



World Powers in the 21st Century

The Results of a Representative Survey in Brazil, China, France, Germany, India, Japan, Russia, the United Kingdom, and the United States

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| BertelsmannStiftung

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FOREWORD

In this evaluation report the Empirical Social Research Project Division of TNS Emnid Medien- und Sozialforschung GmbH presents the results of a demoscopic survey conducted in nine countries and entitled

World Powers in the 21st Century Europe's Global Responsibility

This nine-country survey was commissioned by the

Bertelsmann Stiftung, Gütersloh

and carried out in Brazil, China, Germany, France, the United Kingdom, India, Japan, Russia and the United States among the local adult population. Our client possesses the exclusive rights to the collected data.

The survey took the form of representative questions that respondents answered on the telephone or in face-to-face interviews. The number of interviews amounted to between 1,000 and 1,500 per country. A total of 10,250 people were interviewed for this survey. The interviews were conducted between 29 October and 17 December 2005.

The present documents are for the sole use of our client.

Torsten Schneider-Haase

TNS Emnid

Bielefeld, January 2006

1 OBJECTIVES AND CONTENTS

The aim of this representative survey in selected states in Europe, America and Asia was to elucidate the views of various populations concerning the question “What defines a world power in the 21st century” and, in the process of doing so, to attempt to discover whether or not the EU is accorded a role as a global player. To this end surveys were conducted in nine different states (listed here in alphabetical order) in an exemplary manner:

- Brazil
- China
- Germany
- France
- United Kingdom
- India
- Japan
- Russia
- United States

The states were chosen on the basis of their historical, current or future significance in terms of political, economic, cultural and military power. Brazil, which is the largest industrialized nation in Latin America, and India, an Asian emerging market with a large population and high growth levels, were incorporated into the survey in addition to the five permanent members of the UN Security Council (and nuclear powers), the United States, Russia, China, France and the United Kingdom. Japan and Germany represent global economic powers inasmuch as they are both nations with a high level of exports.

In addition to questions about the qualities of a world power and the world power status of states now and in the future, the survey was concerned to elucidate public views about the global challenges that now confront the world. Conversely, there were questions about the aims and tasks that world powers should embrace in order to be able to meet the identified challenges and risks. The role of the EU and that of the United Nations (UN) was also mentioned in this context. Another set of questions

was devoted to the maintenance of peace and stability throughout the world and sought to elucidate the powers and organizations best able to deal with this task.

2 EXECUTION AND METHODOLOGY

The survey was conducted with 1,000 adults per country. The exceptions were Russia and Brazil (each with 1,500 interviews) and Japan (1,250 interviews). The polls were conducted via telephone with the help of CATI (computer-assisted telephone interviewing) technology. Since the institutes in India, China and Russia were of the opinion that there were not enough telephones in these countries for a representative telephone survey approach; the interviews were conducted on a face-to-face basis. In Brazil, China and India the survey was only conducted in the large “metropolitan areas”, for interviews in rural areas would have been difficult to carry out for organizational reasons.

All of the institutes engaged in the survey are familiar with the structure of international surveys. Furthermore, all of the participating institutes are members of ESOMAR and thus subscribe to international market and opinion research quality standards. All the institutes based their work on the English version of the questionnaire. TNS Emnid then checked the accuracy of the questionnaires translated into the various local languages. The project was coordinated by TNS Emnid in Bielefeld. The international section of the survey was coordinated by our partner, Gallup International.

The average length of the main interview was five minutes. The field time of the survey was between 29 October 2005 and 17 December 2005. The mean margin of error of the proportional values with a total probability of 90 per cent amounts to +/- 3.1 percentage points (based on a sample size of $n = 1,000$).

3 SUMMARY OF THE MOST IMPORTANT RESULTS

The most important results of the study are presented below. In order to make it possible to depict the salient facts in an appropriate manner in the restricted space available, the data for the various countries are to a large extent presented in the form of diagrams. The descriptive commentary refers to specific data only in passing. More detailed information is available in additional volumes that contain the data in tabular form.

