



POLL

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Economic System Seen as Unfair: Global Poll

Perceptions of economic unfairness have become further entrenched around the world over the past three years, according to the results of a new 22-nation global poll for BBC World Service. The poll, conducted by GlobeScan among 11,740 people, shows that majorities in 17 of the 22 countries surveyed believe that economic benefits and burdens are not fairly shared in their country.

The question was asked previously in 2009, when there were already high levels of negative sentiment. But the proportion that now sees the distribution of economic benefits and burdens as unfair has increased from 58 to 61 per cent across the 18 countries tracked in both years.

While shifts in attitudes about economic fairness have been relatively modest in most countries, there has been a dramatic worsening in views in Spain, which has been hit hard by an unfolding economic and labour-market crisis. The proportion of Spaniards who believe that economic benefits and burdens have not been fairly shared in Spain has jumped from 66 per cent in 2009 to 92 per cent this year.

Other countries where large majorities believe that the economic situation in their country is unfair include France (85%), South Korea (81%), Chile (80%), Russia (78%), and Brazil (69%). Nearly two-thirds of Americans feel the same way (65%)—up eleven points since 2009.

The survey also finds that views of the free enterprise system are becoming increasingly polarised, with one in four now believing that the system is “fatally flawed and needs to be replaced” (25%, up 2 points)—but there is also a slight increase in those who believe that the system is working well as it is with no further regulation needed (13%, up 1 point). The predominant view in the 19 countries where views of capitalism were tracked in both years remains that the problems of free market capitalism can be addressed by regulation and reform (now 48%, down 2 points since 2009).

Americans emerge as the strongest defenders of a pure free market system, with more than one in four (27%) feeling that the system works well as it is and should not be reformed. The Chinese (22%, up 11 points since 2009) and Ghanaians (22%, tracking not available) are the next most enthusiastic.

The proportion of Spaniards who now believe that free market capitalism is “fatally flawed” has jumped from 29 per cent to 42 per cent—the highest proportion in any country polled. A similar shift has occurred in Indonesia, where the proportion who believe economic burdens have not been shared fairly has increased from 47 per cent to 67 per cent, and where the proportion believing free market capitalism is “fatally flawed” has risen from 17 per cent to 32 per cent.

GlobeScan Chairman Doug Miller commented: “The broad and deepening sense of

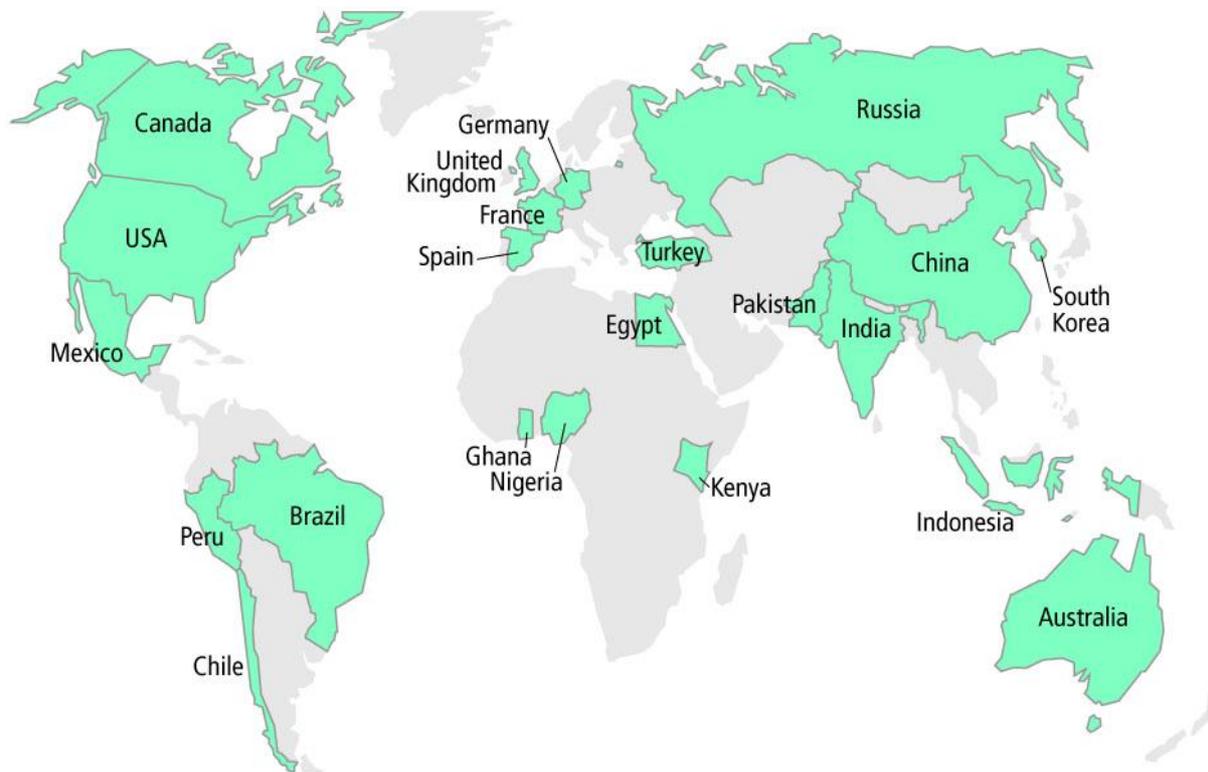


economic unfairness seen in this poll will continue to shape the political agenda in many countries and fuel further protests.

“Views of free enterprise have not significantly worsened, but one in two citizens across the world still seem to be waiting for the kind of reform and regulation they believe is needed for the free market system to again work in everyone’s interest.”

A total of 11,740 citizens across 22 countries were interviewed face-to-face or by telephone between December 6, 2011 and February 17, 2012. Polling was conducted for BBC World Service by the international polling firm GlobeScan and its research partners in each country. In six of the 19 countries, the sample was limited to major urban areas. The margin of error per country ranges from +/- 2.9 to 4.9 per cent, 19 times out of 20.

