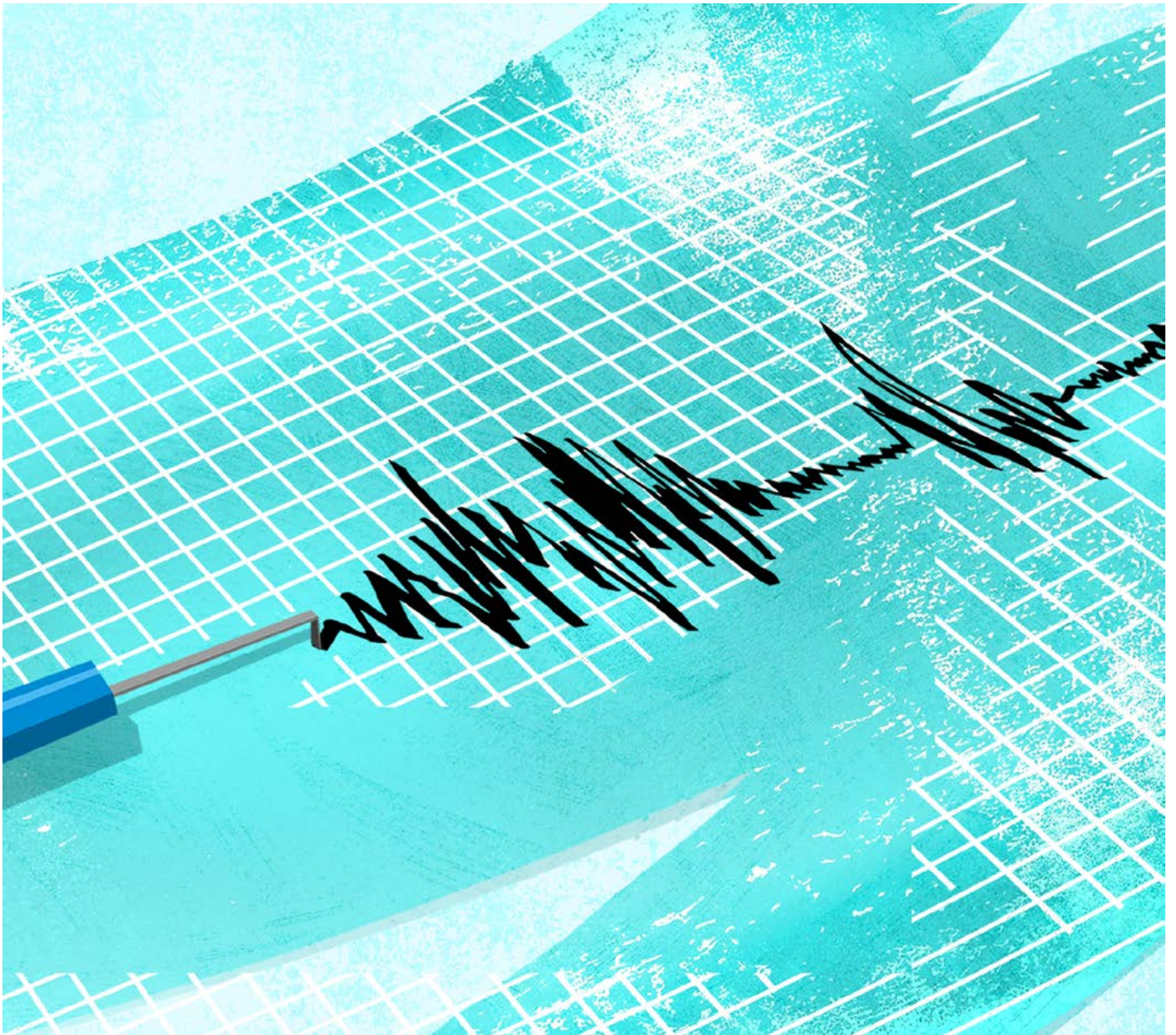

Global Future Survey

1/2017



IN COOPERATION WITH



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Federal Republic the second most attractive country, after the USA.

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General expectation: relationships with the USA will deteriorate.

Note

Because of rounding differences, the sum of the values in some diagrams may be either slightly above or below 100%.

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CLEAR VOTE OF THE EXPERTS: GERMANY SHOULD TAKE ON MORE RESPONSIBILITY IN EUROPE

The Federal Republic in international relationships.

554 experts from 105 countries – these are their opinions and assessments on developments in the next five years. With the *Global Future Survey*, the Konrad Adenauer Foundation is setting out for a special project. The results of the first interviews in early 2017 make it clear: The Federal Republic of Germany enjoys a very good reputation around the world. Furthermore, young talent increasingly feel attracted to Germany. European experts judge that the Federal Republic should assume more responsibility in Europe and the majority of experts rank protection of human rights and the rule of law as their country's most pressing duty. In Europe and internationally, populist tendencies are considered the greatest danger to state stability.