The standard of comparison with which to interpret the data is the mean result of the countries sampled in the survey. The results from the various countries are equally weighted – in other words, the differences in the size of the population are not taken into account.

In the interests of greater legibility, the states are represented by their national flags in the diagrams:

Brazil 

Germany 

Russia 

China 

India 

United Kingdom 

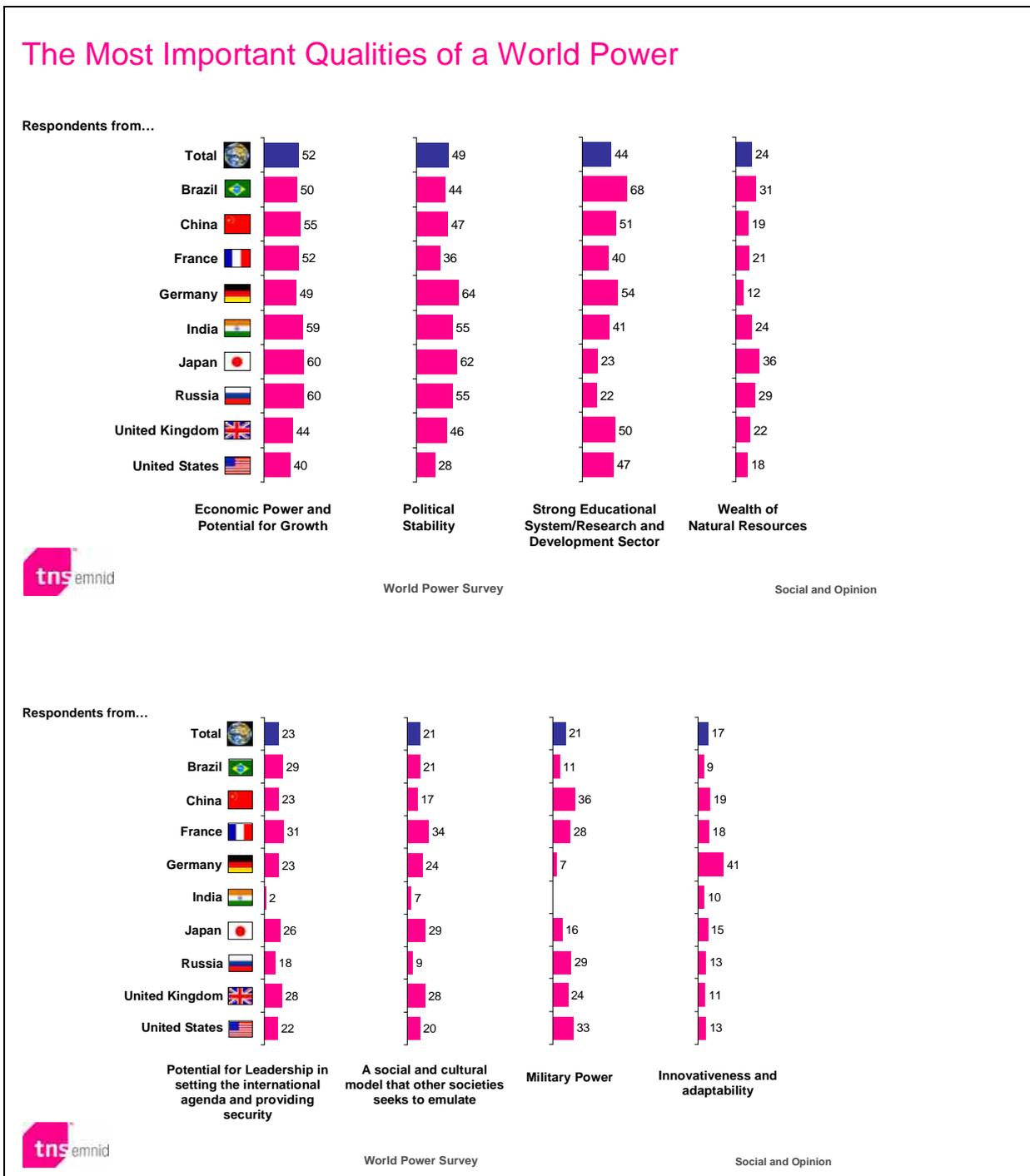
France 

Japan 

United States 

3.1 The Most Important Qualities of a World Power

- The populations surveyed are of the opinion that the economy, politics and research/education are the central factors that determine world power status. A country's military power plays only a subordinate role.