Participating Countries



In Brazil, China, Egypt, Indonesia, Kenya, and Turkey urban samples were used.

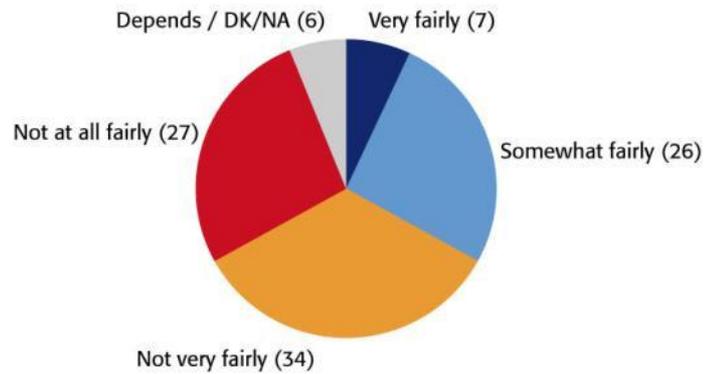
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How Fairly Have Economic Benefits and Burdens Been Shared in Your Country in the Past Few Years?

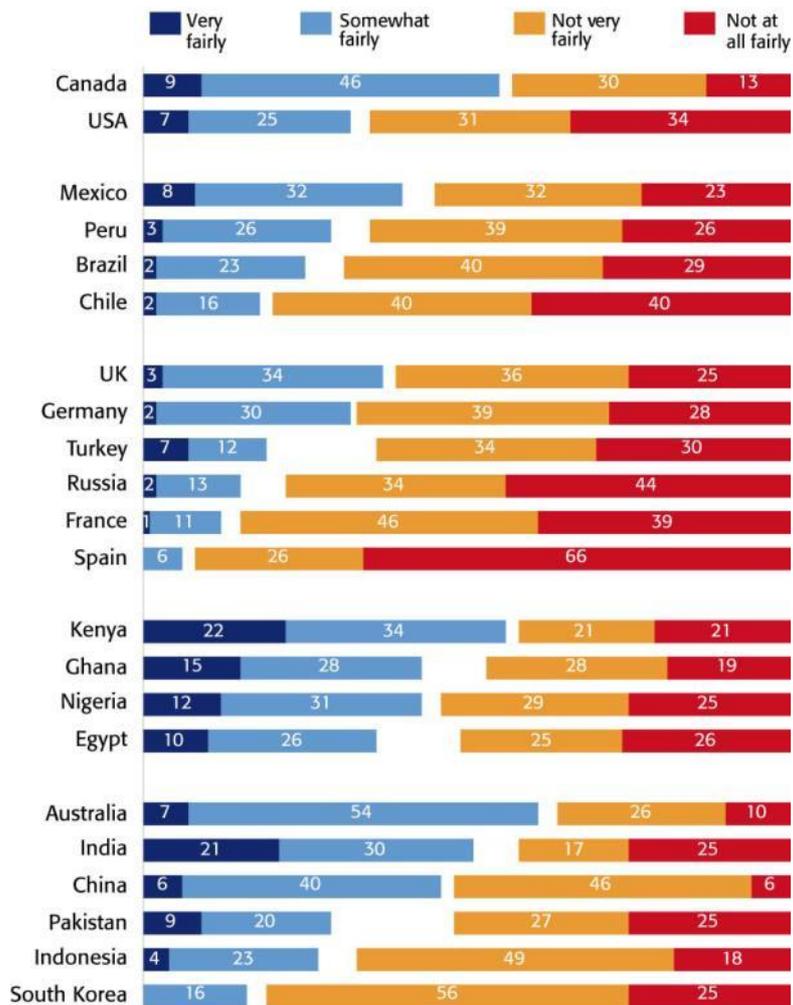
Average of 22 Countries, 2012



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How Fairly Have Economic Benefits and Burdens Been Shared in Your Country in the Past Few Years?

By Country, 2012

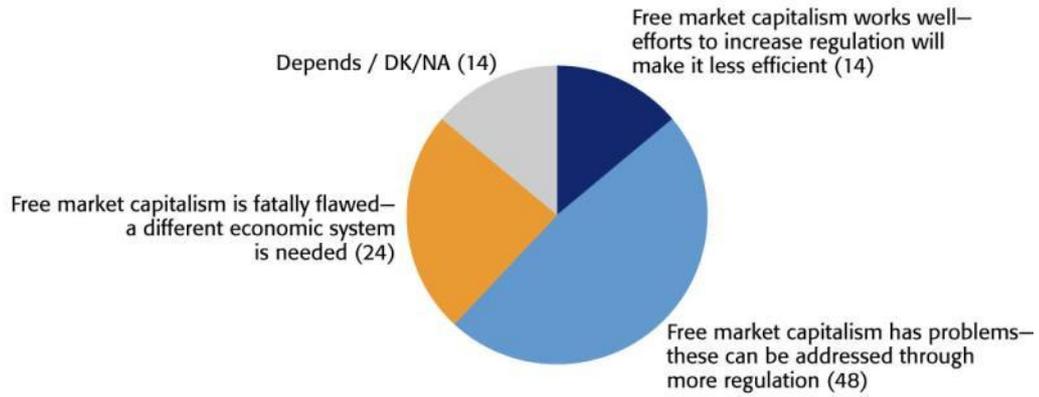


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The white space in this chart represents "Depends" and "DK/NA."

