

Third survey

Germany in the Eyes of the World

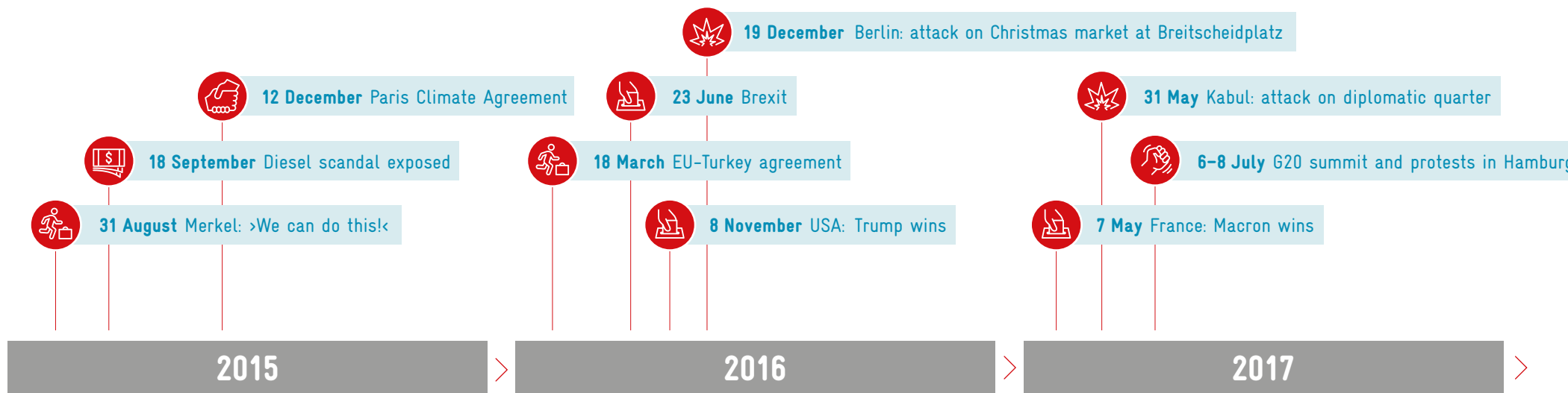
Findings of the 2017/2018 GIZ survey








Germany in the Eyes of the World

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-  **21 August** Suspension of Dublin procedure for Syrians
-  **7 January** Charlie Hebdo
-  **13 November** Series of attacks in Paris
-  **7/8 June** G7 summit without Russia
-  **25 September** 2030 Agenda
-  **All year** IS continues to gain ground
-  **25 October** Poland: PiS wins elections
-  **1 November** Turkey: AKP wins elections

-  **22 March** Brussels: attacks at airport and in city centre
-  **22 March** Nizza: attack on Promenade des Anglais
-  **16 January** Iran nuclear deal
-  **3 April** Panama Papers
-  **15 March** Five years of war in Syria
-  **15 July** Turkey: attempted coup
-  **1 December** Peace accord between government and FARC in Colombia
-  **9 May** Philippines: Duterte wins
-  **1 January** Sexual assaults in Cologne
-  **10 July** Portugal wins Euro 2016
-  **August** Summer Olympics

-  **August–September** Rohingya refugees
-  **18 January** Marshall Plan with Africa
-  **2 June** USA withdraws from climate agreement
-  **6–17 November** Bonn: UN Climate Change Conference
-  **5 November** Paradise Papers
-  **9 July** Liberation of Mosul
-  **14 November** Zimbabwe: Mugabe unseated as president
-  **1 January** António Guterres becomes UN Secretary-General
-  **16 April** Turkey: constitutional referendum
-  **24 September** Seven parties in the new German Bundestag
-  **15 October** ÖVP and right-wing FPÖ win elections
-  **25 October** Xi Jinping confirmed as party leader
-  **14 February** Deniz Yücel arrested
-  **1 October** Catalonia: independence referendum
-  **6 December** USA: recognition of Jerusalem as capital of Israel
-  **1 October** Germany: equal marriage rights for all

The list is not intended to be exhaustive, but rather a selection of international events that have a certain relevance in terms of how Germany is perceived around the world.

Legend

- [1] 
- [2] 
- [3] 
- [4] 
- [5] 
- [6] 
- [7] 
- [8] 

[1] Displacement and migration [2] Terrorism [3] International processes and agreements [4] Finance and economy [5] War and conflict [6] Elections [7] Protests [8] Society

Germany in the Eyes of the World

Findings of the 2017/2018 GIZ survey

Executive Summary

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» **G**o ahead, try on the larger shoes – you’ll find they fit!« That was the resounding message we picked up in our first study back in 2012, when our interviewees felt that Germany should play a more active role in the world – one that better reflects its economic might and political standing. At the time, this encouragement was met with surprise among Germans. Hadn’t other nations expressed huge misgivings and reservations at the time of reunification about an enlarged Germany in the centre of Europe, wondering if the Germans would once again wreak havoc or throw their weight around to advance their own interests? Such anxieties and fears were only calmed by repeated promises of continued restraint. Today, a quarter of a century later, the world seems to have undergone a complete transformation. Calls for Germany to assume a leadership role are louder than ever. Not on its own and not in an aggressive manner – that view remains unchanged – but in a much more prominent position. As a sovereign nation ready to exercise its soft power and willing to help shape the future. As a country that looks forward and develops visions and solutions in response to the challenges of the future and in the interests of a wider community.

This shift in the perception of Germany forms a clear pattern over the three studies conducted to date under the heading *Germany in the Eyes of the World*. While the overall judgement of our interviewees has remained largely consistent, the studies nevertheless highlight a development of which Germans themselves are probably not yet fully aware. The gentle encouragement and flattering statements of six years ago have taken on a firmer and more pressing tone in our latest report. In 2011/2012, Germany was being cordially invited to show greater confidence. By contrast, in 2014/2015, the dominant perception was that Germany had no choice but to step up and get more involved in the wake of the financial crisis and the Greek debt crisis. That was when Germany did indeed put on those ›larger shoes‹, rather out of a sense of duty but – given its embrace of austerity – not to everyone’s delight.

Constantly growing expectations: Now, in our third study, the relatively quiet voices of six years ago have given way to a loud chorus of interviewees worried about global turmoil and urging Europe and Germany to act as guardians of Western values and stand up for the common good of as many people as possible, especially as

a counterweight to the three superpowers – the USA, Russia and China – all of which have recently begun, each in its own way, to adopt more unilateral positions on the world stage. This view of current roles is reinforced by a combination of developments – threats to global trade and the realignment of international power-sharing and burden-sharing arrangements. As such, our three surveys point to a trend that has broadened and become more firmly established over the years. That is the first key finding of this study.

Respect for Germany's treatment of refugees:

One factor – Germany's treatment of refugees fleeing to the country from September 2015 onwards – seems to have reinforced this trend more than any other. While the country's refugee policy has been challenging internally, it has certainly done no damage to its reputation in the wider world. Quite the opposite, in fact. Trust in Germany has grown as a result, and that is the second key finding of this study. Of course, this does not mean that people in other countries are unaware of the difficulties involved in integrating migrants or in resolving the question of what it means to be German. Equally, from our interviewees' perspective, it

does not mean that Germany as a whole no longer needs to become more international in its outlook, for example by showing greater openness towards others and by accepting and promoting foreign languages within the country. To a degree, however, Germany's treatment of refugees has softened the image of the typical German as hard-working and efficient, and added a new characteristic – that of a global citizen with humanitarian principles.

Stable values, sound institutions:

In the eyes of the world, Germany has remained true to itself despite all the external and internal changes it has experienced. It upholds justice and the rule of law, has stable institutions and a functioning welfare state, and overall it is regarded outside its borders as ›mature‹ and ›exemplary‹. To complete the picture, it is admired for its active civil society and a pronounced culture of consensus and debate. While Germany is widely regarded as a modern country in many respects, to the outside observer it is seen as relatively unprogressive when it comes to social issues – gender equality, lesbian and gay rights, same-sex marriage and the structure of the family, for example – yet guided by values and respect for the individual,

4 and overall very solid. These views are echoed throughout the study, and values and institutions make up the third and fourth set of findings.

A strong economy but with shortcomings:

The image of a top-performing economy with strong, widely admired and highly regarded brands is common currency outside Germany. Quality is a priority. The country is seen as having maintained its status as a leading economic hub, thanks in part to its dual system of vocational education and work-based training and its focus on applied research. Yet there are some who wonder whether Germany might not be resting too much or indeed entirely on its past laurels and whether it might be falling behind in our digital age. A number of interviewees expressed surprise at what they saw, alongside a more general aversion to risk, as a substantial dose of scepticism towards technology – particularly in a country renowned for setting new technological standards. To many outside observers, the mere fact that Germans often still pay using cash is symptomatic of a wider inability to embrace innovation and prepare for the future. There is a perception that Germany has a lot of catching up to do when it comes to simply trying out

new things, dealing positively with failure and treating it as a chance to learn from mistakes and start again. According to this view, the fifth of our key survey findings, Germany needs to address this deficit if it wishes to retain its position as one of the world's leading economies in two decades from now.

Low marks for nation branding:

Finally, coming to our sixth key finding, many foreigners are surprised that Germany apparently does so little to project itself on the international stage. Why does it not market itself more vigorously and in a more varied light? Why does it not talk itself up any more? Why does it not advertise the country and its people more effectively? While most people have heard of Mercedes, Porsche and BMW, and of Goethe and Schiller, there is little or no awareness of the rest. Efforts to raise Germany's cultural profile have clearly proven inadequate despite all the evidence of outside interest. Thanks to Berlin's status as a hip city at the heart of Europe, our interviewees have been able to glimpse the other side of Germany – modern, interesting and vibrant. They want to see more of this side, and wonder why Germany does not invest more extensively in

cultural marketing as a strategic tool, a practice long since adopted by other nations.

These are the six main sets of findings to emerge from the third worldwide qualitative survey conducted by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH in 2017. Each is examined more closely in a dedicated chapter of the report. As in the two previous studies, interviews were conducted with over 150 people from a wide range of professional backgrounds and various levels of hierarchy on five continents, this time with a greater emphasis on Africa. They explained their opinions and perceptions of Germany in face-to-face interviews, and their responses were compiled into 4,175 key statements.

GIZ's goal in conducting the survey is to strengthen the discourse with its partners and within the company itself on issues linked to international cooperation for sustainable development. The study is also intended as a contribution to the wider debate around the 2030 Agenda and the Sustainable Development Goals (SDGs), which can only be achieved if the international community works together. Furthermore, the study offers ideas on the role

Germany might play in this endeavour and how it can make best use of its strengths at international level. The findings therefore offer valuable pointers for policy-makers and other actors, both in Germany and beyond its borders. As snapshots, the way we interpret them depends very much on the prevailing context at the time the interviews were conducted. While the propositions they advance are based on individual impressions, as a whole they nevertheless create a more enduring picture and can therefore generate a lasting impact.

»Germany needs to develop a vision of the role it wants to play in the world.«

India

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Foreword

How do others see us? For Germany, a country that has established such strong links to the rest of the world and that depends so heavily on its foreign relations, this information is crucial. How we are perceived, what others like about us, what they are less fond of, what they expect of us and what role we are being asked to play – the answers to all these questions can have a major impact on the way we collaborate with our international partners, making it easier or harder. By comparing the picture we have of ourselves with the impressions others have of us, examining where they diverge and identifying our own blind spots, we can garner valuable information to help guide our future actions.

To this end, GIZ has now conducted three qualitative surveys in numerous countries around the world. We invited people from a variety of personal and professional backgrounds to share their perceptions of Germany. The quality of the findings that emerge from our talks depends above all on the willingness of interviewees to engage with the subject, spontaneously but knowledgeably, and to speak openly about Germany while offering a differentiated analysis. At this point, I would like to thank all those who took part for their cooperation and their contribution.

Following on from the first two studies in 2011/2012 and 2014/2015, we are pleased to present the third in the series entitled *Germany in the Eyes of the World*. The idea came to fruition in the context of Chancellor Angela Merkel's Dialogue on Germany's Future. The latest study picks up on many of the trends identified in its predecessors but also sheds light on some new and rather surprising points. As such, although the three publications form a direct sequence, each can be regarded as a unique piece of research.

For GIZ, the study is an invitation to widen the discourse on Germany's future development, both within the country and beyond. These impressions from outside Germany make a useful extra contribution to an intense debate that has been conducted at many levels for some time, especially since the speech delivered in 2014 by then-President Joachim Gauck on »Germany's role in the world«.

GIZ is well placed to offer this invitation. As a federal enterprise dedicated to international cooperation for sustainable development, we operate in over 120 countries and deal constantly with people from a huge variety of cultural backgrounds. In all these countries and regions, we promote development and transformation and strive to bring about lasting political, economic, environmental and social stability. Every day, our project and programme teams

meet people from all walks of life – in ministries and private-sector companies, in non-governmental organisations and churches, in cities and in rural areas. These working relationships allow us to build up a vast body of experience which the German Government can then draw on to help shape its bilateral and international relations. The same body of experience and network of contacts has also proven invaluable to GIZ in preparing this study with its many individual discussions.

10 Taken as a whole, the interviews offer a rich tapestry of impressions of Germany from many corners of the world that goes well beyond the usual stereotypes, although these can also be found in the study. In a nutshell, they point to a widespread view outside the country – one that has emerged with increasing clarity as each study is produced (and therein lies the most striking aspect of all) – that Germany should assume many more roles than it is probably capable of assuming or would perhaps like to assume. From a model of good environmental practice to a crisis and conflict mediator, from a source of new technology to a protector of human rights, from the saviour of the EU to a supporter of the UN – there are very few roles that are not ascribed and entrusted to Germany in the minds of our interviewees.

Although I have been involved in all three studies in my Management Board role at GIZ, even I have been surprised by the consistent rate at which this trend has become established, and I am personally all the more convinced of the study's value. My fellow interviewers and I – all of us from different parts of the company – felt ourselves changed by the interviews we conducted. The process of confronting your identity (in this case as representatives of Germany) is transformative. It can be thought-provoking and heartening, and it can give rise to feelings such as pride, humility, irritation, amazement and sometimes even a sense of being burdened with overwhelming expectations.

Some of the points that I found particularly striking in this study were the very considered reflections offered by interviewees in China on Germany's relatively slow progress in the area of digitalisation, on the need for Germany to adopt a new approach to innovation in the field of services and on Germany's leadership style within the EU – all from people with a great deal of admiration for and interest in Germany and with high expectations of a major international partner. That we are being urged to play a bigger role on the international stage while at the same time listening more intently to our partners also struck me forcibly because it is not merely a banal observation. In short, the interviews gave me and all those

involved a great deal of food for thought – as individuals and as part of GIZ. They contribute to an ongoing learning process that is vitally important, especially in the field of international development. If this study also helps to challenge and perhaps reshape your own perceptions, it will have fulfilled its purpose entirely.

I hope you enjoy reading the study and look forward to forthcoming discussions on the subject of *Germany in the Eyes of the World*.

A handwritten signature in black ink, appearing to read 'Christoph Beier', with a horizontal line extending to the right.

Dr Christoph Beier
Vice-Chair of the Management Board

Introduction

This is »Germany’s big moment«, wrote Kofi Annan in a recent article for a new book.¹ Strong words from a highly regarded global citizen – not only a successful former UN General Secretary but also a Nobel Peace Prize winner. His judgment highlights very clearly that Germany’s transformation from an »enemy state«, as it was referred to when the UN was formed, into a valued, admired and indispensable member of the international community of states is now evidently complete. In Annan’s view at least, Germany now has a »unique opportunity to be involved in shaping a new era of globalisation.« Albeit in somewhat less euphoric tones, that is also the unmistakable message delivered by many of the interviewees in our third survey entitled *Germany in the Eyes of the World*.

Six years on – study number three

Once again, as in the previous studies, our goal was to find out how Germany is perceived by others. Three years have passed since the second study in the series in 2014/2015 and

another three since our first report covering 2011/2012. Altogether, six years in which the pace of global political change at least appears to have accelerated. A period, moreover, during which the debate about Germany’s international responsibilities has grown even louder and become more visible – not least on account of the international power shifts triggered by Brexit, the election of Donald Trump as US president and the continued rise of China, to name just three of the most striking examples. Our latest study contains some important pointers – both for decision-makers and others with an interest in policy issues – to help us explore the impacts and ramifications of these and other changes, what this means for Germany and what position our country occupies or should occupy in the international order.

The study is one of a growing number of analyses and publications examining Germany’s role in the world. Most are designed to provide quantitative information in the form of rankings and indexes, for instance on the

¹ Wolfgang Ischinger, Dirk Messner: Deutschlands neue Verantwortung. Die Zukunft der deutschen und europäischen Außen-, Entwicklungs- und Sicherheitspolitik. Published by Econ Verlag, 2017. (in German)

international reputation of different countries. In the interval since our second study, however, the number of reports containing information of a more qualitative or descriptive nature has increased – some even published in video form or as a series. Nevertheless, in contrast with our GIZ study, most involve a compilation of articles by different authors with little attempt to provide a systematic evaluation or to interpret them in context.

Growing interest in Germany

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One well-known study providing quantitative information is the *Anholt-GfK Nation Brands Index*, which ranks countries by their international reputation. Germany now occupies the number one position, having displaced the USA.² In a nation brand survey conducted by the BBC,³ the view that Germany's global influence is mainly positive rose from 53% to 63%. Furthermore, according to the Konrad Adenauer Foundation's *Global Future Survey*,⁴ carried out for the first time in 2017, Germany enjoys a very good international reputation and is an attractive location for talented young people.

Reports that focus instead on qualitative data are often published by foundations or think tanks. One such report is *The Berlin Pulse*,⁵ produced by the Körber Foundation, in which prominent writers such as the former US

Secretary of State Condoleezza Rice and the British historian Timothy Garton Ash explore what is expected of Germany in the face of the most pressing foreign policy challenges of 2018. Their findings are supplemented by representative surveys of public opinion.

The German Council on Foreign Relations (DGAP) examines the challenges that lie ahead in a special publication entitled *Foreign Policy and the Next German Government*.⁶ The same theme is addressed in a series of articles by high-ranking contributors under the heading *Deutschlands Neue Verantwortung* (Germany's new responsibility), presented in 2017 by Wolfgang Ischinger, Chairman of the Munich Security Conference, and Dirk Messner, Director of the German Development Institute, which includes the above-mentioned article by Kofi Annan and an article on the results and recommendations of our own second survey.

The media also shows great interest in Germany's character and its place in the world. By way of example, the daily newspaper Tagesspiegel's online debate portal, Causa, hosts numerous articles by commentators and experts seeking answers to the question: ›What is German?‹⁷ In a video series entitled *Typisch deutsch!* (typically German!), ZEIT Online invites foreigners living in the country to talk about how they see the Germans.⁸ Handelsblatt Global's late 2017 issue goes as far as to ask:

2 <http://nation-brands.gfk.com>

3 <http://www.bbc.co.uk/mediacentre/latestnews/2017/globescan-poll-world-views-world-service>

4 <http://www.kas.de/wf/de/33.49452> (in German)

5 <https://www.koerber-stiftung.de/en/berlin-foreign-policy-forum/the-berlin-pulse>

6 <https://dgap.org/en/think-tank/publications/dgapanalyse-compact/foreign-policy-and-next-german-government>

7 <https://causa.tagesspiegel.de/gesellschaft/was-ist-deutsch> (in German)

8 <http://www.zeit.de/serie/typisch-deutsch> (in German)

*Should Germany Step Up? The West Needs a New Leader.*⁹ Reviewing the country's global agenda in a new legislative period, it concludes that all eyes are currently even more firmly fixed on Germany than usual.

A less conventional approach

Alongside these largely ad hoc analyses and as an alternative to the quantitative surveys referred to above, GIZ has once again conducted interviews around the world with people who have some form of link to Germany. The study encompasses a wide range of countries and perspectives. Its greatest value lies in the uniquely global and qualitative insights it offers for a survey of this type and breadth. Another important characteristic is that the main points of the interviews were not fixed in advance, following instead the interviewees' own priorities. As such, the study highlights a broad spectrum of views in different areas, ranging from everyday culture to major policy issues.

On this occasion, too, the interviews were held against a background of various events that define our 'global consciousness' and relate in some way to Germany. While the views expressed in our first survey tended to focus on the issues of climate, energy, the economy and sustainability, the main topics addressed by our interviewees in survey number two were foreign policy, the EU and the economy. In our latest survey, many of the core statements relate to international cooperation in the wider sense and, within this context, more specifically to Germany's (leadership) role in Europe and the

world, as well as offering many reflections on emigration and immigration.

In the earlier studies, Germany's new global role was mainly regarded as a logical consequence of its growing economic power and its prominence within Europe. By contrast, in response to recent global political developments, Germany is now primarily in demand because, in the eyes of the world, it has a duty to act as a counterweight to other nations. This expectation that Germany should do more is therefore based, in at least equal measure, both on German strength and on the weakness of other actors.

Despite the admittedly rough outline provided above, all these factors establish the context and background for our third survey on how Germany is perceived around the world. The results are set out in six main chapters, preceded and followed by detailed notes on the methodology employed.

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9 <https://global.handelsblatt.com/our-magazine/looking-for-a-new-leader-germany-global-politics-elections-us-trans-atlantic-nato-819817>

Overview of methodology

GIZ has now conducted three worldwide surveys to find out how people in different countries see Germany. This latest study builds directly on the findings of our previous surveys in 2011/2012 and 2014/2015 and can therefore be regarded as the next instalment in a series. The interviews for the third study were conducted between May and October 2017.

In this study we applied the methodological design of its two predecessors with practically no changes. It is empirical rather than theory-driven and uses qualitative methods. A more detailed description of the methodology can be found in the annex. The success of the study is down to four main factors and the coherent way these were combined: the countries were deliberately selected; discerning interviewees with a knowledge of Germany were hand-picked in each of these countries; the interviews, systematic documentation and multi-stage evaluation were based on a clear methodology; and a framework of topics was used for the interviews. The various elements and sequences of the study are set out in **figure 1** (see page 18).

