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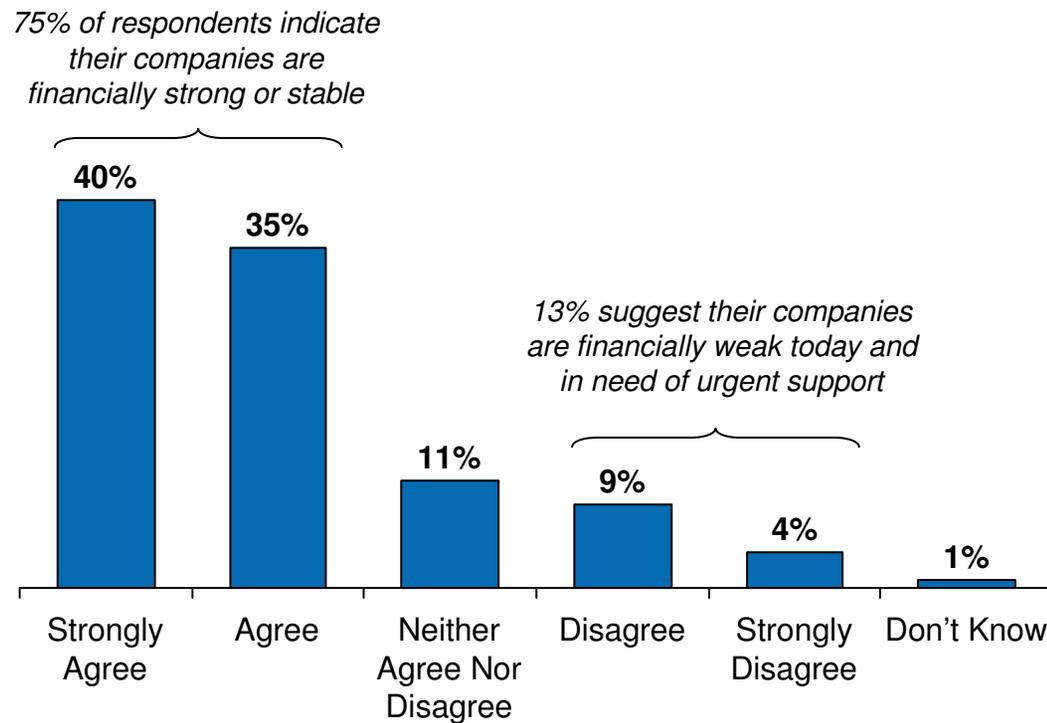
Exhibits for press

Global survey on senior manager response to economic crisis

75% of respondents believe their company is financially strong, but 13% think they need urgent financial support

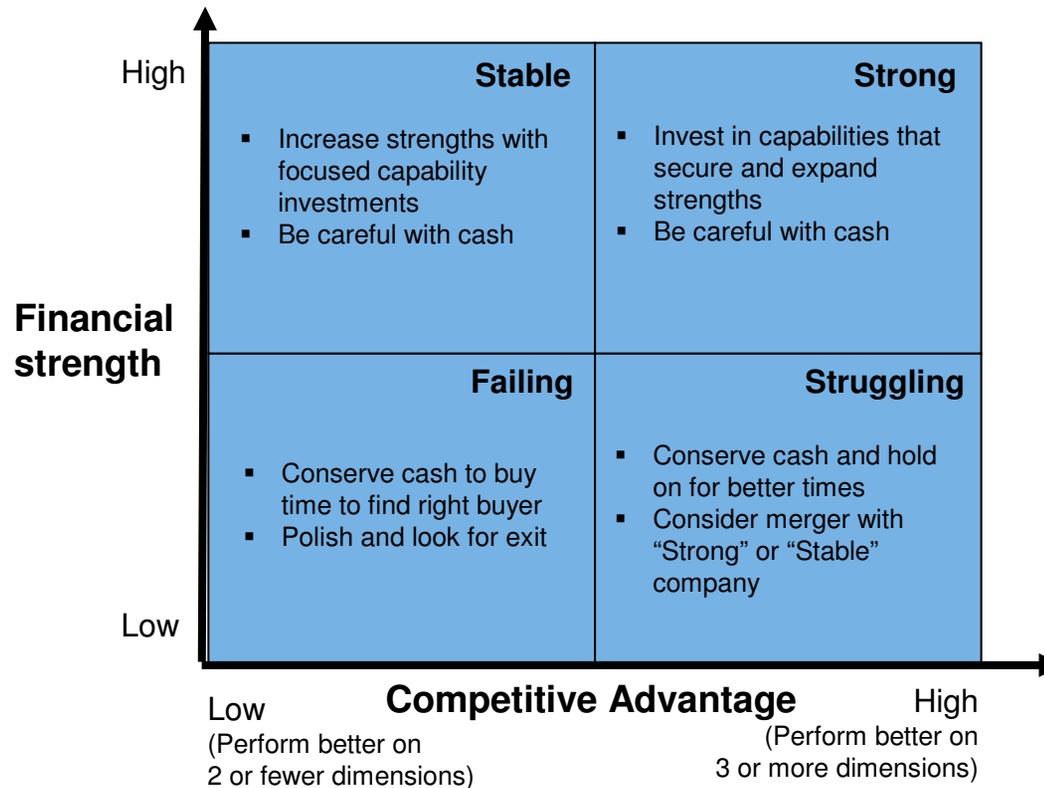
“My company is financially strong today and is not in immediate need of external financial support”