Views on Free Market Capitalism

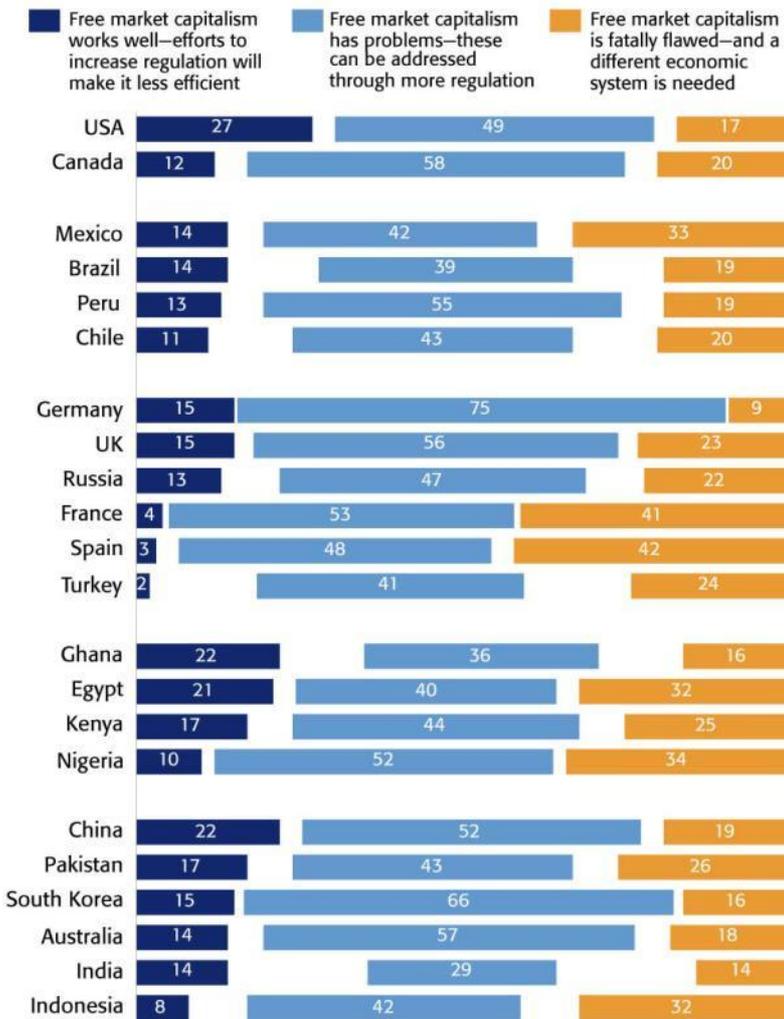
Average of 22 Countries, 2012



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Views on Free Market Capitalism

By Country, 2012

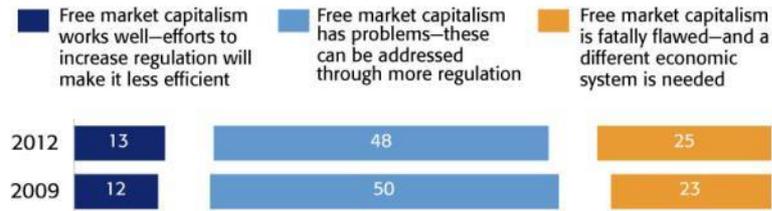


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The white space in this chart represents "Depends" and "DK/NA."

Views on Free Market Capitalism

Average of 19 Tracking Countries,* 2009–2012



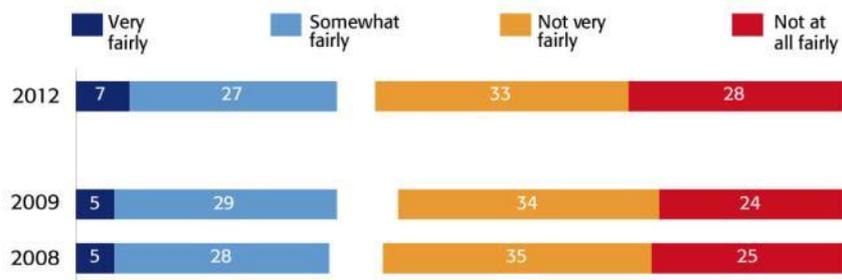
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*Tracking countries include Australia, Brazil, Canada, Chile, China, Egypt, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Russia, Spain, Turkey, the UK, and the USA.

The white space in this chart represents “Depends” and “DK/NA.”

How Fairly Have Economic Benefits and Burdens Been Shared in Your Country in the Past Few Years?

