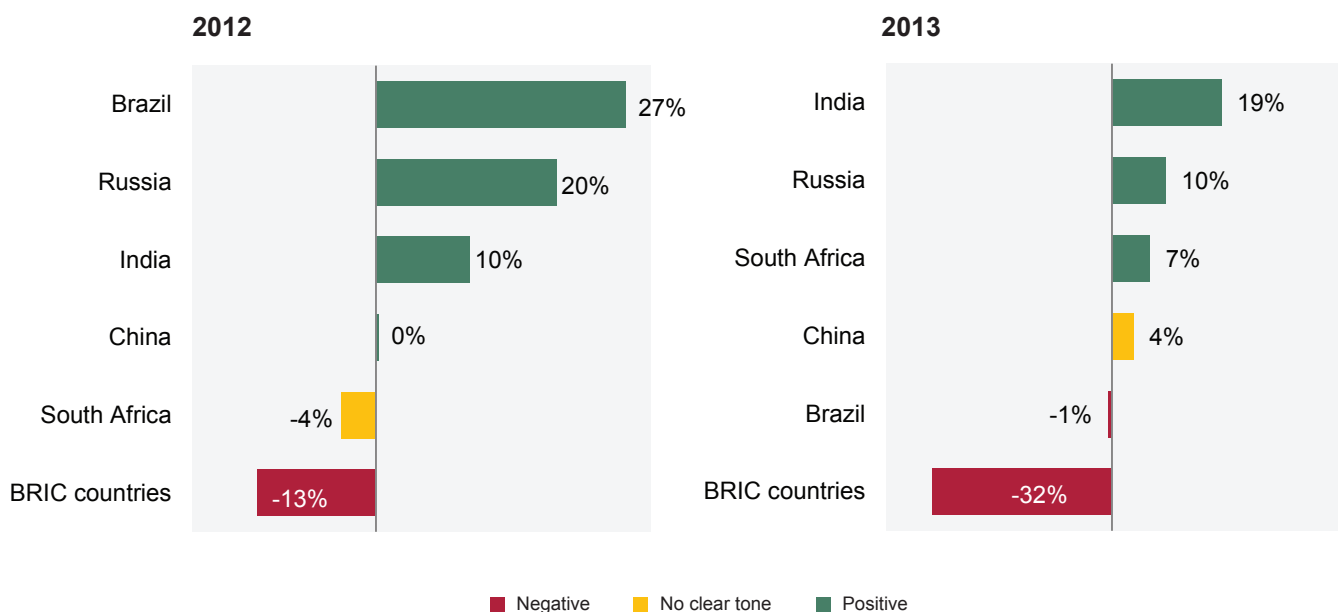
Financial analysts less optimist on BRICS

But see India as a worthy financial investment

In addition to India rising on the radar of think tanks, quoted financial analysts in leading business papers around the globe have also increased their positivity on investments in the country in 2013 compared to 2012. However, overall positivity on the BRICS countries and economic investments have become overall less positive.

Tonality on Brazil saw the biggest decline in analyst confidence. This may be due to protests over building structures for hosting the FIFA World Cup in 2014. Overall, business papers tend to focus on economic factors shaping their sentiment on investments in certain regions which might not provide the full picture of social, legal and educational factors other factors, that influence the business stakeholder opinions on the business growth prospects, beyond the shareholder perspective.

Financial analyst quotes: Tonality on emerging BRICS countries



Basis: 28,475 analyst statements on BRICS countries in 2012 and 15,890 statements in 2013 in 8 financial print media

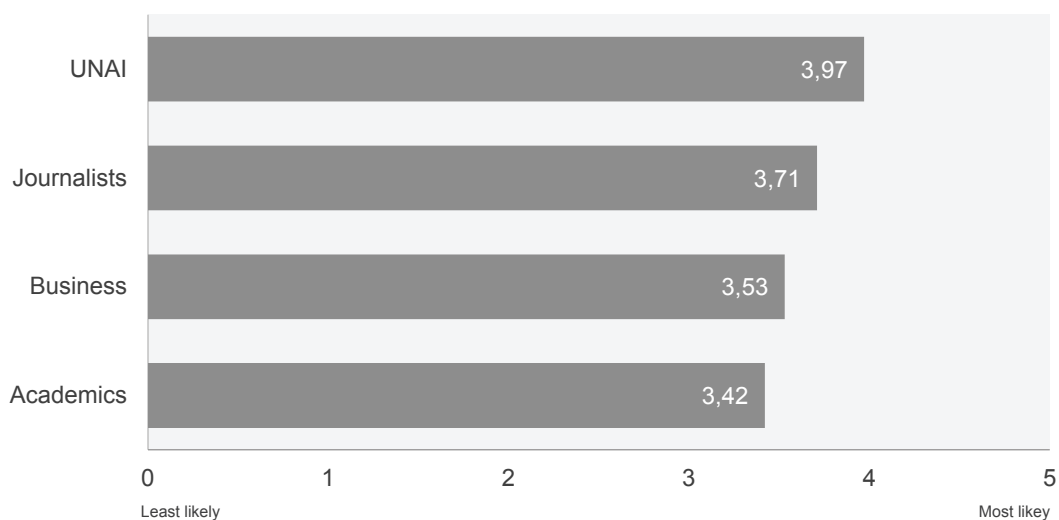
Confidence in BRICS leadership high

Opinion-leaders see them as potential leaders

Despite analysts drastically pulling back on their positive sentiment towards the emerging BRICS markets and investment opportunities, this year's GAI survey respondents expressed a higher likelihood that Brazil, Russia, India, China and South Africa will continue to grow and positively influence the global economy in the next ten years.

This opinion gap may indicate that there are other underlying factors driving opinion-leaders positive attitude towards emerging markets that analysts fail to consider. Put in other words, informational asymmetry may significantly affect the confidence of investors in the region. In turn, through media coverage and word-of-mouth this could put in motion a global policy impact chain which would influence the future economic and social performance of emerging countries, negatively.

GAI Survey participants: Likelihood BRICS countries will continue to grow and positively influence the global economy



Basis: 202 respondents from Media Tenor GAI survey

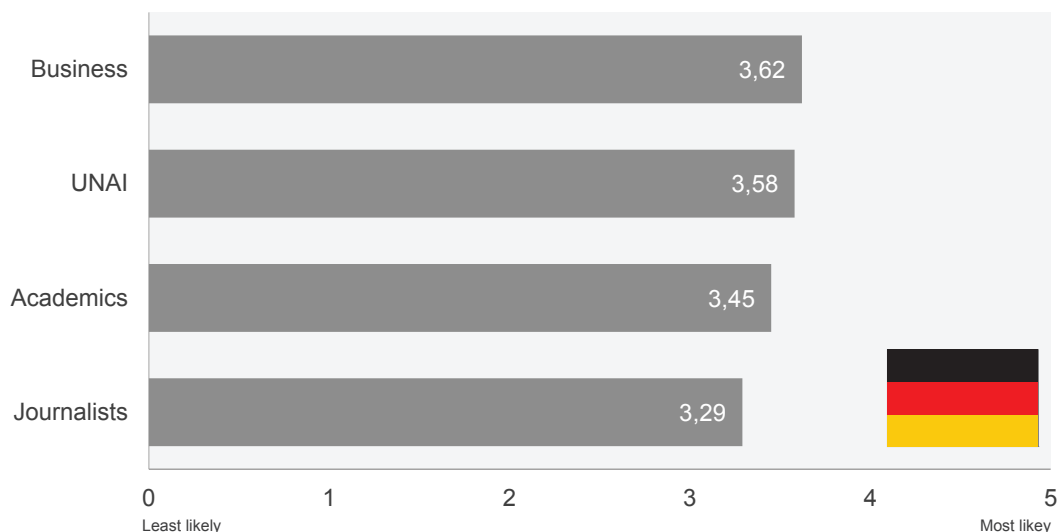
Germany as the center of the euro-zone

Opinion—leaders see Germany's influence increasing

Germany's national election has drawn some attention from global media as Angela Merkel fought to set up a coalition government at the end of 2013. As the economic issues continue well into 2014, opinion-leaders are more optimistic that Germany's influence will likely increase in the euro zone as the European Union irons out its regulatory and economic issues.

Germany is also recognized as one of the global hidden champions in economic and business activity according to Simon-Kucher and Partner's assessment of world market leaders, thus presenting the possibility that Germany is a force to consider as the center of gravity in economic power shifts in the first part of the twenty-first century.

GAI Survey participants: Likelihood Germany will increase its influence in the Euro-zone by 2030



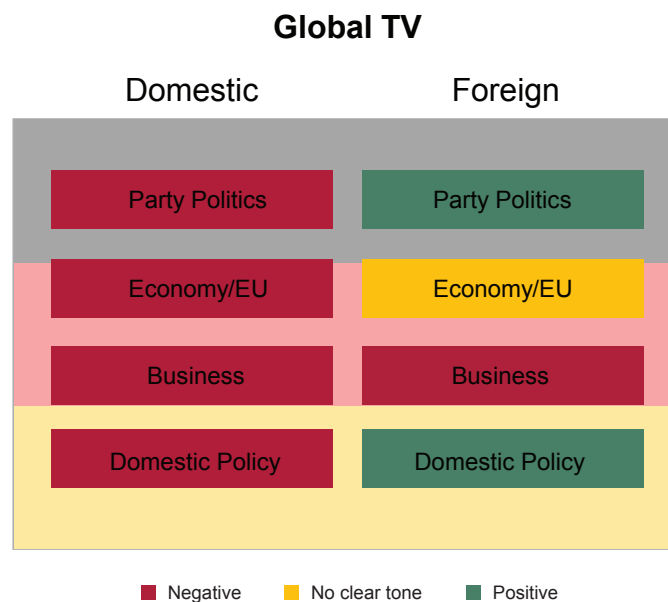
Basis: 202 respondents from Media Tenor GAI survey

Germans unconvinced of their leadership

Foreign media positive about Germany's leadership

Media focus on German elections in the past year and Angela Merkel's high media profile amongst other world leaders indicates the opinion-leading media views Germany as a nation to watch as the euro crisis and regulation issues continue to be worked out in the region. Although GAI survey respondents feel Germany's leadership will increase in the next few years, Germans might not be convinced of their foreboding role. When analyzing German news coverage on their own country's politics, economy, business and domestic policy, sentiment was more negative than positive. Foreign coverage of Germany from other European, North American and African TV news stations reported a more positive tone on these issues, indicating confidence in their leadership.