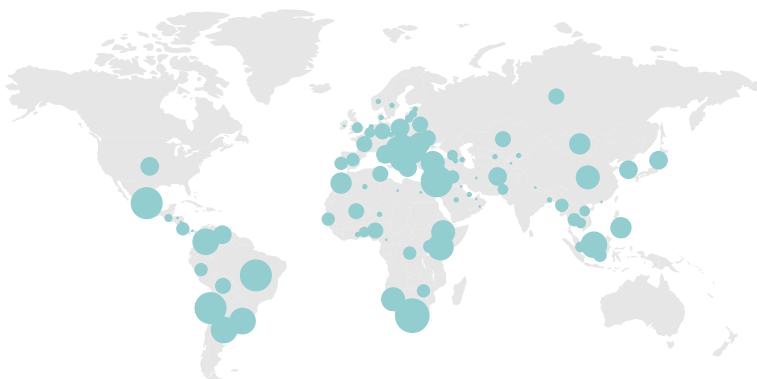
Methods

For the *Global Future Survey*, experts were asked about their expectations on various topics within a five year timeframe. The worldwide network of the Konrad Adenauer Foundation was activated through the respective foreign offices abroad. The responses of the experts were compiled in a database, which currently comprises 850 experts from 113 countries.

In accordance with the objective of the study, the professional expertise of almost half of the participants is in the field of politics. In addition, expertise in the fields of economics, law, media, and education is included. The experts work primarily in the fields of science and non-governmental organisations (NGOs); almost one eighth are political officials and just as many work in the public sector. Employees of the Konrad Adenauer Foundation did not themselves participate in the survey. The survey was methodologically supported by the Competence Center Foresight of the Fraunhofer Institute for System and Innovation Research, carried out with the online-survey tool EFS Survey, and ran from February 13 until March 6, 2017.

The response rate was very high – the experts demonstrated an unexpectedly high level of interest. At the conclusion of the survey, a total of 554 experts from 105 nations had participated. The goal of broad coverage of larger and smaller countries was thus achieved. Due to the high internationality and the accordingly small number of respondents per country, a statistical comparison at the country level is not possible. It is a survey of experts. A representative sample of the population was not attempted.

Origin of the experts



Backgrounds of the experts

Expertise	
46 %	Politics
13 %	Media / Culture / Political education
14 %	Law
13 %	Economics
5 %	Demographics / Society
5 %	Climate / Environment / Energy
4 %	Public administration
2 %	Miscellaneous

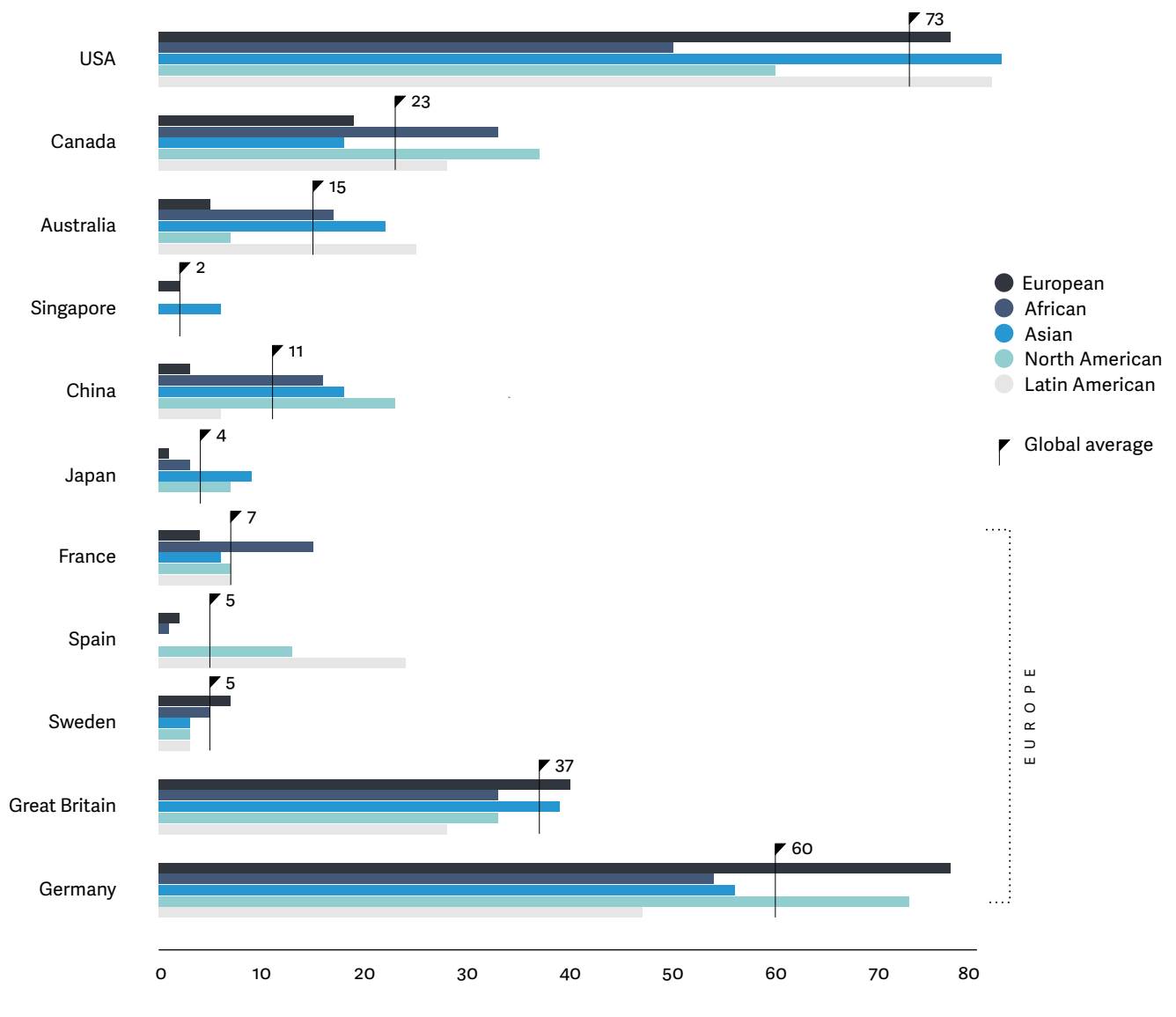
Field of work	
36 %	Science
27 %	Civil society
14 %	Public administration
10 %	Politics
6 %	Economics
4 %	Media
2 %	Miscellaneous

