

# **Entity Clarity Report**

**Tech Top 100 Intelligence  
for the AI Era**

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# TECHNOLOGY IN THE AI ERA: ECC, NARRATIVE CONTROL, AND AUTHORITY COMPOUNDING

## Summary

Technology is not competing to build the best AI models.

It is competing to become legible to the systems that will summarize, rank, and trust it.

This report analyzes the Tech 100 through the lens of **Entity Clarity & Capability (ECC)**, revealing which companies are quietly compounding authority — and which are opting out of the AI-mediated judgment layer altogether.

## METHODOLOGY

This analysis applies the **Entity Clarity & Capability (ECC)** framework to the top 100 global technology companies by market capitalization.

ECC evaluates how legible, trustworthy, and structurally interpretable an entity is to modern AI systems across three weighted tiers:

- **Entity Comprehension & Trust:** Narrative coherence, authority signals, and consistency across public surfaces
- **Structural Data Fidelity:** Schema usage, canonical clarity, internal linking, and entity lattice integrity
- **Page-Level Hygiene:** Technical consistency, crawl efficiency, and inference reliability

Each company is also classified by **AI Posture**:

- **Open** – Accessible and legible to AI systems
- **Defensive** – Partially open with controlled narrative exposure
- **Blocked** – Intentionally opaque or inaccessible

Scores reflect **strategic positioning**, not moral judgment, technological sophistication, or financial performance.

## FINDINGS

Three core findings emerge:

### 1. Authority does not scale linearly with market capitalization

Several trillion-dollar companies exhibit weak or zero ECC, while mid-cap infrastructure and software firms rank among the most legible entities in the dataset. ECC correlates more strongly with **documentation discipline, narrative coherence, and openness** than with size.

## **2. Blocking AI is common — and increasingly costly — in Technology**

Unlike Energy, where opacity often reflects sovereignty, many technology firms block AI due to legacy governance, platform risk, or cultural inertia. This choice preserves short-term control but forfeits long-term authority compounding.

## **3. Defensive postures represent an unstable equilibrium**

Defensive companies maintain partial legibility while attempting to preserve narrative flexibility. As AI systems become embedded in enterprise workflows, investing, hiring, and procurement, partial legibility becomes harder to sustain without drift or misframing.

## LANDSCAPE

Technology does not behave as a single industry.

It is a layered stack — infrastructure, platforms, software, and distribution — where each layer faces different incentives around AI interpretation.

Unlike Energy, which optimizes for regulatory and capital trust, Technology optimizes for **authority compounding**: who AI systems understand, cite, and reuse when forming judgment.

From the ECC analysis of the Tech 100, five distinct strategic archetypes emerge. These archetypes describe **how companies relate to AI as an authority layer**, not whether they "use AI."

## ARCHETYPES

### 1. Authority Compounds

*"We want AI to think with us."*

**Definition:** ECC  $\geq 80$

These companies are structurally easy for AI systems to understand, summarize, and reuse.

**Strategic intent:** Become default reference points in AI-mediated judgment.

**Strengths:** Stable AI summaries, High citation probability, Durable narrative control

**Weaknesses:** Reduced flexibility, Higher scrutiny

**Examples:**

Apple (84), Micron Technology (81), Applied Materials (91), Lam Research (88), KLA (92), CrowdStrike (82), Nintendo (83), Fortinet (83), Workday (83), Datadog (82), Adyen (81), Atlassian (80), Veeva Systems (83)

### 2. Infrastructure Legibility Builders

*"We power the stack — and want that understood."*

**Definition:** ECC 60–79, non-blocked

Primarily semiconductors, tooling, networks, and core infrastructure.

**Strategic intent:** Ensure AI systems correctly attribute economic and strategic importance.

**Examples:**

NVIDIA (67), ASML (69), Samsung (78), Cisco (68), Intel (74), Dell (77), Synopsys (69), Tokyo Electron (65), MediaTek (68), Cloudflare (68), TE Connectivity (73), Infineon (78)

### 3. Defensive Narrative Managers

*"We'll engage AI — but on our terms."*

**Definition:** Posture = Defensive, ECC  $> 0$

Controlled exposure designed to preserve optionality.

**Strategic intent:** Balance visibility with narrative flexibility.

**Examples:**

Microsoft (65), Meta Platforms (73), Salesforce (72), Netflix (59), Palo Alto Networks (69), Automatic Data Processing (64), PayPal (64), Schneider Electric (69), Arm Holdings (72), Intuit (59), Airbnb (49)

## 4. Open but Fragmented Entities

*"We are visible — but not consistently understood."*

**Definition:** Posture = Open,  $ECC < 55$

AI access exists, but internal narrative coherence is weak.