Global TV: Domestic vs. Foreign coverage and tonality on German issues



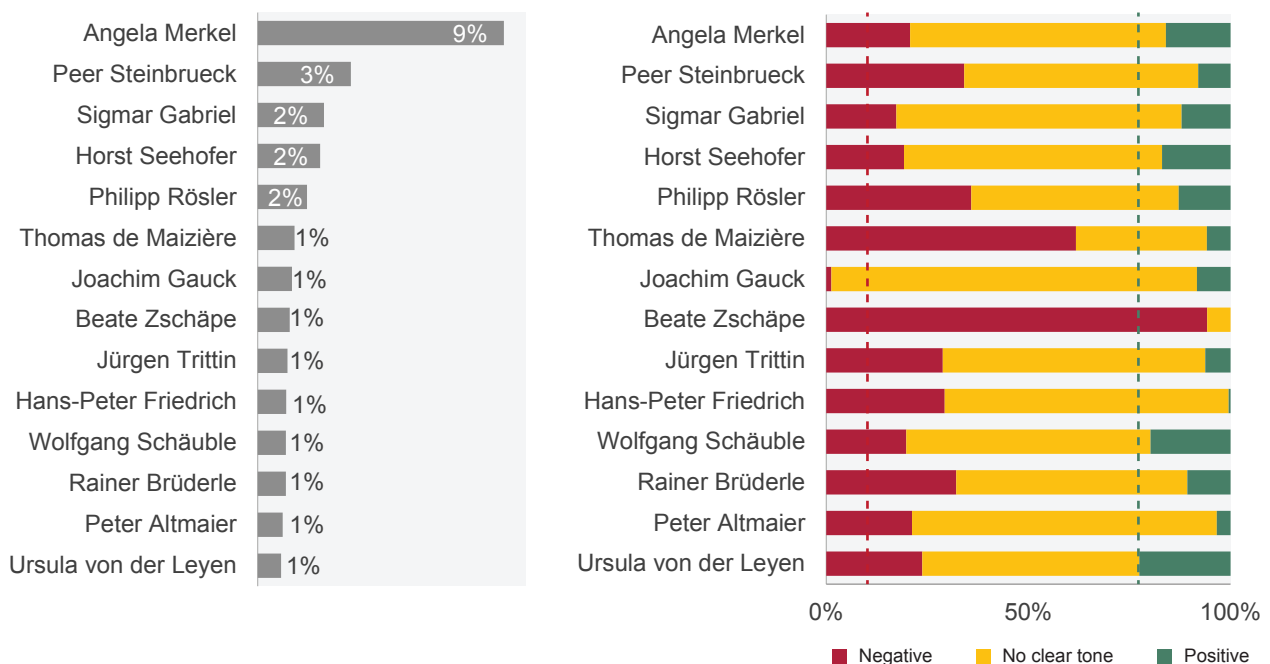
Basis: 593,214 reports in 2013 on 37 global TV news programs

Most visible German personalities in 2013

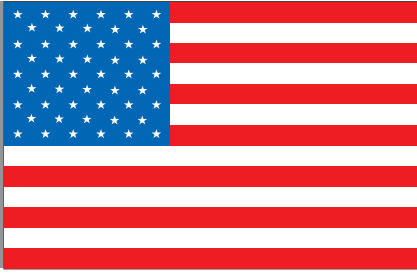
Domestic coverage harsh on leadership

Few German personalities stand out in global media outside of politicians due to the 2013 parliamentary elections. Above all, Angela Merkel stands out as obtaining the lion's share of coverage, and thus is the most visible and influential personality to foreign publics. Little is known about opposition candidates and leaders, as these personalities are well below awareness-levels of global TV coverage. The higher shares of negative tonality also indicate that German domestic media reports are highly critical about their own leaders. Combined with topic analysis from the previous page, it is evident that Merkel's media image is successfully portraying a more united and strong Germany amongst more negative reported on Euro-countries, such as France and Italy.

Global TV: Visibility and tonality of German persons



Basis: 18,676 reports on German protagonists on 37 global TV news programs in 2013



Is the United States Perceived as a as a Future Superpower?

Executive summary

- International perceptions this year are similar to last year: That is the global influence of the United States is seen to continue its decline over the next 10 years
- There is a consensus at the international scale that the US involvement is challenging perceptions of US leadership globally
- The NSA scandal has the potential to destroy global trust in the US on the same level as the subprime crisis

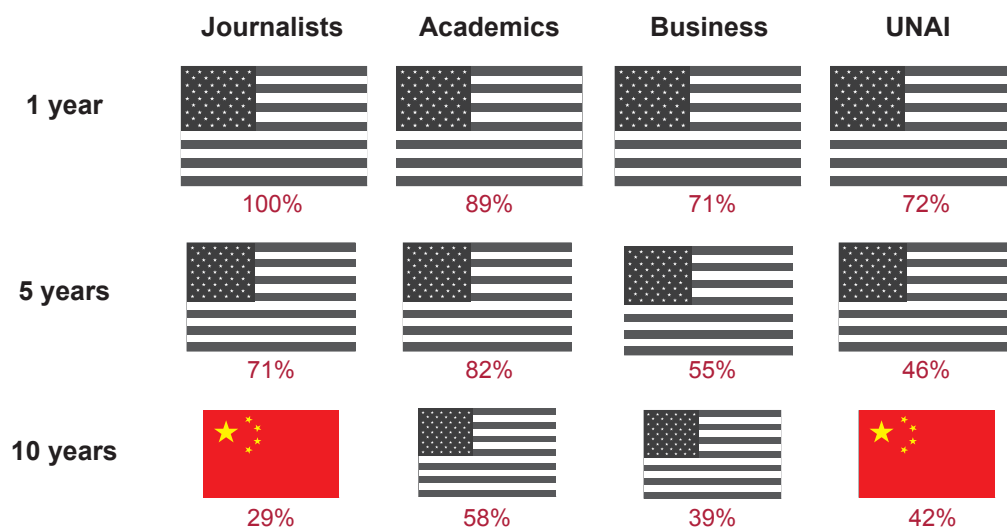
US influence still perceived on the decline

Journalists and UN see China likely to take over

The optimism of President Obama's re-election in 2012 helped boost North American's optimism that the US had a second chance at molding the international system. However, survey participants with non-American identities felt that the role of the US was significantly on the decline in the next 10 years. This year's respondents follow the same trend in opinion, anticipating a dramatic shift in power towards China and East Asia. Both journalists and United Nations survey participants feel that in ten years hence, China is likely to take over the reign as the world's leading country.

As global media and think tanks shift their share of foreign coverage away from the US, opinion-leaders are rethinking how power shifts will influence future risks, opportunities, trade-offs and choices.

GAI survey participants: Share of respondents who identified the most important country in 1-5 years time



Basis: 202 respondents from Media Tenor GAI survey

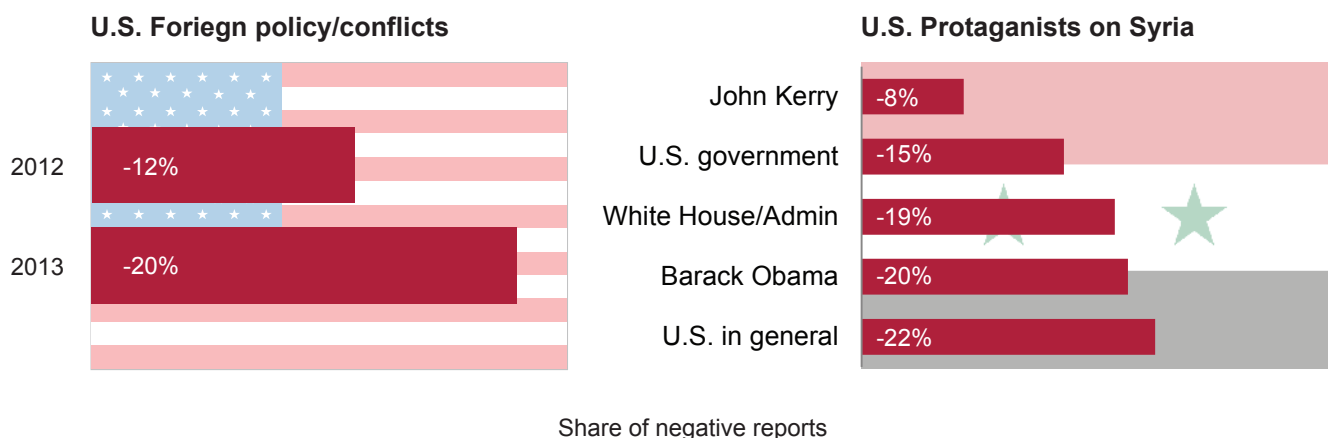
Negative sentiment on Syria harmful

Media coverage could beset diplomatic progress

It is likely that media criticism of President Obama's foreign policy, particularly in relation to intervention in Syria has contributed to foreign perceptions in the last year. Since 2001, US policy in the Middle East has been under scrutiny as wars in Iraq and Afghanistan were the focus of media reporting on US foreign policy and Syria has not helped raise the image of the US role in the region. Analysis of over 590,000 global reports on US foreign policy in general and on protagonists associated with Syria reveal very negative

media sentiment which may influence opinion-leaders perceptions of America's future global leadership. However, the diplomatic efforts by US secretary of state to get peace talks between Israel and the Palestinians back on track have been beset by complications amid mutual recrimination at lack of progress and negative press coverage swaying opinion-leaders to consider which other country could potentially play a more influential role in Middle East negotiations in the next few years as trust in the US diminishes.

Global TV: Tonality on US policy and protagonists associated with Syria



Basis: 593,214 reports in 2013 on 37 global TV news programs

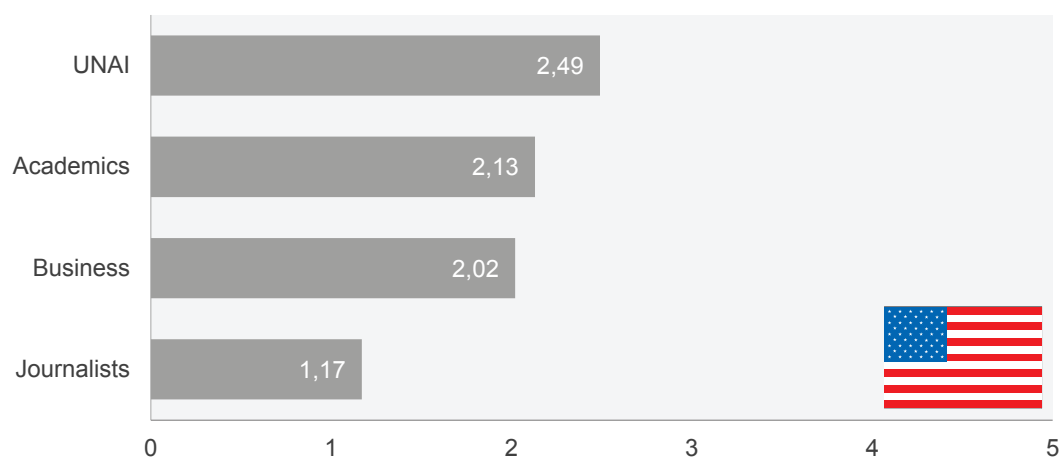
Syria proves a weak spot for the US

Opinion-leaders not convinced America will recover

The increase in negative reporting on US foreign policy in general and action in Syria in particular might explain why survey respondents felt that US hesitancy to act in Syria might damage perceptions of their role in the Middle East, which has the potential to damage perceptions of leadership in other regions of the world.