Average of 18 Tracking Countries,* 2008–2012



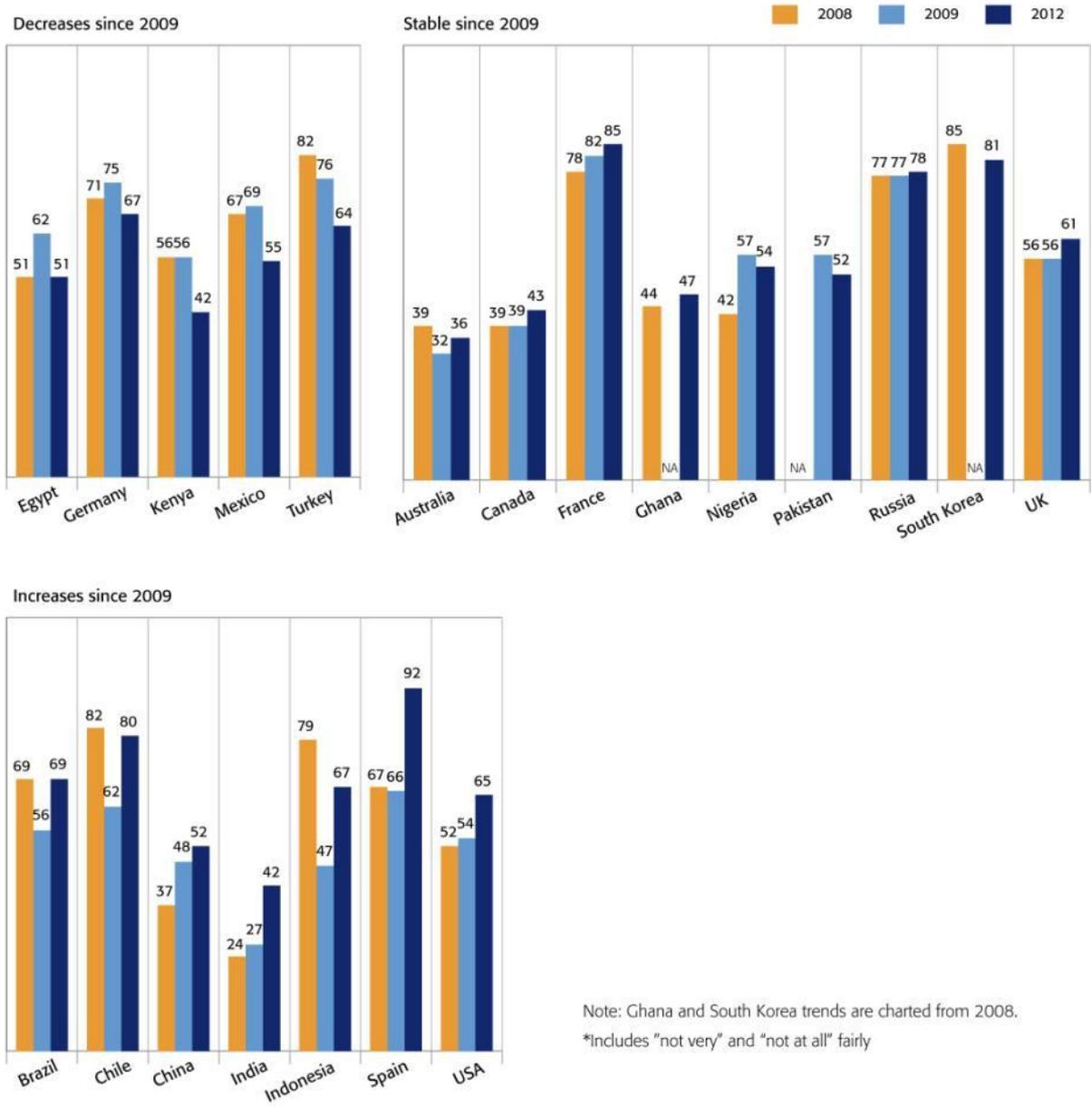
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*Tracking countries include Australia, Brazil, Canada, Chile, China, Egypt, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, the UK, and the USA.

The white space in this chart represents “Depends” and “DK/NA.”

How Fairly Have Economic Benefits and Burdens Been Shared in Your Country in the Past Few Years?

"Not Fairly,"* Trends by Country, 2008–2012

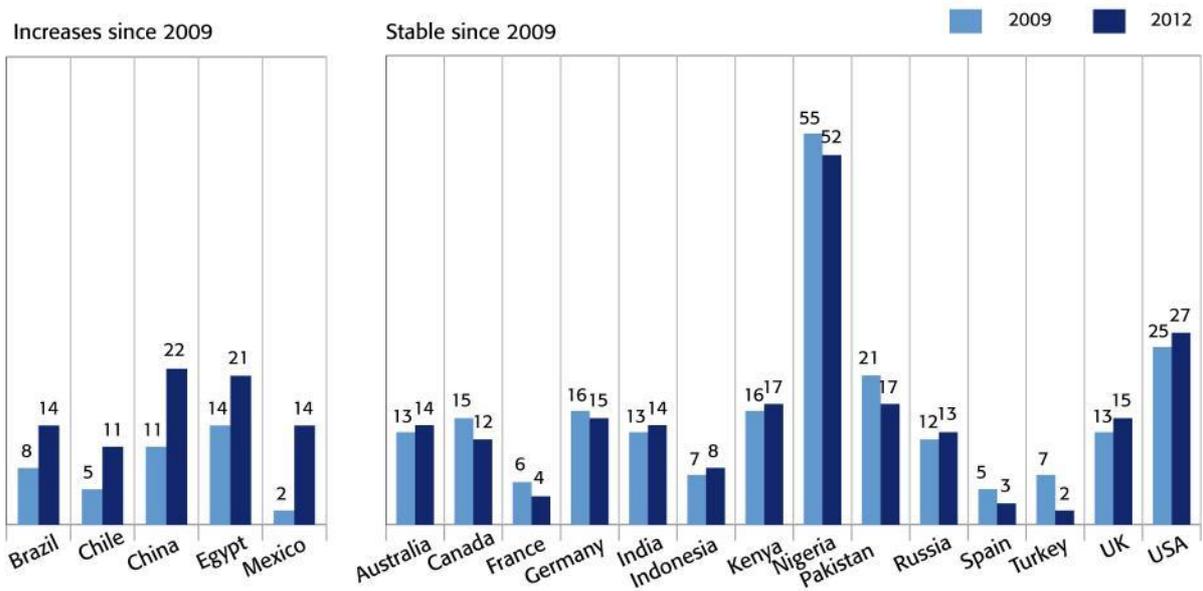


Note: Ghana and South Korea trends are charted from 2008.
*Includes "not very" and "not at all" fairly

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Views on Free Market Capitalism: Capitalism Works Well, Efforts to Increase Regulation Will Make It Less Efficient