Interviews with 154 people on 14 topics

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In total, qualitative interviews were held with 154 individuals from 24 countries. Each interview was conducted and documented by a team of two. On average, as for the first and second study, six to eight interviews were conducted per country. Each interview took an average of one and a half hours. Subsequently, the main thematic lines were identified and recorded in the form of consolidated core statements using a computer-based evaluation tool. The spotlight was on recording and consolidating relevant aspects mentioned by each interviewee. These generated a total of 4,175 core statements that provided the raw material for evaluation purposes. The core statements were recorded both by topic (see page 20) and by type of statement (description, expectation, strength, risk, etc.) and were therefore assigned two separate codes.

All interviews were based on a semi-structured questioning technique. This allowed the interviewers to pick up on statements in order to request further information or produce narrative statements. Each interview

Figure 1

Sequences of the study

1

Study design

(including list of key questions and selection of interviewees)

2

Interviews

Free associations • 14 topics • Future expectations

3

Evaluation

Stage 1
Reading,
analysis,
pre-structuring

Stage 2
Feedback,
discussion,
initial evaluation

Stage 3
Cross-comparison,
discussion,
processing findings

4

Study report

Core statements (phenomena) • Patterns (generalisations)
Conclusions (open hypotheses)

5

Discussion

involved three phases. The initial, open phase was designed to determine how and in which categories the interviewee perceived Germany and how he or she assessed the country. Key questions such as »What comes to mind when you think of Germany?« offered scope for spontaneous, intuitive and personal impressions, experiences and general perceptions.

The second phase of the interview focused on a range of topics. Each interviewee was offered 14 cards (see figure 2, page 20 for the full list of topics) and asked to select those that he or she personally felt to be most relevant. Interviewees were then invited to associate their selected topics freely with Germany. The 14 topics reflected major aspects of society and built on experience gained from the first and second studies. An explicit reference to additional areas of observation that the interviewees could choose freely »wildcard« made it clear to interviewees that they were free to touch on other topics.

The third and final phase of the interview was used for an open discussion and reflection to sum things up. Questions such as »In

conclusion, where do you see the greatest opportunities and risks for Germany?« and »What would be your main advice to the German Chancellor?« were intended to encourage interviewees to look ahead and to express their own personal expectations and recommendations.

Countries selected

The 24 countries were selected using the same criteria as those adopted for the first two studies. These included historical links with Germany, economic ties, and the importance of the countries in bilateral and multilateral political processes. As well as G20 states, »pivotal powers« were chosen: these are states that play a key regional role as a result of their geostrategic position, their population, their economic potential and their political weight. They act as economic hubs and influence future global policy. The widest possible range of cultural areas, ethnic backgrounds and religions was included in the study. Eleven countries, nearly half the total, were included in the study for the first time. Five have been involved in all three studies. **Figure 3** (see page 21) shows the

Figure 2
Topics

- > Political system
- > Economy
- > Security
- > Environment
- > Technology
- > Education
- > Research
- > Health
- > Migration
- > Family
- > Religion
- > Culture
- > Media
- > International cooperation
- > Wildcard

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precise breakdown with comparisons to the first two studies.

Two additional factors should be borne in mind when interpreting the findings of the study. First, the study took a qualitative approach, and second, only a handful of interviewees were selected in each country, so there is no claim that they are representative of the nation in question. Neither the individual statements nor the aggregation or interpretation of them in this study make any claim to reflect a scientifically valid perception of an entire country or region. Instead, a multi-stage analysis and interpretation process allows images of Germany to emerge from the diverse core statements.

Interviews with outside observers of Germany

Given that our studies aim to produce an image of Germany based on actual experiences, it was important to find interviewees with links to the country and a certain ability to articulate their ideas. The majority had either lived in Germany for an extended period or had close business contacts with German companies or family links with Germany. Only a small number of interviewees had acquired most of their knowledge of Germany from the media or other information channels. The interviewees included many decision-makers who could be assumed to possess the skills and experience needed to speak in an informed way about Germany. Overall, however, the interviewees represented an intentionally broad spectrum. By way of example, they included a Ukrainian former professional boxer, Nigeria's Minister

Figure 3 Countries selected

- Countries selected for study 3*
- Countries selected for studies 1 and 2
- Germany



Countries selected for the third study

Africa	Americas	Asia	Europe	MENA region
Ethiopia	Brazil	Afghanistan	Poland	Egypt
Ghana	Canada	China	Russia	Iran
Mali	Mexico	India	Serbia	Israel
Nigeria	USA	Viet Nam	Ukraine	Jordan
Rwanda			United Kingdom	Saudi Arabia
				Tunisia

* Some of the countries included also took part in the first and second study. For a detailed list, see page 108.

for Foreign Affairs, a Chinese singer, a former ambassador from Israel, an Iranian artist, a Polish journalist, a British lawyer, a Rwandan film producer and an advisor to the President of Mali.

Multi-stage evaluation

The main task of the third and fourth steps in the investigation – evaluation and compiling the report – involved recording and structuring the raw material with a view to identifying initial attributions. On the basis of these observations, we then went on to identify certain generalised patterns before formulating assumptions. In simplified terms, the evaluation involved three stages (as shown in figure 1, page 18):

- 1. Reading, analysis and pre-structuring:** individual perusal of all 4,175 core statements, detailed analysis of each topic and drafting of initial observations;
- 2. Feedback, evaluation and discussion:** the groups of interviewers reviewed the initial assumptions and produced open hypotheses in overarching interpretation fields;
- 3. Cross-comparison, discussion and processing of findings:** the group of interviewers reviewed the findings and explored these in greater depth on the basis of the raw material; structuring of the study.

All interviewers were involved in the evaluation. This was partly so that the hypotheses could be frequently related back to the interview context experienced by individual interviewers. At the same time, however, the participation of the entire group of interviewers largely prevented individual distortions. The three-stage

evaluation procedure moved from the concrete to the general and back to the individual experience.

As in the second study, our findings in the survey's 14 topics are not presented separately. Instead, they feed into the six main chapters. Our view is that a more meaningful result is obtained by compiling the material according to overarching themes. Against this background, each of the following chapters is made up of three components. Firstly, core statements or excerpts are used; these are in quotation marks, stay close to the original source and represent the observations of the interviewees. Rather than transcribing verbatim the original statements made, we have consolidated the contents of the individual interviews into core statements. These are not attributed to any one interviewee since all those taking part were guaranteed anonymity. Second, generalised observations are drawn from the core statements to reveal patterns. In some places, these are accompanied by individual statements that we felt offered a particularly remarkable or striking illustration of a pattern; these are highlighted accordingly in the text. Finally, we present higher-level correlations in the form of assumptions or hypotheses. These are shown in red and should be regarded as top-level hypotheses.

The study is both a snapshot and a kaleidoscopic view of worldwide observations and reflections on Germany. It is intended to offer readers the scope to make their own deductions and interpret the material in their own way while also inviting critical scrutiny.

*»You take an interest in other people and countries,
and in what they think. You can tell that from the fact
that you're producing this study.«*

Iran

International role

*Responsibility in a time
of upheaval*

The majority of our interviewees felt the time had come for Germany to show less reticence, shake off the burden of its past and be more actively engaged on the world stage. Given the current global political landscape, with crises and conflicts on all sides, it was generally regarded as no less than Germany's duty to step up to the plate. In this context, they observed, Germany as a »sensible« democracy can play a useful and beneficial role as long as it provides leadership based on values, sets a good example and collaborates with others – especially its European partners.

»The world has reached a defining moment: either we establish a consensus and stand up to Trump, or global affairs will be dominated by populist politicians with totalitarian views.« Statements such as this from Mexico could be found in large numbers among the responses

Filling the gap

In response to the global political situation, there are calls for Germany to show greater engagement. In light of recent developments in the USA and the danger of Russia and China stepping into any vacuum, it seems clear to many that Germany should play a more active role, offering a positive model of leadership and defending the values of the free world in its capacity as a strong and stable European power.

provided by our interviewees. They point to high expectations of Germany and link those expectations directly to the policies adopted by the US President. »When I think of Germany, I see its important and stabilising role within the EU and think of it as a major counterweight to the USA under Trump«, observed another interviewee from Brazil. Many sensed that a global power vacuum had been created, with the USA no longer

providing direction, and feared that China and Russia could step in to fill the gap.

Germany was generally viewed as »grown-up, calm and sensible« (as one British interviewee put it), a prerequisite for any peaceful attempt to build

international relations, not least in contrast with Trump's decision to take the USA out of the Paris Climate Agreement. Since neither the

»Germany has the opportunity to be a country that can help to enhance international cooperation on security, the environment, climate change and free trade.«

Canada

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USA nor large multilateral organisations such as the UN are currently credited with sufficient power to shape the global agenda, Germany is almost seen as an automatic choice to assume greater responsibility. »From a historical perspective, it is inevitable that Germany will take on a leading international role in the future,« noted one interviewee from India. However, this encouragement for Germany to assume greater responsibility is frequently accompanied by the proviso that it must act in concert with its European partners. Restrained leadership was advised, for example, by an interviewee in Israel: »For a country with a strong economy and strong military forces, it is of course tempting to adopt a bigger role, but Germany should avoid stretching itself too far or risking its values and principles in exchange. I would urge Germany to maintain its current restraint.«

Defending free and fair trade

The world would like Germany to be more actively engaged in multilateral organisations, especially the United Nations, and to assume a leadership role in efforts to create a free and fair system of trade that benefits as many people as possible. In this context, Germany should also act as an advocate for the interests of developing countries.

In short, Germany is invited to show greater engagement but with a due sense of proportion. Furthermore, against a backdrop of numerous crises and conflicts and growing populism, the tone of such invitations is much more pressing than before. In the minds of our interviewees, the weakness of the European Union, the conflict in Ukraine, the (still) incomplete stabilisation of the Balkans, the problematic relations between the EU and Turkey, the war in Syria, the seemingly interminable conflict in the Middle East, the deaths of thousands of people in the Mediterranean and the emergence of conditions akin to slavery in Libya all form part of a wider context in which increased efforts are needed to promote stability and peace, and Europe – above all Germany, albeit in concert with others – is looked on to shoulder more responsibility. »My expectations of Germany have not

Great respect – high expectations

Angela Merkel is highly regarded outside Germany. Of course, we were already aware of this admiration. It has been extensively documented, not least in the last GIZ study in this series. In the meantime, however, that relatively sober respect for her accomplishments, virtues and determination seems to have given way to an almost overwhelming enthusiasm. »I really admire Angela Merkel«, we heard from a Brazilian interviewee. »She has sacrificed her whole life to politics out of a sense of personal conviction that it's the right thing to do.«

While her political style is still perceived outside Germany as unassuming, straightforward and constructive, our interviewees frequently expressed their admiration in more effusive tones. »What impresses me above all is her sober manner. She doesn't need a lot of fuss or to be surrounded by cronies (...). She is unpretentious«, enthused one interviewee from Mexico, adding that her actions were guided by an »obvious sense of humility«.

To paraphrase the descriptions we were given of the Chancellor as a »strong figure«, »strong woman« or »strong character« would be to put it mildly. Many see her as »powerful«, »assertive« and »brave«, as a politician who follows her own personal compass when making decisions and does not allow herself to be derailed by resistance in her own country or in other EU states. In the view of a Canadian interviewee, »She

shows backbone and takes a stand when she sees things are simply wrong.«

For many, she is an outstanding role model. From an Egyptian, we heard that she is »already an important historical figure«. An interviewee from Ghana described her as »a symbol for the world«, adding with a tangible sense of admiration: »Merkel is my hero«. In China, she is even regarded by some as a »female icon«, while in Mexico she was described as a »progressive visionary«. To be fair, there were dissenting voices among the participants in our survey, one of whom felt that »Merkel is the most boring TV show anywhere in the world«, but overall such views were occasional exceptions.

The slightly eerie level of esteem now enjoyed by Angela Merkel outside Germany is clearly related very closely to the international situation: conflicts seemingly all around us; global challenges ranging from climate change to the over-exploitation of natural resources and from hunger to youth unemployment; a sense that our established systems and organisations are being eroded; the threat posed by international terrorism; and the rise of populism. The world seems to have turned upside down – and for many Angela Merkel represents a beacon of light amid an otherwise fraught landscape.

For one Saudi Arabian observer, »She is the only sensible world leader left.« Another, >

› from Rwanda, drew a contrast between Merkel, a »real democrat«, and many other politicians. A contributor to our survey from Afghanistan felt that she stands for a »constructive role in global politics«, while an interviewee from China reflected that the world needs »good leadership« of the sort ascribed to the German Chancellor. Above all, it seems that she is valued as a counterweight to Donald Trump, whom many perceive as an erratic figure, and as a champion of the European idea, notwithstanding all the potential splits currently affecting the Union. »Angela Merkel has a key leadership responsibility within the EU and at global level«, noted a participant from Mexico, adding that, »Right now, she is the only one with the clout to take on Donald Trump«.

Angela Merkel's aura has grown even bigger over recent years, as have people's expectations of her. The list of roles ascribed to her is a long one, and those voices – with a greater or lesser note of urgency – emanate from all over the world, including China, India and the USA. The German Chancellor is widely expected to apply her considered approach

to the task of sorting things out, whether as a counterpart to Trump, as a locomotive within Europe or as a crisis manager with a global remit. »There is no need for lengthy discussion«, in the view of one interviewee from Mexico. »Angela Merkel occupies an undisputed role as a global leader and proponent of liberal values«. One of the key factors that has clearly shaped perceptions of the Chancellor outside Germany is her refugee policy, which many regard as humane, exemplary and far-sighted. In this respect, according to a contributor from the USA, she has shown »precisely the kind of leadership qualities that we desperately need today«.

All in all, Merkel is evidently perceived in other countries as a figure who combines the abilities to lead and to unify, and on this basis she is admired and respected. Time and again, our interviewees linked their impressions to exhortations such as, »Be strong and stay strong,« or, »Don't lose heart. Stick to your principles.« The outside view of Angela Merkel can neatly be summed up as one of great respect coupled with high expectations. ■

changed over the last three years«, remarked one interviewee from Poland. »If anything, they have grown. Within Europe, hopes now lie with Germany. The British are out of the picture, and the French are still finding their way. Who else is going to stand up to Trump?« In similar vein, we heard from a Chinese interviewee that »Germany ought to be more engaged at international level. Global governance is too

heavily dominated by the USA. I hope to see a strong Europe – it's important for the world.«

»Germany should continue to push openly and actively for free trade, but also press for greater progress on humanitarian issues such as global migration«, stated one of our interviewees from the USA. It is a view shared by many of our survey participants, especially those from

»I would like Germany to continue to stand up for human rights on the international stage and advocate free trade on fair terms; to defend democratic values and a free world.«

Mexico

developing countries and emerging economies, who expressed the hope that Germany can make an important contribution in discussions on international trade policy and help to moderate the disadvantages experienced by those countries. In Brazil, for example, a female interviewee complained that raw coffee beans are bought in Brazil very cheaply and all the value is then added through processing and marketing outside the country: »Brazil doesn't really benefit from the high price charged for the finished product«.

Germany is being asked to adopt a clearly altruistic role that involves not only standing up for free trade but also supporting value chains in poorer countries. Many of our interviewees wanted Germany to help focus greater attention on those countries with currently very little or no presence on the international stage. »Germany should be our voice, so that we know someone

is out there for us«, urged a participant from Rwanda. An interviewee from Viet Nam hoped that Germany would again take up a seat on the UN Security Council: »Perhaps even a permanent seat. That would be good for the world«.

Between soft and hard leadership

We are currently experiencing a shift in globally established patterns of responsibility and power. It is felt that Germany must respond to these new demands. While there is general appreciation for the way in which Germany has exercised its soft power, many interviewees argued that in today's world, this approach might also need to be combined with »hard military power«.

policy areas. By contrast, the leadership role of the USA under Trump is primarily based on military power. Global power structures are in a state of flux. While some countries look to international cooperation and agreements as the best way to meet global challenges, others choose to highlight their military strength – and expect their counterparts to do the same.

In the view of a US observer, Germany's current strategy is one of »networked security«, which involves coordinating and applying a range of instruments – military, policing, diplomatic, development policy and humanitarian – from different



Accordingly, the US government has urged Germany to increase its defence budget to two per cent of GDP.

This debate was also addressed by our survey participants. A Russian interviewee expressed the view that Germany's actions as a NATO member were »entirely dependent on the protective umbrella offered by the Americans. America calls the shots.« An interviewee from India observed:

»When it comes to security issues, we look to France, not Germany.« Some felt it likely that expectations of German defence policy would grow in the coming years. It was frequently suggested that Germany's soft-

power approach might prove insufficient in the future without parallel military strength and the willingness to use it if need arises. »I can detect the first signs of a tougher policy towards Erdogan and Putin«, noted an Israeli.

»Germany needs to establish a sense of its own strength. At present, it still underestimates its powerful position. Soft power does not work without hard power to back it up. The country's hard power needs building up – and that includes developing a really strong army.« In similar vein, a Polish contributor to our survey remarked that Germany should act as a over- sovereign partner within the EU in terms of its military capacity, concluding that »a stronger German

army within NATO is vital for a stronger Germany in Europe.«

This is clear encouragement, but it was expressed in such explicit terms only by a minority of interviewees. As in our first and second studies,

most appreciated Germany's tendency to adopt a more restrained approach to military interventions. The widespread view was that military force should be employed only once all attempts to find a diplomatic solution had been

Casting off the past

The general perception in other countries is that the reasons for Germany's restrained manner can still be found in its history. If Germany were to assume a leadership role, then it would be a reluctant move. According to our survey participants, however, it is time for Germany to emerge from the shadow of the past, without, of course, forgetting its history.

»In areas where the US goes too far, Germany doesn't go far enough. Getting involved in other countries, for example. The results would perhaps be different, thought out more logically and with greater foresight.«

Ghana

32 exhausted. »Germany should not allow itself to be pushed into hasty responses,« advised an interviewee from Ghana.

One US interviewee summed up the current situation as follows: »While the USA remains increasingly focused on itself, the world faces the challenge of redistributing power and responsibility at global level. Within NATO, it's about finding a new balance of power and burden-sharing. With regard to trade policy, it's about negotiating fair deals. Germany plays a crucial role in this situation and will have a big say when it comes to reshaping the way we work together to find solutions.«

»Germany should be more conscious of its greater international significance and adopt a more visible profile,« noted one interviewee from Saudi Arabia, a call echoed by participants from many other countries. Its unwillingness

to take on more responsibility in the world is mainly attributed to the legacy and memory of two world wars. It should be noted, however, that this view was not shared by all our interviewees. In the opinion of one observer from Israel, »Germany must not assume a global leadership role. Not enough time has passed since the end of the Third Reich.« Other reasons were also cited for avoiding such a

leadership position. These included maintaining a balance of power to promote constructive and collaborative relations within the European Union.

Some argued that Germany needs to

face up to current reality regardless of its past. In the words of a Russian interviewee: »The Germans recoil from the whole concept of leading. Although they perform this role, they don't like talking about it. They regard it instead as something they are being forced to do.« The view that Germany is suitably equipped but

Sensitive leadership

While Germany is associated with a leadership role, it is also accused of sometimes treating other countries and cultures without the required sensitivity. Accordingly, the message from our interviewees is to adopt a style of leadership that involves more listening and greater reflection.

Praise and exhortation combined

Germany's image among other countries has long been shaped by its uniquely challenging past. Right at the centre of Europe, it has been widely associated with the Nazi dictatorship, the Holocaust and the Second World War, and perhaps, too, with the Berlin Wall. To this day, the country's past looms large in the way it is perceived from outside. Slowly, however, that perspective seems to be changing. The focus is no longer on »Germans as the symbol of evil«, as one interviewee from Canada put it, or on the »ugly German« in the words of another from India, but instead on a country that has striven to come to terms with its past and continues to do so.

Germany has attracted praise and even admiration from many parts of the world for pursuing this approach. »I am impressed by the way Germans deal with the challenge of remembering the brutal elements of their past at institutional level – in museums and through the education system. This approach makes sure that the past remains alive and present. I think that is Germany's most important message«, said an interviewee from Mexico. The country's strenuous efforts to remember the past are mostly seen as positive and, furthermore, as a guarantee of stability and progress – paving the way for its economic and social development since the Second World War. Another participant from Brazil spoke of Germany's remarkable achievement in »shaking off its terrible

history, starting all over again and producing good out of evil«.

However, Germany's past also influences its foreign policy – one that is viewed with mixed feelings. On the one hand, there is recognition of Germany's desire for peace and its efforts to integrate itself into international organisations and contexts. A US interviewee quoted the great historian Fritz Stern (»Never again, never alone«) to describe the key elements of German foreign policy. Many others regretted what they continue to see as Germany's excessive reluctance to lead on global political matters. »At some point Germany will have to step out of the shadow of its past«, observed one interviewee from Iran, who was clearly not alone in that view.

All the more so given that Germany does not have a strong colonial background and is therefore perceived today not as a former imperial power but as a potential mediator. Reflections of this kind were particularly common among survey participants from the Middle East and Africa. »Germany was never an imperial power in the Arab world in the way that France was, for example. For that reason, Germans are well regarded here and always welcome«, explained a Jordanian. For others, however, this has left Germany with a more parochial outlook, with the result that it now lacks the interest or willingness to play a more prominent role on the world stage. >

➤ Even so, the reflections offered on Germany's past can be interpreted as a call to strike the right balance – assuming greater leadership, yes, but as a benevolent and harmonising force, avoiding any relapse into old ways. Opinions are divided on whether the latter course is conceivable after 70 years of peaceful coexistence and commitment to multilateralism. In the words of a Russian interviewee, Germany today »embodies peace like no other country in the world. It acts like a dove of peace«. Yet there are voices, too, calling for vigilance to avoid any recurrence of the past. While the majority felt that Germany had learned the lessons from its own history, there remain occasional question marks, irritations and even

fears. »Germany is very careful to make sure that its brutal past is not repeated. Hopefully there are no traces of totalitarian ideology lurking in the background«, commented an interviewee from Mexico.