Although US media has been highly negative on partisan conflict in the government and solving simple domestic issues, Americans are still convinced that the US is the only country to lead in the next ten years. Reconciling opinions about global leadership in regions that have been in the spotlight for the past ten years will be vital for building future scenarios that are more realistic and shed light on the drivers that change the global landscape and help leaders to charter routes across interrelated market level risks, opportunities so as to make informed decisions.

GAI Survey participants: Likelihood US policy in Syria will better international perceptions of the role of the US in the Middle East



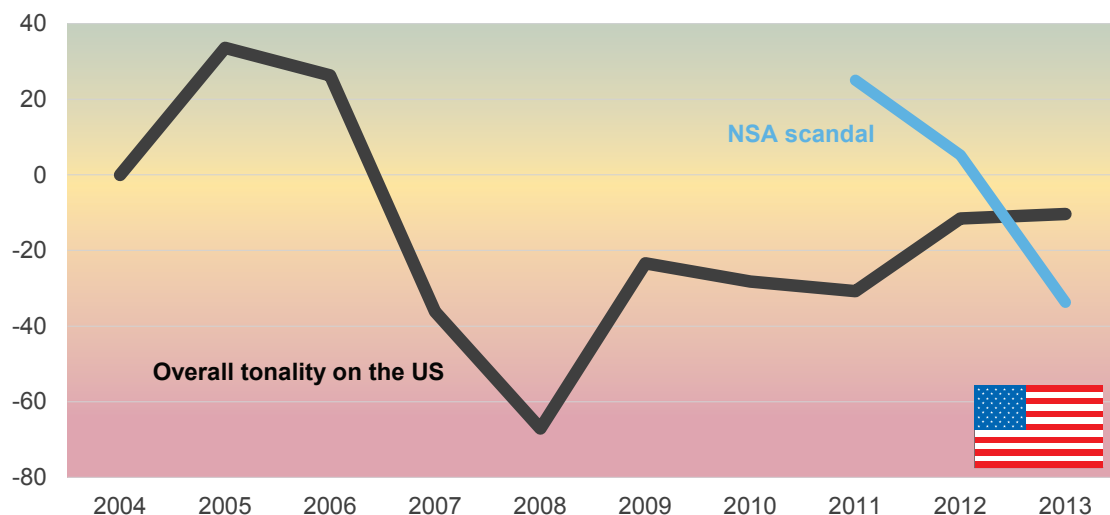
Basis: 202 respondents from Media Tenor GAI survey

NSA scandal could again destroy trust

Recovering rep since financial crisis stalled

The sub-prime crisis in the United States had a significant impact on media reporting on the US since 2007. It wasn't until 2009 that foreign reports on the US and its recovery efforts helped improve overall tonality. However, global media continues to report harshly on the US. Although the re-election of president Obama in 2012 may have helped neutralize global sentiment on the country, the recent discovery of domestic and international "spying" activity by the National Security Agency has been increasingly negative as reporters challenge the values and leadership of a country that does not respect its citizens or allies privacy. This negative focus represents a similar trend to reporting on the US during the crisis that spread across the globe.

Global media: Overall tonality on US over time and in relation to NSA scandal

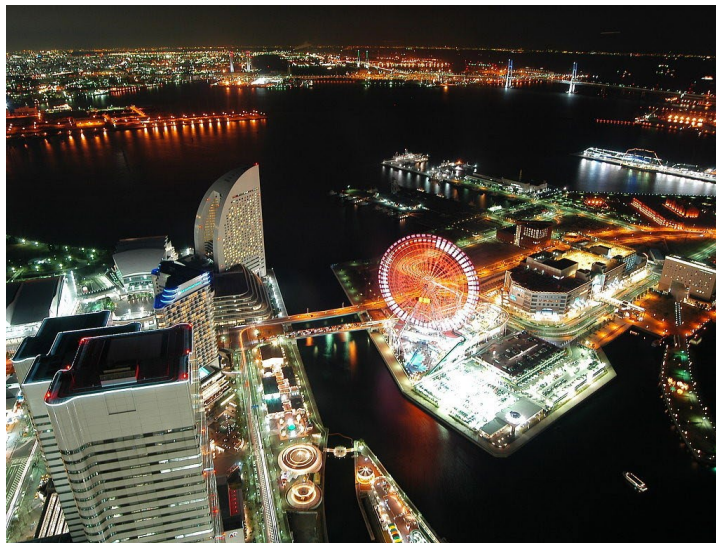


Basis: 430,656 reports on the United States in global TV and print media; 994 reports on privacy and security issues since 2011.

Who is making the most progress?

Hiroshima vs. Detroit 68 years after bombing

Hiroshima 68 years later



Detroit 68 years later



Competitive America

Lawrence Summers is clear in describing the challenge America faces regaining its global leadership: printing money is not helping much. It did not help before the financial crisis and it is not helping now. During the last seven years America's standing has steadily declined in the World Economic Forum Global Competitiveness Report. And, to put a face on just one aspect of this U.S. decline, New York City currently has its largest population of people without homes since the Great Depression (The New Yorker, October 28, 2013). The United States must change, must innovate. But how?

How can we understand the complex nest of causes and effects that create and permit global leadership to emerge and be sustained? Perhaps there is a useful analogy to Mr. Maslow's approach to human needs that can structure our thoughts about nations and leadership among nations. The analogy might go something like this: Nations need to have physical security; when they are physically secure, they can focus on economic security; when they are economically secure, they can focus on values. Leadership among nations emerges when nations ally themselves with a set of approaches to physical security, approaches to economic security and values.

Talk is cheap. The real leader has to have the capacity to aid the others in reaching their goals; the real leader has to have the demonstrated will to use its capacity to help; the real leader has to have the dogged persistence to see the problem through. Implementing George Marshall's genius for decades, the United States lead the world so successfully that there was a presumption of real leadership on its part.

The financial crisis is generally seen as created by, or at least precipitated by the United States. As a result, the United States spent a great deal of its reputational capital and a great deal of its presumption of leadership. Five years after the financial meltdown it is clear that the world needs the United States to recover its competitiveness and to recover its leadership and its presumption of leadership. The world is cheering for the United States, and wants it to succeed, but, like an athlete on the field, the United States has to do the work itself.

Several observations may be helpful in identifying what it will take for the United States to regain its presumption of primacy and to effectively compete with China, Germany and many others.

Time and perpetual short-termism

America has a reputation for fixing problems quickly. It has never hesitated to drop approaches that have stopped working and adopt approaches that now work. Asia and Europe have envied the United States for its quickness even as they have recognized the two edges of the sword of time. The strengths created by changing quickly and often undermine the strengths created by changing slowly.

Competitive America

Employees sell their homes and move to other parts of the country for (“nothing more than”) a better job.

Employers lay off trained, loyal workers to maintain (short term) profits.

Owners and managers sell solid businesses for a (short lived) premium price.

Politicians withdraw troops in the face of political opposition.

Speculation trumps investment in the financial exchanges.

Asset stripping trumps investment in the new euphemism, “private equity.”

The media are mesmerized by short termism in all these fields, honoring the short term players and denigrating the long term players. Media attention amplifies all it touches, even values that work against long term competitiveness. This is particularly true when the media over-simplifies complex issues into sound bites. While sound bites are emotionally satisfying, they lay the ground work for solutions that are not effective and are often counter-productive. We realize the problems children face due to failure to stay focused. Yes, U.S. television, with its frequent advertising breaks suggests that the whole nation seems to suffer from this disease. If everything has to be cut down to three lines or, at maximum, a one-pager, who in the corporate sector, in politics and even in the sciences will be left with the capacity to dig deep?

There is a central unifying theme to the short term expedients to which America, and perhaps democracies generally, subscribe. In every case, the short term decision either spends stored capital or fails to store capital in fat years

Tangible results, a wake-up call for America

The United States has been spending stored capital for a long time. Physical resources that seemed limitless are now understood as limited. The bison and the carrier pigeon are dramatic examples; clean water, clean air, clean soil and clean oceans are better examples.

The United States is so large and feels so insular that it misses the impact of its attitudes and policies on others. While it has a few globally competitive and dominant companies, it has few world market leaders, companies that are selling successfully in their own regions and on a global scale. Americans are taught they are the best at everything, even as America has lost both momentum and leadership in field after field.

According to Prof. Herman Simon from Simon Kucher & Partners, the United States has 366, while Germany alone have 1,500 leading their markets on a global scale. These hidden champions are not new, flash in the pans or instant successes; many are family owned companies that are four or five generations old. American tax laws make this type of continuity and stability, and the accumulated experience it offers, almost impossible. Europe outperforms the United States in this category by a factor of almost ten. In other words, the United States is farther behind than

Competitive America

it realizes and, like a frog in a pot, does not feel the temperature rising. The temperature rises when actions are unsustainable.

Let's look at specific problems and try to understand, first, their sustainability and, second, how they impact America's competitiveness and America's need to regain the primacy that the world needs.

Printing Money

America is inflating its currency at an accelerating rate. Currencies are valued on faith, on confidence. America is trusted around the world to maintain the value of its currency. America is robbing that piggy bank of trust. It is a dangerous game to play. A trusted currency is a fundamental foundation of leadership.

Property

One problem with lionizing the short term lies in its tendency to denigrate achievement. America's infrastructure is a great achievement. It is being allowed to rot.

Every ride from New York to Washington on Amtrak highlights this issue. The physical condition of the real estate, including houses, along this route gives better insight into the American soul than any Fourth of July ceremony. If the view out the window is not enough, the slow speed of the trains belies a rail infrastructure that cripples commerce, particularly international commerce.