All respondents



Based on self-reported financial strength and competitive advantage, we have assigned each company to a cluster

What actions would one expect companies to be taking?

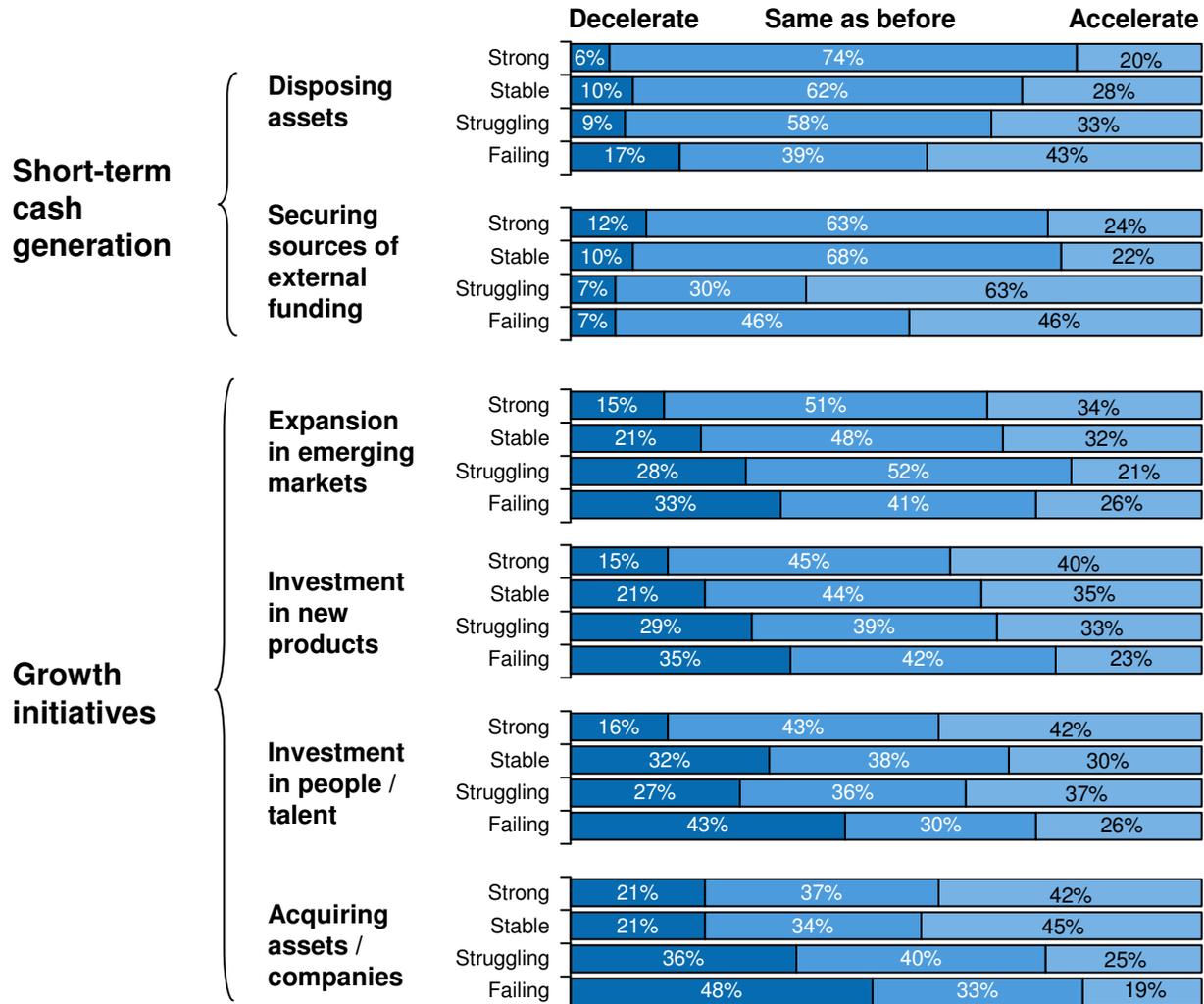


Financial strength Based on response to "My company is financially strong today and is not in immediate need of external financial support"; High includes respondents who agreed; Low includes respondents who neither agreed nor disagreed.

Competitive advantage Five competitive dimensions tested: 1. Cost, 2. Product / positioning, 3. Technology / capabilities, 4. Leadership / management, 5. Ability to influence / collaborate with regulatory authorities

Evaluation of actions taken by each cluster shows unexpected results

What actions are companies actually taking?