GERMANY

Promised Land: Young Talent Attracted to Germany

The most attractive countries for young talent, by continent

Figures in percent



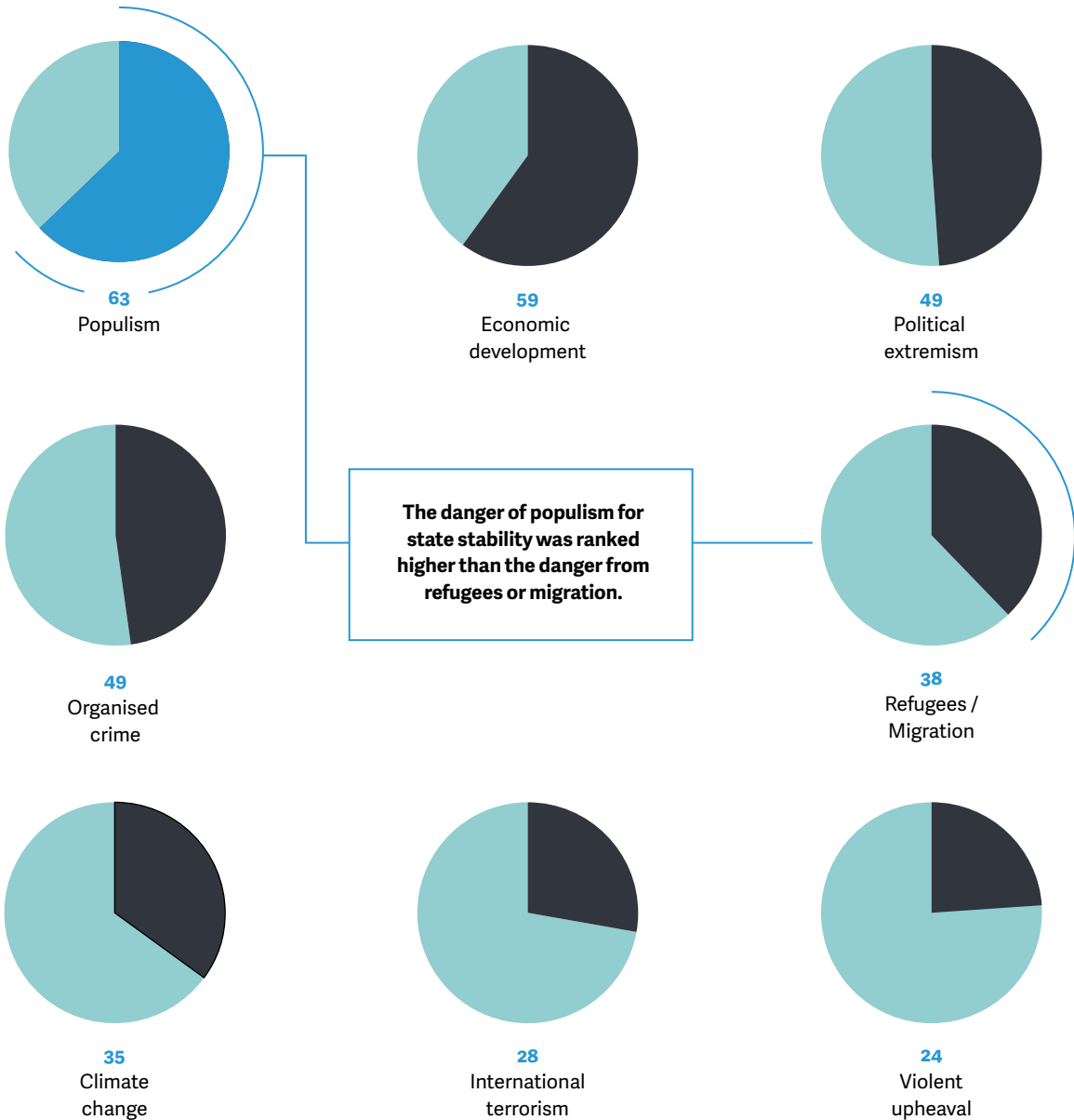
Young talent increasingly want to come to Germany. After the United States (73%), according to 60% of the respondents, the Federal Republic is the most attractive destination for young professionals around the world. The United Kingdom (37%), Canada (23%), Australia (15%) and China (11%) follow at a clear distance, leaving behind three other European nations