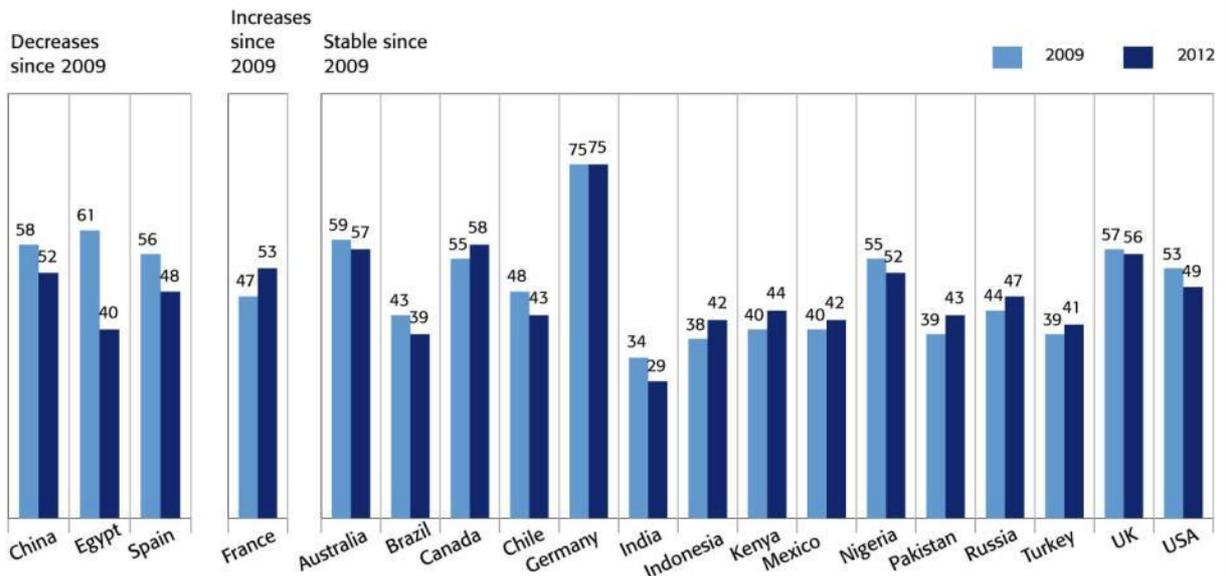
Trends by Country, 2009–2012



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Views on Free Market Capitalism: Free Market Capitalism Has Problems, These Can Be Addressed through More Regulation

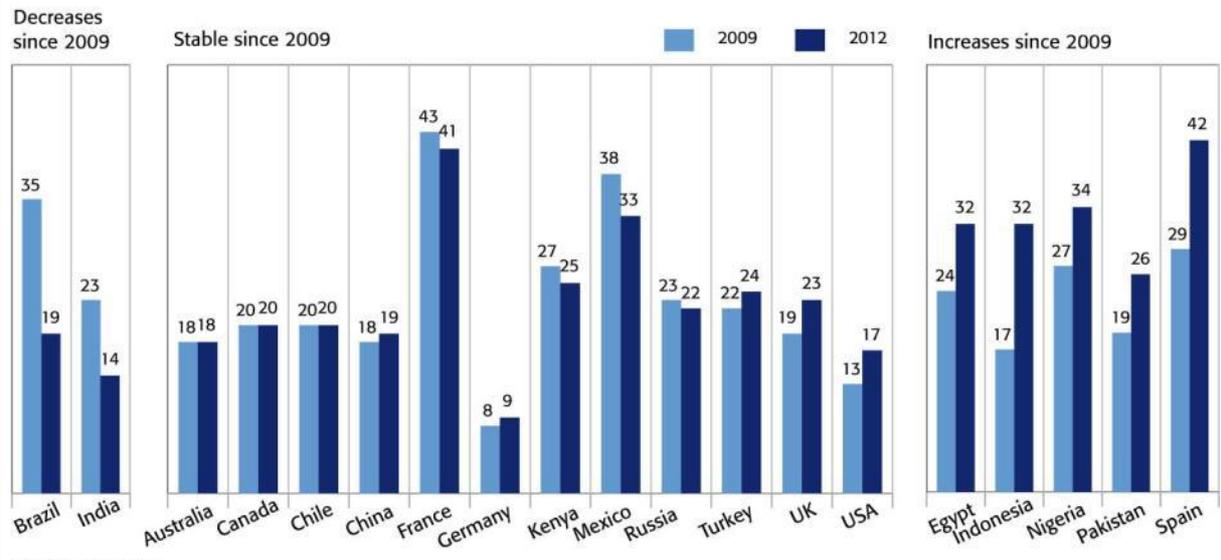
Trends by Country, 2009–2012



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Views on Free Market Capitalism: Free Market Capitalism Is Fatally Flawed, a Different Economic System Is Needed

Trends by Country, 2009–2012



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Questionnaire

M4t. Which of these three statements best reflects your view of free market capitalism?

READ AND ROTATE. CHOOSE ONE.

01 – Free market capitalism is fatally flawed, and a different economic system is needed.

02 – Free market capitalism has some problems, but these can be addressed through more regulation and reform

03 – Free market capitalism works well and efforts to increase regulation will make it much less efficient.

VOLUNTEERED (DO NOT READ)

99 – Don't know/not sure/depends

M5t. Thinking about the economic developments of the last few years, how fairly do you think the benefits and burdens have been shared in [COUNTRY]: very fairly, somewhat fairly, not very fairly, or not at all fairly?

01 – Very fairly

02 – Somewhat fairly

03 – Not very fairly

04 – Not at all fairly

VOLUNTEERED (DO NOT READ)

05 – Depends

99 – DK/NA

Backgrounder: Region-by-Region Results

North America

A stark contrast exists in North America between the US and Canada in terms of people's perceptions of how fairly economic benefits and burdens have been shared in the past few years. Americans increasingly say that benefits and burdens have not been shared fairly (65%, up 11 points since 2009), and their views are now closely aligned with the global picture (61% for the 22-country global average). In Canada the picture is radically different, as it is among the very few countries (four in total) where a majority believes that benefits and burdens have been shared fairly in the past few years—55 per cent, a proportion that has remained relatively stable since 2008. This is 22 points above the global average (33%), and the third highest percentage in the survey.