Intellectual Property

America's obvious disrespect for physical property is one thing, but a more serious impediment to international leadership is its obvious disrespect for intellectual property. Google thinks it can build its business by copying thousands and thousands of books, without paying a dime to those writing and publishing them. Microsoft has no problem selling products that do not function properly. A thousand small thefts corrode the citizenry's trust. America is robbing its piggy bank of lawfulness when it condones these abuses of the golden rule. Globally, the perception of lawlessness corrodes America's call on leadership in values.

Privacy

The NSA seems not even willing to consider the concerns of people and nations that have experienced one man, one vote, once perversions of democracy. These pragmatic realists recognize that privacy deserves respect and that should be violated only for good proven reasons, and only under court supervision, not simply because technology makes it possible to violate and especially not because a political party may be voted out of office because some criminal incident is undeterred while privacy is honored. The government's poor image makes commercial infringements hard to sanction.

Competitive America

Democracies need intelligence services, but they must follow rule of law. By failing to frame the necessity of sophisticated surveillance and by failing to scrupulously follow the letter of the law, the United States robs its piggy bank of stored trust and weakens its call on international leadership. Because trust is a bed rock foundation of leadership, and because the world needs wisdom and judgment applied to the ever present gray areas of intelligence, the United States needs to pay special attention to this breach of trust.

Sustainability

America's arrogance regarding privacy is entirely in synch with the arrogance Europeans sense when the United States ignored the Kyoto treaty and treats it as a sign of superiority. By allowing itself to be perceived as callously disregarding sustainability for global resources, the United States weakens its call on global leadership.

Healthcare

It is unlikely that Americans understand the damage its approach to healthcare inflicts on its reputation and therefore its claim on leadership. If we postulate that physical security is an essential pre-requisite to economic security and that economic security is an essential pre-requisite to the luxury of a values based codification of law, then denying healthcare to citizens deprives them of physical security and economic security and undermines their willingness to support the rule of law.

Europe undertook universal healthcare not because it was a moral issue, but because it was pragmatically cheaper to pay the costs of coverage than the much higher, but much harder to measure, costs of an uninsured citizenry.

The world looks at American healthcare and says to itself, "if they treat their own like this, how will they treat me and my family?" America's own economy is probably hurt more than its international reputation and its call on leadership, which are hurt substantially.

Retirement

While America is struggling to solve the healthcare issue with Obamacare, the next great issue is brewing. Millions of Americans are retiring without enough money to retire. Essentially all the major democracies face the same problem. Modern medicine is keeping people alive longer; we still throw them out of the labor force in their 60's. They do not have enough to live on. There are a lot of them. They vote. The world is watching how the United States deals with the retirement issue.

Finance

America's financial exchanges have emerged as the greatest casinos ever created, with the exchanges themselves and the regulators behind them introducing rule after rule favoring speculation over investment. Billions of dollars are

Competitive America

are transferred from savers to speculators as a result, eroding faith in the markets. America's tax rules inhibit building stable companies over generations. America's take over rules encourage asset stripping. America's short term views encourage quarter to quarter earnings management. America's regulatory regime encourages speculation at the expense of investment. This is probably a result of peopling regulatory agencies with precedent driven attorneys instead of forward looking economists.

A significant number of non-US public companies have delisted from the United States' stock exchanges, reflecting unsatisfactory experiences and intolerable legal risks. Capital is available to these large companies in other, more predictable regulatory regimes. That the large, global players which can leave are leaving is the canary in the coal mine for this industry.

Education

Education is a nation's investment in opportunity. America's approach has incorporated Jefferson's ideal of an educated citizenry. It is a noble aspiration. It is failing. America has recently settled on a reasonable body of knowledge to be taught, The Common Core curriculum; it has not settled on a reasonable method of teaching, the pedagogy. The goal is to teach to mastery.

The dispute between "drill and kill" and "creativity" is a sham. There is no meaningful creativity without a solid mastery of fundamentals. America honors coaches who demand practice, practice, practice and yet mocks the teacher who demands her class drill, drill, drill. There is no instant gratification in drill, but there is gratification in mastery. There is no mastery without drill. Too many so-called educational policy experts prohibit teachers from doing the hard work of drilling the fundamentals into their students until they obtain mastery. Again, the easy to measure costs of educating the populace are dwarfed by the hard to measure costs of ignorance. The sensible, pragmatic answer is to invest in mastery.

Does any of this matter for America's leadership? Yes, it does. On the one hand, the United States needs a globally competitive workforce to thrive in a globally competitive market. On the other hand, there are fewer and fewer jobs for under-educated people and they become pushed into the lawless economy. They threaten security, they become a drag on the economy and they have no perspective from which to vote for win-win international policies. The political response will be to pander to the needs of the uneducated. Many Europeans believe this has begun.

Critical discourse

We need to be able to talk about these unpleasant issues, and to do so civilly. That ability seems to be slipping away. Many European companies have stopped hiring U.S. employees even for their U.S. offices. Why? Because it is almost impossible to train and educate them. The response to constructive criticism is no longer a discussion about

Competitive America

how to improve, but a defense along the lines of, “You hurt my feelings.” The inability to tolerate constructive criticism has become a systemic disease for America. This is probably the harvest of an educational system in which “mastery” was sacrificed on the altar of “self-esteem.”

While few Americans know it, the United States would love to have the problems that Europe is facing. Europe has a 3,000 year history and is skilled at dealing with the ups and downs of history. This is why managers, scientists and politicians in Asia increasingly prefer to deal with Europe. They are long term oriented and neither side expects a quick fix.

Roland Schatz & Alfred III Berkeley



Perceptions of Asia: Heading towards conflict or economic stability?

Executive summary

- Japan enters the media agenda of business print as the Asian country most reported on after China
- Media tonality on Japan's reforms was less positive in 2013 and elite opinion reflects more neutral opinions on the direction Japan is likely to take
- Opinion-leaders not convinced territorial claims in the South China Sea will result in regional conflict, which could potentially prohibit economic growth

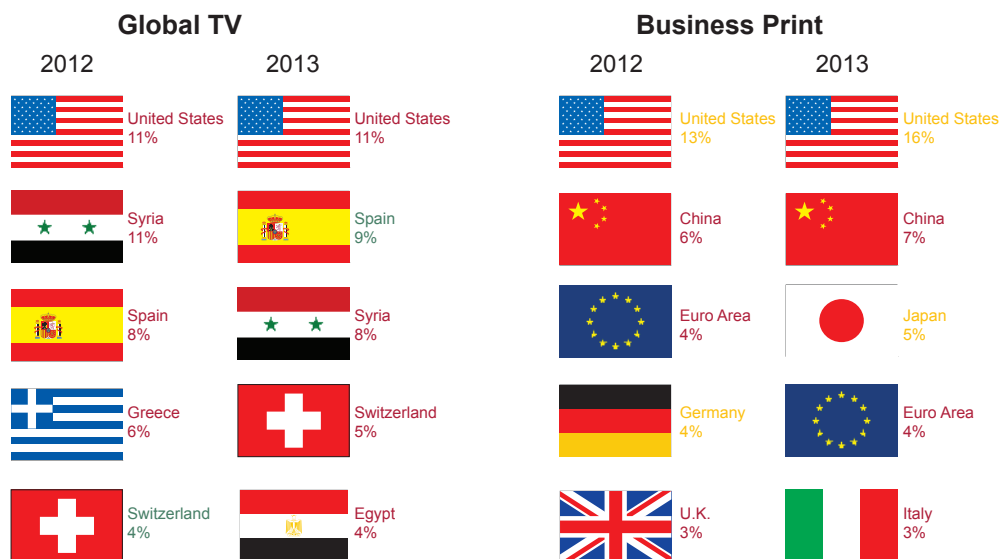
Business papers focus on China and Japan

US TV news still consumed with Syria and Europe

Last year's GAI survey respondents put East Asia, particularly China, at the forefront as the most important country and region by 2030. Despite China's aging population and environmental concerns, change in leadership over the last year was in the spotlight, mainly for business print media. However, sentiment has been more negative than positive.

Business print media such as Financial Times Europe, Wall Street Journal US and France's Les Echos also raised Japan to the spotlight in 2013 as Shinzo Abe implemented a three-tiered economic plan to increase Japan's competitiveness. Overall media opinion seems neutral as the world waits to see how Abe's reforms pan out, but it is a rivaling perceptions of China's leadership in the region, especially with conflict over disputed islands shaping media reporting on the Asian region.

Global media: Share of foreign reporting by country and tonality



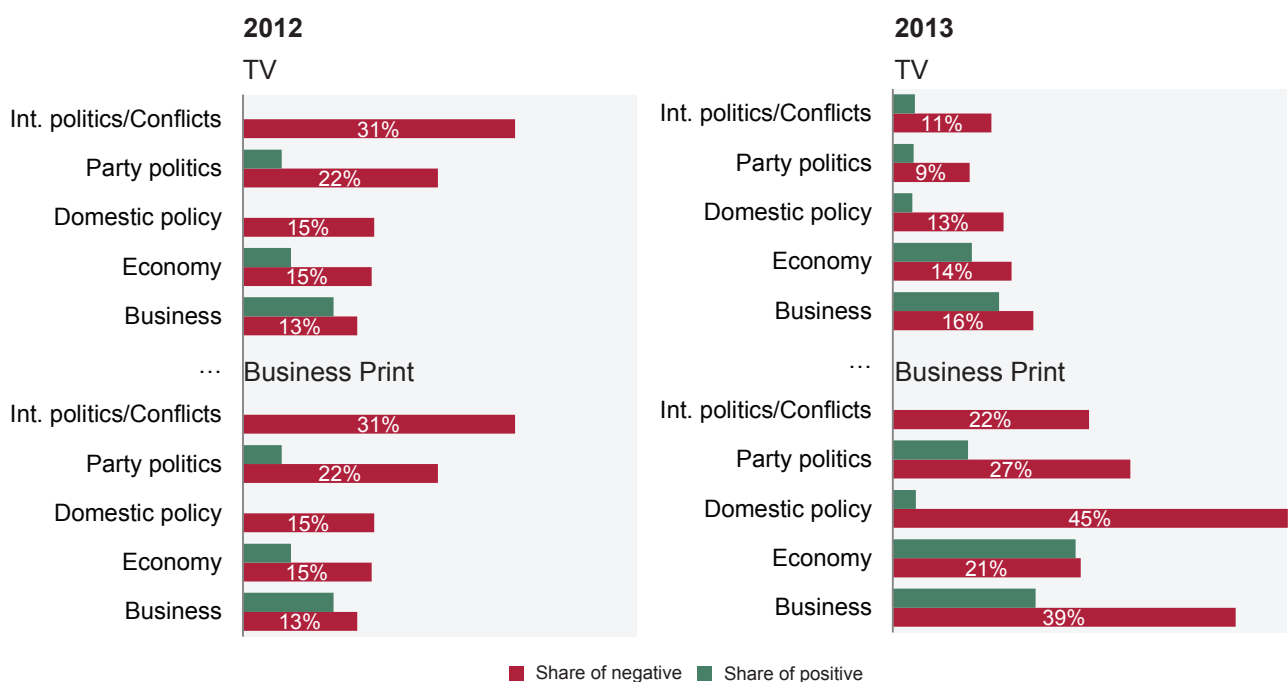
Basis: 395,447 reports in 2012 on 30 global TV news programs and 593,214 reports in 2013 on 37 global TV news programs; 145,185 reports in 2012 and 219,290 reports from Jan.-Jun. 2013 in WSJ, FT and Les Echos

Business media less optimistic on China's reform

International conflicts could challenge perceptions

Overall, foreign TV news and business papers reporting on China have negatively focused on international conflicts and relations with neighboring countries. Most significantly, global TV has drastically re-reported less negatively on conflict compared to 2012, with shares of negative commentary dropping 20 percent. Business media has also been less negative on conflict but has drastically increased negativity on China's business activity and domestic policies as the country shifted leadership and declared efforts to reform China in the coming years. Skepticism appears high.