in terms of attractiveness: France (7%), Spain (5%) and Sweden (5%). According to the survey, for talented young people from Europe, Germany is just as interesting as the USA (77% in each case). For young professionals from Africa, Germany is actually seen in first place worldwide (54% compared to 50% for the USA).

POLITICS

Populism – The Number 1 Threat to Stability Worldwide

Figures in percent



According to the experts surveyed, populism will become the biggest threat to state stability in the coming years. About 63% see populism as a great or very great risk for the stability of their nation. Thus in an assessment of risk, populism is considered more dangerous than economic development (59%), political

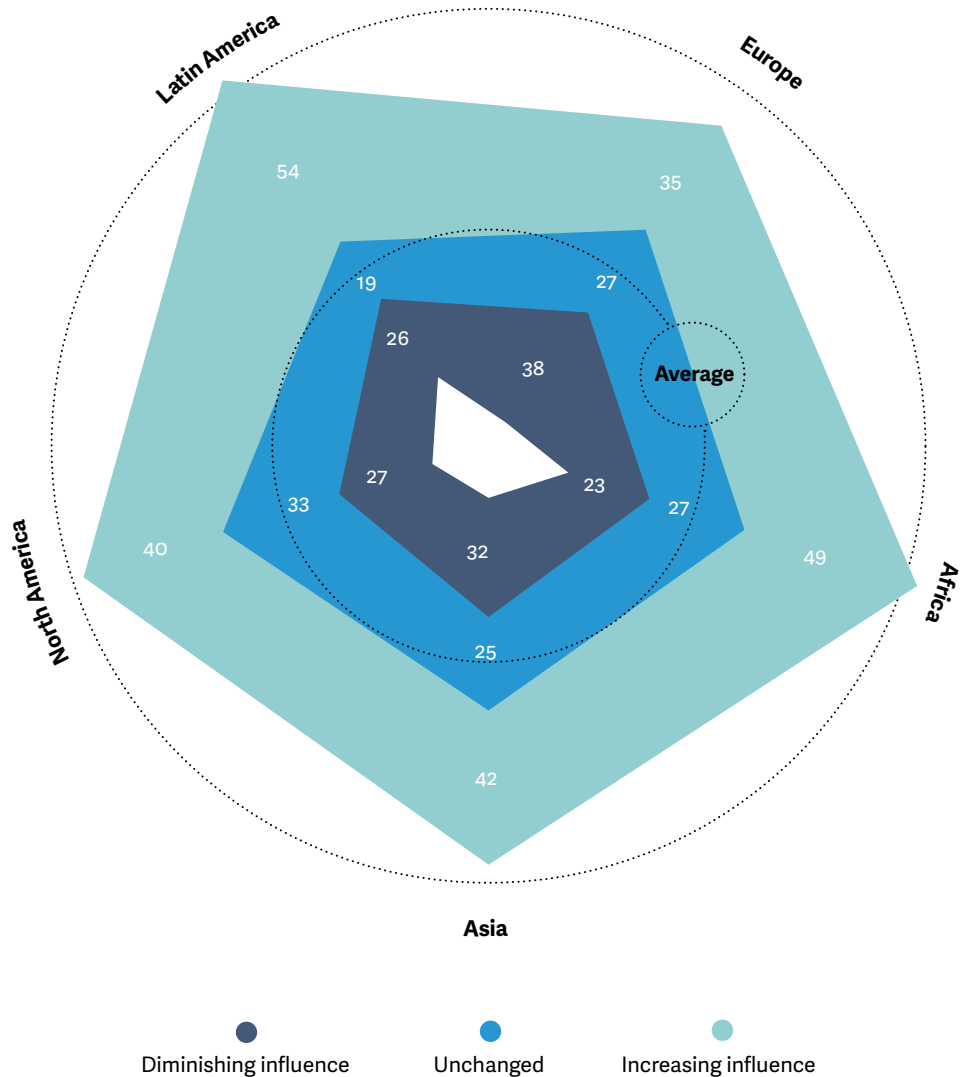
extremism (49%) and organised crime (49%). Noticeably less pronounced are the expectations of a negative impact on the political stability of states from migration and refugee matters (38%), consequences of climate change (35%), or even international terrorism (28%).