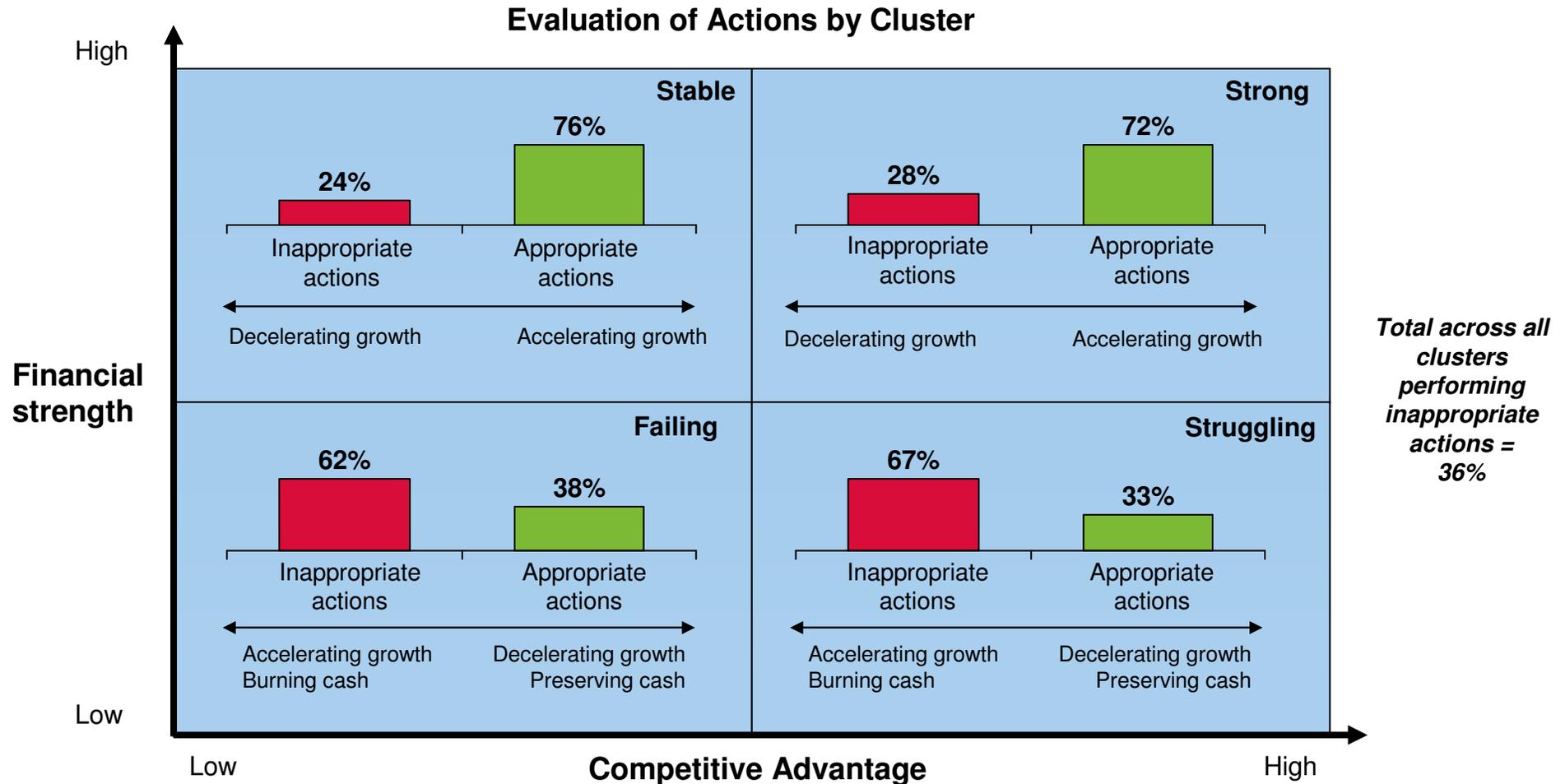


Surprisingly, many financially weak companies (Struggling and Failing) are not accelerating actions to generate cash in the short-term -- actions one would expect from those trying to survive.

And one-quarter to one-third of weaker companies have accelerated growth efforts -- cash-burning actions that are unexpected from this group

Among financially strong companies (Strong and Stable), the surprising result is that many have not put more