However, despite an increasing feeling of economic injustice among almost two-thirds of the population, Americans are still the most fervent supporters of free market capitalism, and their views about this economic system have remained stable since 2009. Over a quarter (27%) feel that the system works well as it is and should not be reformed. This is almost twice the global average (14%), and more than double the proportion in Canada (12%). Canadian views about free market capitalism have also remained stable since 2009. A solid majority of Canadians (58%, 10 points above the global average) endorses the free market economic system but recognises that it has problems that could be addressed by more regulation.

Latin America

There is a regional consensus among respondents in Latin America about perceptions of economic injustice in their own countries in the past few years. In each of the four countries surveyed, solid majorities say that economic benefits and burdens have not been shared fairly. At the regional level, two-thirds of respondents (67%) feel this way—above the 61 per cent global average. Chile is the country where negative sentiment is the strongest (80%, the fourth highest proportion in the survey), followed by Brazil (69%). In both these countries, perceptions of economic injustice have sharply increased since 2009 (up 18 and 13 points, respectively) and are now stronger than in Mexico, where negative sentiment has softened over the period (55%, down from 69% in 2009). Peru sits in between, with 65 per cent of Peruvians saying that the distribution of economic benefits and burdens has not been fair in the past few years.

When it comes to the free market capitalism as an economic system, respondents in Latin American countries share quite similar views, with some nuances. The dominant view in the region is that capitalism has problems that can be addressed by more regulation (45% at the regional level, in line with the global average of 48%). A majority of Peruvians (55%) agrees with this statement, while pluralities do so in Chile, Mexico, and Brazil (43%, 42%, and 39% respectively). These figures have remained stable since 2009. Supporters of a pure free market system are in the minority in Latin America, with figures in line with the observed global percentage (14%). However, in the three countries where tracking is available, it is noteworthy that this support has gained real ground since 2009, increasing greatly in Mexico (14%, up 12 points), and nearly doubling in Brazil (14%, up 6 points) and Chile (11%, up 6 points).

Despite this sharp increase, and the softening feelings about economic injustice mentioned previously, Mexico remains the Latin American country where opinions about free market capitalism are the most polarised. A third of Mexicans (33%, down 5 points since 2009) consider to be fatally flawed and think it should be abandoned for another economic model. This represents the fourth highest percentage in the survey, nine points above the 24 per cent global average. In Brazil, the proportion of respondents holding anti-free market views has decreased substantially (19%, down from 35% in 2009), but this is linked to an increased proportion of Brazilians without a firm opinion (up 13%) rather than to a radical shift in attitudes on the topic.

Europe

In Europe, views of how fairly economic benefits and burdens have been shared across the population in the past few years are similar to those in Latin America, in that there is consensus that the distribution has not been fair. At the regional level, three quarters (75%) of Europeans feel this way, with strong majorities in each of the six European countries surveyed. The countries can, however, be split into two groups with differing perspectives.

In the UK (61%), Turkey (64%), and Germany (67%), the proportions that think economic benefits and burdens have not been fairly shared are similar, just above the 61 per cent global average. In Russia (78%), France (85%), and Spain (92%), perceptions of economic unfairness are much more acute. The Spaniards and the French have the highest negative sentiment in the whole survey. In Spain, in particular, the situation has dramatically deteriorated since 2009, mirroring the serious economic difficulties that have engulfed the country—the proportion of Spaniards who believe that economic benefits and burdens have not been fairly shared has jumped 26 points, from 66 per cent in 2009. Perceptions of economic unfairness have also become entrenched in the past two years the UK, France, and Russia, although they have softened in Germany (67%, down 8 points) and Turkey (64%, down 12 points).

The shift in attitudes observed in Spain is reinforced by an important change in Spanish views on free market capitalism. The proportion thinking that free market capitalism is fatally flawed has jumped from 29 to 42 per cent. This is the highest proportion in the survey, 18 points above the global average (24%). This rise in the proportion of those who distrust the free market is matched by a decrease in the proportion who think that the problems of capitalism can be addressed by more regulation (48%, down 12 points since 2009), making Spain the most polarised country in the survey. The picture in France is very similar to that in Spain, with a significant polarisation between respondents who totally reject free market capitalism (41%, second highest percentage in the survey), and those who advocate for more regulation to address its problems (53%). French opinion, unlike Spanish, has been relatively steady on this question since 2009.

Elsewhere in Europe, views of the free market have remained very stable since 2009, with large majorities or pluralities embracing the economic system while recognising it to have some problems that should be addressed by more regulation. Germans are by far the biggest supporters of a regulated and reformed free market system (75%, an overwhelming 27 points above the global average). Fifty-six per cent of Britons share the same opinion (fifth highest percentage in the survey), 47 per cent of Russians, and 41 per cent of Turks—but Turkey has the second highest percentage of people without a clear opinion.

In Europe in general, there are very few respondents who support a pure free market system. This proportion is small but stable in Spain (3%), France (4%), and Turkey (2%), and in line with the 14 per cent global average in the UK, Germany, and Russia.

Africa

Attitudes in Africa regarding the perceived fairness of the distribution of economic benefits and burdens vary from country to country. In Nigeria and Egypt, majorities of 54 and 51 per cent respectively feel that this distribution has not been fair in the past few years—although this view has softened in Egypt since 2009 (51%, down 11 points from 62%). The trend is matched in Kenya, where perceptions of injustice in the way economic benefits and burdens have been shared have decreased sharply, down 14 points to 42 per cent (19 points below the global average). At the same time, positive sentiment has surged: 56 per cent of Kenyans (up 20 points) now believe the distribution of economic benefits and burdens has been fair. This is the second highest percentage in the survey, and is 23 points above the global average (33%). In Ghana, the public went from reporting a positive sentiment in 2008 (53% vs 44%) to being divided in 2012 (43% vs 47%).