VALUES AND POLITICS

Countertrend: Western Ideas Prove to Be Persuasive

Influence of western liberal ideas on political action

Figures in percent



Against all odds: In the next five years, the impact of the western liberal idea on political action will increase in almost all parts of the world, according to the experts. This trend is especially pronounced in Africa and Latin America: 49% of those surveyed in Africa expect an increase in its impact, 23% a decrease; in Latin America, 54% expect an increase and only 26% anticipate

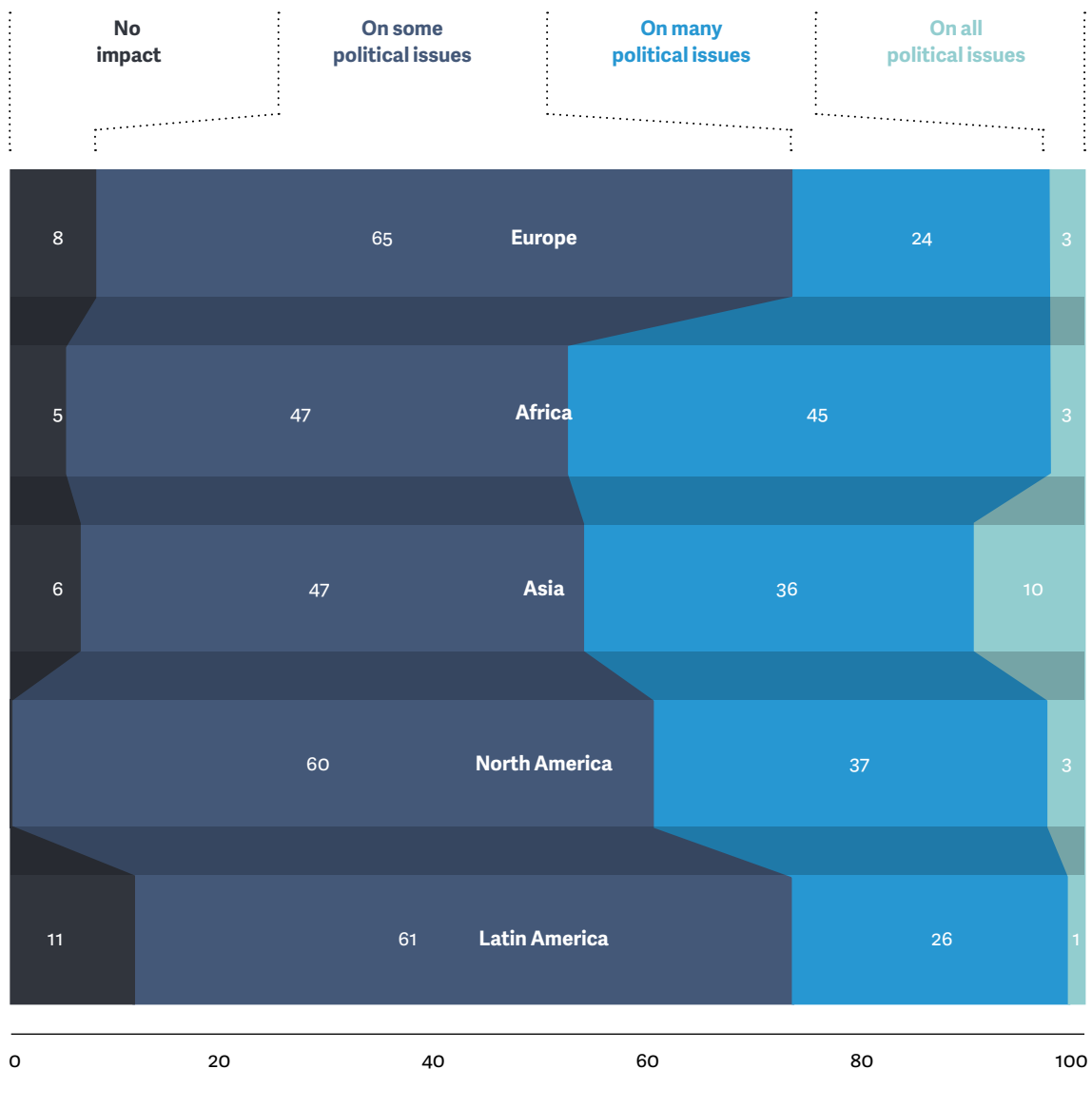
a decrease. This trend is also observed in Asia (increase 42% and decrease 32%) as well as in North America (increase 40% and decrease 27%), although less pronounced. Only in Europe are the experts skeptical. Here only 35% of those surveyed predict an increase in the influence of the western liberal idea on political action and 38% see that influence to be diminishing.