**Strategic intent:** None explicit; fragmentation is typically accidental.

**Examples:**

Alphabet (Google) (40), Palantir (27), Qualcomm (15), Adobe (24), Spotify (31), PDD Holdings (33), MercadoLibre (30), Sea Limited (53), Baidu (47), JD.com (38), Meituan (45), Snowflake (15), Booking Holdings (5), Foxconn (5)

## 5. Closed or Sovereign Holders

*"We do not want to be interpreted."*

**Definition:** Posture = Blocked ( $ECC \approx 0$ )

**Strategic intent:** Maintain information sovereignty and maximum control.

**Examples:**

TSMC, Tesla, Oracle, AMD, SAP, ServiceNow, Sony, Xiaomi, Analog Devices, DoorDash, Cadence Design Systems, Marvell Technology, Equinix, Coinbase, Autodesk, Seagate Technology, Coupang, Strategy (MicroStrategy), NEC, Roper Technologies, Reddit

# TECH TOP 100 INDEX

#	Company	Market Cap	Posture	ECC	Archetype
1	NVIDIA	\$4.43T	Open	67	Infra Legibility Builder
2	Apple	\$4.16T	Open	84	Authority Compounder
3	Alphabet (Google)	\$3.86T	Open	40	Open but Fragmented
4	Microsoft	\$3.58T	Defensive	65	Defensive Narrative Mgr
5	Amazon	\$2.46T	Open	64	Defensive Narrative Mgr
6	Broadcom	\$1.82T	Defensive	16	Open but Fragmented
7	Meta Platforms	\$1.69T	Defensive	73	Defensive Narrative Mgr
8	TSMC	\$1.54T	Blocked	0	Closed/Sovereign
9	Tesla	\$1.51T	Blocked	0	Closed/Sovereign
10	Tencent	\$710B	Open	56	Open but Fragmented
11	Oracle	\$617B	Blocked	0	Closed/Sovereign
12	Samsung	\$492B	Defensive	78	Defensive Narrative Mgr
13	Netflix	\$432B	Defensive	59	Defensive Narrative Mgr
14	ASML	\$431B	Defensive	69	Infra Legibility Builder
15	Palantir	\$428B	Open	27	Open but Fragmented
16	Alibaba	\$378B	Open	63	Infra Legibility Builder
17	AMD	\$355B	Blocked	0	Closed/Sovereign
18	Cisco	\$307B	Defensive	68	Infra Legibility Builder
19	SAP	\$290B	Blocked	0	Closed/Sovereign
20	IBM	\$289B	Open	61	Infra Legibility Builder
21	Micron Tech	\$262B	Open	81	Authority Compounder
22	SK Hynix	\$255B	Blocked	0	Closed/Sovereign
23	Salesforce	\$250B	Defensive	72	Defensive Narrative Mgr
24	AppLovin	\$230B	Open	57	Open but Fragmented
25	Applied Materials	\$215B	Defensive	91	Authority Compounder
26	Shopify	\$209B	Open	73	Infra Legibility Builder
27	Intel	\$201B	Open	74	Infra Legibility Builder
28	Lam Research	\$200B	Open	88	Authority Compounder
29	Uber	\$193B	Open	61	Open but Fragmented
30	Qualcomm	\$190B	Open	15	Open but Fragmented
31	Intuit	\$187B	Defensive	59	Defensive Narrative Mgr
32	ServiceNow	\$179B	Blocked	0	Closed/Sovereign
33	Sony	\$169B	Blocked	0	Closed/Sovereign
34	Texas Instruments	\$167B	Open	60	Infra Legibility Builder
35	PDD Holdings	\$167B	Open	33	Open but Fragmented
36	Booking Holdings	\$167B	Open	5	Open but Fragmented
37	Arista Networks	\$161B	Open	7	Open but Fragmented
38	KLA	\$160B	Open	92	Authority Compounder
39	Schneider Electric	\$154B	Defensive	69	Infra Legibility Builder
40	Arm Holdings	\$151B	Defensive	72	Defensive Narrative Mgr
41	Adobe	\$148B	Open	24	Open but Fragmented
42	Xiaomi	\$143B	Blocked	0	Closed/Sovereign
43	Analog Devices	\$138B	Blocked	0	Closed/Sovereign
44	Palo Alto Networks	\$138B	Defensive	69	Defensive Narrative Mgr
45	CrowdStrike	\$132B	Open	82	Authority Compounder
46	Robinhood	\$118B	Open	59	Open but Fragmented
47	Spotify	\$117B	Open	31	Open but Fragmented
48	MercadoLibre	\$109B	Open	30	Open but Fragmented
49	ADP	\$106B	Defensive	64	Defensive Narrative Mgr
50	Foxconn	\$103B	Open	5	Open but Fragmented
51	DoorDash	\$98B	Blocked	0	Closed/Sovereign
52	Tokyo Electron	\$98B	Defensive	65	Infra Legibility Builder
53	Advantest	\$95B	Open	68	Infra Legibility Builder
54	Nintendo	\$94B	Open	83	Authority Compounder
55	Cadence Design	\$92B	Blocked	0	Closed/Sovereign
56	Dell	\$92B	Open	77	Infra Legibility Builder
57	NetEase	\$90B	Open	26	Open but Fragmented
58	Synopsys	\$89B	Open	69	Infra Legibility Builder
59	SMIC	\$86B	Open	48	Open but Fragmented
60	Marvell Tech	\$85B	Blocked	0	Closed/Sovereign
61	Keyence	\$85B	Defensive	72	Defensive Narrative Mgr
62	Delta Electronics	\$81B	Open	63	Infra Legibility Builder
63	Sea Limited	\$81B	Open	53	Open but Fragmented
64	Cambricon Tech	\$81B	Open	41	Open but Fragmented
65	Delta Elec (Thai)	\$78B	Open	8	Open but Fragmented
66	Snowflake	\$78B	Open	15	Open but Fragmented
67	Meituan	\$78B	Open	45	Open but Fragmented
68	Airbnb	\$76B	Defensive	49	Open but Fragmented