In conclusion, the mission entrusted to Germany is to remain mindful of its past, not hiding from either the positive aspects of its history, such as the absence of any significant colonial presence, or the negative side, such as the Second World War, but equally not allowing itself to be shackled by its past so that it can assume a more resolute position and play a more formative role on the international stage. ■

unwilling to assume a greater international role was also expressed in Egypt. An alternative perspective from Ukraine was that Germany's attitude has already changed, »not necessarily because it is looking for a new role but because that new role is imposing itself on the country. Germany is merely facing up to that.«

Others felt they could already detect signs of greater self-confidence in Germany. A US interviewee said he had noticed an increasingly »can-do« attitude among Germans – younger members of the Bundestag, for example, during their visits to Washington. Overall, however, it was felt that Germany's past was the principal reason and explanation for the country's prevailing and, in the view of most observers, excessively ingrained sense of restraint. A Rwandan interviewee argued that Germany

should take a more proactive role precisely because of its past:

»I would like to see Germany play a major role in resolving global crises and conflicts, and especially in efforts to prevent war and conflicts. Germany is well placed to help given its own experience of war and reconstruction.«

The unmistakable calls for Germany to assume greater leadership responsibility are accompanied by equally clear ideas of the form that leadership should take – empathetic rather than aggressive, listening rather than imposing. The words of a Chinese interviewee could almost be an oriental aphorism: »Germany should reflect more on its leadership style. Sometimes you need strong leadership and sometimes rather weaker leadership. Sometimes it can actually be helpful to practise

»German directness is a good thing, but it can sometimes be hurtful, too. It wouldn't do any harm to be a little more sensitive towards others.«

Rwanda

weak leadership.« A more critical view was expressed in Ukraine: »The Germans should be more open to the spirit of other countries.« Understanding other cultures was felt to be crucial when working with those countries. »Policy-makers in particular need to show greater sensitivity in this regard«, remarked an observer from Saudi Arabia. Similar views were heard in Israel. There is a sense that Germany needs to think more carefully about how its actions might be interpreted and that it must be sensitive in its dealings with others, especially its weaker partners, »unlike the USA in the Middle East.«

While leading by example is always a welcome trait, it was observed nevertheless that Germany should avoid offering allegedly universal solutions to others based on its own exemplary conduct. From developing countries and emerging economies above all, there were calls for a greater sense of partnership with regard to international cooperation. In Nigeria, for example: »We do not want to be treated as a patient, as a child or as a problem. Germany can learn from the mistakes made by other countries. The dialogue between us should reflect the equal status of each partner.

Germany is already on the right path.« Our interviewees repeatedly drew attention to the impressive network and body of institutions through which Germany articulates its global interests – without recourse to military resources. In the view of a US participant, however, »It needs to promote those interests more consistently as a form of networked security and put them to effective use at global level – constantly working to persuade its partners and take them with it.«

It was very striking how often our interviewees associated Germany with the values of the free Western world while expressing the hope that it would uphold and defend those values. This message was delivered in particularly succinct form by a Brazilian participant: »Germany must take a leading role in championing an open and transparent society. If Germany does not perform this role, the world is lost.« Dozens of participants made the same observation that certain values embedded in daily life in Germany are seen in other countries as an ideal to be aspired to. A Ghanaian interviewee found it exemplary that everyone in Germany is free to voice their opinions regardless of their financial situation or political connections.

»Africans need to take on more responsibility, but they also need international support, and especially support from Germany.«

Mali

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A Canadian wanted to highlight Germany's potential with regard to international cooperation on the environment, the climate and free trade. In Serbia, there was hope that Germany would offer its support to help the country strengthen its democratic institutions.

Where does this tremendous confidence in Germany come from? Or the view that Germany should be the almost natural champion of the free world? Part of the explanation lies in today's confusing global situation and the admiration enjoyed by Angela Merkel for her role in Germany's recent history. Another factor is the way

Germany has faced up to its own past. According to an interviewee from Canada, this has made it possible to create »good out of bad«, while another from Mexico wished to emphasise Germany's tradition of humanism. A Vietnamese participant put it this way: »Although Germany and the USA are very similar with regard to

certain values, they are nevertheless completely different. Thanks to a combination of Kant's categorical imperative and the country's humanist tradition, Germany is able to influence other countries in a positive way.«

Also mentioned in this context were Germany's economic strength, which on its own is regarded as imposing greater responsibility, and

a general sense of admiration for the country's welfare state: »Germany has an outstanding combination of state and market. Its social market economic model is not as extremely liberalised as in the USA or the

UK. There is greater justice, a balance between poor and rich, between urban and rural areas, between wealthy and less prosperous regions.« The list of statements is not exhaustive, but the tendency points clearly in one direction – that of wanting to see Germany occupy a more prominent leadership role. The issue was

Leadership based on values

Democracy, diplomacy, peace, humanism, human rights, free trade, the social market economy, the environment, the climate and sustainability are the keywords to be found in the list of tasks entrusted to Germany. It is called on to actively defend the values of a free, open and fair world.

Greater involvement called for, but also sensitivity

Germany should be intervening more around the world. Statements by our interviewees indicate that this generalised view is particularly relevant to both North Africa and sub-Saharan Africa, and from two different perspectives. First, they expressed the hope that Germany would exert greater international influence. Second, many interviewees said that Germany should be intervening even more decisively in both North and sub-Saharan Africa and using its »soft power« here. For example, an interviewee in Rwanda said, »We think of Germany as a dependable partner and we know that we can rely on agreements and promises. The majority of Rwandans would therefore welcome a bigger role for Germany in politics.« These are just a few of the many voices expressing similar wishes.

There are clearly various reasons why Germany could play a larger role in Africa. Across the continent, Germany is considered to be reliable, credible and – unlike former colonial powers – largely free of direct interests. In the view of a male interviewee from Mali, »When Germany offers support, nobody believes it is doing so out of self-interest. Germany always creates an impression of honesty. Germany is a very credible and sincere partner.«

Germany is also given credit for working in a targeted and solution-oriented way, as we heard for example in Nigeria. Germany's reputation in Africa seems to be so positive in all respects that African countries would like greater cooperation at many levels. This is particularly true of German investment in Africa (the continent would like to see more investment and expects it to generate vital impetus) and of the expansion of vocational training. One Rwandan interviewee told us, »My suggestion would be for Germany to take the lead in transferring its dual vocational training system to Africa – that is the key to creating jobs.« Ethiopian interviewees said much the same. Across the board, in fact, interviewees felt that Germany's model of vocational training could be vital to Africa's development.

It was not all positive, however: some interviewees argued that Germany did not really understand Africa and its diverse development dynamics, seeing it as a monolithic bloc rather than as a continent of diversity. One interviewee from Ethiopia summed up: »Germany's (and Europe's) perception of Africa is underdeveloped.«

Interviewees also argued that Germany should not think it can simply transfer its ideas and systems to Africa wholesale but needs to listen more, engage more with >

› its partners and show greater respect for their characteristics and values. One male interviewee in Nigeria told us, »We appreciate the advice Germany gives us, but it has to be based on our needs.« A response along similar lines from Ethiopia was that »Germany needs to realise that it does not have a monopoly on truth.« A number of interviewees pointed to China, arguing that it did not merely sit on its high horse, »talking only about human rights.« On the other hand, interviewees also argued that, by contrast with other actors, Germany should be upholding human rights and confronting

China about its approach. There was therefore a mixed picture in this area.

To sum up, Germany clearly enjoys great respect in Africa, and interviewees felt that it should expand its activities in the region. However, this desire for greater engagement was tempered by the view that Germany should not just arrive and dispense patent solutions but needs to engage more closely with local needs and conditions. In short, it was »yes« to greater interest, a greater obligation and a greater responsibility for Africa – but not at the cost of greater forcefulness, pressure and dogmatism. ■

summed up as follows by an interviewee from Rwanda: »In contrast with other countries, I no longer have the impression that Germany wants to establish itself as a superpower with a desire to control others. In fact, I would be very happy with a strong Germany that uses its influence to promote freedom and mutual understanding.«

Apart from calls for Germany to show leadership with respect to values,

our interviewees were looking in particular for leadership based on expertise, as a Nigerian interviewee explained: »I see Germany as one of the world's top powers – not because it demonstrates its strength through wars but with

regard to transfers of knowledge and technology from which all humankind stands to benefit.« So is a dominant Germany viewed as a problem? This question was addressed among others by a Tunisian: »In my opinion, dominance based

on expertise is not a major issue.« A similar view was expressed by a female interviewee in Viet Nam: »For me, Germany is a model country in terms of sustainability, welfare standards

and Industry 4.0, one that can encourage others to follow its lead. It follows that to a certain extent Germany is responsible for the development of other nations and of the world as a whole.« This reflection was echoed in almost

Leadership based on expertise

Germany is perceived as a country with a strong economic and technological base and with robust political and social institutions. The world regards it as a leader in many areas and sees this as the basis for greater cooperation.

identical form by a Rwandan observer: »My hope is that Germany will act as a model of how we can make things better in the world, whether in the field of health, education, the environment or political systems.

Germany could forge a good reputation for itself in this area.«

We came across numerous calls for Germany to transfer knowledge to other countries on the basis of its assumed strengths in areas ranging from education, the climate and the environment through to human rights, transparency, the fight against corruption, accountability and democracy. While some noted that the Scandinavian countries did these even better, it was felt that they lacked Germany's economic and political influence.

Most interviewees emphasised that Germany has no alternative to Europe. They felt unanimously that a European voice on major geopolitical issues must be heard alongside that of Russia, China and the United States and that the EU should play a key role in the international power structure. We also heard from a Jordanian, however, who argued that Germany has recently lost some of its importance – within the EU – due to a certain »European introversion«. A Canadian interviewee observed that Germany has acted hesitantly and indecisively, for example during the financial crisis, almost paralysed by domestic policy considerations, thus generating considerable international frustration.

Proportionate and collaborative leadership

Although Germany is urged to assume a leadership role, the caveat is that it should exercise such a role only in the context of the European Union, never on its own. It should not be a global power in isolation. Europe's future and its influence in the world also depend on how well Germany achieves this balancing act.

Others reflected that the European Union was now showing obvious shortcomings and signs of fatigue, with outdated administrative systems and a loss of focus on its broader visions. They

felt that these shortcomings can be rectified only through the involvement of Germany: »Germany plays a key role in preserving the EU, and the whole world has an interest in that happening«,

explained an Iranian observer. One view from Poland was that »Europe is too confusing for many citizens. It has become too difficult to explain what it does. It would be more effective if Europe spoke with a single voice – and if there is any country in a position to be that voice it is Germany.« In India we heard a stark warning that »Germany must do all it can to preserve the European project, because if that dies, Europe will also die.« There is a clear view from outside Germany that it needs to play a strong role, not least on account of its economic power within Europe. Most interviewees felt it should perform this role more effectively.

Against this background, an Indian contributor proposed the following solution: »Germany should not turn its back on the world. It should follow a twin-track approach, leading from the front as part of Europe but also pursuing its own course.« Another reference to the need for Germany to exhibit moderation in its leadership role came from Ukraine: »If Europe is to grow even closer together, Germany has to maintain its systematic approach on political

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and economic matters without wanting to impose its system on everyone else. I wouldn't want to live in a ›German Europe‹.«

The EU is uniformly held to be crucial to the world's future development and Germany's involvement equally crucial to the future of the EU. As one Polish interviewee expressed it: »We need Germany in the EU. I agree with the former Polish foreign minister – I'm more worried about what Germany might not do rather than about what it might do.«

While our interviewees place a great deal of hope in Germany's ability to shape international developments, they remain confused about what Germany itself wishes

to achieve. Where is the country heading? This question arises frequently in the context of Germany's future leadership role. Many speculate that Germany does indeed have clear ideas in this regard but is not communicating them

openly. Others doubt whether Berlin really knows which path it intends to follow. This view was expressed, for example, in Ethiopia: »I have the feeling that Germany sometimes does something big, and then quickly backs down again. It has no clear path.« A similar assessment was offered by a Canadian interviewee: »Germany's actions during the refugee crisis showed the lack of a coherent strategy.

Urgent need for a vision

Foreign observers remain unclear about the role that Germany sees itself as playing in the world. The basis on which key international policy decisions are made in Berlin and the longer-term thinking behind them are not really apparent outside the country. The responses to this perceived absence of a strategic vision range from surprise to annoyance and even mistrust.

It was close the borders, open the borders and then close them again.« Although Germany is perceived as generally cautious in its actions, many interviewees felt that it is nevertheless prepared to make rapid and far-reaching decisions. Apart

from the refugee crisis, one such case, cited frequently by participants, is that of Germany's energy transition. Examples of this kind suggest the emergence of a more varied set of perceptions of Germany as a whole than it

»It's time for Germany to champion the fight for a better world, to stand up for outsiders, fairness and sustainability so that our children and grandchildren can have a better life than we do.«

India

was the case as recently as the last study. They also pose a question: Is Germany increasingly showing signs of irrational behaviour alongside the usual systematic, reasoned approach with which outsiders are more familiar?

If only to counter this impression, Germany was frequently urged to explain its actions and interests more clearly. As a female interviewee from Brazil put it, »If you are dealing with China, you can see exactly what economic interests lie behind its international activities. With you Germans, you can never quite tell. That creates a fundamental mistrust.« By contrast, a UK observer concluded that this might well be down to the basic lack of a strategy: »The Germans always need a strategy, a plan, but there is no strategy for the future. It needs to lay the foundations now for its future. At the moment, Germany is still in a strong competitive position on international markets, but it can't afford to rest on its laurels and miss out on new developments.« One view from Tunisia that reflects the seemingly heartfelt conviction of many was that Germany deserves praise for its general focus on diplomacy, trade and international cooperation, an approach judged to be highly sustainable. In India, however,

we heard the following contrasting advice:

»Germany needs to develop a vision of the role it wants to play in the world. It can no longer remain alone within its own borders.«

Many interviewees also doubted whether enough was being done in Berlin to improve Germany's strategic position. One US participant, for example, had this view: »Germany should take a more strategic and forward-looking approach when planning future policy. Moscow is much more proactive in this area. At the moment, no one in the German Chancellery is looking beyond the next crisis. They should be exploring long-term trends, but to do that they need to do some scenario-building.«

For outside observers of Germany, the call for it to show greater willingness to lead is inextricably linked to a sense that it must also show a determination to do so on the basis of clear goals, visions and strategies.

Displacement and
migration

*Germany seen with
new eyes*

The topic that most clearly defines this study compared with its predecessors is that of immigration. On the one hand, there is admiration for Germany's culture of welcoming new arrivals, a response that is regarded as exceptional and humane. At the same time, there are doubts about Germany's motives for adopting this policy. What was it exactly that led Germany to take this course of action? Were the domestic risks really given adequate consideration? How can integration work? Was sufficient attention paid to critical voices from Germany's neighbours? In answer to these and other questions, our interviewees pointed to the scale and breadth of the challenges involved and emphasised the importance of international solutions and solidarity when dealing with the issues of displacement and migration.

Germany acquires a more humane image

Migration can transform a country's image. Germany's treatment of refugees has brought it a great deal of attention and respect from all over the world. Through its migration policy, the country has acquired a more humane image.

»What Germany accomplished during the refugee crisis was fantastic, and worthy of respect. Germany should place much greater emphasis on what it achieved during the crisis. Germans

should be proud of what they did.« Such was the view of an interviewee in Saudi Arabia. It is perhaps no surprise that Germany's openness towards refugees should meet with a positive response in the Arab world, where the Syrian conflict above all has led to displacement on a massive scale. Yet we heard similar reflections in many other places, too. A Mexican interviewee quoted from Germany's Basic Law: »Human dignity shall be inviolable.« That is what it says right at the beginning of the German constitution. Germany's refugee policy shows that these are not merely empty words and that the state really does protect the weak.«

A remarkable number of participants offered similar observations. In many countries, Germany seems to have emerged from the refugee crisis with an even more

positive image. Wherever our interviews took us – Afghanistan, Brazil, Canada, China, Egypt, Ethiopia, Ghana, India, Iran, Jordan, Mexico, Nigeria, Rwanda, Saudi Arabia, Tunisia, the

USA and Viet Nam – we heard the same message that Germany had acquired a more humane face through its refugee policy and that Chancellor Merkel had shown courage in pushing such a policy through given that it was not met with uniform approval across German society.

A Canadian interviewee observed that »Angela Merkel showed great empathy right from the start during the refugee crisis in Europe. The Germans are now seen as the good guys around the world, and you have earned the right to say so.« An Iranian felt that »What Germany did is a model for others to follow.« Asked whether Germany had changed in this respect since 2015, a US participant replied, »Yes, I see a change compared with the last study. Germany now has a more humane image. It was totally unprepared for the Ebola crisis three years ago, and it missed the opportunity to play an active role in the response. They turned that around completely in the way they dealt with the refugee crisis, although maybe Germany is now being too proactive, too generous.« This view accords with the general feeling among our interviewees, albeit expressed with different nuances.

»My assumption is that Germany's recent decision to admit refugees was partly based on compassion but that demographic reasons were also a significant factor«, noted a Canadian interviewee, neatly summing up the two most frequently cited motives. A Jordanian was more explicit: »Germany seems to want to solve the problem of its low birth rate by taking in migrants.« A striking number of interviewees expressed puzzlement about Germany's »real« motives. Amid a variety of theories, demographic change emerged as a widely held assumption.

In Nigeria, the opening of Germany's border came as a surprise. While accepting that Germany has shown a humanitarian side on previous occasions, our interviewees felt this was the first time it had done so quite so openly. Germany's migration policy was described in Mali as exemplary: »They act on the basis of clear convictions, despite growing extremism and xenophobia.« A Mexican interviewee offered the more nuanced observation that migration is a »painful« subject for Germany because the country is genuinely driven by good intentions and a concern for human rights but cannot avoid the downsides that accompany

»Germany's decision to take in so many refugees showed a lot of compassion and improved its standing in the world.«

Saudi Arabia

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the benefits. »Germans tend to swing between extremes«, he added. »On the matter of immigration, the pendulum is currently heading towards opening the border completely.«

All in all, the predominant conclusion of our interviewees was that Germany's admission of refugees was ultimately motivated by humanitarian considerations. »What Germany did is a model for others to follow«, asserted an Iranian observer. Another contributor from Rwanda was not surprised by the »We can do this!« slogan: »I was in Germany during reunification. The Germans are not afraid of change and are also willing to share.« In one way or another, Germany's decision to admit the refugees in the face of perceived domestic resistance made a big impression on those we spoke to in other countries, especially given their prevailing sense that the policy was supported by most Germans.

What are Germany's motives?

Many interviewees wondered about Germany's motives for admitting refugees. While some felt that humanitarian reasons were the main factor, others suspected that Germany may have been acting out of national self-interest. Overall, however, they felt unable to reach a definitive conclusion based on Germany's behaviour. It seems apparent that many are in need of a clearer explanation in this case too.

Notwithstanding all the words of approval, our interviewees also made clear that they saw the arrival of hundreds of thousands of people as a major challenge. Many contributors to the survey urged

Germany to view this change as a task to be dealt with and as an opportunity rather than as a burden. A Brazilian interviewee summed up a frequently voiced opinion: »Germany should regard the integration of migrants as an opportunity. It could add a more attractive human element to complement the image of Germans as great planners.« A Chinese observer predicted that »Mrs Merkel's decision to open the borders to refugees was a very brave one and will benefit Germany in the long term.«

A US interviewee argued that this could even be seen as an opportunity for Germany to emerge as a »global citizen« with an authority that goes beyond purely economic matters. Also in the

»The idea of a Europe as a fortress doesn't work. It is important to have a broad perspective rather than just looking inwards.«

India

USA, we heard the view that inward migration to Germany is simply a necessity: »You have already successfully integrated several waves of migrants – Turks, later Southern Europeans and then the refugees from the Balkans. You need to see that more clearly in a demographic context and in terms of your future labour market. Germany needs migration.« In the UK, too, it was felt that Germany stands to reap long-term benefits from migration given its shrinking population. The most confident assessment of the future benefits to Germany was articulated by an observer from Viet Nam, who forecast that Germany would begin to see its refugee policy bear fruit in just five to ten years, arguing that »refugees who have been welcomed and properly treated will help to build strong links between Germany and the Arab world, parts of which are very wealthy.« In similar vein, he noted that »Someone has to rebuild Syria. A million migrants – the way I see it, if you

go about it the right way, that makes a million potential new partners in your network to support your future business.«

Time and again, we heard that Germany needs migration but that it should perhaps be a little more systematic in its approach and distinguish between refugees and migrants. To quote an Iranian participant we interviewed: »I think it is remarkable what Germany has done for those

refugees. It took in people who were in need. By contrast, skilled migrants find it hard to get in. Germany does not have a coherent migration strategy.« On a similar note, an Indian man observed that

»In order to tackle its declining population Germany must ask itself who should be allowed to become German and who can provide the impetus the society needs in the future.« An Egyptian participant in our survey urged Germany to focus more on hard-working and well-motivated migrants. In Jordan, too, there

The opportunities created by migration

It was argued that Germany should regard migration as an opportunity. The economy could benefit from new workers and fresh ideas. For this to happen, however, migration must be properly regulated. Viewed from the outside, Germany appears to be lacking a strategy.



»A million migrants – the way I see it, if you go about it the right way, that makes a million potential new partners in your network to support your future business.«

Viet Nam

was a perception that Germany needed to improve: »Many highly qualified people who submit formal applications are refused entry. Yet large numbers of unqualified people have been admitted as part of the wave of refugees. Germany could take its pick.« A Ukrainian interviewee wondered why Germany does not give priority to its European neighbours when it comes to admitting qualified migrants.

A Canadian stressed that migrants are often among the most innovative members of society. This view was echoed by a Polish observer, citing the example of Silicon Valley in the USA where the slogan »Proudly made in America by immigrants« can be found on the products made by an app company. In this context, a different perspective was offered by a Chinese contributor, who saw clear differences: »Many smart people – those without a background of fear – head for Silicon Valley. The pattern of migration in Germany is different, involving mainly guest workers and people with very simple jobs.« In this person's view, it makes a difference whether you are coming from a place of war and violence or looking to boost your earnings as a highly qualified IT specialist.