Foreign TV reports on China: Top issues and tonality



Basis: 395,447 reports in 2012 on 30 global TV news programs and 593,214 reports in 2013 on 37 global TV news programs

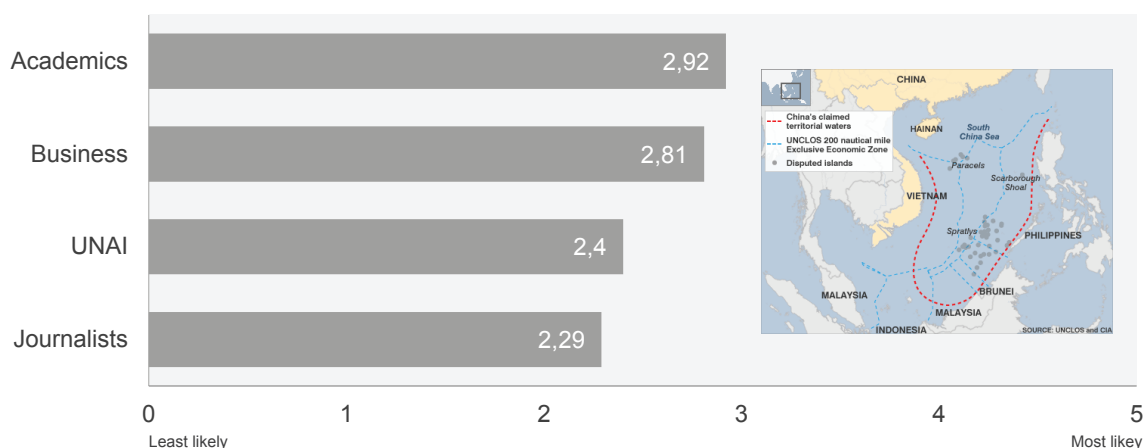
Conflict viewed as less likely in Asia

Elites ill-concerned with China's role as an aggressor

When opinion-leaders were asked if they thought that territorial claims in the South China sea will lead to conflict in the next ten years, a majority of the participants expressed that it is less likely. This may be a result of both TV news and business papers being less negative about conflict and international politics in general. However, overall tonality of reporting on China, in particular, is marked by a trend of high negativity. This begs the question, which factors are driving the elite opinion of Asia's future.

Business media does show much higher shares of positive tonality towards China's economy and policy. In turn, helping to explain the elite optimism that a more integrated Asian economy may help to deter conflict in future.

GAI Survey participants: Likelihood Territorial claims in the South China Sea will lead to conflict within the next 5 years



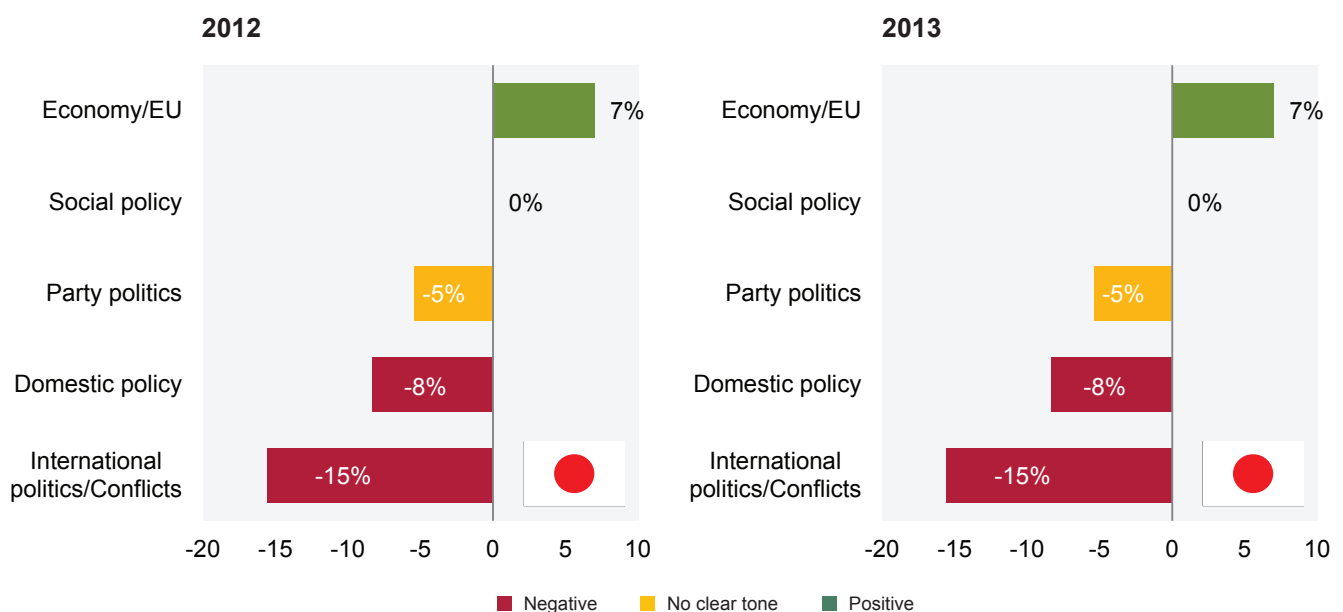
Basis: 202 respondents from Media Tenor GAI survey

Enthusiasm about Japan wanes in 2013

Business media's optimism on economic reform declines

Of course another possibility driving elite opinions on Asia's future may be the increase in reporting on Japan since Shinzo Abe took office and revealed his three-tiered economic policy to increase Japan's competitiveness. Along with Abe's economic reforms are desires to revise Japan's constitution, which could threaten to eliminate freedoms and formalize Japan's right to expand its military power. In the last year, business media has drastically changed its positive tone on Japan's economy to a more neutral position, indicating skepticism over Japan's ability to reform and rival China in the region. Overall, media has been most negative on Japan's foreign policy and role in regional conflicts which might have an effect on decision-maker's opinions about Japan's power.

Business Media: Tonality on Japanese issues



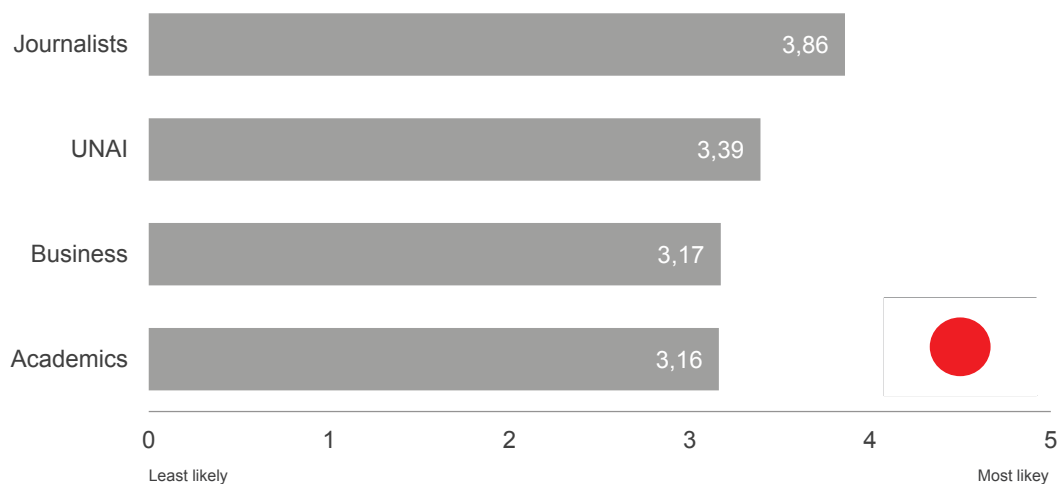
Basis: 395,447 reports in 2012 on 30 global TV news programs and 593,214 reports in 2013 on 37 global TV news programs

Japan: An opportunity or threat?

Drastic changes in Japan challenge opinions

This year's GAI survey respondents indicated that elites seem slightly indifferent about the opinion whether Japan will return to a more socially conservative position and expand its military in a time of regional vulnerability. In their responses journalists leaned in a pronounced way towards the likelihood that Japan would expand its powers within five years. Analyzing topical focus and sentiment towards the region in the coming years will be vital in determining the underlying risk and opportunities in the region.