When it comes to assessing free market capitalism as an economic system, the predominant view in all the African countries surveyed is that capitalism has problems, but that these can be addressed through regulation. Forty-three per cent of Africans feel this way at the regional level, a figure somewhat below the global average (48%). There are, however, some variations between these countries.

In Egypt, the public opinion has become much more polarised between supporters and opponents of free market capitalism. Four in ten Egyptians favour a reformed and regulated capitalism. This is down 21 points from 61 per cent in 2009, and this decrease has been matched by a comparable rise in the proportions of those who reject capitalism and consider it as fatally flawed (32%, up 8 points and fifth highest percentage in the survey) and those who are fervent supporters of the system (21%, up 7 points and fourth highest percentage in the survey). In Nigeria, opposition to the free market has increased, too. Thirty-four per cent of Nigerians now say the system is fatally flawed, up seven points since 2009 and the third highest proportion in the survey.

In Ghana, the public seems to view capitalism more favourably, with 22 per cent of respondents who support a pure free market system (8 points above the global average and the second highest percentage in the survey), while only 36 per cent favour regulated capitalism (the second lowest proportion in the survey). However, over a quarter of Ghanaians offer no opinion on this question. In Kenya, opinion on this issue is in close alignment with the global average.

Asia

When opinion about the fairness of the economic system is examined, the countries surveyed in Asia can be split into two groups. In Australia and India, majorities well above the 33 per cent global average think that economic benefits and burdens have been shared fairly in their country in the past few years. With 61 per cent agreeing, Australia is the country where positive sentiment is the strongest—as was the case in 2009. In India, however, overall perceptions of fairness have deteriorated: although the proportion of Indians who think the distribution of economic benefits and burdens is fair has gone up by six points to 51 per cent, the increase in the number of those with a negative sentiment has been even more pronounced (42%, up 15 points). Chinese views are more balanced, but a slight majority continues to perceive economic injustice (52%).

The picture is very different in the three other Asian countries surveyed. In Pakistan, Indonesia, and South Korea, majorities claim that economic benefits and burdens have not been fairly shared. This negative sentiment is very acute in South Korea—and stable since 2008—with 81 per cent of South Koreans saying that they perceive injustice in the distribution of economic benefits and burdens in their country—20 points above the global average, and the third highest proportion in the survey. In Indonesia, two-thirds of respondents share this opinion, and dissatisfaction has grown significantly since 2009: it rose by 20 points to 67 per cent in 2012. In Pakistan, perceptions have improved but the overall sentiment remains largely negative (29% “fair” vs 52% “unfair,” an improvement from 21% vs 57% in 2009).

As in the other regions surveyed, views of free market capitalism in Asian countries are dominated by the acknowledgement that capitalism has problems that need to be addressed through more regulation—although in India there is a plurality (42%) without a clear opinion on the question. The view that capitalism has resolvable problems is dominant in South Korea, shared by 66 per cent of respondents (the second highest percentage in the survey and 18 points above the global average). This is also the dominant perception in Australia (57%, stable since 2009).

China is the only surveyed country in Asia where support for a pure free market system has increased. Twenty-two per cent of Chinese say that the system works well as it is and

should not be reformed. This is the second highest percentage in the survey (tied with Ghana), and has doubled since 2009 (11%). Outright opposition to a pure free market system is the strongest and is increasing in Indonesia, where it has almost doubled since 2009 (32% up 15 points). This increase is at the expense of the proportion of those without an opinion, which has declined dramatically— the Indonesian public has become much more polarised on the topic. A similar pattern is observed in Pakistan, though not to the same extent. Over a quarter of Pakistanis (26%) reject unregulated capitalism, compared with just 19 per cent in 2009.

Methodology

In total 11,740 citizens in Australia, Brazil, Canada, Chile, China, Egypt, France, Germany, Ghana, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, South Korea, Spain, Turkey, the United Kingdom, and the United States were interviewed face-to-face or by telephone between December 6, 2011 and February 17, 2012. Polling was conducted for BBC World Service by GlobeScan and its research partners in each country.

In Brazil, China, Egypt, Indonesia, Kenya, and Turkey urban samples were used. The margin of error per country ranges from +/- 2.9 to 4.9 per cent, 19 times out of 20.

| Country | Sample Size (unweighted) | Field dates | Sample frame | Survey methodology | Type of sample |
|----------------|--------------------------|--------------------------------------|--------------|--------------------|--------------------|
| Australia | 495 | December 7, 2011 – February 1, 2012 | 18+ | Telephone | National |
| Brazil | 403 | December 20, 2011 – January 20, 2012 | 18–69 | Face-to-face | Urban ¹ |
| Canada | 502 | December 21, 2011 – January 18, 2012 | 18+ | Telephone | National |
| Chile | 600 | December 12–22, 2011 | 18+ | Face-to-face | National |
| China | 500 | December 22, 2011 – January 12, 2012 | 18+ | Telephone | Urban ² |
| Egypt | 510 | December 8–22, 2011 | 18+ | Face-to-face | Urban ³ |
| France | 407 | January 2–12, 2012 | 15+ | Telephone | National |
| Germany | 495 | December 27, 2011 – January 24, 2012 | 16–70 | Telephone | National |
| Ghana | 518 | January 9–24, 2012 | 18+ | Face-to-face | National |
| India | 604 | January 4–12, 2012 | 18+ | Face-to-face | National |
| Indonesia | 500 | December 17, 2011 – January 18, 2012 | 18+ | Face-to-face | Urban ⁴ |
| Kenya | 500 | January 12–18, 2012 | 18+ | Face-to-face | Urban ⁵ |
| Mexico | 500 | January 15–20, 2012 | 18+ | Face-to-face | National |
| Nigeria | 500 | December 19–27, 2011 | 18+ | Face-to-face | National |
| Pakistan | 1180 | December 25–31, 2011 | 18+ | Face-to-face | National |
| Peru | 605 | January 1–9, 2012 | 18–70 | Face-to-face | National |
| Russia | 500 | December 13–28, 2011 | 18+ | Face-to-face | National |
| South Korea | 500 | January 29–31, 2012 | 19+ | Telephone | National |
| Spain | 400 | February 7–17, 2012 | 18+ | Telephone | National |
| Turkey | 500 | December 8–20, 2011 | 15+ | Face-to-face | Urban ⁶ |
| United Kingdom | 496 | December 6, 2011 – January 18, 2012 | 18+ | Telephone | National |