The perception that Germany's entry policy fails to discriminate led to a certain bewilderment among some interviewees: »In Canada, migrants have to undergo a comprehensive, multi-stage screening process before they can settle here. Preference is given to families and people who are being persecuted on account of their sexual orientation. As a deliberate policy, we don't really admit young males travelling alone into the country, unlike in Germany where most of the refugees were young men, and that has generated conflict«, said a Canadian. Although many of those we spoke to repeatedly cited President Trump, who described Germany's refugee policy as a grave strategic mistake, most felt that the benefits outweighed the disadvantages – on the proviso that Germany distinguishes between refugees and migrants and adopts a carefully targeted policy to manage the latter. The view expressed by a Tunisian summed up the general feeling: »Migration is good for Germany if those who come are skilled and willing to integrate. It is bad, however, if they are people with closed minds who do not want to adapt and refuse to learn German.«

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As well as the potential benefits, our interviewees repeatedly brought up the risks of Germany's refugee policy. First of all, there were reflections on the resistance demonstrated by some elements of German society. In Rwanda we heard that »There are parties in Germany, such as the CSU and the AfD, as well as some parts of the population, that don't like Merkel's stance on the refugee issue.« The challenges of integration were also raised: »If it goes wrong, it will create a totally divided society,« speculated a Canadian. For one Polish interviewee, »The decision to let in all those refugees in 2015 was taken too lightly. At the end of the day it was the volunteers who helped out, partly because the state failed.« Many participants in our survey expressed concern at how the country might change as a result of the influx. This brought up concepts such as ›culture‹ and ›identity‹. A Russian interviewee was afraid that »Migration will dilute German culture and its cultural values.

Is Germany underestimating the risks?

Whatever the opportunities, it was felt that the arrival of many people from other cultures and religions also entails serious risks. One of those is the question of security. Many interviewees wondered if life in Germany might become more dangerous as a result.

It will lead to far-reaching changes in the political system that will damage Germany.« A similar view was taken by an interviewee from Rwanda: »Germany cannot take in an infinite number of refugees – I think there are limits. It is important for a country to preserve its identity and culture.« Another observer from Poland, while admiring Merkel's refugee policy, was more critical about its implementation: »After the enthusiastic welcome, there was no

real debate about the problems of integrating people from such radically different backgrounds.«

It is clear from the statements we compiled that the decision to

admit refugees, especially those from a different cultural and religious background, is perceived as a risk. Nevertheless, our interviewees found it difficult to believe that the Germans are or were unaware of such risks and for this reason see other factors at play. A participant from Rwanda offered the following explanation: »You almost

»I fear that too much migration could lead to security problems in Germany.«

Iran

get the impression that Germans have had this whole idea of welcoming refugees imposed on them for political reasons, so that the country can appear tolerant and responsible, not least because of the Second World War.« Among those who suggested that Germany's motives were not entirely altruistic was a Serbian interviewee, although she viewed the situation from a different perspective: »I think Germany had no other choice. It would be much more expensive to keep Germany's borders tightly sealed.«

Another risk highlighted in our survey concerned internal security. »In Germany I feel safe and happy. It is a peaceful and beautiful country,« noted an interviewee from Afghanistan. This view was ultimately shared by most of our contributors, who pointed to what are seen as functioning border controls and to the presence and behaviour of the police force, and the fact that it enjoys public trust while nevertheless maintaining a low profile. This perception is changing, however, and it was clear that developments such as the sexual assaults in Cologne had not gone unnoticed. The situation is exacerbated by the potential threat of terrorist attacks, from which Germany has not been spared – witness the attack on

Berlin's Christmas market in December 2016: »I used to feel safer in Germany. Now women are being advised not to walk the streets unaccompanied at night,« reported a female interviewee from Israel.

From a Russian we heard the view that »Germany spends a lot of money on helping migrants. The price you pay for that is increasingly fragile internal security.« This opinion was shared by other participants from Iran and Canada. An Israeli interviewee wanted to draw attention to another aspect of the security issue, namely the concern felt – alongside all the admiration expressed for Germany's refugee policy – that most of the recent refugees coming to Germany were Arabs: »I'm just saying,« he offered, explaining that he felt more threatened living next to Arab neighbours, »we would have preferred Latin Americans.«

The question of cultural identity and future diversity in a largely homogeneous society and the potential impact on Germany's political system and on internal security were among the most important risks associated by our foreign observers with the arrival of refugees and migrants.

»Germany is guilty of selective racism based on people's culture,« asserted one interviewee from Mexico. »The reaction ranges from outright rejection to welcoming you with open arms. They like Mexicans more than Turks.« While this observation was mostly couched in milder terms, there was nevertheless an impression among the participants in our survey that migrants in Germany are measured by two different yardsticks, one that leads to rejection and another to a warm welcome.

Encounters with racism were offered in particular by our African interviewees: »I felt I was being discriminated against on a day-to-day basis when I was doing temporary work on building sites with other students.

As the only black person in a group of white people, I was always given the hardest jobs to do. I thought that was really unfair,« recounted a participant from Rwanda. An interviewee, also from Rwanda, offered us the following anecdote: »I experienced racism. As a black woman I was asked in the street: »How much do you charge?«, even though I was a student and smartly dressed. They obviously associated black women with prostitution.«

While negative examples such as these were in a minority, they could still point to a real problem – namely that while the Germans have made strenuous efforts to confront antisemitism and have learned from this, the lessons seem not to apply to the same extent in their general attitude to »otherness«. »I would feel more at ease in Germany if they simply accepted

others the way they are,« explained a Jordanian interviewee, arguing that the country's failure to extend marriage to same-sex couples until 2017 forms part of a wider picture and that Germans should learn to accept others and their differences without always wanting to impose their ways on them.

For an interviewee from Rwanda, »the contrasting responses of Germans to migration – racism on the one hand and a culture of welcome on the other« are a result

of »different levels of education and social differences«. Whatever the case, various interviewees felt there is a risk from the re-emergence of radical far-right political forces in Germany and their

growing influence within society. In part this anxiety is rooted in the country's particular history: »For Israelis, the ugly face of national socialism lurks behind the scenes in everyday situations. All it takes to evoke those memories is a bunch of Germans getting drunk together and playing aggressive music.«

Others see this development with greater equanimity and regard Germany as being very stable. In the view of a Polish observer, it is unlikely that a party such as the AfD will form part of any government: »Germany has learned from its past. Things that are possible in Poland are not in Germany. I see Germany as a mature society.« While most of our interviewees were similarly optimistic that Germany's political system and its institutions can be relied on to effectively prevent a recurrence

Selective xenophobia

According to our interviewees, Germany shows two faces to people from other countries – on the one hand open and welcoming and on the other racist. German society is seen as divided, discriminating on the basis of origin rather than treating all outsiders equally.

»When I was a student in Germany I thought that it ought to put an end to the process of coming to terms with its past. Now I think that it's an important means of protecting itself against populism, so in fact it is a continuous investment in the future.«

Serbia

of past iniquities, we nevertheless heard some disquieting assessments, for example in Jordan: »I am afraid there are still signs in Germany that the hate some people feel towards others who are different could get out of control.

There is still a lot to do in Germany to eradicate such attitudes.«

The growing strength of the right is viewed with concern by foreign observers, not just in Germany but also in other European countries and the USA. One of the dangers highlighted by participants in our survey was that of attempting to deal with the problem without properly engaging the public. »On the surface, everything looks very positive in Germany at the moment,« observed a Canadian. »I often wonder what is going on below the surface. Look at all the simmering feelings that came to light in no time at all in the USA and in Britain.« A Brazilian participant

invited the Germans to »address the problem by sometimes taking a closer look inside the country rather than outside, by which I mean giving more thought to ordinary people's fears and concerns and responding accordingly.«

Growing populism

Germany is not the only country in Europe and around the world to face the challenge of growing populism. It is a phenomenon that reflects the current mood. In the view of our interviewees, the best way to counter it is through education and culture, although they also highlight the need for international solutions – and trust Germany to play a leading role in finding them.

But what lies behind this growing populism? Is it the changes brought about by displacement and immigration? This was an issue that greatly concerned our interviewees. The explanations offered focused not only on the

implications of maintaining an open border policy but also on economic and social factors that can equally be found in countries where there is no comparable tradition of welcoming newcomers. »I can see signs of renewed far-right activity in Germany,« said one Brazilian interviewee, »but I think those movements are much stronger in France and Holland.« A Polish explanation of the phenomenon was that »East

54 Germans and Poles are linked by a common sense of frustration, and that's why populists in both those regions have attracted such a big following.«

The responses offered by our interviewees suggested that various factors lie at the root of today's populist movements and that they are not merely a consequence of migration and the associated xenophobia. For a participant from India, it is the sense of economic exclusion felt by many that creates a breeding ground for populist ideologies (on the far right). The impact of globalisation and the sense of disadvantage felt by some groups in society feature prominently in the explanations offered in our survey. While noting that Germany cannot shield itself against either of these factors, those we spoke to argued that it can still try to fight the symptoms through targeted educational and cultural measures. Perhaps, too, a fresh European vision can play the role ascribed to it by a Serbian interviewee: »A mild dose of pro-European indoctrination acts like penicillin against far-right extremism. Young Europeans take the benefits of the EU for granted and do not realise what a long political journey it took to get there.«

If migration is one of the causes of growing populism, greater international efforts are needed to manage it more effectively. For many of the participants in our survey, it is self-evident that such huge challenges can be overcome only by showing greater solidarity (at European level) and working together to find solutions. »Germany cannot be expected to shoulder the burden of dealing with the refugee issue on its own. All European countries should admit refugees,« demanded one interviewee in Ghana. Similarly, in the UK: »With regard to migration, the countries of the North need to cooperate and find solutions together. That hasn't happened yet.«

A Chinese respondent drew attention to the Schengen Agreement, which necessitates a common policy and European solutions. Given its experience, Germany is regarded as the ideal country to assume a leading role on the issue of refugees as well. »Germany should lead a global initiative to integrate refugees,« mooted a Jordanian. »It has behaved very humanely towards refugees and in this regard has demonstrated that its values are honourable. The world will listen to Germany.« A Rwandan suggested that Germany could »organise

»It's difficult to integrate if you don't speak the language and look a bit different. People only start listening to you when you speak German.«

Rwanda

conferences to share experiences and identify common ground«.

»Learning German is a crucial part of the integration process,« declared an Indian participant, stressing the difficulties of being accepted in a country without a good knowledge of the language. »More should be done to encourage and help immigrants to learn German, although that doesn't necessarily mean everyone has to speak the same language.« Her view was shared by many other interviewees, including an interviewee from

Ethiopia: »Speaking German without an accent made it much easier for me to integrate. What was funny was that once I got to that stage they started talking to me about other black people as though I was just another German. For me, that showed how important it is to have a really good command of the language wherever you live.«

However, German is not an easy language to learn, and for this reason it is seen as a potential barrier to integration. In fact, some interviewees believed that Germany could benefit enormously if it were (more) open to the use of other languages, especially English. Speaking from personal experience, a Nigerian interviewee observed that »Germany is very

proud of its culture and language, but as a foreigner in Germany it is difficult to interact with others. Hardly anyone speaks a language other than German. Given that we are living in an age of globalisation, my advice to

Germany would be to ensure that its people can speak English as well as German.«

Others reflected that foreigners generally find it difficult to settle in because of the language. One interviewee from Rwanda confessed: »In Germany I feel as though I am blind. I don't even understand the road signs. Everything you

Improving language skills on both sides

Acquiring a good knowledge of German is regarded as key to gaining acceptance.

For many, however, the language can be a barrier to integration. Germany must therefore do more to encourage language-learning, although it also needs to adopt a more international outlook itself.

see is in German only.« Yet perhaps the key to integration lies elsewhere, as we heard from a Tunisian: »I made some friends at work. They helped me with translations I needed for the authorities and always invited me to join in with them.« This, she explained, was the biggest help in learning the language and integrating into German society.

The massive influx of refugees and migrants and the EU principle of freedom of movement are viewed as challenges for Germany. Unlike former colonial powers such as Britain, the Netherlands, France and Belgium, it has not previously had to deal with quite such a degree of cultural diversity. For some interviewees, this explains what they see as a prevailing cultural conservatism that makes integration more difficult. For one Indian observer, »The notion that there can only be one possible identity is the biggest obstacle to integration in Germany because it excludes others.«

Some of the Muslim contributors to our survey said they genuinely found it unlikely that someone could wear a headscarf in Germany and still be regarded as German. The task that lies ahead is seen as particularly challenging in other respects, too, as we heard from a Mexican interviewee: »Germany wants migrants who can be assimilated and who can and want to integrate. At present, however, many of those arriving come from different religious backgrounds and are poorly educated. In a meritocracy such as Germany, it will be difficult to maintain a balance in this area.« Highlighting the pressure on migrants to adapt, the following view was offered by a Rwandan: »I advise those

of my friends thinking of going to Germany to do so while they are young. German society is very conformist. To integrate, you have to adapt, to reinvent yourself.« An Afghan shared his own impression: »Whether you are at the theatre, listening to music somewhere or eating out, the German influence is always very obvious, even if other cultures are present, too.«

According to many of our outside observers, the process of integration is still dogged by problems at every level, and this leads to a widespread sense of disorientation. It was felt that efforts should be made to better explain the benefits of contact with other cultures and to refute the argument that foreigners are »taking German jobs« – especially to certain critical groups on the margins of German society. After all, they remarked, most of the jobs performed by immigrants involve work that otherwise attracts little interest or

willingness among Germans. Another suggestion was that the accommodation offered to foreigners should be located centrally rather than on the outskirts of towns and cities in order to promote the kind of everyday contacts and informal communication that will help them to integrate more easily. The authorities should avoid situations where groups of foreigners end up together in isolated communities.

Ultimately, our interviewees regard the question of integration as one of self-esteem, arguing that targeted measures should be put in place to promote that sense among newcomers.

Germany is still too uniform

Germany is perceived as meaning well but as having little experience of integration and cultural diversity. In this respect it is seen as still having a lot to learn – in terms of policy-making and everyday life.

»You only have to look at Germany's football teams to see how diverse the country is.«

Egypt

One recurrent view was that both sides need to abandon unrealistic expectations – either the notion that new arrivals should completely give up their traditions or the hope among some migrants that they will be able to get by without learning German.

While our interviewees felt that the goal of integrating migrants into German society is not easy to achieve, most took the view that Germany has what it takes to bring this about given that it has successfully integrated people from other countries on many occasions in the past. In this context, we heard numerous tales of people being admitted and welcomed into German society, for example that of an interviewee from Afghanistan: »I have wonderful memories of my arrival in Germany in 1995. I was given a very friendly welcome as an asylum seeker, and I had a small, quiet room. I had no problems of any kind with the German authorities. I was given a work permit after just six months and then after two years my qualifications were recognised.«

Germany can do this

Despite all the challenges and risks involved, the overriding view – supported by positive examples such as in the world of football – was that Germany can deal successfully with the problem of integration.

An Ethiopian recounted a similar experience: »The ice was broken when I started playing football at the club. That was the most

important step in my integration. And as my German got better, people stopped noticing the colour of my skin.«

Football was cited as clear evidence of the changes that have already taken place. »Back in the 90s, pretty much all the political parties were telling us that Germany is not a country of immigration. That has changed in a big way over the last 15 years for demographic reasons. Immigrants can now be found in every part of society. You can see how diverse Germany is today in the world of politics and even on the football pitch,« remarked a Canadian. The reflections of a Russian interviewee were typical of the comments we received: »When it comes to migration, I think Germany has struck the right balance between expectation and encouragement. Migration to Germany works. I'm impressed by how tolerant the Germans are. Germany can do this.«

Values and society
*Stable – but a little
behind the times*

Despite all the social changes it has experienced, Germany remains firmly attached to and upholds core values such as the rule of law, human rights, equality and individual responsibility. These values are seen as the foundations of the German system. In the eyes of our foreign observers, however, Germany is guilty of certain contradictions and departures from these values in areas ranging from German arms exports through to gender inequality.

»Germany is built on a foundation of values, and it wants people to prosper.« This brief summary was offered by an interviewee from Ghana. All over the world, this assessment of the country's fundamental convictions was shared by many others as a matter of course. Sometimes we almost had the impression that they were quoting from the constitution, citing Germany as a country

that upholds human rights and equality of opportunity while protecting the freedom of the individual. »German laws apply to everyone,« we heard in Rwanda. »They are not subject to different interpretation depending on your position or official role.« Discrimination is unlawful, and everyone can say what they

think, we were told. In the words of an interviewee from Rwanda: »In Germany you have every opportunity, wherever you come from. There is no class mentality. You don't need to have a degree or come from a wealthy family to become Chancellor.«

Strong foundations

Fundamental values such as the rule of law and tolerance are treasured in Germany. They are inculcated at an early age and protected by a strong institutional framework. While the social changes of recent years have done little to disturb this order, from outside there is a clear perception of those values occasionally being compromised, for example when economic interests conflict with human rights.

During our survey, we frequently came across observations of this type and others of a similar nature. Such views coincide with those expressed in the two previous studies. This leads us to conclude that the core values shaping the way people coexist in Germany are perceived

»For me, typical German values are strictness, correctness, efficiency and respect for other people.«

Tunisia

60

from the outside as stable despite all the other changes affecting the country. Our interviewees felt that this was because those values are protected by a strong institutional framework and inculcated from a young age. For a Tunisian interviewee, for example, German values remain strong because they are taught to very young children from nursery school onwards.

Overall, the responses offered by our interviewees paint a humanist picture of the Germans. It was felt that everyone can develop to his or her full potential and that this promotes better forms of interaction. From a Ghanaian, we heard that »the school system is fair and objective, based on work and performance rather than people's financial resources.« There was admiration for the fact that children are expected from a young age to show a lot of responsibility and autonomy as a way of preparing them for later life. Some interviewees had even copied this approach: »I am in the process of conducting an experiment with my daughter. Based on the German method, I allow her much more freedom than is usual in Viet Nam at her young age. In fact, I think I can already see her becoming more confident and less anxious than other girls of her age.«

In this context, we also heard some surprising observations from the Arab world: »German culture focuses more on the individual, while in Jordan the community is regarded as most important. Nevertheless, Germans care more for others and their surroundings than we do here.« A possible explanation for this was offered by a Ukrainian: »In German culture there is no contradiction between assuming responsibility for your community and acting on your own initiative.«

This picture is not without its blemishes, however, as we heard from a Mexican interviewee: »There is a certain contradiction in the fact that Germany stands up for human rights on the one hand while also producing and exporting arms on a large scale.« Equally, it was pointed out that while Germany is perceived as strong on environmental issues it was also at the centre of the massive diesel scandal. For our interviewees, these accusations show that as an industrial nation and a major economy, Germany has its own conflicts of interest and is not free of contradictions. It wants to ensure its own prosperity but also wants to be seen as a model in the area of human rights. On balance,

however, the impression of Germany from outside is a positive one, leading some – in Serbia, for example – to offer broader observations: »Above all, I would like to see Germany offer more cooperation on human rights, the rule of law and media freedom.«

»If you heard someone say ›I'm proud to be German,‹ it would probably strike you as odd. In other countries, it's perfectly normal.« That was the view at least of an interviewee from Rwanda. Germans do not find it easy to deal with the issue of national identity given the country's recent past. This reflex is apparent to outside observers. »In Rwanda, we are nationalists. We embrace that feeling and celebrate it. In other countries, too, every house has a flag. If I see a flag in Germany, I wonder what's going on, unless there's an international football tournament taking place.«

There is a growing sense of a generation of Germans who are untainted by the events of the war and relate instead to key events in later German history such as the opening of the Berlin Wall. From an international perspective, probably the most salient development in recent times was

Germany's admission of refugees from 2015 onwards: »Germany was the first country to open the door to thousands of refugees. I think it is amazing how efficiently Germany coped with such a huge flow of migrants. The population increased all of a sudden by over a million, and yet you managed to organise it,« enthused an Afghan interviewee.

The heated nature of the national debate triggered by this policy is clear from outside Germany, too. An Israeli participant wondered: »Does a traditional German society still exist? What are the consequences of immigration for German identity, and what is the appropriate response?« Many interviewees viewed these latest developments with respect and sympathy. Some touched on demographic and economic considerations, as this person in the USA: »I like the way Germany has been so open in the refugee crisis. The country is admitting potential new workers. That has an impact on national identity and perceptions of safety. It will be interesting to see how you deal with this change of role in Germany.«

With regard to the already sensitive issue of an German identity, the additional challenge presented by other religions and faiths was addressed by an Indian participant in our study, who argued that Germany must find a way of talking about religion because many

of the new arrivals are Muslims due to Germany's relative proximity to the Middle East. At present, he noted, the separation of the church and the state is not complete, making

it difficult to ensure the equal treatment of all religions. From inside the country, Germany may appear to be a secular state. Indeed, that was the perception of most interviewees, exemplified by the following quotation from Ukraine: »Atheism is not popular in Germany. The Germans are religious, but they just don't show it in

Searching for a ›German Identity‹

Until quite recently, the way Germans saw themselves appeared to be clear and unambiguous. The country was predominantly mono-cultural. Today, however, in large part due to immigration, Germany finds itself having to redefine its national identity.

»Germans distance themselves from national identity. You can see this in their ironic attitude towards the national anthem, for example. That is typically German.«

Poland

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public. They have a pragmatic approach to religion. It supports economic activity.«

In many countries, however, there was surprise at the relationship between religion and the state: »How is it possible for the church to maintain such close ties to politicians? And what about the church tax? And church-run nursery schools? To us here in Mexico that seems extraordinary.« It was observed that the church in Germany still plays a big role in society despite a consistent decline in membership. For a Canadian, that influence was particularly apparent in one important respect: »I am surprised to see political parties in Germany demonstrating a link to religion through their name. Take the CDU, for example. That would be unthinkable in Canada.«

While some recommended that Germany should re-embrace its Christian roots, arguing that these ultimately lay behind its success, others called for it to cater more effectively for the needs of all religions. Some observed that few Germans actually attend a mass or service, while others sensed a veritable detachment from the church. The general view was that

religion is losing influence and importance in Germany, »perhaps because people tend to adopt a more critical view as they become more educated«, according to a Rwandan interviewee. »Even so, the fact that every public holiday – the anniversary of German reunification, for example – begins with a church service, even if it is an ecumenical one, and that the Chancellor goes along to the German Protestant Church Assembly shows that religion does still play a role.«

»In Germany, they don't have enough time for family, and they might only see each other once a year at Christmas. The value of the family is being lost. Also, there is a very narrow view of what constitutes the family. Over here, we see the family as our children, parents and our neighbours, all together. If someone has a problem, then we all have a problem. In Germany, people spend too much time on their own.« This picture of the German family, offered by an interviewee from Rwanda, was reflected in similar observations not just in Africa but also in countries such as Brazil, Israel, Afghanistan and China, to name just a few. A Jordanian observer was even more

(A-)Typically German

There were few changes to the stereotypical views of Germans expressed in our previous studies. Many remain in place, although new ones have also emerged. There was a consensus that Germans are careful, focused and very serious when it comes to getting a job done but a little inflexible when their plans need to change. And of course, efficiency is a must. Instead of rushing frantically into action, Germans lay the ground thoroughly for whatever project they are undertaking. They try to plan and devise solutions for every eventuality. When they finally start a job, they work through each step meticulously like a well-oiled machine. As a result, it can certainly take longer for things to get going in Germany. However, the learning curve is then much steeper, and mistakes appear to be largely ruled out. Germans are also perceived to be willing to tackle unpleasant jobs when needed, and even on a personal level their response to issues that may be disturbing their relationship with others is likely to be more immediate and direct.