GAI Survey participants: Likelihood Japan will return to a more socially conservative position and expand military power in 5 years time



Basis: 202 respondents from Media Tenor GAI survey



Challenging how the media frame and cover economic crisis, and analysts search for evidence markers of stories in the media

Executive summary

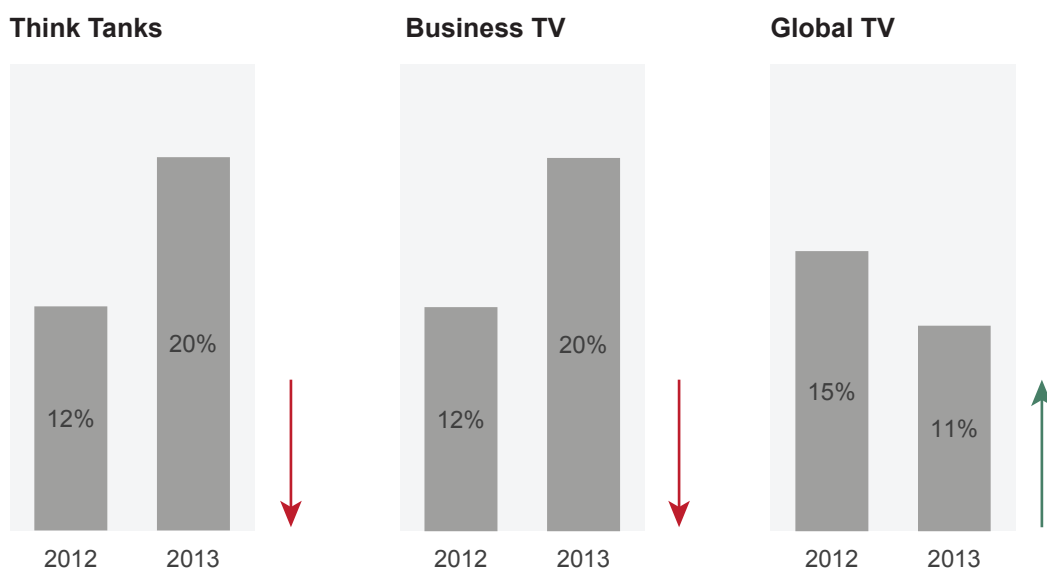
- Despite last year's opinion-leaders feeling economic and financial crisis was hyped-up and a waste of time, opinion-leading media and experts increased their focus on the economy in 2013
- Opinion-leaders also feel that economic and financial crises remain the top risks in the next 1-10 years

Focus on economic issues rises

Only global TV decreases focus on economics

Most significant in this year's content analysis of economic and financial issues is the increase in topic focus for both expert think tanks and business print media, both increasing reporting on the issues by eight and four percent respectively, while global TV news decreased focus on economic issues by three percent. Overall, it is still a top issue for opinion-leading media and content which raises questions as to how decision-makers feel about the future global recovery since 2012. Investigating the issues getting most attention will help identify underlying concerns.

Opinion-leading media and experts: share of coverage on economic and financial crisis



Basis: 395,447 reports in 2012 on 30 global TV news programs and 593,214 reports in 2013 on 37 global TV news programs; 280 think tanks in 2012 and 166 in 2013;

Basis: 145,185 reports in 2012 and 219,290 reports from Jan.-Jun. 2013 in WSJ, FT and Les Echos

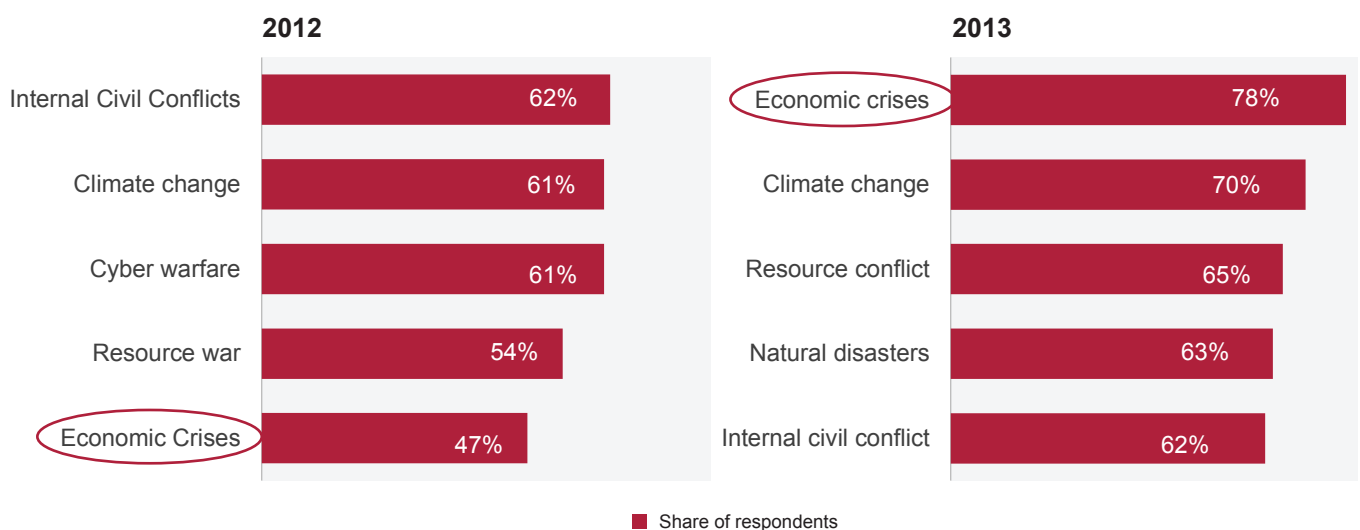
Global risks are drastically changing

Economic crisis & climate change a risk

Strategic evaluation of future scenarios also includes aware-ness of perceived risks and the underlying structures which generate them. When asked to list the pernicious risks to security in the next 10 years, economic issues rose to the number one issue in 2013.

Despite GAI respondents recognition that economic issues are driving future risk scenario planning, increased attention to regulatory issues seems to have influenced their perceptions of its role in 2013. Climate change remains a top issue. Cyber warfare increased its visibility in the business media. But only by one percent and therefore fails to occupy opinion-leaders' minds. With the media drastically dialing down their coverage of Syria and other armed conflicts, the economic issues continue to claim the lion's share of the debates featured in opinion-leading media.

GAI survey respondents: Perceived risks to security in the next 1-10 years



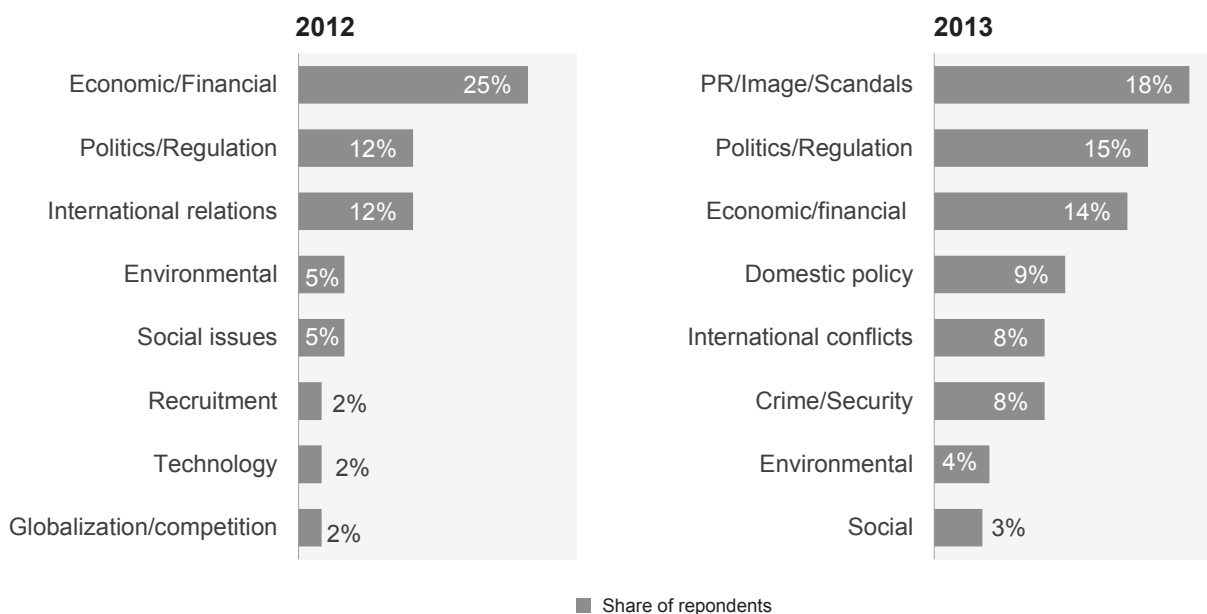
Basis: 202 respondents from Media Tenor GAI survey

Economic crises remain relevant

Media focus on politics and scandals seem irrelevant

Economic crisis and policy were at the center of media focus in 2012, as well as the most identified risk to future scenarios by elites in last year's Global Agenda Index survey. Yet, when elites were asked which issue took up a lot of their time in 2012 that now seemed less relevant, respondents identified economic and financial crisis, indicating optimism that the world would in fact recover. This year elites identified concern over company scandals and political regulation as the most time consuming issues that in retrospect seem less relevant. Although economic and financial issues were still listed in the top three of the most irrelevant issues in terms of decision-makers' time consumption, they nevertheless remain in the media spotlight.

GAI survey participants: Issues that opinion-leaders have spent time on that seem less relevant



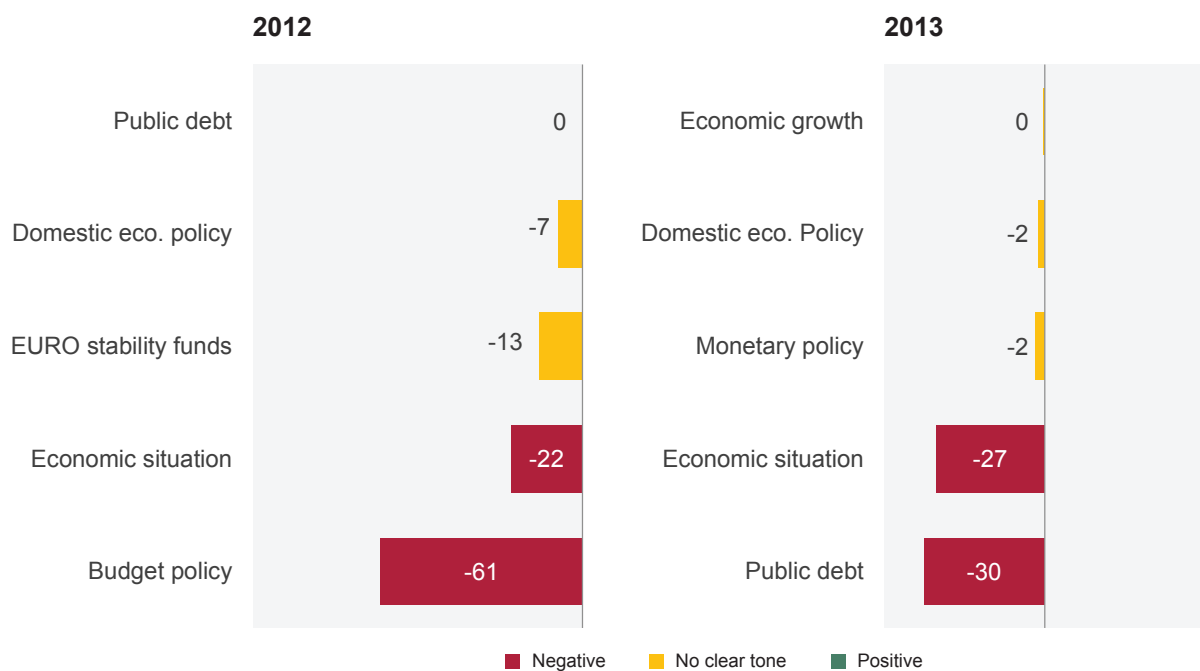
Basis: 202 respondents from Media Tenor GAI survey

Monetary policies in focus

Negativity of overall economic situation worsens

All three content sources analyzed followed similar topic and sentiment trends when reporting on the economy in both 2012 and 2013. When comparing the combined coverage of global TV news reports and business print media, it is evident that journalists are continuing to focus on specific country debt and domestic economic policies. Monetary policy from both the European Central Bank and the Federal Reserve have come more into focus in 2013 as leaders anticipate changing policies with changing economic conditions. This may be affecting elite optimism over how economics are shaping future scenarios. But overall, media has been slightly more negative about the situation in general.