Question: In your opinion, what qualities must a country possess to be considered a world power? Please state the three most important qualities.

Legend: The results from the various states in which populations were surveyed are aligned from top to bottom – in alphabetical order. The top line, which is labelled “Total”, is the mean value derived from the individual results and can be used as a benchmark with which to interpret the results from the various countries. From left to right are the individual qualities which could be assigned to a world power, arranged in descending order on the basis of the average frequency of the responses. Thus the quality labelled “economic power and potential for growth” is on average assigned to a world power by 52 per cent of the respondents (“Total”), whereas half of the Brazilians selected this particular quality.

At the beginning of the survey people were asked to name what they considered to be the most important qualities of a world power.

In all of the states in the survey, it is primarily a country's economic effectiveness (52%), political stability (49%), and educational and research sector (44%) that determine its world power status. As the level of the percentage results, which hardly surpasses the 50-per-cent mark, demonstrates, people are not aware of a clear-cut and predominant world-power factor. On the other hand, the distribution also shows that the other five factors mentioned with values of around 20% - including cultural attractiveness and military power, each of which reaches 21% - play only a subordinate role.

Important differences emerge when we examine the results from the various countries in which the survey was conducted.

Whereas it is true that economic effectiveness as a salient factor of a world power is considered to be fairly important by people in all of the countries included in this survey, in the case of the Germans it occupies third place (49%) after the factors of education/research (54%) and political stability (64%). Similarly, the British do not consider economic power to be the central factor (44% - also in third place). The Americans assign the lowest value in absolute terms (40%) to this factor.

Germans and Japanese in particular consider political stability to be an important criterion. However, it plays an especially subordinate role in the case of the Americans (28 per cent response level) and ranks only fourth in the evaluations. Political stability ranks only third in the case of the French, the Brazilians and the Chinese.

On the other hand, for people in the United States the factor of education and research is, in relative terms, at the top of the list when they define a world power (47%). This is equally true of the United Kingdom (50%) and Brazil (68% - the highest percentage for any single factor). Conversely, an effective education and research sector plays a markedly subordinate role for Japan and Russia, where it receives the lowest number of responses (23% and 22%).

People also attach little importance to responsibility for international agenda-setting and security provision, i.e., to a leadership role of the kind that is traditionally associated with a world power. With roughly 29 per cent, the French, the Brazilians and the British still consider “leadership” to be one of the most important qualities of a world power.

Only the French, the Japanese, and the British place a relatively higher value on the cultural attractiveness of a state. It is of no importance in India (7%) or in Russia (9%).