The impression offered is that Germans are initially rather reserved but soon let down that façade to become friends for life. However cool and collected a German may appear when talking business, there is an equally passionate or warm side that emerges at the football stadium or among friends and family. Germans drink cold beer in summer, and in winter they eat the sauerkraut that they prepared earlier in the year, planning

well ahead. They prefer to eat sauerkraut with bratwurst, although they are also happy to consume it with other hearty meat dishes. Germans are generally civilised in their behaviour. They queue up readily and wait for the green light before crossing the road, even at night. They love their rules, and there are rules for almost everything. In a way, Germans find them liberating. They plan their holidays with the same rigour they apply to their work. After all, the holiday experience must be just right. Once the holiday begins, after being obliged to indulge in a bottle of vodka, they might just loosen up a bit – or maybe not!

Some interviewees offered less hackneyed and consequently more varied and nuanced impressions of the German character, commenting, for example, that the country's obsession with meticulous planning even manifested itself when making arrangements to get married or have children, or that in their constant eagerness to learn the Germans can still be found carrying and reading something as old-fashioned as a book. Our contributors also noted that Germans place a great deal of importance on good-quality and preferably organic food.

German cars are held to be solidly built and luxurious, although interestingly they are also associated with inflexibility and obstinacy (on the part of their developers). This perception coincides with the view >

➤ that the behaviour of the Germans abroad can in some cases be felt to be arrogant. We even encountered this impression in relation to international development, for which one interviewee offered a culinary metaphor: the Germans organise everything so that the cake can be baked in situ, but they like to supply the recipe and all the ingredients themselves, with little regard for local tastes. If we eat it in Germany, they say, it must be perfectly suitable for consumption in other countries, too. Hence the charge that Germans prefer to talk about problems that have already been solved (by them) rather than about unsolved challenges.

Some felt that Germany's preoccupation with discipline can be too demanding – towards Greece during the eurozone crisis, for example – but also more generally. Yet they are also seen as amazingly relaxed when it comes to achieving a good work-life balance. All in all, however, they are regarded as too serious and too self-critical. They should learn to blow their own trumpet now and again – and with good reason: Germans are described as friendly and generous and on the international stage as a voice of reason. They are also perceived as trustworthy and keen to help, not least in other parts of the world and of course through the admission of hundreds of thousands of refugees.

Amid the all too familiar and the relatively familiar, it seems that the Germans are still able to surprise. Germany's efforts in the direction of equality for women are viewed by some as superficial, despite the country's more general commitment to build a modern state. Others were puzzled at what they saw as the concentration of wealth within a small group, especially in a country that places so much importance on equality and justice. There was astonishment that terrorist attacks could take place in Germany yet in the next moment approval for the differentiated response of Germans to such attacks, resisting calls to foist blame for the actions of a handful of perpetrators of Arab origin on the entire Arab world. On a completely different note, some expressed surprise that such a highly developed country lags behind in terms of internet connectivity and the availability of Wi-Fi, and that television content, in their view, is so boring.

In conclusion, the old stereotypes remain entrenched but are slowly being complemented by other perceived national characteristics that, up to now, have attracted less attention among foreign observers. The result is a more nuanced but less clear picture of how others see the Germans. Equally, there are inconsistencies in those perceptions that defy simple explanation. ■

outspoken on the subject: »Many Germans have no family at all. They are perfectly content with a dog.«

German families are perceived outside the country as having a low profile. The (few) accounts we were given of time spent with a

»In Germany, having children is treated like a project; it is planned meticulously.«

Mali

German family were slightly reminiscent of a wildlife documentary in which the narrator cautiously approaches a timid creature. Those interviewees who had forged closer links with German families described them as traditional and held together by shared values rather than by proximity. »Family ties in Germany are strong, but that doesn't necessarily mean living close to each other. Young people move away to study, but they still keep up strong links with their family,« we heard in Mexico. An Ethiopian added: »To begin with in Germany, I thought the family just consisted of the parents and the children. But there is support from other family members, too, including the grandparents. You just don't see that from the outside because German families are not as closely knit.« The surprise expressed by our foreign observers is not limited, however, to the issue of family size or the perceived lack of close family

The role of the family

Families in Germany are seen as small, narrowly defined and less highly valued than in other countries for their contribution to society. To the outside observer, there are few initial signs of strong family cohesion, although such bonds can be detected on closer inspection. Traditional family structures are perceived as evolving quite slowly.

bonds. It also extends to the general position of the family as an institution within German society. »Germans are very professional in many ways, but when it comes to personal relationships and the family they are on the wrong track,« declared an Indian observer. »Family ties are stronger in India, but family structures in Germany are in competition with the market. Young women especially often choose to pursue a career. More and more people are opting to remain single, and families are increasingly falling apart. That creates isolation and psychological problems. It's particularly hard for single parents.«

While our interviewees drew attention to some emerging trends in this context, they felt that the pace of such changes is extremely slow. It was observed that while same-sex partnerships



are increasingly accepted in Germany, attitudes towards such couples are less open and public than in the UK, for example.

Some participants in our survey highlighted generational differences in outlook. A Nigerian participant offered the following observation: »While I was working with older Germans, I had the impression that they felt the (strict) German way was also the best approach for others, too. By contrast, younger generations of Germans are more in favour of equality and open-minded debate.«

In the eyes of our interviewees, there are too few women in top positions in Germany. Yes, the Chancellor and the Federal Minister of Defence are both female, but in the view of a Chinese observer at least these are exceptions, despite efforts to increase the number of women in senior positions. Most observers see German women as very driven and enjoying equal rights, at least in terms of their qualifications and skills. As such, »gender issues« do not appear to explain the

Traditional roles

Although there are influential women in Germany, they are seldom to be found in top positions. Seen from outside, that is due in no small measure to traditionally held views of male and female roles. In this respect, Germany is seen as lagging behind.

absence of women in top positions. An interviewee from Mali was impressed by the career opportunities open to women in Germany: »They

even drive buses.« In South America, too, Germany was cited as a progressive country in this respect: »German women are more liberal in their outlook and more active in different roles than in Brazil.« Overall, however, the impression is that while more and more women can be found in influential positions within German organisations, very few occupy the top job.

German attitudes towards the roles of men and women are seen as outdated. »At work, women are seen no differently than they were 30 years ago,« remarked a British interviewee. »The expectation is that they will spend the first few years looking after their children.« A frequent observation was that women in Germany find it hard to reconcile their family and work commitments. »The old German term ›Rabenmutter‹ [literally raven mother,

»School lesson times are not compatible with working life. Childcare provision is insufficient, too, and this doesn't encourage women to return to work.«

United Kingdom

suggesting an uncaring, absent mother] is still often used to criticise working mothers,« said a Canadian. »Getting a job can be tough, and childcare provision is inadequate. The whole issue of family policy in Germany is very interesting. With its ageing population, Germany needs more working women. From a historical perspective, however, its traditionally male-dominated workforce and somewhat macho workplace culture is closer to Southern Europe than Scandinavia.«

Although the picture created by these observations may not be complete, it is very clear that our interviewees were surprised at the extent of conservative attitudes towards the role of women in such a highly modern state. The situation in other countries such as Tunisia is quite different, we heard: »In Tunisia, unlike Germany, it would be perfectly normal to see a qualified female electrical engineer.« For some observers, the fact that Germany's government is led by a woman is the exception that confirms the rule. A Russian interviewee saw it as nothing less than a miracle that Angela Merkel should have reached the very top of the political ladder in a country that was some way behind in allowing women to vote. A female interviewee from Brazil imagined a conversation with the Chancellor: »If I could speak to Mrs Merkel, I would urge her to talk even more about her experience as a woman in a position of power. That would support the

women's movement and help to strengthen women's rights.«

Many of those we spoke to were unimpressed that in the 21st century it should still be so difficult to reconcile work and family commitments in Germany, citing what they saw as unhelpful school hours and inadequate childcare provision as likely to discourage women from returning to work. The pattern of male and female roles in Germany was felt to be very traditional with much still to be done in order to catch up with other countries. This situation produced a humorous observation from a Russian interviewee: »Nursery school provision is so bad that Germany could easily meet NATO's two per cent goal by spending the money on more nursery schools and painting them in camouflage colours.«

Children – a luxury?

Despite efforts to reconcile the demands of work and family, in the view of our interviewees the measures taken so far are inadequate. This is seen as an obstacle to family planning and to the career opportunities of women.

It was argued that creating more nursery school places would also allow Germans to have more children. A Vietnamese interviewee asked: »How can the

Germans as an ageing society regard having children as too expensive or a luxury. Does the state not provide financial support for families? Or are there other reasons for it? In Japan, people work so hard that they consider having children a luxury, but the pressure of work is not that high by comparison in Germany.« After all, it was frequently observed, Germans have a good work-life balance, and considerable efforts are made to achieve and maintain it.

State and institutions

A strong foundation

Germany attracts considerable admiration in other countries for its highly developed system of national governance. In our survey, this achievement was primarily attributed to its smoothly functioning institutions, capacity for discourse (especially at the level of political parties), strong and active civil society and federal structure. Social cohesion and health care provision were also perceived to be good. The quality of German journalism was praised, although the media also came in for some criticism. In general, the German state was viewed more sceptically in areas where the rules on which it is based appeared to be in danger of ossifying.

»Germany has a very interesting and modern political system based on the rule of law, democracy, a vibrant civil society and a well-structured system of government. From the outside, I don't even see German bureaucracy as a problem,« said an Afghan contributor. Germany is pictured by others not only as

A political system ›Made in Germany‹

Germany's systems and institutions are regarded as very sound. Effective rules are valued as they offer clear guidance, especially in times of global uncertainty and upheaval.

a maker of reliable products but also as a land of well-designed and smoothly running administrative processes and political systems. In this respect, it is perceived as a society that constantly strives to improve. In the view of our interviewees, one of the advantages of such clear and established political structures is that success is not then dependent on individuals. As one British contributor put it, the right decisions are made in Germany because they

are based on the common good rather than solely on the interests of the economy.

The institutional landscape in Germany is widely respected and

admired by our interviewees. In the words of an Israeli: »While Germany stands for political order, we represent political disorder, and we look with envy at a system where elections are not (always) brought forward.« For a Nigerian observer, that order is precisely the secret of Germany's success: »Growth doesn't emerge out of chaos. It emerges from clear

and systematically implemented structures.« The enthusiasm of a Serbian interviewee was very apparent: »Germany has an incredible constitutional court that deals expertly with social developments and interprets the constitution with an eye to the future.« On a similar note, there was praise for the Federal Press Conference, as a great example of openness towards the media, and for the German police, which upholds the right of citizens to demonstrate, even at events such as the G20 summit in Hamburg.

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A Ukrainian wished that politicians there, too, would adhere to the same rules and laws as everyone else. »If the system is abused in your country, there is a reaction. It's investigated, not simply brushed over as a scandal.« As a Ghanaian interviewee explained, the principle of equality, not just under the law but also in dealings with German institutions, offers a further advantage: »In Germany, you are not dependent on personal contacts. You can rely on well-functioning structures.«

Germany's political stability and efficient structures create an impression of a relatively carefree existence. »Cultural differences are accepted,« declared a Serbian, adding that while he felt culturally closer to Russia he would always prefer to live in Germany. People in the Balkans long for a simple and peaceful life, he explained, and it is this prospect of safety and stability that makes Germany so attractive to many. All people want, he

concluded, is to have a decent quality of life governed by the rule of law.

The prevailing impression among our interviewees was that Germany's political system is very stable, notwithstanding party crises and attempts to forge coalitions. In the view of a Nigerian participant, Germany's political landscape is no less than exemplary: »All the parties have to state very clearly what they stand for and what they can be held responsible for. It's all very transparent.« A contributor from the USA confessed himself fascinated by the mechanisms used to reconcile diverse interests in Germany: »I'm impressed how Germany manages time after

Parties remain stable in face of challenges

Germany stands out as a country with a stable political system and party structure that effectively balances competing interests and facilitates compromise. The hallmarks of this system are seen as openness and tolerance.

time to negotiate political coalitions, even when there are major ideological differences involved. That points to effective organisations and negotiating skills. In the USA we

keep swinging between two polar opposites – either Republicans or Democrats.«

The work of political foundations also came in for praise. By way of example, an Indian observer remarked: »I was surprised to learn about Germany's political foundations and the idea behind them. As an instrument of foreign policy, they are not so obvious.« The fact that new faces and new political groupings such as the Pirate Party are officially permitted and given a chance to air their views and gain support alongside the established parties and politicians is regarded as equally positive. Other strengths were also highlighted, including the relatively high turnout in German elections.

»What impresses me most of all in Germany are the country's institutions. They are well run, and they work together efficiently.«

China

Other more critical observers sensed a certain amount of disenchantment with politics in Germany, not least due to a perceived lack of authenticity at party level. »What do all these parties stand for today?« asked an interviewee in the USA. »They no longer inspire people in the way Genscher, Brandt and Schmidt did.« The growing number of (smaller) parties in the Bundestag was felt to be a sign of new challenges ahead: »Take this as a warning,« we were told. »The lights are flashing red. It is an expression of dissatisfaction with the traditional big tent parties because they no longer pay sufficient attention to people's concerns.«

It seems that political parties are no longer as good at addressing the needs of their citizens. A US interviewee asserted that »Many people have lost hope in the system. That gives rise to new party-political dynamics as demonstrated by the rise of the AfD.« Could that pose a threat to Germany? An Israeli observer felt that while it could indeed be dangerous, the probability of a far-right party making it into government in Germany is smaller than in Israel, where that was already the case. This analysis was shared in Brazil: »In Germany, every effort is made to create an atmosphere in which people can

talk openly about the past. Personally, I don't think that Germany can pose a threat anymore because there are mechanisms in place to stop that happening.« Germany's independent media system is regarded as one of those mechanisms.

As in previous surveys, it was generally felt that German journalists are doing a good job by compiling facts and uncovering shortcomings. Compared with people in other countries, Germans are seen by foreign observers as placing a lot of trust in their media.

Interviewees who had experience of dealing with German journalists were impressed by their attitude, the way they worked and how thorough they were. »They organise themselves and try to make direct contact with all those involved. That approach is mirrored in the balanced nature of their reporting,« observed a Ukrainian. Particular admiration was expressed for Germany's print media, which were felt to be reputable and a source of high-quality journalism, even by comparison with international publications. Others said they enjoyed the literary character of German newspapers and magazines, an attribute described by a Polish interviewee as »their

»When it comes to reporting on conflicts, the German media doesn't give you the whole picture. Both sides should be represented, whatever the conflict.«

Israel

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wonderful writing style, richly idiomatic and abounding in humorous wordplay«. In turn, a Canadian picked out Germany's quality newspapers as standard-bearers that reflect the tremendous value attached to knowledge, culture and education: »Take the Frankfurter Allgemeine Zeitung, for example. That's what I call outstanding journalism.«

Overall, our interviewees regarded the media in Germany as among the most independent in the world and unlikely to degenerate into propaganda tools as in some countries. For a Ghanaian observer, the quality and depth of reporting has improved in every media category as a result of competition. According to a Mexican observer, German media organisations have successfully embraced the new reality of the media world and now

form part of the broader information-sharing community. In this context, one example cited was the publication – initiated in Germany – of the Panama Papers. »It was a very smart move to share the information globally via new communication channels such as WikiLeaks. After all, the case had international ramifications. This approach to publication brought the world together, and the global

scandal attracted a large public audience. For one media outlet on its own, that would have been too much.«

Alongside all the praise, however, there were plenty of more critical voices. Some interviewees detected greater government

influence over the media. »During the election campaign, all the questions in the television debate were submitted to the candidates in advance. I think the gap between politicians

High-quality journalism

The German media and German journalism are perceived as being of high quality. There is widespread admiration for their independence, their capacity for investigation and the competition between different media organisations. There were concerns, however, about a possible trend towards more one-sided reporting and more government influence. Other perceptions identified in the survey were a lack of English-language content and digital expertise.

and the people is widening,« asserted an Afghan contributor. A Polish observer believed there was a trend towards more sensationalist journalism on German television, especially during the parliamentary elections in 2017. A Jordanian was dissatisfied by the lack of international coverage in the German media. The same criticism – that German media outlets focus too exclusively on Germany and pay much less attention to international stories – was offered by an Indian interviewee, who cited the New York Times, the Guardian and the Washington Post as counter-examples from the USA and Britain.

Several participants in our survey expressed astonishment at the perceived trend in the German media to dedicate more space or time to negative as opposed to positive news. »In this respect, Germany is different from other countries,« we heard in Saudi Arabia. This impression was shared by a Canadian: »Media reporting in Germany tends to focus on extremes – far-right criminality or attacks by Islamists, for example on the Christmas market in Berlin. You get the impression that these things are happening every day.« An interviewee in India suggested that the German

broadcaster Deutsche Welle should take greater care to ensure that its reporting is balanced and to cover positive stories as well. In general, he felt that coverage of India was very limited in the German media, tending to focus on disasters, and that generally speaking a wider international perspective was needed.

Another suspicion, aired by several interviewees, was articulated as follows by a Russian contributor: »There is a criticism that Germany's mass media and German journalism are no longer sufficiently independent and show more American influence.« An Ethiopian expressed disappointment at what he saw as very undifferentiated reporting, even in Germany's more serious media: only positive stories about the USA (except on Trump), only negative stories about Russia and almost nothing about Africa. If they did feature an occasional piece about Africa, the chances are, he felt, that it would be poorly researched and written in a sermonising tone.

Finally, doubts were raised about Germany's capabilities in making use of modern digital communication channels: »Germany needs to learn and acquire a better understanding of

how to communicate effectively and efficiently in today's world. If German media organisations want to deal with Trump on his own territory, they absolutely must harness those new communication channels. Trump's Twitter messages are very effective.« In short, according to a Mexican interviewee, Germany's approach to communications is too conventional, despite the vibrant dialogue that characterises its political system and not least the activities of civil society.

»In Germany, decision-making responsibility is spread across different levels and centres,« we heard in Moscow. »As well as the power of the government, there is an effective civil society. Here in Russia, there is just one centre of power – the President.« The diverse nature and influential role of German civil society were highlighted in numerous countries.

For many interviewees, clubs and associations are a cornerstone of German civil society.

Active citizenship

There is considerable admiration in other countries for the work of German civil society, which is seen as active, strong and long-established. Our interviewees highlighted the solidarity and organisational capacity shown by civil society groups and their vigorous involvement in political processes.

»I have always been impressed by Germany's active culture of associations,« said somebody from Poland. »How many are there?

They also represent a form of solidarity and community. Even if you only join the local bowling club.« An Israeli felt that it was an excellent idea to have associations covering so many important aspects of life but that the reason for their existence may not always be obvious at first sight: »Over here, people think it's funny that Germans have even set up an association to save the wood ant, although if you know anything about woodlands you wouldn't think it strange at all.«

The sheer breadth of the examples cited can be seen as evidence of the many different ways in which people in Germany contribute to political and social processes. In this context, our interviewees also drew attention to the work of German trade unions and the role of civil society in the integration of new arrivals.

»Germany's federal system is a good model. It distributes power and respects local and regional identities.«

USA

An Indian contributor to our survey observed that Germany's pronounced federal structure delegates considerable power to local authorities and regions: »The Chancellor is not the boss; her job is to mediate between different interests. You couldn't really say that about any other major country, because most of them are highly centralised.« The fact that Germany's federal states, cities and municipalities have their own areas of authority and responsibility is regarded as positive in Brazil, too: »Not everything is decided at national level. That's why it works so well, because the federal states, cities and municipalities have a much better idea of what they need in many areas.« It was generally felt that delegating responsibilities to a more local level is crucial to the effectiveness of welfare systems.

Germany's federal system was held up as an effective tool to combat populism thanks to the protection it offers against ideological

hijacking, especially in the education sector. It was also suggested as a potential model for the decentralisation process in Ukraine and for future development in Africa. We also came across occasional criticism, for example in Canada: »In Germany, every federal state and every city has its own approach. In some places, immigrants and refugees are isolated in empty

American barracks, while in others they might be properly integrated in the centre of town. Equally, they might find themselves hived off into abandoned rural areas.«

Federalism as a model of state governance

As a principle of state governance, Germany's federal system is widely admired around the world and even perceived as a model. Federal structures are seen as guaranteeing effective welfare systems and preventing ideological influences from hijacking the education system.

Federalism was perceived by some, however, as creating a plethora of regional and local identities. Parallels were drawn with Europe as a whole, and there was speculation about the extent to which Germany's federal political system might be used as a model for the European Union. Some argued that German federalism can indeed act as a guide in this respect since Europe needs to readdress the

»Germans are too blinkered, especially when it comes to bureaucracy. They need to be more focused on solutions.«

Ghana

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issue of identity politics in greater depth. A US interviewee put it this way: »The political system in Germany is so well developed that you always know which button to press if you need to reach consensus or seek approval. At EU level things aren't yet that clear. You need to work out how the EU can ensure regional diversity in this area, too.«

Our interviewees held differing opinions of German bureaucracy. For some, the way Germans carefully administer their country is a key ingredient of

their success. A Russian observer felt that Germany possessed a »fine bureaucracy that recognises nuances and is sufficiently flexible«. A Brazilian interviewee regarded the system of public administration as a quintessentially German invention: »Germany may be bureaucratic, but things work. That's partly because the whole concept of public

administration is embedded in German culture.«

On the other hand, many interviewees were confident that Germany could manage perfectly well without quite so many rules. In some

cases, German bureaucracy was viewed as complicated. »However many forms you may have filled in, you can be sure there are more to come,« observed a Tunisian. A Chinese pointed to what he saw as difficulties in conducting typical

business operations such as establishing a company or a new production site as evidence that German bureaucracy is not that efficient.