Global media: Topic breakdown of specific economic issues



Basis: 395,447 reports in 2012 on 30 global TV news programs and 593,214 reports in 2013 on 37 global TV news programs



Value shifts: From democratic concerns to Security issues

Executive summary

- With a shift in most reported on issues from 2012 to 2013, reporting on values has shifted from a democratic focus to security issues
- Opinion-leaders no longer perceive a fragmented world in the next ten years, but rather a stand-off between a scenario involving non-traditional “smart alliances” replacing political power and a “con-frontation”scenario
- The latter is driven by members of specific factions and manifest within the divisions of a world that while more interconnect-ed is perceived to have become even more volatile and unstable.

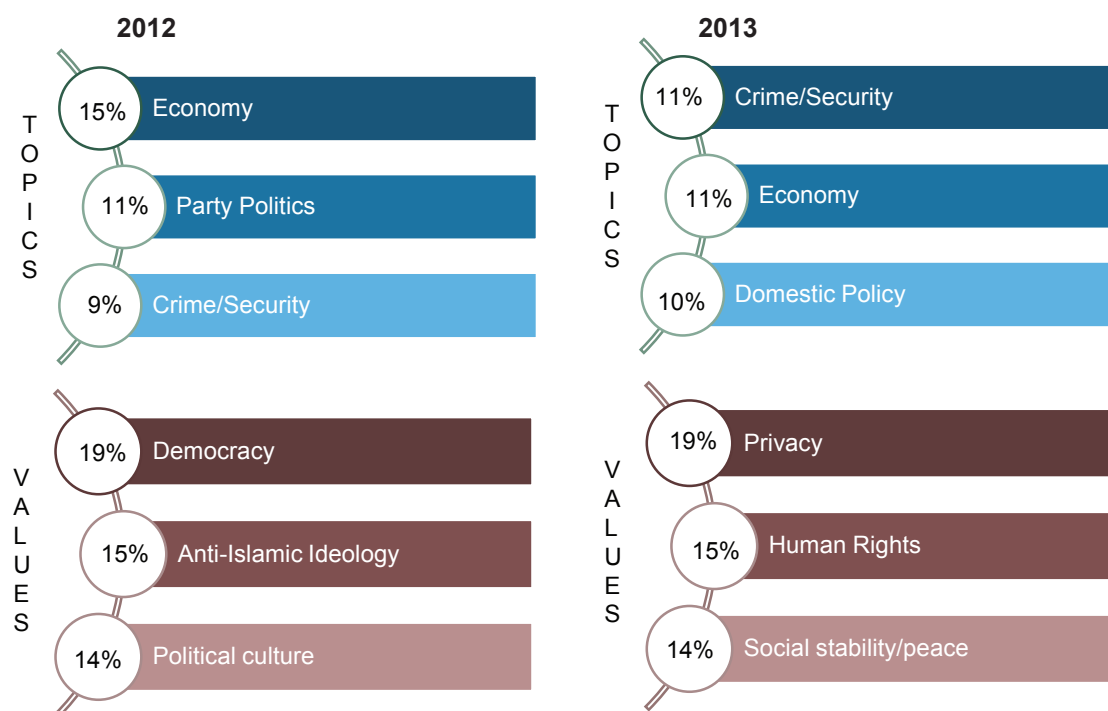
Value shifts as top media topics shift

Questions of democracy replaced by security concerns

When global TV news were focusing on economic and financial crisis in the Euro zone and protest throughout the Middle East in 2012, the most reported on values that were questioned by the media were the future of democracy, anti-Islamic ideology and how political cultures were shaping global societies.

In 2013, there was a significant shift in reporting with crime and security issues topping the agenda of most covered issues – as the NSA became more and more a global threat. Along with the economy, although overall coverage slightly decreased. have an effect on how institutions prepare to deal with future risks.

Global TV: Top reported issues and values, 2012 vs 2013



Basis: 395,447 reports in 2012 on 30 global TV news programs and 593,214 reports in 2013 on 37 global TV news programs

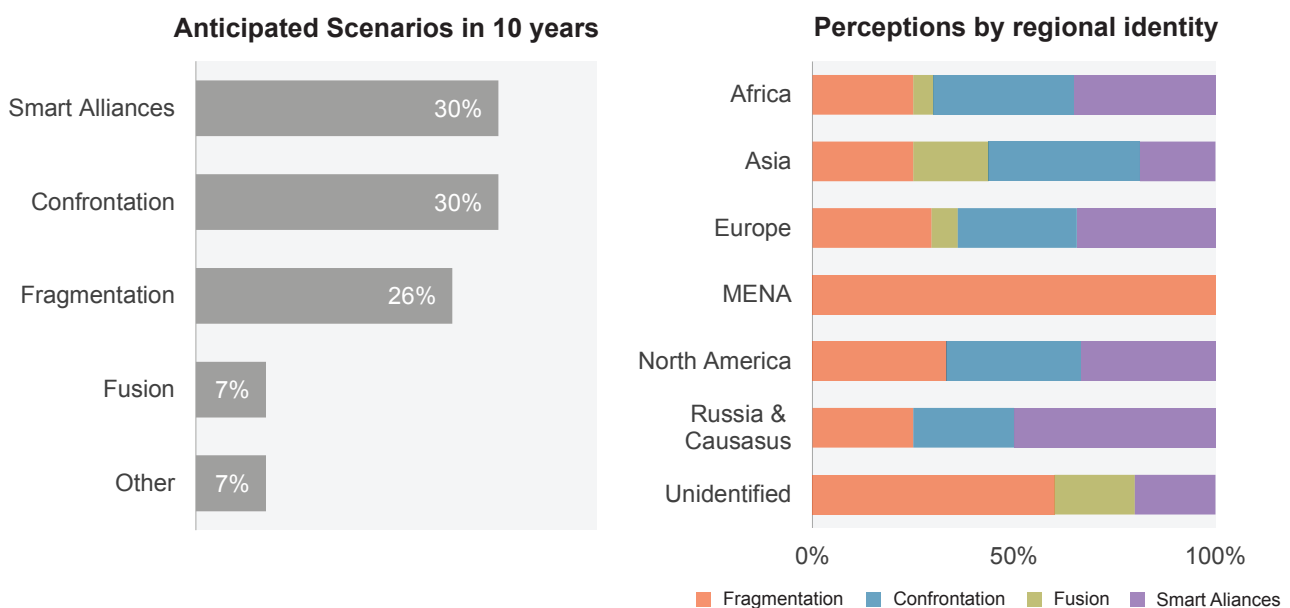
Fragmentation perceptions shift in 2013

Inherent scenarios perceived as alliances or conflict

North Americans face multiple dilemmas. Fragmentation has resulted in the growth of western economies lagging behind those of the emerging economies. The confrontation scenario has had consequences manifested in “casino capitalism” and led to a world characterized by tensions and conflicts on the one hand and smart alliances, on the other. Overall, smart alliances and confrontation seem to be the most likely

scenarios. These serve as indicators that the world has entered a transitional era, including complexity to which organizations must respond by fostering adaptability to change. Within this context, traditional political spheres of power are likely to be replaced by alliances between prominent global brands and/or independent actors. Leaders can use scenarios to help review future strategy and assess reputational risk.

GAI survey participants: The most likely scenario of the world in 10 years time



Basis: 202 respondents from Media Tenor GAI survey

Concluding remarks

These final comments aim to bring together the running themes and salient ideas in this White Paper into different views of the issues and critical incidents that leaders have to deal with in an uncertain, global market environment. So, what does it all mean?

Turning the conventional view of the market on its head

A conventional view of the word “market” conjures up the image of a fixed audience. Instead a more critical and realistic view, however, would consider that the media, transport facilitate mobility and flexible work styles all connected to the same logic, based on a digital logic. Globalization and technological advancement are turning how we view the market, in conventional terms, on its head. The active restructuring by all kinds of organizations has contributed to the blurring of geographical, industrial, regulatory and ethical boundaries. But just as technologies are changing the way business is conducted, so do these alter everyday life and the attitudes of people, not only as consumers, but also as employees, citizens, family members, migrants and refugees. In a world where diversity is becoming the norm rather than exception, the exponential expansion of media coupled to information asymmetry results in ambiguities. Same can be perpetuated by the prolonged coverage of political scandals in the media, which fuel public cynicism over the motives of leaders – both in the corporate and governmental realms. Hence, it becomes unclear what organizational identities exactly stand for and how they relate to society as a whole. Moreover, the emergence of the confrontation scenario threatens to disintegrate public life into incoherent fragments. Has the human condition reached the stage where division has become the rule? And shifting of opinions and power shifts result in winners and losers as the prevailing icons of contemporary society?