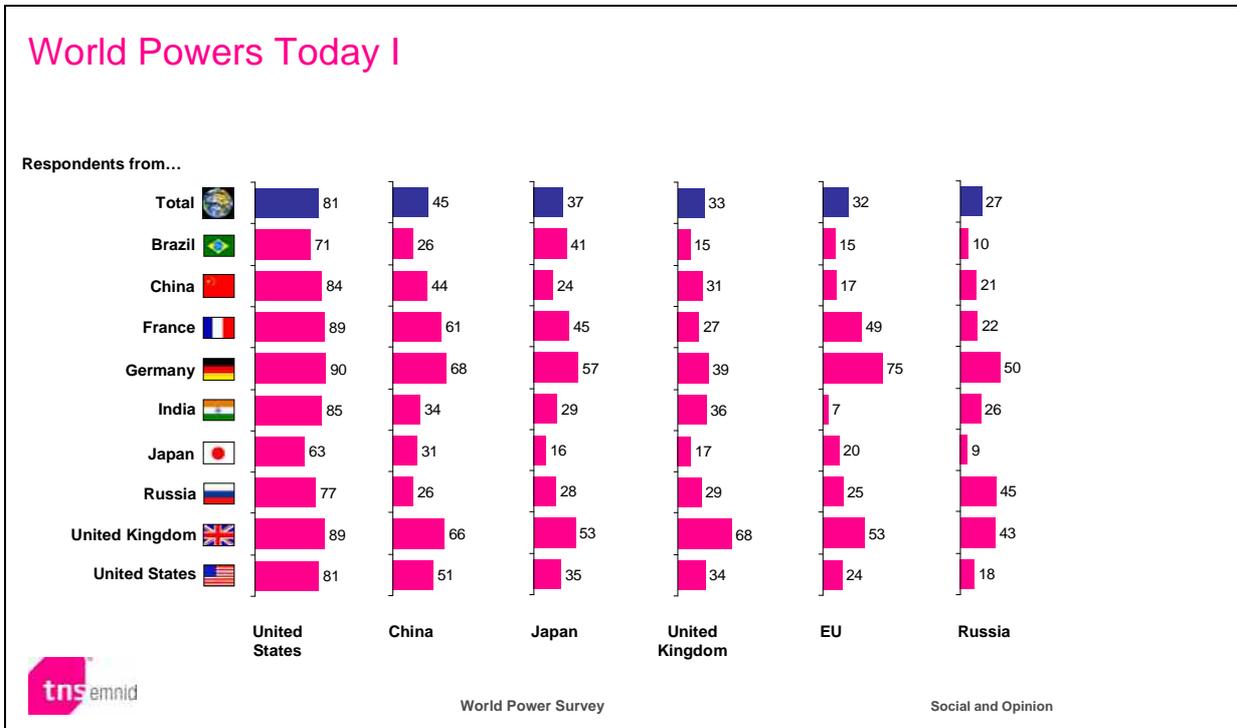
With a response of about 30 per cent, respondents from countries that are permanent members of the UN Security Council still place a comparatively high value on “military power”. It is accorded the highest value (36%) by the Chinese, and is far and away least significant in Germany (only 7%). Even the value for Japan (16%) is more than twice as high.

People are not in fact of the opinion that the factor of innovation is of importance for a world power. The singular exception is Germany, where 41 per cent believe that innovative strength constitutes an important aspect of a world power.

3.2 States and Organizations with World Power Status

3.2.1 States and Organizations with World Power Status Today

- **The United States is unquestionably perceived to be a world power, and is followed at a considerable distance by China. The EU and UN in are in the “middle range” of perceived world powers.**



Question: Which of the following countries or organizations are world powers today?

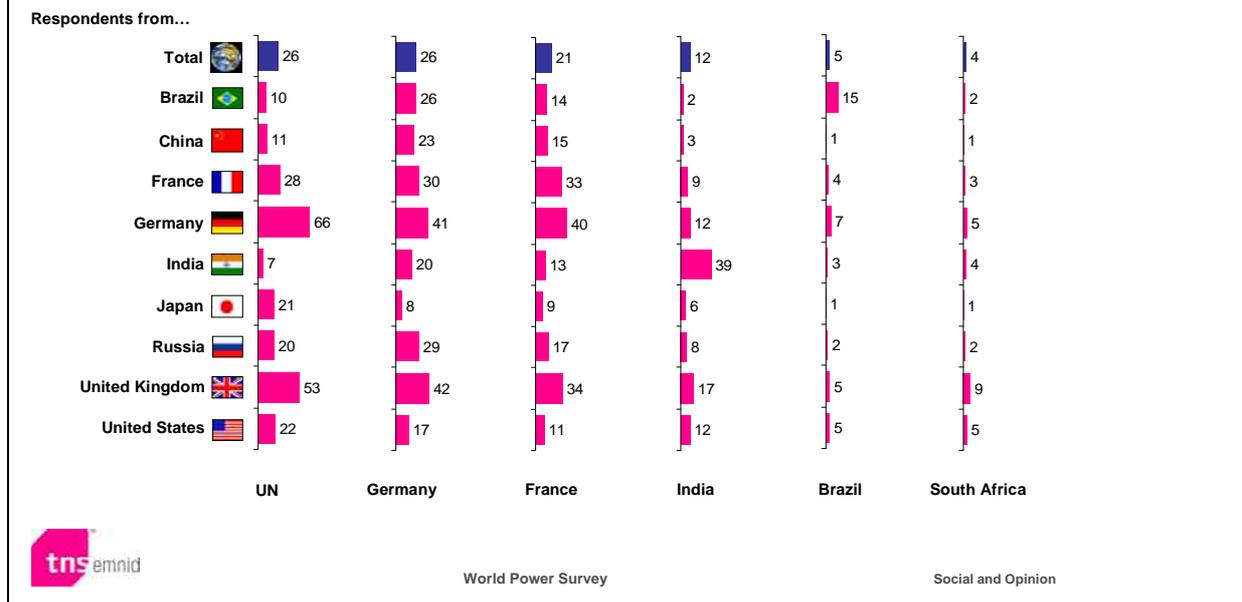
Legend: The results from the various states in which populations were surveyed are aligned from top to bottom – in alphabetical order. The top line, which is labelled “Total”, is the mean value derived from the individual results and can be used as a benchmark with which to interpret the results from the various countries. From left to right are the individual states and organizations that might be described as world powers, arranged in descending order on the basis of the average frequency of the responses.