#	Company	Market Cap	Posture	ECC	Archetype
69	Equinix	\$73B	Blocked	0	Closed/Sovereign
70	MediaTek	\$73B	Open	68	Infra Legibility Builder
71	Coinbase	\$72B	Blocked	0	Closed/Sovereign
72	Cloudflare	\$71B	Open	68	Infra Legibility Builder
73	TE Connectivity	\$69B	Defensive	73	Defensive Narrative Mgr
74	Fortinet	\$66B	Open	83	Authority Compounder
75	Autodesk	\$65B	Blocked	0	Closed/Sovereign
76	Seagate Tech	\$60B	Blocked	0	Closed/Sovereign
77	PayPal	\$60B	Defensive	64	Defensive Narrative Mgr
78	Workday	\$59B	Open	83	Authority Compounder
79	NXP Semi	\$58B	Defensive	55	Defensive Narrative Mgr
80	Infineon	\$57B	Open	78	Infra Legibility Builder
81	Datadog	\$53B	Open	82	Authority Compounder
82	MicroStrategy	\$52B	Blocked	0	Closed/Sovereign
83	Constellation Soft	\$51B	Open	49	Open but Fragmented
84	Electronic Arts	\$51B	Open	73	Infra Legibility Builder
85	Coupang	\$50B	Blocked	0	Closed/Sovereign
86	Adyen	\$50B	Defensive	81	Authority Compounder
87	NEC	\$49B	Blocked	0	Closed/Sovereign
88	Roper Tech	\$48B	Blocked	0	Closed/Sovereign
89	Trip.com	\$47B	Open	61	Infra Legibility Builder
90	NAURA Tech	\$46B	Open	50	Open but Fragmented
91	Take-Two	\$46B	Open	72	Infra Legibility Builder
92	Monolithic Power	\$46B	Open	7	Open but Fragmented
93	JD.com	\$44B	Open	38	Open but Fragmented
94	Reddit	\$44B	Blocked	0	Closed/Sovereign
95	Baidu	\$43B	Open	47	Open but Fragmented
96	Atlassian	\$43B	Open	80	Authority Compounder
97	FICO	\$43B	Open	73	Infra Legibility Builder
98	CoreWeave	\$43B	Open	65	Infra Legibility Builder
99	Veeva Systems	\$40B	Open	83	Authority Compounder
100	Murata Mfg	\$40B	Open	66	Infra Legibility Builder

## STRATEGIC IMPLICATIONS

AI is becoming a **default authority layer**, not merely a productivity tool.

Technology firms that are easy to summarize accurately will increasingly shape how capital, labor, partners, and regulators understand the sector.

ECC will influence:

- Capital allocation
- M&A diligence framing
- Enterprise vendor selection
- Long-term valuation narratives

**Opacity buys time — not immunity.**

**Fragmentation invites substitution.**

**Authority compounds quietly, then decisively.**

## FULL REPORT

Technology's AI posture is not ideological. It is economic.

Companies are not deciding whether to "use AI." They are deciding whether to allow AI systems to **understand them**.

Authority Compounders are becoming the grammar of AI-mediated judgment. Defensive Managers are buying time. Fragmented entities are leaking narrative control. Closed holders are opting out of authority compounding entirely.

As AI becomes embedded in institutional workflows, the cost of being misunderstood will exceed the cost of being seen.

**ECC measures who understands that trade-off — and who is betting they can avoid it.**

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