The rather innocuous examples cited above were accompanied in our survey by more emotional experiences: »It was a shock working with German ministries. The whole concept

Stifling bureaucracy

Dependable structures and rules offer guidance and certainty. They are part and parcel of the German success story. In many areas, however, inflexible regulation is perceived as a hindrance, for example when setting up a new business or new production sites, looking for a job or somewhere to live, with regard to migration and more generally as a bar to progress or creativity.

of the ›Beamte‹, the civil servant, has not changed in fifty years. It's very rigid, with strict limits on what you can say or think – even in senior positions. In that environment, it is very difficult to be creative. Even if a few people want to change the system, it will only happen very slowly,« explained a British interviewee. »In Germany, everything takes forever. That's because there are so many rules and processes lying behind it. You lose so much time – just looking for a flat, for example. In the US, it's super easy. In Germany, it's simply too complicated,« complained a Mexican interviewee.

The general perception of our interviewees, for example in Jordan, was that Germany has a well-structured system of social welfare, including provision for illness and retirement. Germany, it was felt, sees itself duty-bound to maintain a strong welfare system and is a model welfare state. This view was also expressed in Ghana, albeit with reservations: »Of course, the system has its faults, but at the end of the day what matters is the conviction that lies behind it. It stands in complete contrast to the US.«

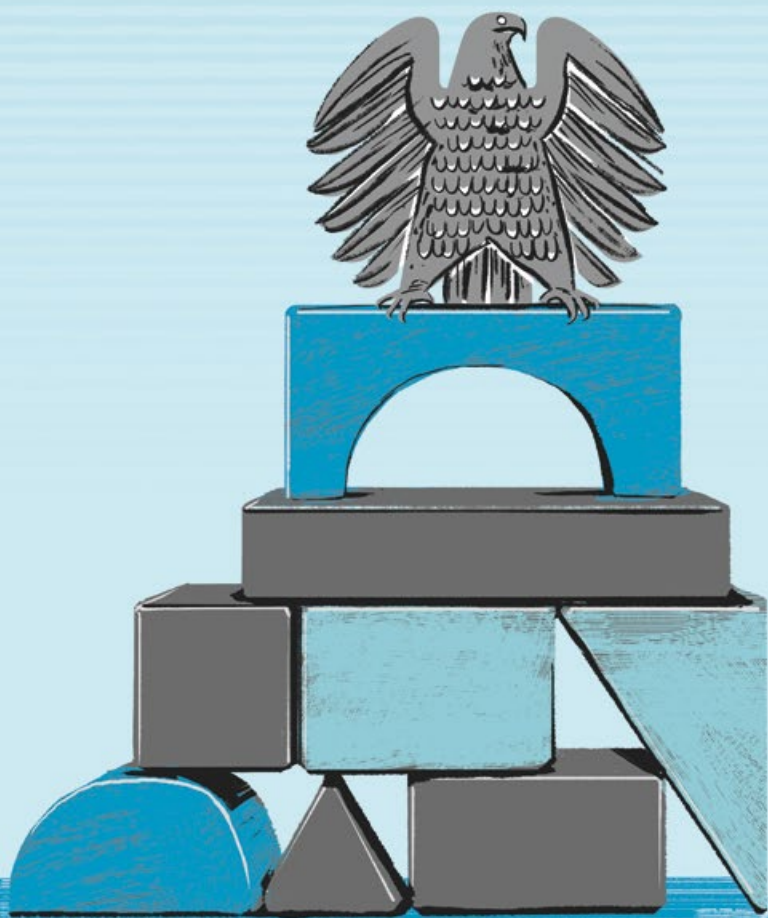
The welfare state – a key factor in Germany's success

A properly functioning welfare state with appropriate systems to meet the needs of the population helps to maintain a healthy and cohesive society. Viewed from outside the country, social inequality is not particularly evident. The German health system is regarded as good and accessible to everyone, albeit in first-class and second-class form.

Some observers emphasised that social security benefits in Germany

are even sufficient to allow an unemployed person to live in dignity and remain an active member of society. A British interviewee saw a difference between attitudes towards unemployment in Germany and in the UK. In Germany, she explained, unemployment is regarded as a temporary state of affairs, and it is accepted that people will need time to look for work. Furthermore, in the view of an Ethiopian, German companies take their social role seriously and invest in training, with the result that unemployment in Germany is almost non-existent – even among young people – and much lower than in other European countries. It was also noted that Germany looks after people with disabilities or limited mobility, ensuring that they are properly catered for in public spaces.

Overall, the standard of living in Germany is described in our survey as very high, and this is attributed to the absence of any major divide between rich and poor. »German society is more balanced,« we were told in Serbia.



»If I ever get ill, then I'd like it to be in Germany.«

Jordan

»Public goods really are available to everyone, and there are minimum standards to protect those who are less well-off.« Among some, however, there was a perception that this situation is slowly changing and that it will change even more rapidly with the expectation of further migration to the country. »For Germany, that will be a problem,« predicted a British interviewee. Some of those we spoke to observed that Germany was not free of poverty: »Poverty in Germany does not extend to every age group, however. It's not on the scale you will find it in Egypt, where people walk around barefoot.« Although not expressed as a major issue in our survey, such perceptions nevertheless signal future challenges. In this context, a Ghanaian interviewee shared her own wish for the future: »I hope that Germany keeps its model of social welfare and doesn't become too capitalist. I hope human beings continue to play a role despite all the technological advances being made.«

Our interviewees also stressed the importance of the human factor in relation to Germany's health system, which is seen as a key element of its strong social safety net. They admired the

fact that it provides universal coverage and is affordable to people at every level of society. The principle of general practitioners referring cases as needed to specialists or hospitals is viewed as efficient. Among others, a British interviewee suggested that anyone familiar with the German system who could afford it would travel to Germany for treatment, although it was felt that the hospitals could improve in terms of infrastructure and general aesthetics.

Perceived shortcomings were also remarked on in our survey. There were comments to the effect that even the German health system suffered from a degree of bureaucracy, and some interviewees complained of long waits to get an appointment, unless you pay as a private patient. It was felt, however, that the difference in the treatment received by private and public-sector patients is not as pronounced as in other countries such as the UK. In the view of a Brazilian interviewee, Germany's health system has almost everything you could wish for: cutting-edge equipment, technology and a lot of money for research – everything, that is, except the personal touch. »Ideally, it would be great to have both,« she added.

Economy and education
Fit for the digital future?

In the opinion of our interviewees, Germany's strong economic position is above all a product of its education system and its focus on applied research. But does the country have the flexibility needed to meet the demands of the future? Is it sufficiently innovative for the digital age? Most felt that this depends above all on whether Germany can develop smart software to complement and connect its hardware so that it can maintain its status as a leading economy as we head further into the fourth industrial revolution.

Germany is described in our survey as very stable economically. While many countries have been hammered by financial crises and unemployment, Germany is perceived as having escaped almost entirely unscathed. In this respect, the country's political leaders are credited with having taken the appropriate decisions. Naturally, German technology is also cited as an important

German quality still in demand

The >Made in Germany< label is still regarded as a guarantee of quality, even if not everyone can afford the products that bear it. The dieselgate scandal has severely dented this reputation, however, and other countries are closing in on Germany. Despite this, Germany is still viewed as a strong economic hub.

factor behind this stability, as are its small and medium-sized companies, which are held to be resilient and creative in equal measure, guaranteeing plenty of jobs and therefore helping to maintain unemployment at a very low level. Another ingredient widely regarded as contributing to Germany's economic success is the perceived dedication of German workers, as summed up by an interviewee from Saudi Arabia: »They are known for having a strong work ethic and for their perseverance and reliability.«

A Chinese man felt that taxes in Germany were at the right level: »Many other countries set their taxes too low, although in Scandinavia they are too high.« This impression was not shared by everyone, however. In Ukraine, we were told that German taxes are clearly too high: »That makes it much harder to set up a company in Germany compared with other

countries – in Eastern Europe, for example.« Turning to wages and prices, a Canadian observed that German wages are very low by international comparison. »That suppresses domestic consumption. Higher wages in Germany could help to improve incomes in Southern Europe because Germans would go on holiday more and spend more while they are away,« she reasoned. Another Canadian offered a similarly critical assessment: »The outside view of Germany as an economically and politically successful country can be seen in a more relative light if you take a closer look from inside. Wages in Germany are exceptionally low, and the country is still suffering from the economic impact of reunification. The problems just seem to get bigger the more you zoom in.« A Tunisian interviewee was even more sceptical: »The much-vaunted benefits of delivering economic stability through a balanced budget are nowhere to be seen. OK, there are fewer people unemployed, but instead there are lots more temporary workers who don't earn any more than someone else receiving unemployment benefit.«

Another frequent observation was made in relation to the high industrial and ethical

standards usually expected of Germany, namely that trust in this area has been badly shaken by corruption scandals – the diesel scandal above all, although other ›product scams‹ (in the words of a Polish interviewee) are also felt to have damaged the country's international reputation. One example cited was the allegedly widespread practice among large German companies of selling low-quality products with the same label in regions perceived to be less developed or less demanding. In this context, it is worth mentioning a truly astonishing reflection from Israel: »Despite two corruption scandals involving the German firms Thyssen-Krupp and Siemens, Germany's image has hardly suffered at all. People simply don't associate Germany with this kind of thing.« It remains to be seen whether this is just one person's view or whether it perhaps suggests that the impact of such scandals has been overestimated.

Overall, our interviewees were impressed by Germany's economic strength and its appeal as a worldwide business hub. They praised the quality of German products, still regarded by many as exceptional, albeit often without

»The diesel scandal is a massive international problem. It doesn't fit in with Germany's environmentally friendly image. The whole business would not have been possible without the industry and the government deliberately turning a blind eye.«

United Kingdom

mentioning their relatively high cost. A Tunisian contributor regretted not always being able to afford high-quality German products on account of the price, while noting that they probably work out cheaper over the whole life of the product. A Brazilian was also concerned about prices: »In the long run, I doubt whether German technology will be able to compete successfully because it is so expensive, for example in the solar energy market.

The products made by its competitors in China may not be as good, but they are much cheaper.« A similar outlook was expressed in Saudi Arabia: »German technology is world-beating and known for its durability. On price, however, it is less attractive. Germany needs to be careful. Other countries such as Japan and the USA also make good products, but they are cheaper.«

Symbiotic relationship between education and technology

In the field of technology, Germany is acclaimed as a pioneer and valued as a partner. Germany's well-established system of apprenticeships and continuing professional development, which is closely linked to research and industry, is seen as the key ingredient of this success. There is an expectation that transfers of German technology should also benefit less developed countries.

As in the two previous studies, Germany garners admiration as a world leader in the field of technology. »Wherever you go, the world is learning from Germany,« asserted an

Ethiopian observer. Reflecting on the reasons for this, our interviewees were unanimous in their assessment that Germany's technological prowess was largely a product of the country's education system. Germany is good, they felt, at transforming new research findings

into industrial applications, in the mechanical engineering sector, for example, and in the pharmaceutical and chemical industries. In Rwanda, we were offered the following picture: »If you want to find out something technical, or if you need an engineer or a specialist, Germans are the automatic choice, and everyone here wants German machines because they are the most reliable.«

The impression of those we spoke to was that researchers in Germany are trained to develop technologies with an eye to future industrial use. This strategy was praised by a Russian interviewee: »You have to admire the way the Germans link education, research, technology and industry together.« This view was backed up in Brazil, where we heard that research in Germany is always conducted with a specific objective in mind and indeed that the whole research sector is target-driven. On the same theme, a Ghanaian declared: »What sets technology and science in Germany apart is the holistic approach taken.«

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Similar admiration was expressed with regard to German technology transfers: »When I first went to Germany after so many years during which I only knew the country from all the products and equipment in daily use in Afghanistan, everything was much better than I had expected. I realised that you don't just export products but complete technologies. In that respect Germany is different from other countries such as China.« It is no longer merely a case of selling products, we heard in Afghanistan, but of contributing to social progress: »Germany supports the efforts of other countries all over the world to develop. Keep up the good work! Do whatever you can to promote peaceful development through the use of advanced technology.«

An interviewee in Beijing felt that more could be done: »China would like to see more technology transfers, but there are political

problems. Germany is playing a negative leadership role. China's president is very frustrated about it. China has big expectations of Germany in this field.« In Ghana, too, there were calls for Germany to be more willing to share its technological edge to help other countries develop – in the fields of waste disposal and recycling, for example. On this note, we were told by an India observer that »Germany is certainly strong in the area of technology, but it does not do enough to develop technological solutions that would also benefit poor people.«

»There is nowhere else in the world where education is given such a high priority,« we heard in Saudi Arabia. So far, so good – but

Education for everyone

Germany's education system is seen as well-structured yet diverse. Alongside theory, knowledge and ethical principles, it focuses on the acquisition of practical skills and encourages young people to take on responsibility.

what do people think in the countries of Oxford and Harvard?

»Germany has a strong education system,« said a British interviewee.

»It is open to everyone and,

unlike the British system, not elitist because it is affordable or even free, and it combines different models as well as formal, theoretical education and practical training.« The view from across the Atlantic was essentially the same: »Germany is a champion when it comes to the academic sector, education and research. Education has a higher priority here than in many other comparable countries. You can tell that from the number of people in the government with doctorates.«

For many interviewees, universal access is one of the big advantages of the German system and sets Germany apart from many other countries.

»Germany is the world leader in technology. This is down to their excellent vocational education and training system.«

Saudi Arabia

»I think it is wonderful that education is available to everyone in Germany for free,« said a Nigerian interviewee. »Even for people from other countries. A country that invests so much in education is securing its own future. That's brilliant.«

The opportunities available to rejoin the education system and perhaps obtain a qualification at a later date are regarded as further positives, and although Germany's performance in PISA studies and university rankings attract greater criticism, a clear majority of our interviewees regard the level in Germany as high and the quality as good. Doubts are expressed, however, about the traditional marking scale, which is described as ›austerely designed‹ and even ›hardcore‹.

Some interviewees raised the issue of private education, observing that pupils do not

necessarily learn any more in expensive fee-paying schools. The Anglo-Saxon model of commercialisation would probably be damaging to Germany, argued a British observer. A similar point was made in Viet Nam: »The Australians and Americans sell education to foreigners. In Germany, however, you have to learn and study hard, and it costs very little.« Many expressed the hope that it would stay that way. Looking ahead, at any rate, the prevailing view is positive: »Germany's education system is strong

and progressive. It is a forward-looking system, and that means it can quickly adapt.«

»Germany offers a great model of vocational education,« declared a Brazilian interviewee.

»The government and the private sector work together to help young people gain qualifications and enter the labour market.« The perception of Germany's vocational education system as a model is shared by many others. Our survey highlights a

International praise for vocational education

Germany's ›dual‹ system is admired and seen as a model all over the world. It has a strong focus on business and industry, and helps young people integrate into the labour market. As a result, apprenticeships enjoy a similar status to that of more academic career paths.

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great deal of interest all the way from Brazil and across Africa to India and China.

The German model even attracts envious comments from within Europe: »In Germany, an engineer who has completed an apprenticeship is just as valued as someone else with an engineering degree,« observed a British interviewee. »The Germans understand that both make an equal contribution to the country's success.« It is widely felt that the German system produces much better trained workers whereas elsewhere everyone goes to university, but many end up with mediocre qualifications.

According to our survey, another factor in the success of the dual system is the close collaboration between training institutions and the private sector. While the companies in question may not have purely altruistic motives, they are nevertheless credited with recognising the value

of this form of training as the backbone of the German economy. An Ethiopian contributor offered the following assessment: »It's incredible how strong the German economy is, especially its small and medium-sized companies. I think the way the private sector, the education system and research bodies interact in the dual training model makes the German economy strong.«

The dual system may be a great export hit, but according to many observers in our survey, it would not be possible to copy it on a

one-to-one basis in other countries. »I doubt whether Germany's dual system of vocational education could be scaled up and used all over the United States,« we were told. »The focus of the US labour market is on simply employing people, not training them.«

German universities are described as very good but a little way behind compared with elite

Universities – thorough but unglamorous

German universities have a strong reputation for thoroughness but are also seen as having clear shortcomings. The absence of internationally recognised elite universities is also noted in our survey. University structures are described as rigid and outdated, while professors are seen as often unapproachable.

»The German version of the dual model is the best that I'm aware of. It gives a high status to vocational training – you don't need to have been to university in order to be of value.«

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Mexico

»In today's world, Germany should continue to focus on the fundamentals, on basic research, despite financial pressure. If you concentrate too much on applied research, you risk looking at things from a superficial, consumer-based perspective.«

Russia

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universities in the USA and the UK. They are seen as offering good value for money but needing to adopt a more international outlook. Some observers were critical of the hierarchical structure of German universities, elements of which one Israeli interviewee described as almost medieval. This hierarchical mindset defines the entire system, we were told, undermining the creativity and autonomy that are so important in research. A similar view was expressed in Jordan: »The professor decides everything and, in most cases, stays in office until retirement.« In Ethiopia, the concept of permanent tenure for professorships was regarded as a weakness of the German university system rather than as a mechanism for protecting academic freedom, as it is perceived here: »Once an appointment is made, that position will often remain occupied for a long time. As a result, it is difficult for women especially to make it into senior academic posts.«

Research viewed as too ›German‹

According to the views expressed in our survey, Germany is focused on applied research. Whether at universities or in other institutions, research is seen as clearly structured and demand-driven but lacking an international profile.

With regard to teaching methods and the contact between students and professors, the outside perception, here too, is that change is needed. »German professors give their students hardly any individual attention. Even

Harvard professors see their students regularly as an opportunity to pass on knowledge.« Germany's predilection for academic titles was also raised in our survey, as in this comment from a

Canadian interviewee: »University faculties in Germany are much more formal than in Canada. There seems to be an obsession with titles – even multiple titles like ›Dr Dr‹. It comes across as really old-fashioned.«

The perception among many of our interviewees was that most research in Germany is applied research. »That's good, because it means they are concentrating on finding solutions for existing problems,« observed an Ethiopian. As expected, Fraunhofer and Max Planck were the most

frequently mentioned research institutions, although numerous universities were also praised. This approach was also welcomed by a Mexican contributor: »When it comes to research, the Germans place more importance on methodology than on money. Research is driven by demand and focuses on real-world applications.«

According to an Ethiopian observer, however, investment in research is not as high as one might expect – lower, for example, than in the USA – and spending in this area needs to rise. Although numerous grants are available to foreign researchers during the initial phase, there is not enough funding in place to allow them to complete their research work, she complained. A contrasting view was offered by a Tunisian observer: »The research environment in Germany is professional. You can access all the documentation you need, and you can attend conferences and present your work there.

Calls for greater risk-taking and creativity

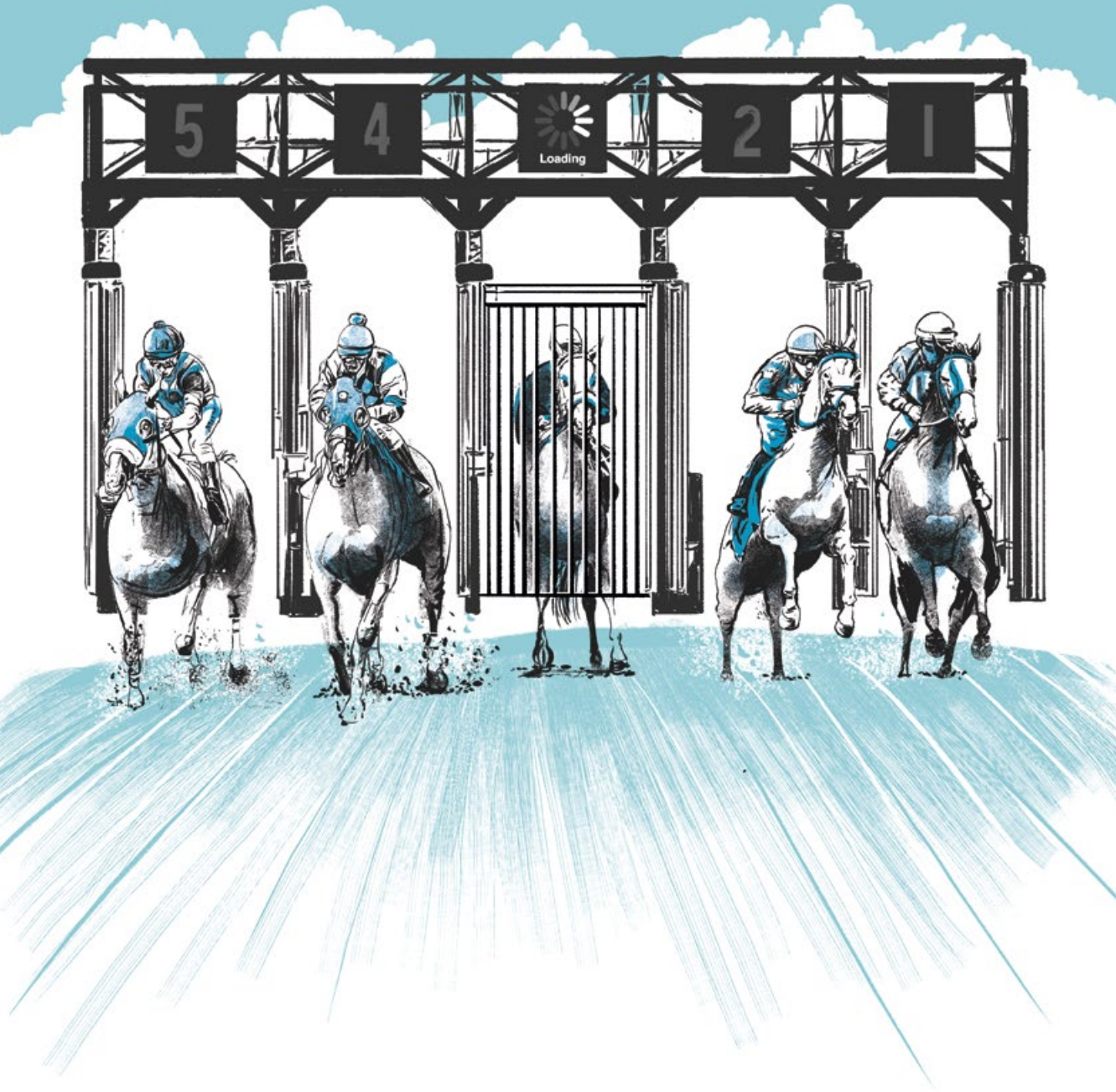
The quality of German products and the country's position as a leading economy should not mask the fact that Germany needs to be more responsive, more flexible and more open to risk if it does not want to be left behind.