The Stereotypical view and the paradox of reversed globalization

The ascendancy of Asian leadership and Africa, albeit to a lesser extent, manifest those perceived to be on the side of the winners. Though Asia may be thriving economically, it faces socio-cultural constraints in the set of beliefs which Edward Said (1978) coined as Orientalism. His view highlights the inaccuracies of a wide variety of assumptions and stereotypes which raise questions about stereotyping and the various paradigms of thought which are accepted at the individual, academic and political levels. Asia's gain appears to coincide with US loss. The latter measured in content amounted to 18 per cent and sends a signal of the continued decline of U.S. power in our world. In between the winners and losers, the jury is still out in regard to India the world's largest democracy. The global media's dire domestic image renders opinion-leaders hesitant about India's reform. Paradoxically, financial analysts who are less optimistic about the BRICS view India as a country worth to invest in. With the exception of the financial analysts the confidence among opinion leaders concerning the BRICs leadership is high. Remarkable in this context is how the face of one person can make a significant difference. The positive coverage Iran received in the international media propelled its leader Rohani in the spotlight, thereby underscoring the tremendous impact of global media power. The

Concluding remarks

opinion leaders' view on Germany is that it is situated at the core of the Euro – zone and they anticipate that the country's influence will rise to new heights. In contrast, the German people seem less certain of their homeland's leadership role in the world. Their perception contrasts rather starkly with the one Americans hold of their country. The US divided politics, diplomatic faux pas in Syria, and the NSA scandal which undermine the trust of citizens and raise negative sentiments in the media about US both at home and abroad. Sadly, instead of helping to arrest the trend to decline, media coverage may contribute to the domestic mistrust of US leadership. In spite of it all, Americans remain convinced that the US continues to play the first 'fiddle' in the world. On the other side of the globe, developments raise the question: Is Asia heading towards conflict or economic stability? Rather than homogeneous, Asia is the most heterogeneous among the world's regions, in terms of development, factor endowment, ethnic diversity and trade structure. Our White Paper limits treatment of Asia to its most developed and powerful countries: China and Japan which represent the focal points of the business press and US TV news. Though the business media are less optimistic on China's recently announced reform advanced and signal that the threat of impending regional conflict could challenge perceptions, opinion leaders seem to view conflict in Asia as a less likely scenario. Optimism on Japan's economic reform declined among the business media. Japan's drastic political reforms challenged optimism in the general press.

A stakeholder activism view

A stakeholder activism view, including consumers, shareholders, employees, community groups and activist are challenging, increasingly how the media frame and cover economic crisis, and how analysts limit their search for evidence to markers of stories in the media. For example, the use the internet and social media to connect and strike a responsive chord causing people to approve and share their agreement with opinion leaders. Voicing of concerns about monetary policies that are seen to have served as detrimental antecedents of the current economic crisis can be seen as illustration of such 'bottom-up' stakeholder activism. Instead many of the international media continue their prolonged focus on politics and scandals that in retrospect have proven irrelevant. Overall, the negative sentiments in regard to the economic situation appear to worsen. Though relevant economic crisis refers to a decisive turning point filled with disorder. Such crisis can only rise to a new beginning if leaders can identify a new pathway to navigate out of wrenching change toward an economic system aimed at durable development, instead of 'short-terminism', which currently prevails in decision making processes.

A view from the leader's pinnacle

From the leader's pinnacle a view would need to include the current shift in values from democratic issues towards concerns of security considers global risks, including, climate change, irreparable environmental damage, political instability, shortages of resources and short-term responses in production and consumption. The latter suggests that

Concluding remarks

our technological ability to include, change or even create new biological systems is rapidly developing, racing past our cultural expectations of nature. Leaders sensitive to these developments will no doubt ask how they can make sense of where we are? [the 'we' refers here to the human condition]. The impending resource scarcity, rising research and development expenditures and the rise of social media are salient factors that result in a sense of urgency for a more long-term view of organizational leadership as an interactive, responsive and evolutionary process; in contrast to the traditional and restrictive view captured by the myth that an organization is able to act independently. Question: To what extent will a view from the leader's pinnacle result in stakeholders following along the new pathway connecting value propositions that match the goals of business and sustainable development?

A view on "Smart Alliances"

Practice shows that organizational dilemmas in the global context are so complex that the three main actors - private businesses, public sector and Non-Governmental Organizations (NGOs) increasingly join forces in partnership to stand a better chance to balance social, economic and environmental constraints and opportunities. We view "Smart Alliances" as organizations which focus on connecting value propositions in partnerships within a systematic framework. But how can alliances perform in "Smart" fashion? We interpret the adjective smart as 'intelligent', by attaching meaning to information or content in response to the awareness that every situational practice is unique. This interactive approach enables leaders to prepare for extreme events by considering the role of context not only in relation to how they frame a story. But also, how leaders interpret the structure of local contingencies and index relevant information to crack the "code" enabling them to access the real meaning of content. Such dialogical view as opposed to the commonly used functional view can help leaders shed light on 'where we are'. And determine whether their organization is ready to respond to change rather than being swept away by it. This White Paper's content suggests that Smart Alliances form an alternative response to the emerging "Confrontation Scenario" with the aim to generate sustainable business. Their membership is characterized by actors who seek, jointly, to create a world wherein accountability to stakeholder rather than merely shareholder interest. Smart Alliances seek to balance their profit generating capacity and their potentially broader societal role with carefully selected partners, such as NGOs, which represent complementary fields at the cluster, regional and/or national level. Research should try to identify core decision making with the context of Smart Alliances in order to comprehend both the process and areas of conflicts that may arise in relationships between individual and a collection of decision makers.

These typically arise from known dichotomies, different agendas, objectives and information asymmetry undermining confidence of actors, closely linked to accountability structures and therefore represent a potential reputational risk for all concerned. Smart Alliances that emerge, erect bridges between private businesses, public sector and NGOs. By connecting their value propositions they demonstrate the possibility that individual organizations can benefit Smart Alliances and vice versa and ultimately sustain one another. This thought should fill many of us with some hope that Smart Alliances can contribute to a better future for all.

GLOBAL ORIENTATION

GERMANY CALLS EU'S TUNE

Euro-zone capitalism

CHINA'S RISE

Network capitalism

HIERARCHIC
APPROACH

INTERACTIVE
APPROACH

EUROPE CHAINED

Cultural capitalism

U.S. A NATION DIVIDED

Entrepreneurial capitalism

NATIONAL ORIENTATION

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 and 2012 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 editorial 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 mentioned. 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.




Methodology: Content measurement

Statement coding, passages, and reports

STATEMENT CODING separately analyzes every single piece of information in an article (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 whether negative/positive tone is changing with regard to headlines and so forth.

Information entities are 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 (minimum of 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 (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).

<p>1) "Allianz triplica sus beneficios en España..." (Allianz triples its profits in Spain)</p> <p>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)</p>	<p>3) "...un 7,1 por ciento más" (7,1 per cent more)</p> <p>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)</p>	
<p>1) "Allianz Seguros, la filial española del grupo alemán..." (Allianz Seguros, the Spanish subsidiary of the German group)</p> <p>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)</p>	<p>A total of 20 statements were coded.</p>	

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	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
	Economist
	Barron's
	Handelsblatt
	Mint

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 Institute	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	Istituto 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'Etudes 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 de 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 Paolo
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 Mexicano para la Competitividad	Center for the Study of State and Society	Fundacion Ideas para la Paz
Centro de Investigaciones Sobre la Libre Empresa	Centro de Divulgacion del Conocimiento Economico 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, former Head of Corporate Communications, 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 communication with their shareholders and other stakeholders. Media Tenor is also a useful tool for investors, since it enables them to assess the risks to the reputation and brand of their portfolio companies.”

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

Media Tenor International

Advisory Board

Prof. Dr. Frank Brettschneider, Institute for Communication Science,
University of Hohenheim, Stuttgart

Prof. Dr. Stephen Coleman, University of Leeds, Director of Research
Institute for Communications

Farhad Dilmaghani Secretary of State, Senate Administration for Labour,
Integration and Women, Berlin

Prof. Dr. Wolfgang Donsbach Managing Director of the Institute for
Communication Science, TU Dresden, President Past and Chair of
International Communication Association

Dr. Robert G. Eccles Harvard Business School, Boston

Nakhle El-Hage Editor-in-Chief, Al Arabiyah, Dubai

Dr. Christoph Frei Director General, World Energy Council, London

Prof. Dr. Frank Go Rotterdam School of Management, Erasmus University,
Rotterdam

Anthony Gooch, Head of Public Affairs and Media Relations, OECD, Paris

Prof. Michael B. Goodman, Director Corporate Communication Institute,
New York

Ulrik Haagerup Editor-in-Chief, DR-TV, Copenhagen

Bernard Kalb former Assistant Secretary of State for Public Affairs, State
Department, Washington DC

Eli Khoury Founder and CEO, Quantum Group Saatchi & Saatchi MENA,
Beirut

Stephen Killelea Founder and CEO, Institute for Economics and Peace,
Sydney

Francesco de Leo CEO Green Comm Challenge, Los Angeles

Prof. Shiping Liu Chief Scientist & Associate Director of CAS Financial
Technology Center, Chairman of GBICC, Shanghai

Prof. Dr. Max McCombs University of Texas, Austin

Alisa Miller CEO, Public Radio International, Minneapolis

Michel Ogrizek, International Communications Expert, Paris

Prof. Dr. Nitin Nohria Professor Business Administration of Dean Harvard
Business School, Boston

Prof. Dr. Eli Pollak Weizman Institute, University of Jerusalem, Israel's
Media Watch, Jerusalem

Prof. Dr. Donald Shaw, University of North Carolina at Chapel Hill

Prof. Jan-Egbert Sturm Director, KOF, Zurich

Mathatha Tsedu Editor, City Press, Johannesburg

Prof. Dr. Magdalena Wojcieszak IE School of Communication, Sergovia

Analyzed Countries



Founder and CEO

Roland Schatz
r.schatz@mediatenor.com

Super-Visory Board

Alfred Berkeley III, former President NASDAQ, New York
Richard Gaul, former Global Head PR and Politics, BMW Group,
Berlin

Martin Gurri, former US Government, Washington DC

Dr. Michel Ogrizek, former Global Head Communications, World
Economic Forum, Geneva

Liv Watson, Director, Webfilings, Ohio

Media Tenor South Africa

306 Glenwood Road,
Lynnwood Park,
Pretoria, 0081
South Africa
(t) +27 12 369 7760
(f) +27 12 361 0470

Media Tenor United States

515 Madison Ave
Suite 1600, New York,
NY 10022
United States
(t) +1 212 935 0210
(f) +1 212 428 6817

Media Tenor Vietnam

A10, 78 Planning Area
Trung Tien,
Kham Thien
Dong Da District, Ha Noi
Vietnam
(t) +84 4 3516 1926

Media Tenor International AG

Alte Jonastrasse 48
CH-8640 Rapperswil
Lake Zurich
Switzerland
(t) +41 43 255 1920
(f) +41 43 255 1929

www.mediatenor.com
www.agendasetting.com
www.innovatio.de