RELIGION

Secularisation? Religion and Politics Remain Tightly Intertwined

Impact of faith and religion on political systems

Figures in percent



Fewer than 7% of the experts surveyed believe that faith and religion will have no impact on the political system of their country in the next five years. This trend is clearest in Africa – 48% of the experts here are of the opinion that religion exerts influence on many or all political sectors, followed by Asia

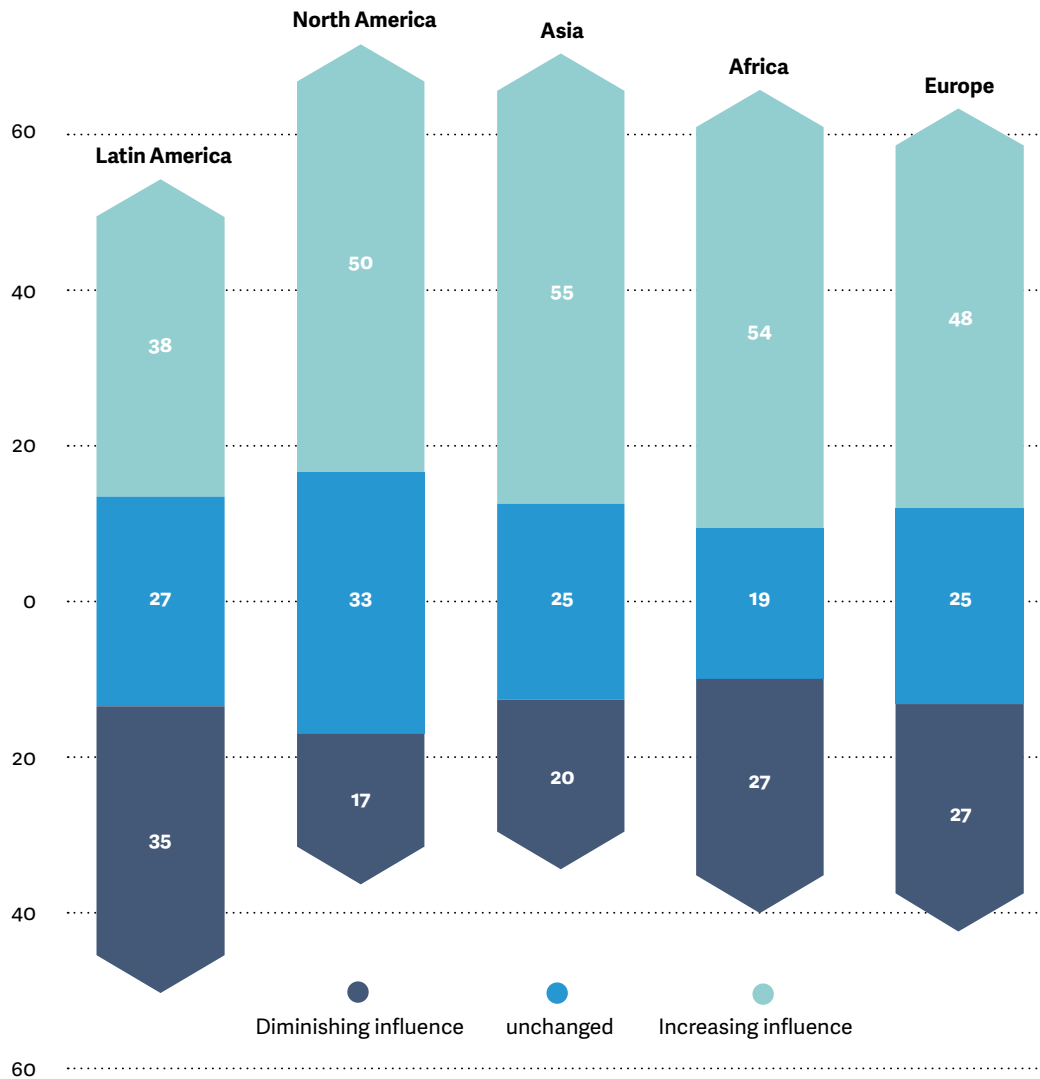
(46%) and North America (39%). Interestingly, the opinions of the experts surveyed in Latin America hardly differ from those in Europe – in both cases, 27% said religion influences many or all political sectors.

ECONOMY

More State, Less Market

State influence on the economy

Figures in percent



In the next five years, the influence of states on the economic system could grow significantly worldwide. All the experts surveyed agree: 50% surmise an increase in state influence, only 25% expect a decrease. This tendency is the most marked in Asia (increase 55% and decrease 20%), in Africa (increase 54% and decrease 27%), as well as in North America (increase 50% and decrease 17%). This could further increase the growing influence of government policies on economic systems.