People work around the clock because they want to be the best.« An interviewee in Canada expressed her admiration for another aspect of the German research system: »The research community in Germany is unique. There is nothing like it anywhere in the world. There are no quotas for individual disciplines. Science,

the humanities, literature and the social sciences all receive the same attention, but only the best qualify for funding.«

Despite the large volume of research conducted in Germany, some

interviewees regretted that too little was being done to establish networks with other countries, that there were not enough international conferences and that in many cases results were still too often published in German only. »The biggest problem is that the results are not translated,« complained an Indian interviewee in support of her view that a greater international outlook is required. All things considered,



»The Germans shouldn't keep churning things over and testing everything, they should be willing to take a few more risks. If you dare, you'll succeed.«

Ukraine

however, the perception for many interviewees is that German research is outstanding.

German brands are perceived as very strong. At the same time, as we heard in Tunisia, Germany's industrial image is based on engineering, mechatronics, its automotive sector and on environmental and medical technology – with an emphasis therefore on established technologies rather than new ones. While Germany is regarded as a high-tech country, our interviewees pointed out that it has not created its own Google, Microsoft or Apple. Some wondered where Germany might be in thirty years from now: »The values that matter in a rapidly changing world marked by disruptive trends cannot be taught,« argued a participant from India. »For Germans, predictability, stability and certainty are just too important.« A possible explanation of this attitude was offered by a Brazilian participant: »The German school system and the curriculum are very logically structured and interwoven – detailed and thorough. As a result, learning follows a seamless and highly structured path. Unfortunately, that can also be a disadvantage. You are not as good when it comes to thinking out of the box.«

Germans are typically seen as sticking to tried-and-tested processes and technologies that they continue to refine over time rather than choosing to approach things from a completely different or new direction. This impression was frequent among interviewees all over the world. For some, this approach has its advantages, as noted by an Ethiopian: »Germany makes a lot of effort to keep improving its technology instead of always developing new ideas and then abandoning them as in the USA. I think that is a good approach and one that makes Germany stronger.« Using almost identical wording, a Vietnamese woman felt that while Americans are good at marketing, they don't think long-term. The overall impression in our survey, however, is that Germany lacks the flexibility and creativity needed to drive innovation.

Why is that? »Germans are not very keen on risk-taking,« explained an interviewee from Mali. Many others went even further, suggesting that Germans are extremely risk-averse. »In the 21st century you can't avoid taking risks if you want to get ahead,« declared an observer in Rwanda. The same basic point was made in Viet Nam and the USA, along the following lines: »We have lots of ideas and we

»Germany is a very environmentally aware country, and very green. Whenever I fly to Germany and look down on the green countryside from above, it warms my heart. I have high hopes for electric cars, and that Germany will make progress with them, too.«

Afghanistan

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develop them. We think it's not that bad if they don't turn out successful. In the USA you learn from failure.«

Alongside this perception of unwillingness to embrace risk, our survey revealed an impression that Germans are generally rather wary of things new and modern. »Germans love to indulge in apocalyptic scenarios. They are more afraid of the gig economy as typified by firms such as Uber than they are of an all-controlling state. They are also too dependent on big, outdated systems,«

observed a Chinese interviewee, likening Germany to a stranded whale rotting away on the beach. In this context, young Chinese in particular apparently see Germany as a little behind the times: »The fact that so many people in Germany still pay in cash and hardly ever use mobile payment systems clearly shows that they are lagging behind when it comes to modern technology.«

Others point out that technological innovation does happen in Germany but tends to be the preserve of smaller companies in the SME sector that may attract less media attention, but nevertheless have tremendous potential to develop new ideas. Not everyone shares the view that Germany's automotive industry is incapable of embracing the future, although

there is criticism of the slow pace of change. On this point, a Tunisian offers the following assessment: »It keeps reinventing itself. It takes a bit longer to get going, but then it really picks up momentum.«

Even so, given the perception that rapid change is contrary to the German mentality, doubts remain among our interviewees as to whether Germany can progress fast enough to avoid being left behind. Summarising the view of many others, a US contributor noted: »Purely for cultural reasons, I wonder whether Germany and the new economy will prove compatible in the medium term.«

Industry in need of modernisation

With regard to information and communication technology, Germany is perceived as lagging behind but with the capacity to reoccupy a leading position if the country's outstanding industrial base can be catapulted as a whole into the digital age.

Setting a good example on green issues – but for how much longer?

Germany is widely perceived as a model of good practice on environmental issues. »I think it's terrible what my own government is doing, especially its decision to abandon the Paris Climate Agreement,« said a US interviewee. »Germany is a good model. It stands for leadership on the environment, especially in terms of recycling and the sustainable use of natural resources. It's ingrained in German culture – nature, woodland, German Romanticism.« Despite various conflicts of interest involving German industry, the country is still regarded as a pioneer when it comes to the environment and the issue of sustainability: »I think Germany is right at the top on environmental protection and recycling,« we heard in Ghana. In Viet Nam, too, it was felt that Germany places greater importance on protecting the environment than either France or Spain, for example. Above all, Germany is viewed as a world leader in the field of water supply and wastewater treatment systems.

Our survey points to ongoing interest in Germany's decision to phase out nuclear power and embark on a transition towards low-carbon energy. »No other country has taken such a courageous step as that of switching off its nuclear power and building entire »forests« of wind turbines,« asserted a Ukrainian observer. »There is a common vision that Germany must follow a cleaner path. Well done!« One view expressed in

India was that Germany's change of direction in favour of solar and wind power will generate benefits for the rest of the world. A Polish interviewee argued that the move by Germany is one of the most far-reaching political decisions of recent years. There were also sceptical voices, especially with regard to arguments over safety: »I think it's a shame that Germany is closing down its nuclear power stations. In my opinion, the quality of the engineering is very good,« commented a Russian. A similar view was put forward in Ukraine: »On safety grounds alone, it makes no sense to go it alone. After all, your neighbours will continue to operate their own plants. I would like Germany to be involved in making nuclear power safer.«

Interestingly, none of our observers linked the nuclear phase-out with concern that Germany would again be more reliant on coal. This issue was mainly raised in Canada, where climate campaigners were initially worried at the prospect of rising emissions. Since then, however, many have been reassured by Germany's efforts to implement the Paris Climate Agreement and by the fact that it now has a large green energy sector.

For many interviewees, Germany's energy transition is forward-looking and achievable. The predominant view is that Germany can and should play a leading role in this >

› area on account of its economic and political influence. A British observer felt that Germany is perfectly aware of its position as a role model but could certainly do more: »Renewable energy needs to expand all across Europe. Germany is well placed to help shape EU legislation and set a good example for others to follow.« In Poland, one interviewee sensed that Germany was guilty of a patronising attitude towards other countries in relation to its energy transition strategy: »After all, Germany has been polluting the world for centuries. In the long term, of course, Germany is right, but each country has to reach a point where it can afford to make that transition.«

On the basis of our survey, there is no longer any question as to the importance of the climate and the environment as economic factors. Germany is still regarded in other countries as occupying pole position in this global market of the

future, although – as in other sectors – it is advised to keep its eye on the ball and avoid being left behind by new developments. The goal, we were told, is to push ahead now with the development of technologies that will allow Germany to remain globally competitive beyond 2040. In this context, a US observer wondered whether Germany has what it takes: »In terms of environmental technology, you Germans are on a par with Apple and Google in the United States. The question is whether Germany can achieve the same global success as Apple and Google with that technology. Can you make it as a global leader? You have the capacity, but there is no corresponding innovation environment.« A Mexican interviewee expressed similar reservations: »It seems to me that Germany is slowly being overtaken by smaller countries with a more consistent approach. Denmark, for example, is working very hard to become self-sufficient in energy.« ■

The almost unanimous view among participants in our survey is that Germany spends its time catching up with the latest developments. »If you are too used to enjoying past successes in engineering and car-making, there is a risk that you might fail to spot promising new developments in ICT,« explained a Jordanian, adding that Germany needs to launch a major campaign to make people aware of the importance of acquiring ICT skills in our knowledge-based era.

The same criticism was repeated in Mali: »One wonders whether the Germans are missing the

boat when it comes to the digital revolution.« In China, too, there was no let-up: »Germany comes across as a bit pathetic when it comes to digitalisation. Take the density of internet connections, for example. It's like the Stone Age. You should come to China.« In the view of a Serbian interviewee, »Germany is still up there in terms of technology, but it is at risk of falling behind. What will it do then? The technologies of the future are being created in other countries – the software in the USA and the hardware in China – and the servers are based in India.« There is a warning, too, from a US observer: »Germany is resting too much on

»Germans still write letters. By hand. They put them in an envelope, go to the post office and queue up for ages to post them. And, best of all, they still pay in cash, using coins and notes!«

China

its laurels – on its current economic strength. You need to focus instead on how you plan to remain competitive as far ahead as 2040 and on what basis.«

So why is Germany not making faster progress towards digitalisation? Our survey suggests a number of other explanations alongside the perceived obstacle of the German mentality. For one Chinese interviewee, the main issue is the country's generally strict data protection rules and the difficulties they present, especially for young businesses.

Apart from concerns about the German mentality and regulation, the general feeling is that Germany is not actually in such a bad starting position. According to our survey, the challenge facing the USA is to upgrade its engineering plant and equipment so that they can be linked to advanced IT systems, while the situation in Germany is exactly the opposite. Its main task is seen as the relatively simple one of digitalising its otherwise advanced industrial systems. In this regard, a Russian observer argued that Germany had already made considerable progress over recent years. In Brazil, meanwhile, it was suggested that

Germany could even emerge as a global beacon of the fourth industrial revolution.

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Advice on how to achieve this is offered by a Tunisian, emphasising the need for greater networking and cooperation: »Germany should get together with other countries and think about what steps it needs to take in order to manage the process of digital transformation and meet the challenges of Industry 4.0. No one country can handle that on its own, so cooperation is vital.« In Ukraine we heard calls for Germany to harness its potential more effectively and set up IT clusters across Europe. That would be one way, it was felt, of avoiding an exodus of Ukrainian IT specialists to Silicon Valley.

Overall, Germany is perceived as fundamentally capable of being a front-runner in the new industrial age, as long as it can pluck up the courage to venture out of its comfort zone, move into a higher gear, update its IT skills and then link that new-found expertise into its existing industrial systems. In the view of a US observer, the country's new arrivals could provide the fresh impetus that it needs: »The current wave of immigration might just help Germany to slip into a higher gear.«

Image and branding
*Thinking and acting
more strategically*

Those interviewees with personal experience of Germany describe a rich artistic and cultural landscape waiting to be discovered and extending well beyond the classics. This begs the question why Germany does not transmit its cultural values more proactively. A common theme was that Germany is not very good at marketing itself and its cultural diversity outside its borders.

Whether in the form of musical theatre, literature or the local museum, most of the observers in our survey were enthusiastic about German culture, praising the country's investment in art and culture and the way the tax system is set up to preserve and support cultural activities. As a result, it was noted, the sector can thrive without necessarily making a profit – a situation contrasted with that in Anglo-Saxon countries.

It was even felt that there is a connection between German art and culture and the country's economic and social

achievements. For one Ukrainian observer, those achievements are firmly rooted in a long tradition of architecture, music and literature. Admiration is expressed, too, for the fact that culture in Germany is affordable and so diverse: »In Germany culture permeates the whole of society. It is complex and diverse – from opera to street festivals. I missed that in the United States. Not everyone there can afford to go to cultural events,« said an Iranian interviewee who had lived in both Germany and the USA.

Culture is perceived as playing a role in the economy, too. Berlin, in particular, is seemingly regarded as the top destination for culture lovers from all over the world. »The way the Museum

Island in Berlin has been developed is fantastic,« said one interviewee. Other major cultural centres such as the Tonhalle in Dusseldorf and the Elbphilharmonie in Hamburg were also

mentioned. Even smaller venues outside the main cities were held up as examples of cultural

Beyond bratwurst and Goethe

People in other countries admire German culture and are impressed by the way it is preserved and promoted. Unfortunately, apart from the classics, there is too little awareness of that culture outside Germany.

»Germany has a lot to offer but it doesn't promote itself enough. Germans should blow their own trumpets more.«

Brazil

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breadth: »There is always something going on in Germany, even in small towns,« remarked an Egyptian. »I lived in Bad Nauheim, and even there you will find lots of cultural events.«

Another view expressed by interviewees was that German culture appears to fulfil an educational role. An interviewee in the USA was struck by the attention given to signage and explanatory texts in German museums: »Even art exhibitions are very academic. Visitors are very disciplined and move systematically from one board to the next.«

If there was any criticism of German culture, it was that there are too few opportunities to enjoy it in other countries. Most of what is available is dedicated to the classics, we were told. »I can't say much about German culture,« admitted a Canadian, »because I don't speak the language. I think Germany should invest more in this area and appoint cultural attachés in its embassies and set aside a budget for cultural activities. In Ottawa, the National Arts Centre has a British director whose role is to promote British art. It's packed.«

A British interviewee wondered whether the language barrier is to blame for the fact that so

little is known about German culture outside the country. Or perhaps it is because Germany is not a ›sunny beach destination‹, she suggested, noting that the country is better known for more prosaic matters such as politics and business, despite having so much to offer on a cultural and personal level – German cinema, theatre, German music and books. This view was expressed in very similar terms by dozens of interviewees all over the world.

The perception of many observers was summed up in India: »We don't really notice German history and culture, although it is very rich. Many people even think that Germany has no culture at all compared with Britain and France.« This line of thought was taken up by an Iranian who felt that his compatriots knew very little about German culture beyond the Oktoberfest and German sausages. By contrast, they know a lot more about France and French cuisine, he concluded.

The general picture offered by our interviewees can be neatly summed up as follows: with the exception of those in top positions, most of whom equate German culture with classical music and relatively complex philosophy,

The magnetic attraction of Berlin

A young and open Germany

»For me, Berlin is not a typical German city. It's international. I'd say Munich is more typical of Germany as a whole.« Most of our interviewees echoed this view of the capital and of where to find the more traditional side of Germany – namely in Munich, Stuttgart or Bonn. For many, Berlin is not just a place where you can explore a vast pool of German history and culture in a short space of time. It is the beating heart of a young and innovative Germany. »Berlin is like New York – really laid back and relaxed, but unlike New York it's very affordable.« That makes Berlin a firm favourite with businesses, especially new start-ups. According to our interviewees, the city projects a special energy. It is associated with openness, flexibility, diversity and culture.

The fact that people cycle in Berlin – an unusual practice for a large city – attracts the attention of many observers. They like its combination of old and new. Dilapidated

buildings can be found alongside modern homes, the walls of both adorned with graffiti and street art, and back yards dedicated to urban gardening. Most feel welcome in Berlin. There are no striking divisions between social classes, and there is a strong and politically aware civil society. Perhaps it is because of this exciting mix that many interviewees felt they could imagine living in Berlin. In many respects, Berlin is simply a phenomenon. »You want to know why young Chinese people travel to Berlin?« we were asked in China. »Because it's sexy.«

The only problem with Berlin, observed some, is the (allegedly surly) locals. Others felt that the prevailing attitude towards foreigners out in the streets is unfriendly. A few suggested that Berlin's image is not matched by the reality. Nevertheless, there was broad agreement that the city leaves its mark on visitors. You can't visit the capital and not feel anything. ■

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most people in their countries know very little about German culture. »German culture is very diverse,« observed a Brazilian contributor. »We mostly associate it here with classical music. Yet in terms of culture Germany is young and dynamic. Exporting German culture to Brazil would help us to understand Germany as it is today.«

In the judgment of our interviewees, Germany does too little to market its cultural achievements at international level. It is perceived as standing for quality, but first and foremost that connection elicits thoughts of Mercedes, BMW and Porsche. As a mental reflex, people simply do not associate Germany with culture.



»There are so many great things in Germany but nobody knows about them.«

Nigeria

The Goethe-Institut's cultural offerings around the world are described as very interesting but inadequate in scale, especially in direct contrast with those of other countries. In the view of a Russian interviewee: »The American Centre in Moscow does that kind of thing much better than the Goethe-Institut. There are English-language activities every day for young and older Russians.« A similar observation was made in India: »The Germans need to make more of an effort in this area through their cultural centres and through grants. Take the Fulbright Program, for example. That is much more influential than the Goethe-Institut.« The same message encouraging the Goethe-Institut to scale up its activities was repeated in many other interviews.

Some interviewees suggested broadening the focus beyond the work of a single cultural institution. A Nigerian interviewee confessed

herself puzzled: »Although there are so many German institutions, such as the embassy, the consulate, the chamber of commerce and the Goethe-Institut, we don't really know that much about Germany. Why is that?« People in other countries have registered that something

is missing – that there is a gap in provision. To close that gap, we were told repeatedly, Germany needs to invest much more in cultural centres, set up local German schools to teach the language more widely and promote cultural exchange.

Germany would benefit from blowing its own trumpet

Germany needs a more visible profile. To this end, it needs to talk more about itself and its culture and draw the attention of the world to its politics, economy and history so that others can share and benefit from them. Why doesn't Germany engage more in cultural branding as a strategic tool?

Among the ideas put forward by our interviewees were alumni clubs for parents and their children who had previously lived or gone to school in Germany. »Otherwise you can lose your command of the language very quickly, and unfortunately the Goethe-Institut does not run enough courses, especially for children.« One contributor proposed a

»The Goethe-Institut has space for 30 people to learn about German culture. The British and Americans fill stadiums.«

Ethiopia

strategy for supporting local, German-friendly municipalities in other countries by funding core groups that have a great deal of experience of and strong ties to Germany to help them pass on their knowledge. Those towns and cities could then act as a hub where people from all over the country would undergo intensive cultural and linguistic preparation before travelling to Germany.

So why is Germany perceived to be less successful than other countries when it comes to projecting its culture abroad? Some interviewees felt this was because the French and the British were better at appealing on an emotional level, while the Americans were just so good at marketing, full stop. And the Chinese? Considering how much of everything they sell across the globe, that goes without saying. In Tunisia, too, we heard that the Germans were simply not as aggressive as the Americans when it comes to marketing.

To sum up, Germany is seen as less skilful at marketing itself. According to a US observer, Germany should launch a global advertising campaign based on its soft power, projecting the message »We are the good guys«. An Ethiopian interviewee argued that the media and the German people themselves should help to market their country more effectively: »They

should be saying, ›We have a lot more to offer than the others,‹ but they don't. The Germans are very restrained.«

Against this background, some interviewees wondered why the Germans don't adopt a more strategic approach to nation branding. Is it that they can't or simply don't want to? Examples were offered to back up both hypotheses: »The Deutsche Welle service is underused,« we heard in Egypt. »Germany should invest more in its media.« A Saudi Arabian observer was puzzled at what he saw as poor marketing by Germany's international broadcaster. While the issue is explored from many angles in our survey, the overriding perception is that Germany does not do enough to market itself and its products. It should, we were told, expand its PR activities and in doing so feel free to turn up the volume a little.

Annex 1:
Methodology

This study, the third in the series entitled *Germany in the Eyes of the World*, follows the same methodology as its two predecessors to ensure comparability. Here, too, the goal is to discover how people in other countries perceive Germany, what they see as its strengths and weaknesses and what role they expect Germany to play on the international stage. A basic introduction to the methodology can be found at the beginning of the study. This chapter explains it in further detail.

Design and case selection

This series of studies is an exploratory research project based on a qualitative and empirical approach. This means that the survey is not driven by hypotheses or theories but conducted in an open-ended manner with the aim of identifying phenomena and patterns through a careful evaluation of statements previously compiled during personal interviews. As such, the approach differs fundamentally from the quantitative methods generally applied in conventional opinion surveys, where the aim is usually to identify distributions of characteristics (in this case opinions) within a certain group. This is rarely done by surveying

everyone in the group. Typically, it involves sampling. To ensure that the results are statistically representative, samples are based on specific principles such as random selection. This approach makes it possible to draw conclusions about the (usually much) bigger group with a degree of confidence from the responses given by the sample.

Our own study follows a different approach that permits very few statistical inferences. In order to achieve the objectives of the study, we need to choose suitable interviewees who are capable of focusing their observations on a particular subject. In this case, the subject of those observations is ›Germany‹ and our group of suitable interviewees is made up of people who are familiar with Germany and who live in other countries around the world.

The 154 interviewees were selected on the basis of the theoretical sampling principles commonly used in qualitative research. To begin with, the two main selection criteria were nationality and knowledge of Germany. We chose countries that we judged to be relevant to Germany with reference to various sub-criteria (historical links, economic ties and

Figure 4
The countries included

		First Study (2011/2012)	Second Study (2014/2015)	Third Study (2017/2018)
Africa	DR Congo		✓	
	Ethiopia			✓
	Ghana			✓
	Kenya	✓		
	Mali			✓
	Nigeria			✓
	Rwanda			✓
	South Africa	✓	✓	
	Tanzania		✓	
	Americas	Brazil	✓	✓
Canada				✓
Chile		✓		
Colombia			✓	
Mexico			✓	✓
USA		✓	✓	✓
Asia	Afghanistan		✓	✓
	China	✓	✓	✓
	India	✓	✓	✓
	Indonesia	✓	✓	
	Japan	✓		
	Kazakhstan	✓		
	Mongolia		✓	
	South Korea	✓		
	Viet Nam		✓	✓
	MENA	Egypt		✓
Iran			✓	✓
Israel		✓		✓
Jordan				✓
Marocco		✓	✓	
Palistinian Territories		✓		
Saudi Arabia				✓
Tunisia				✓

	First Study (2011/2012)	Second Study (2014/2015)	Third Study (2017/2018)	
Europe	France	✓	✓	
	Greece		✓	
	Italy		✓	
	Netherlands	✓	✓	
	Norway		✓	
	Poland	✓	✓	✓
	Romania		✓	
	Russia	✓	✓	✓
	Serbia			✓
	Spain	✓		
	Turkey	✓	✓	
	Ukraine			✓
	United Kingdom	✓	✓	✓

the importance of those countries in current bilateral and multilateral political processes). The following table lists the countries selected for inclusion in each of the three studies conducted to date.