emphasis on growth initiatives -- potentially leaving opportunities on the table

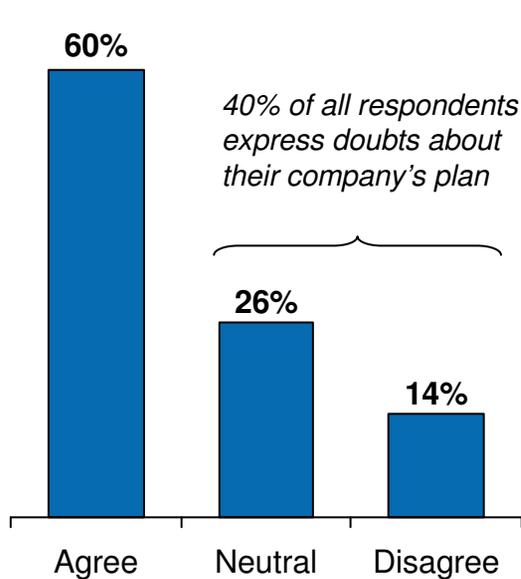
In aggregate, 36% of companies across clusters appear to be taking inappropriate actions given their situation



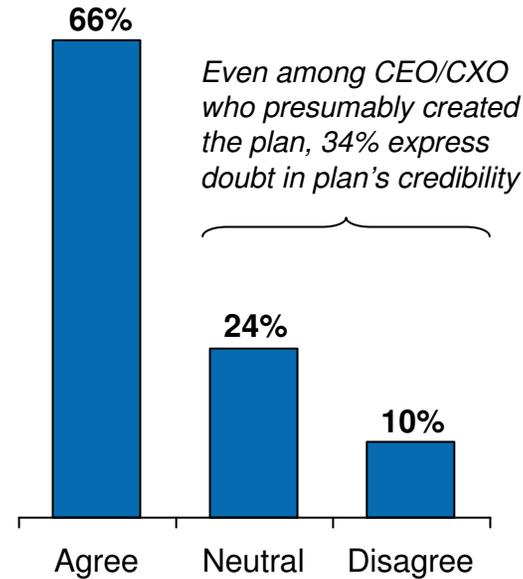
There is doubt among respondents for their leadership's plans for the crisis – even among the leaders who wrote the plans

“My company’s senior leadership has defined a credible plan for navigating through the crisis”