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|-----|-----|---|-----|-----------|----------|
| USA | 500 | December 14, 2011 – January 18, 2012 | 18+ | Telephone | National |
|-----|-----|---|-----|-----------|----------|

¹ In Brazil the survey was conducted in Belo Horizonte, Brasília, Curitiba, Goiânia, Porto Alegre, Recife, Rio de Janeiro, Salvador, São Paulo, representing 45 per cent of the national adult population.

² In China the survey was conducted in Beijing, Beiliu, Chengdu, Dujiangyan, Fenyang, Fuyang, Guangzhou, Hangzhou, Manzhouli, Quanzhou, Qijing, Shanghai, Shenyang, Shuangcheng, Wuhan, Xi'an, Xining, and Zhengzhou, representing 45 per cent of the national adult population.

³ In Egypt the survey was conducted in Alexandria, Cairo, Giza, and Shubra El-Kheima, representing 24 per cent of the national population.

⁴ In Indonesia the survey was conducted in Bandung, Jakarta, Makassar, Medan, and Surabaya, representing 27 per cent of the national adult population.

⁵ In Kenya the survey was conducted in Kakamega, Kisumu, Machakos, Mombasa, Nairobi, Nakuru, and Nyeri, representing 45 per cent of the national adult population.

⁶ In Turkey the survey was conducted in Adana, Ankara, Antalya, Bursa, Diyarbakir, Erzurum, Istanbul, Izmir, Konya, Samsun, and Zonguldak, representing 56 per cent of the national adult population.

Research Partners

| Country | Research Institute | Location | Contact |
|-----------|---|------------------|--|
| Australia | GlobeScan | Toronto | Oliver Martin |
| | | | oliver.martin@globescan.com |
| | | | +1 416 969 3073 |
| Brazil | Market Analysis | Florianópolis | Fabián Echegaray |
| | | | fabian@marketanalysis.com.br |
| | | | +55 48 3364 0000 |
| Canada | GlobeScan | Toronto | Oliver Martin |
| | | | oliver.martin@globescan.com |
| | | | +1 416 969 3073 |
| Chile | Mori Chile | Santiago | Marta Lagos |
| | | | mlagos@morichile.cl |
| | | | +56 2334 4544 |
| China | GlobeScan | Toronto | Oliver Martin |
| | | | oliver.martin@globescan.com |
| | | | +1 416 969 3073 |
| Egypt | Attitude Market Research | Cairo | Mohamed Al Gendy |
| | | | mgendy@attitude-eg.com |
| | | | +202 2702438 |
| France | Efficienc 3 | Paris and Rheims | Christian de Thieulloy |
| | | | christian.t@efficienc3.com |
| | | | +33 1 4316 5442 |
| Germany | Ri*QUESTA GmbH | Teningen | Bernhard Rieder |
| | | | riquesta.rieder@t-online.de |
| | | | +49 7641 93 43 36 |
| Ghana | Business Interactive Consulting Limited | Accra | Razaaque Animashaun |
| | | | info@bigghana.com |
| | | | +233 302 783140 / +233 302 782892 |
| India | Team C Voter | Noida | Yashwant Deshmukh |
| | | | yashwant@teamcvoter.com |
| | | | +91 120 424 7135 |
| Indonesia | DEKA Marketing Research | Jakarta | Irma Malibari |
| | | | irma.malibari@deka-research.co.id |
| | | | info@deka-research.co.id |
| Kenya | Research Path Associates Ltd. | Nairobi | Jeremy Mwololo |
| | | | jeremy.mwololo@rpa.co.ke |
| | | | +254 20 2734770 |
| Mexico | Parametría | Mexico City | Francisco Abundis |
| | | | fabundis@parametria.com.mx |
| | | | +52 55 2614 0089 |
| Nigeria | Market Trends | Lagos | Jo Ebhomenye |
| | | | joebhomenye@hotmail.com |
| | | | +234 1734 7384 |
| Pakistan | Gallup Pakistan | Islamabad | Ijaz Shafi Gilani |
| | | | isb@gallup.com.pk |
| | | | +92 51 2655630 |
| Peru | Datum | Lima | Urpi Torrado |
| | | | urpi@datum.com.pe |

| | | | |
|----------------|---|----------|--|
| | | | +511 215 0600 |
| Russia | CESSI Institute for Comparative Social Research | Moscow | Vladimir Andreenkov |
| | | | vladimir.andreenkov@cessi.ru |
| | | | +7 495 650 55 18 |
| South Korea | East Asia Institute | Seoul | Wonchil Chung |
| | | | cwc@eai.or.kr |
| | | | +82 2 2277 1683 |
| Spain | Sigma Dos Int. | Madrid | Gines Garrido |
| | | | petrana@sigmados.com |
| | | | +34 91 360 0474 |
| Turkey | Yöntem Research Consultancy Ltd. | Istanbul | Bülent Gündoğmuş |
| | | | info@yontemresearch.com |
| | | | mehmet.aktulga@yontemresearch.com |
| | | | bulent.gundogmus@yontemresearch.co |
| | | | +90 212 278 1219 |
| United Kingdom | Populus Data Solutions | London | Patrick Diamond |
| | | | pdiamond@populusdatasolutions.com |
| | | | +44 207 553 4148 |
| USA | GlobeScan | Toronto | Oliver Martin |
| | | | oliver.martin@globescan.com |
| | | | +1 416 969 3073 |