FOREIGN POLICY

Germany – Champion of Western Values

German foreign policy in the next five years should advocate for:

Figures in percent



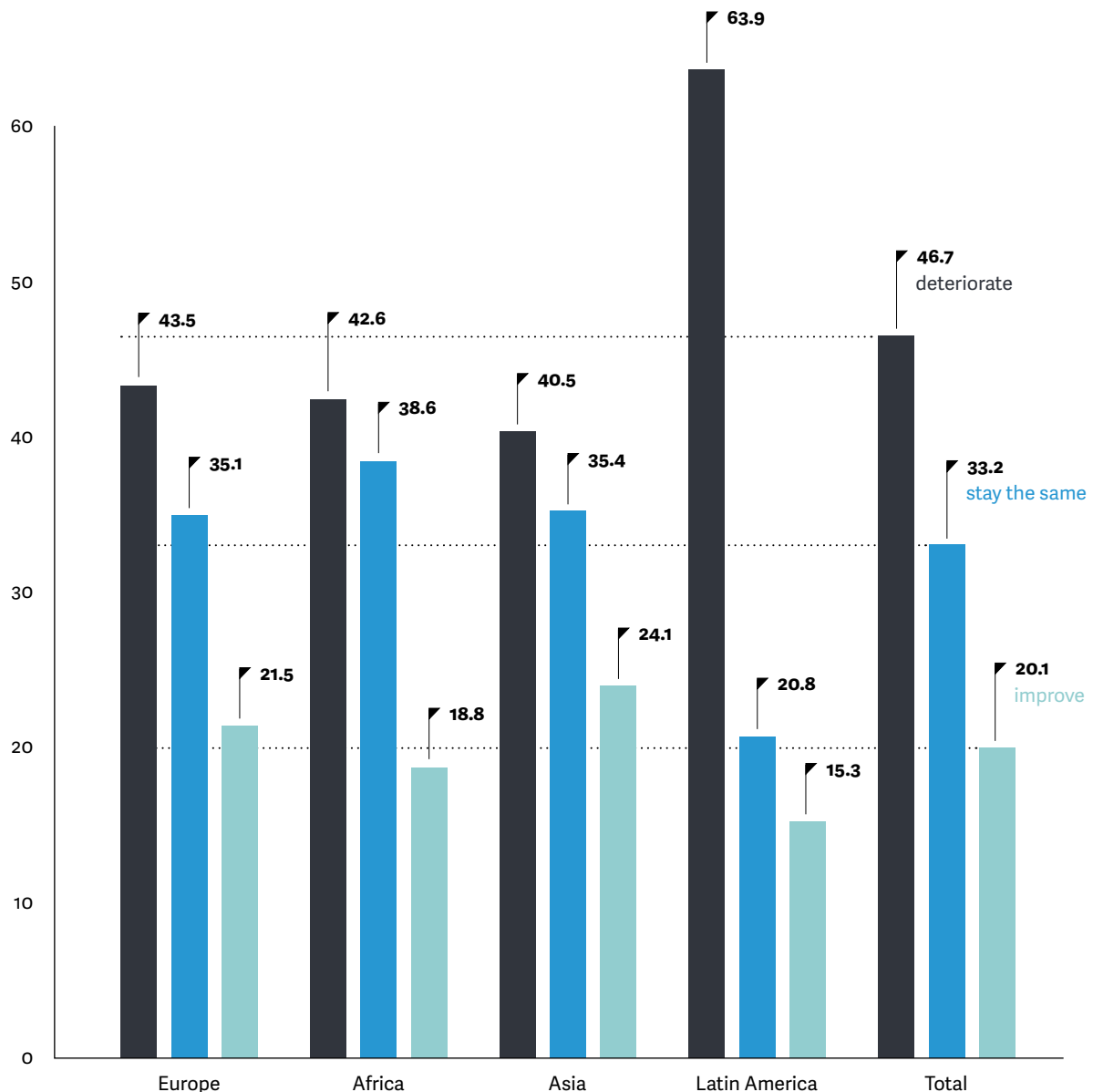
Regarding the foreign policy priorities of the Federal Republic of Germany, those surveyed have a clear opinion: 60% of all experts see the defense of human rights and the rule of law as the most pressing task. The acquisition of a coordinating role in international migration issues follows with 41%, and sustainable climate and energy policy with 40%. Parsing the answers by continent, in Africa, the defense of human rights and the rule of law ranks first, with 77%, and in Europe, the desire for a coordinating role in migration and immigration issues is strongest, with 52%.