All respondents

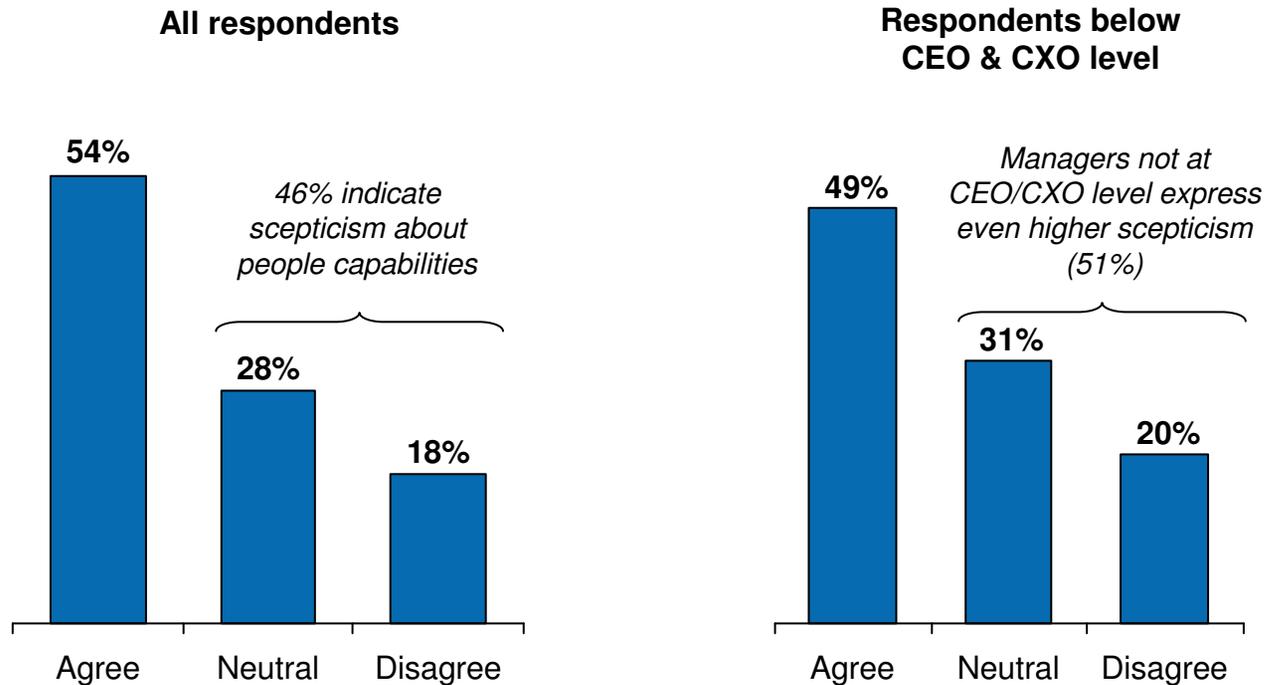


CEO & CXO level respondents only



Significant doubt exists in management capabilities – especially among lower levels

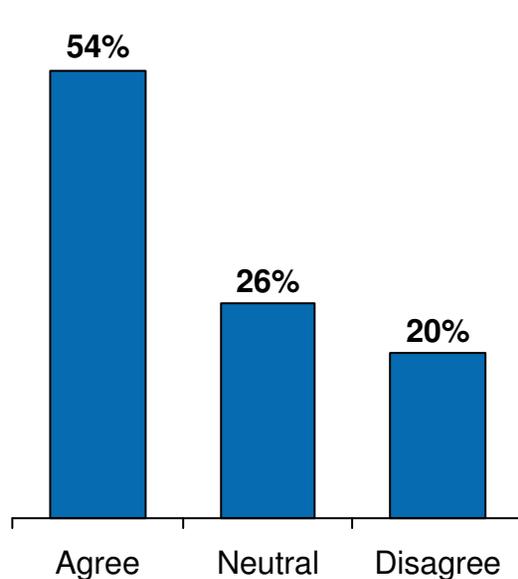
“Executives and managers at all levels of my company have the capabilities to carry out the crisis plan”