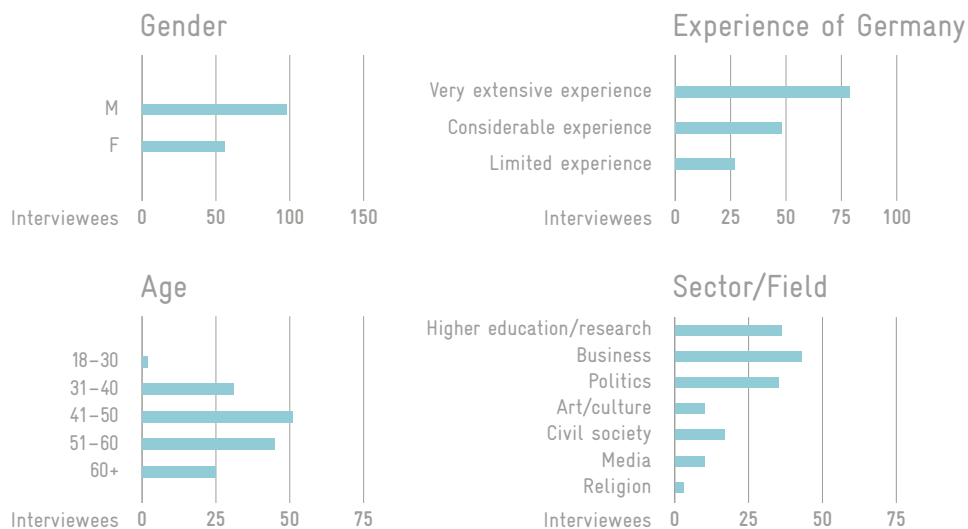
Wherever possible, we selected people in decision-making roles from various sectors and with different levels of seniority. On this basis, we drew up an initial list of 25 countries. Unfortunately, due to events at the time, we had to cancel plans to conduct interviews in Turkey, so we were left with 24 countries. The next step was to produce a shortlist of between eight and ten interviewees for each country. The goal here was to achieve the best possible distribution of selection criteria. **The following diagram** (see figure 5, page 110) shows the final make-up of the overall group.

The interviewees come from a range of occupational backgrounds, for example politics, business, higher education, culture and civil society. 98 (64%) were male, 56 (36%) female. There was also a good spread of ages. Most had either very extensive or considerable experience of Germany (127 interviewees, 82%), although to ensure an element of diversification in this area, too, we included a number of people (27 interviewees, 18%) with more limited experience of Germany.

Overall, we were very satisfied with the broad spectrum of interviewees generated by the selection process¹⁰ as it offered the greatest possible variety of perspectives. Once again, the initial list of potential interviewees we contacted was drawn up using GIZ's extensive international network. In the end, on average,

Figure 5

Characteristics of the interviewees



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we conducted between six and eight interviews per country.

GIZ's country offices in particular drew on their contacts with people in a wide variety of positions. In countries in which GIZ has no official representation, we tapped into our interviewers' personal networks or liaised with German institutions such as the Goethe-Institut, the local office of the German Academic Exchange Service or the German embassy. Special care was taken to ensure that

the interviewees had no direct link with GIZ as a company.

Data generated from personal interviews

Each participant was invited to describe his or her perceptions and opinions of Germany in a personal interview lasting around 90 minutes. The interviews followed a semi-structured procedure and included a self-selection mechanism. As well as key questions at the beginning and end, the interviewees were

10 The spectrum is deemed to be narrow if the subjects (people with knowledge of Germany) are similar in the majority of characteristics and differ from each other in only one or a few characteristics. The spectrum is described as broad if two subjects are dissimilar, i.e. they differ in a large number of characteristics (e.g. origin, age, gender).

allowed to choose from a variety of topics that they wished to speak about. This ensured on the one hand that topics relevant to the everyday context in the interviewee's country were aired while also allowing interviewees to discuss subjects about which they felt knowledgeable and informed.

The flow of the conversation was determined by the interviewee's own natural logic. The interviewers were instructed to respect that logic and avoid intervening to direct the interview or add their own images. The procedure is designed to trace the individual perspectives of interviewees and their pictures of Germany. All the interviewers were trained before conducting any interviews to ensure that they adhered to the theoretical basis of the survey and conducted their interviews in a uniform manner. They all received an identical set of materials and were asked to follow the same pattern in each case.

As in the first two studies, each interview began with an open-ended introductory phase in which the emphasis lay on free association and on images of Germany. In the second phase, the interviewees were given an opportunity to select freely from 14 available topics. In the concluding phase, which again was open-ended, the interviewees were invited to summarise their thoughts, talk about their future expectations and offer any recommendations. The 14 topics for the core section of the interview were selected to cover all the main areas of German society as well as relevant cross-cutting themes. **The following table** (figure 6, page 112) shows the range of themes covered in the third study compared with its two predecessors.

The list of topics was again updated for this study. Shorter headings were used to make the

topics (even) more accessible for interviewees. While this change produced a rather longer list of topics, it did not appear problematic since the interviewees were able to choose any number of topics. Various cross-cutting themes such as migration and the environment were also available. The rationale for their inclusion is that they appear to be more relevant than ever to outside perceptions of Germany in light of current developments.

As in the first two studies, the number of statements we compiled varied between topics. While this allows us to draw certain inferences, we were particularly cautious in our interpretations given the pseudostatic nature of this qualitative survey. In this respect, we wish merely to flag up the striking frequency of statements on the topic of international cooperation. We think this can reasonably be taken as an indication of the intensity with which current shifts in global power structures are perceived. For the purposes of this study, it is not primarily the frequency but the substance of the statements that is of interest. Accordingly, we have deliberately chosen not to provide a frequency distribution.

The next step was to transcribe the interviews, albeit not word for word. Verbatim transcription was not possible in any case as we deliberately chose not to make audio recordings. During the first study, we found that the use of audio recording devices in some cases produced a tangible sense of unease, a noticeable reticence among interviewees and a tendency to offer politically correct formulations. Instead, we chose another method of ensuring that relevant core statements were fully documented. All the interviews were conducted by a team of two interviewers, one of whom concentrated more on the actual conversation, while the

Figure 6
Topics used in the three studies

First Study (2011/2012)	Second Study (2014/2015)	Third Study (2017/2018)	
Democracy and citizen participation	Political order and administration	Political system	
Security and development	Internal and external security	Security	
The economy and sustainability	Economy and finance	Economy	
Energy and climate	Energy and the environment	Environment	
Education and professional life	Education and professional life	Education	
Research and innovation	Research and innovation	Research	
Mobility and infrastructure	Infrastructure, technology and digital change	Technology	
Migration and integration	Migration and integration	Migration	
Culture and family	Culture and lifestyle	Culture	
Faith and ethics	Family and values	Religion	
	Health and quality of life	Family	
	Wildcard		Health
			Media
			International cooperation
		Wildcard	

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other concentrated more on the task of making notes. The written records of each interviewer were subsequently matched against each other to ensure that the responses were adequately documented. Instead of producing a verbatim transcript, the team members were instructed to condense and then document the core statements. This was done using a pre-structured evaluation document in which each statement was directly assigned to one of the 14 topics (see figure 6) and given a code to indicate the type of statement (e.g. description, strength, weakness and recommendation).

In total, 154 interviews were conducted in 24 countries between May and October 2017. This was roughly in line with the number of interviews conducted for the second study. Altogether we compiled 4,175 core statements, an average of 27 core statements per interview. This average figure was slightly higher than for the second study, possibly due to the greater experience of individual interviewers, although it could also be that the documentation process was even more thorough and that the interviews were particularly informative. The latter explanation, if true, may be due to the

fact that a number of interviewees from the previous studies – individuals we knew to have expert knowledge of Germany – were again selected. However, we tried to keep the number of repeat interviewees low as a way of ensuring that we mostly obtained new impressions. As these repeat interviewees were able to highlight potential similarities or contrasts with the first two studies and therefore provide observations spanning several years, we felt that a quota of 10% was appropriate for this group of participants.

While the 154 case studies offer a certain statistical potential, we cannot simply draw conclusions for individual regions, countries or continents or for the world as a whole on the basis of this sample. The sample, which is based on geographical units, is much too small to justify this. Equally, neither the method used to create the sample nor the procedure as a whole is entirely suitable for this purpose. Thanks to the very broad spectrum of characteristics covered in our selection and the appropriately large number of interviewees for the subject under observation (Germany), we can assume a very high degree of data saturation. This was also confirmed during the evaluation phase. It became clear that additional data input would not have produced much in the way of new findings and that a sufficiently varied body of opinions and impressions had been obtained for the subject under observation.

The evaluation process

The main task in the data evaluation process was to observe phenomena in the different statements. We merged statements containing similar references and then examined their various facets. This approach enabled us

to create an overall picture based on the individual phenomena.

The basic sequence is presented below in simplified form:

- 1. Reading, analysis and pre-structuring:**
individual perusal of all 4,175 core statements, detailed analysis of each topic and drafting of initial observations;
- 2. Feedback, evaluation and discussion:**
the groups of interviewers reviewed the initial assumptions and produced open hypotheses in overarching interpretation fields;
- 3. Cross-comparison, discussion and processing of findings:** the group of interviewers reviewed the findings and explored these in greater depth on the basis of the raw material; structuring of the study.

We read and analysed the 4,175 core statements from the interviews, which formed our source material (the corpus of data). This material was made available to the evaluation team (consisting of all the dozen or so interviewers) in the form of prepared cards and lists. No other sources were used. The direction and course of the analysis followed from the qualitative objectives of the study. As in previous studies, the focus here was on identifying the most striking and interesting phenomena related to the subject being observed, i.e. the image of Germany. Accordingly, we were not looking to produce a description of a single phenomenon (i.e. an image of Germany) but initially – free of any preconceived ideas of what we might find – to identify statements that were very similar and could therefore be merged.

Each pattern was then fleshed out as far as possible in the second and most important step of the evaluation phase, referring back continuously to the source data until the potential to generate new findings in that area was exhausted. In turn, the resulting statement clusters were moulded into an overall picture. As we have indicated at several points in this study, there was no question of attempting to produce statistical generalisations (sample-to-population). We worked instead on the basis of analytical generalisation, which allows concepts to emerge by combining a series of phenomena.

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The next step of the evaluation process was to discuss the results obtained so far and formulate hypotheses. This involved re-examining the now structured material in depth and drawing up hypotheses in the form of brief texts which were then made available for further editing. In this context, it should be noted that, when conducting a qualitative study, the process of forming generalisations and hypotheses must pass two main tests. Are the assumptions backed up sufficiently by the source data, and would the same results be obtained if the analysis were repeated or if it were performed by a different team? These tests are mainly intended to avoid the risk of drawing ill-considered and uncorroborated conclusions (i.e. not thinking beyond the initial 'eureka' moment) if the process of reflection is ended because it is convenient

to do so rather than because the point of theoretical saturation has been reached. It is also important to exclude as far as possible the risk of subjective bias leading analysts to enthuse over potentially artificial correlations. Finally, even in a comprehensive qualitative study, the contextual information available is often not sufficiently differentiated to permit case-to-case transferability.

The cross-comparison, interpretation and review of the findings took place at several levels. Firstly, during the preparatory and evaluation workshops, the findings were critically appraised by the team of interviewers. Secondly, while the study report was being designed and written up, the team constantly referred back to the raw material to check their assumptions and achieve a greater degree of precision where required. Finally, care was taken not to present the conclusions and hypotheses as truths but merely as statements that can be interpreted by readers in their own way.

Annex 2:

List of interviewees¹

¹ Some interviewees requested that only their names be given. Changes in position in the interim period cannot be ruled out.

Afghanistan

Ibrahim ARIFY

CEO • Afghan Film

Shafiq GAWHARI

Managing Director • CEO Afghanistan • Moby Group

Prof. Mohammad Sayed KAKAR

Chancellor • Kabul Polytechnic University (KPU)

Mohammad Gull KHULMI

Deputy Minister of Energy • Ministry of Energy and Water

Akram ZAKI

Manager Policy & Advocacy • Oxfam Afghanistan

Brazil

Paulo Durval BRANCO

Vice Coordinator at the Centre for Sustainability Studies • Business Administration School of the Fundação Getulio Vargas

Sonia Karin CHAPMAN

Director • Chapman Consulting

Amanda PAIVA

Start-up Empodera Marta

Carla PEREIRA

International Relations Specialist • National Confederation of Industry (CNI)

Carlos Alexandre PRINCIPE PIRES

Director, Energy Efficiency Department • Ministry of Mines and Energy

Ligia SAAD

Institutional Development • Instituto Votorantim

Eduardo SORIANO LOUSADA

General Coordinator and Deputy Director • Ministry of Science, Technology, Innovation and Communications

Jaqueline VENTURIM

Start-up Empodera Marta

Canada

Céline BAK

President • Analytica Advisors

Doug BRUBACHER

Owner • Brubacher Development Strategies Inc.

Angela GEI

Actor and Coach for Presentation and Presence

Rajah LEHAL

Founder, Business Development • Cobalt Lawyers

Amitav RATH

CEO • Policy Research International Inc.

Doug SAUNDERS

Writer on International Affairs • The Globe and Mail

Irene SPADAFORA

Author/Producer • Accessible Media

Christine TAUSIG-FORD

President • Higher Thinking Strategies Limited

China

Xia DONG

Deputy Secretary-General • All China Youth Federation

Helen FENG

Singer • Nova Heart

Prof. Dr Zheng HAN

Chair Professor of Innovation and Entrepreneurship • Sino-German School of Postgraduate Studies (CDHK), Tongji University

Biliang HU

Dean, Emerging Markets Institute • Beijing Normal University

Alex (Jie) SUN

Vice President • Envision Energy

Shouliang SUN

Director, Division for German-Speaking Countries, International Department • Central Committee of the Communist Party of China

Egypt

Prof. Mahmoud Mohamed BAHGAT

Head of the Research Group on Biomarkers for Infection and Immunity • The Center of Excellence for Advanced Sciences, National Research Center

Soraya BAHGAT

Trustee and MENA Region Director • Elisa Sednaoui Foundation

Dr Nefertiti EL NIKHELY

Lecturer of Biotechnology and Molecular Biology •
Institute of Graduate Studies and Research (IGSR),
University of Alexandria

Dr Menattallah ELSERAFY

Postdoctoral Researcher • Zewail City of Science and
Technology

Dr Khaled FAHMY

Minister • Ministry of the Environment

Dr Mennattallah GOWAYED

Teacher of German as a Foreign Language •
Goethe-Institut

Ashraf SWELAM

Director General • Cairo International Center for Conflict
Resolution, Peacekeeping and Peacebuilding (CCCPA)

Ethiopia**Aida BAHTA**

Project Manager • PROJECT-E

Dr Berhanu BEYENE

Founding Director • African Institute of Governance and
Development (HIGAD)

Eskinder MAMO

Managing Partner • AhaadooTec ICT Solutions PLC

Prof. Yalemtehay MEKONNEN

Professor of Cell and Human Physiology •
College of Natural Sciences, University of Addis Ababa

Abinet Belay TILAHUN

Business and Investment Consultant • MPE Business &
Investment Consulting PLC

H. E. Teshome Lemma WODAJO

State Minister • Ministry of Education

Ghana**Dr Richard ADJEI**

Deputy Director for Research and Business
Development • Ghana Investment Promotion Centre

Prof. Akosua ADOMAKO AMPOFO

Professor • Institute of African Studies, University of
Ghana

Rev. Joseph ADUBOFUOR

Pastor • Central Gospel Church (ICGC) Bushein, Kumasi

King AMPAW

Film Maker, Director and Actor

Kwesi ASAF0-ADJEI

Executive Secretary • Ghanaian-German Economic
Association (GGEA)

Abiko BREMER

Founder • General Media Solutions

Dr Emmanuel GYIMAH-BOADI

Executive Director • Ghana Center for Democratic
Development (CDD)

Pamela SACKEYFIO

Director and Physiotherapist • RIMA TheraTouch Ltd
(RIMA)

India**Omair AHMAD**

Managing Editor, South Asia • The Third Pole

Dr Ashok KHOSLA

Chairman • Development Alternatives

Dr Ranjana KUMARI

Director • Centre for Social Research (CSR)

Dr Ajay MATHUR

Director General • TERI – The Energy & Resources
Institute

C. S. MATHUR

Partner • Mohinder Puri & Company

Rekha Vaidya RAJAN

Professor • Centre for German Studies, Jawaharlal
Nehru University

Jairam RAMESH

Member of Parliament • Rajya Sabha

Iran**Amir ALIZADEH**

Deputy Managing Director • German-Iranian Chamber of
Industry and Commerce

Noushin FOUROUTAN

Artist

Pouran LAK

Financial Manager (retired) • German-Iranian Chamber
of Industry and Commerce

Dr Mahta MOGHTADAEI

Alireza RAHIMIZADEH

Managing Director • Wirtgen Qeshm Ltd.

Prof. Dr Bahram TAHERI

Advisor to the Minister and Director General of the Environment, Health, Safety and Social Affairs Department • Ministry of Energy

Israel

Dr Yaacov DEUTSCH

Head of History Department • David Yellin Academic College of Education

Dr Lea GANOR

Director • Mashmaut Centre

Prof. Tamar HERRMANN

Senior Fellow and Academic Director • Guttmann Survey Center, The Israel Democracy Institute

Avi PRIMOR

Ambassador (retired).

Prof. Carlo STRENGER

Professor of Psychology and Philosophy • University of Tel Aviv

Prof. emer. Moshe ZIMMERMANN

Former Director of the Richard Koebner Minerva Centre for German History • Hebrew University of Jerusalem

Jordan

Dr Sara ABABNEH

Assistant Professor • Centre for Strategic Studies, University of Jordan

Dr Talal ABU-GHAZALEH

Chairman • Talal Abu-Ghazaleh & Co. International

Dr Hazim EL-NASER

Minister • Ministry of Water and Irrigation

Prof. Dr Labib KHADRA

President • Al Hussein Technical University (HTU)

Prof. Azmi MAHAFAZH

President • University of Jordan

Prof. Dr Marwan S. MOUSA

President • Jordanian Club of Von Humboldt Fellows (HCJ)

Dr Ghazi Farid MUSHARBASH

General Manager • Mirna Industrial Commercial Co.

Mali

Amb. Mamadou Mandjou BERTHÉ

Director Europe • Ministry of Foreign Affairs

Aïssata Touré DIALLO

Member of the Parliament and Chair of the Committee on Foreign Affairs • National Assembly of Mali

Mahamadou Moussa DIALLO

Chairman • Commission for Truth, Justice and Reconciliation

Mohamed EL MOCTAR

Minister • Ministry for National Reconciliation

Amb. Seyni NAFO

Advisor to the President of Mali on Climate Change

Mexico

Carmen ARISTEGUI

Journalist and Anchorwoman • Aristegui Noticias

Adolfo AYUSO AUDRY

Director General, 2030 Agenda for Sustainable Development • Office of the President of Mexico

Francisco N. GONZÁLEZ DÍAZ

CEO • Mexico's Development Bank, Bancomext

Luis Alfonso MUÑOZCANO ÁLVAREZ

Deputy Director General for Renewable Energies • Ministry of Energy

Fabiola SOTO NARVAÉZ

Deputy Director, Strategic Planning • Mexican Agency for International Development Cooperation (AMEXCID)

Vicente YÁÑEZ SOLLOA

President • National Association of Supermarkets and Department Stores (ANTAD)

Nigeria

Hafsat ABIOLA-COSTELLO

Founder and Board President • Kudirat Initiative for Democracy (KIND)

Folabi ESAN

Partner • Adlevo Capital

Fatima Kyari MOHAMMED

Founder and Coordinator • LikeMinds Project

Sam ODIA

CEO • Millard Fuller Foundation

Geoffrey ONYEAMA

Minister • Ministry of Foreign Affairs

Onyeche TIFASE

CEO • Siemens Nigeria

Alhaji Abdulsalam K. USMAN

Deputy Director, Office of the Permanent Secretary (Power) • Ministry of Power, Works and Housing

Poland**Anya Margaret BAUM**

Managing Director • The Keryx Group

Wojciech GRACZYK

Director Legal Affairs and Regulatory Management • innogy Polska S.A.

Michał KOKOT

Foreign Desk Journalist • Gazeta Wyborcza

Dr Jacek KOKŁAN

Deputy Director for Research, Social Thought Department • European Solidarity Centre

Paweł MORAS

CEO • German-Polish Youth Office

Wojciech SOCZEWICA

Deputy Head for International Cooperation • Warsaw City Hall

Russia**Dr Vladislav BELOV**

Head of the Center for German Studies at the Institute of Europe • Russian Academy of Sciences

Dr Evgeny GASHO

Expert • Analytical Centre of the Russian Government

Prof. Dr Tatjana ILARIONOVA

Professor • Russian Presidential Academy of National Economy and Public Administration (RANEPA)

Yuriy MAKSIMENKO

Deputy Chair of the Committee on Environmental Management and Ecology • Russian Union of Industrialists and Entrepreneurs (RSPP)

Dr Dmitri TRENIN

Director • Carnegie Moscow Center

Prof. Viacheslav WOLFENGAGEN

Professor • National Research Nuclear University MEPhI

Rwanda**Dr Pascal BATARINGAYA**

President • Presbyterian Church of Rwanda

Eric KABERA

Founder • Kwetu Film Institute

Jones Kennedy MAZIMPAKA

Vice President of the Rwanda Film Federation • Chairperson, Media, Arts and Entertainment Sector Skills Council

Patrick MUHIRE

Fashion designer • Inkanda House

Alice NKULIKIYINKA

Operations Director Rwanda • Business Professionals Network

Christine NKULIKIYINKA

Ambassador in Sweden • Embassy of Rwanda

Alexis RUZIBUKIRA

Director General • Ministry of Finance and Economic Planning (MINECOFIN)

Saudi Arabia**Dr Saleh AL AMR**

Managing Director • Human Resources Development Fund (HRDF)

Dr Yousef AL JEMELY

Professor emer. • Institute for Technical Vocational Training

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»Germany is like an African cat. It will watch you for a while before getting closer. It won't welcome you straight away. It won't let you approach it until it has decided that you are okay. And if it doesn't have a good feeling about you, it will keep its distance.«

Rwanda

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