THE UNITED STATES

President Trump – Neither Depression nor Delight

The development of political relationships with the USA

Figures in percent



Asked for their opinion about the new U.S. administration at the end of February, the experts paint a rather restrained picture. Globally, 47% of survey respondents anticipate something of a deterioration of their nation's relationship with the USA, 20% expect an improvement, and about 33% are of the opinion that the new U.S. administration will change essentially nothing in the relationship.

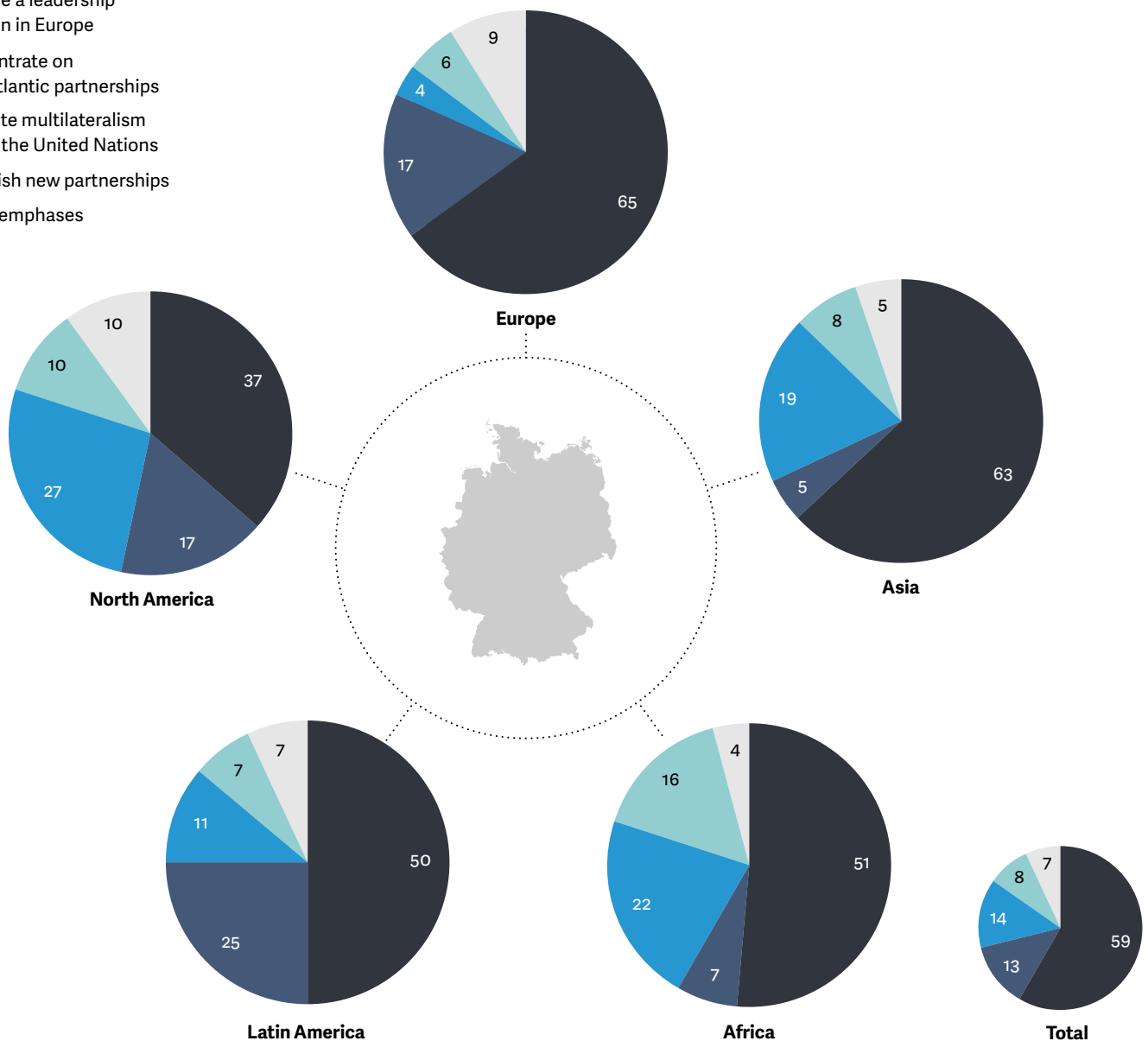
LEADERSHIP

Clear Vote of the Experts: Germany Should Take on More Responsibility in Europe

International expectations on Germany's role in the world

Figures in percent

- Assume a leadership position in Europe
- Concentrate on transatlantic partnerships
- Promote multilateralism within the United Nations
- Establish new partnerships
- Other emphases



Germany can and must assume more leadership in Europe: this is the consensus view of the international experts. Asked about scenarios for Germany's international presence in the coming years, the clear majority of respondents (59%) say that Germany should take on a leading role in Europe. This wish is par-

ticularly expressed by European experts (65%). Only a little more than 10 percent of all survey participants recommend that Germany should concentrate on transatlantic partnerships (13%) or should promote multilateralism in the United Nations (14%).