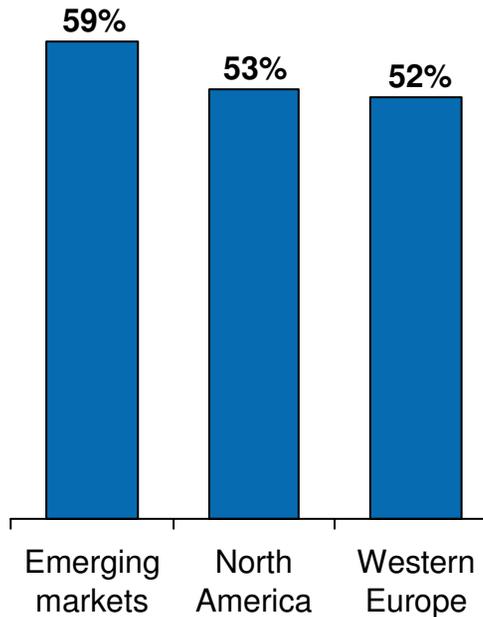
Still, a majority believe the crisis will have a positive impact on their company – especially in emerging markets

“I expect that the overall impact of the economic crisis will be positive for my company’s competitive position in the medium to long-term”

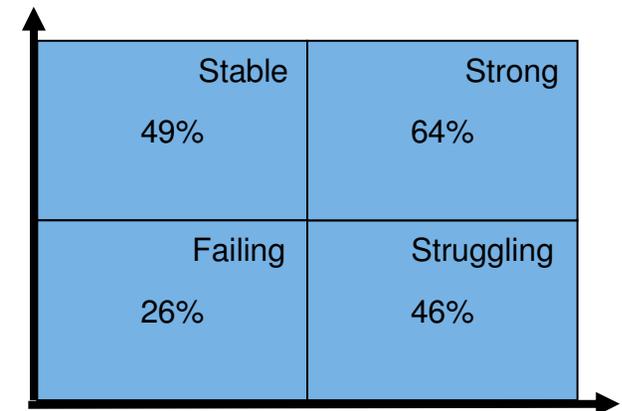
All respondents



All respondents by region
% who agree



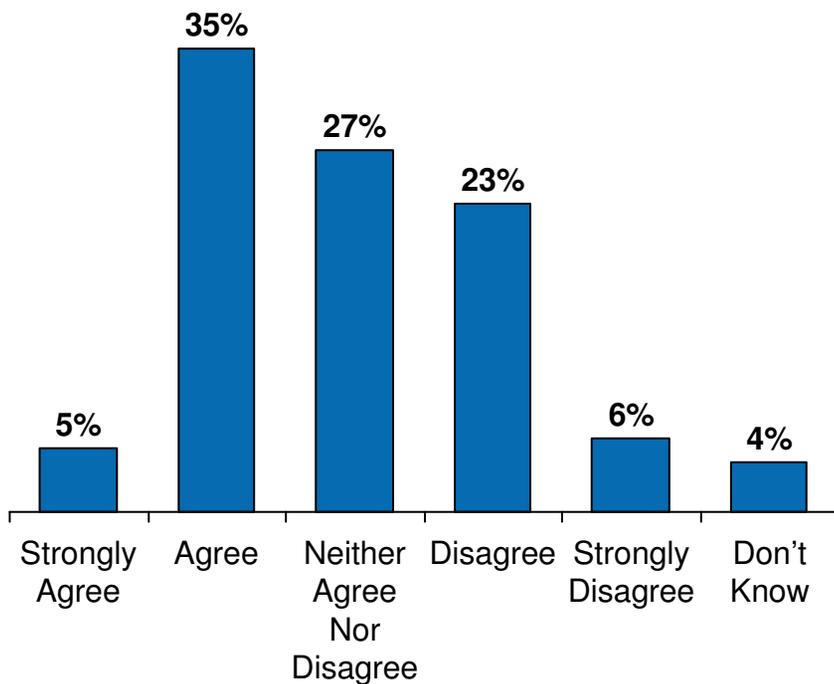
By cluster
% who agree



“Green” efforts will be significantly delayed due to recession – particularly worrying within transport and energy

“The economic crisis will delay progress in my industry against the social responsibility agenda (energy, environment, community, etc.)”

All respondents



All respondents by industry