On average (“Total”) 81 per cent of the respondents consider the United States to be a world power, whereas in Brazil 71 per cent are of this opinion.

Populations of the countries surveyed are unanimous in their perception of the United States as a world power, which heads the list with 81 per cent. The Japanese have a below-average opinion (61%) of the position of the United States as a world power. On the other hand, the west European EU states in the survey (Germany, the United Kingdom and France) have an above-average opinion of the role of the United States as a world power.

The United States is evidently best able to combine the most important qualities of a world power referred to in the previous section, namely “economic power”, “political stability” and “efficient research and education”.

World Powers Today II



The populations of the various states recognize the leading world power status of the United States, though to different extents. Conversely, a vast majority of those surveyed do not perceive Brazil and South Africa as world powers.

Clear differences exist with regard to the evaluation of other states. The People's Republic of China, which is considered a world power by 45 per cent of respondents, follows the United States in second place, though at a very perceptible distance (36 percentage points). China is accorded the status of a "world power" in particular by the west European states in the survey as well as the United States. In its self-perception China sees itself in fourth place.

Considerable differences between how a country perceives itself and how it is perceived by others are also in evidence in the case of some other states. For example, Japan achieved a third-place ranking before the United Kingdom, France and Russia, even though only 16 per cent of the Japanese population share this estimation.

Whereas the majority of the British still regard their own country as a world power next to the United States and China, this view is not shared by other states. Of the states under consideration, the United Kingdom is followed by Russia, which received above-average responses from Germany, the British and the Russians

themselves. Germany is deemed to be a world power on the same level as Russia (26%). France follows on a slightly lower level. The Germans are far more convinced of their role as a world power (41%) than the French are of theirs (33%).

The question also allowed respondents to select the UN and the EU in addition to specific states. Here the EU's significance as a world power was placed before that of the UN -- not only by European states. The Germans in particular envisage an especially important role for the two supranational organizations. They believe that the EU is in second place in the world power hierarchy followed by China, with the UN in fourth position. Conversely, the two organizations play a markedly subordinate role in Latin America and Asia.

3.2.2 States and Organizations with World Power Status in 2020

- In future the United States is expected to lose its current position as undisputed leading world power. Survey respondents believe that China's growing importance will enable it to become an equal partner. The envisaged role of the EU and the UN remains basically unchanged.



Question: Which of the following countries or organizations will be world powers in the year 2020?

Legend: The results from the various states in which populations were surveyed are aligned from top to bottom – in alphabetical order. The top line, which is labelled “Total”, is the mean value derived from the individual results and can be used as a benchmark with which to interpret the results from the various countries. From left to right are the individual states and organizations which it was possible to describe as future world powers, arranged in descending order on the basis of the average frequency of the responses. On average (“Total”) 57 per cent of the respondents consider the United States to be a future world power, whereas in Germany 82 per cent are of this opinion.

In this question, it is the United States whose world power status is expected to decline the most by the year 2020. Currently the United States is undisputedly deemed to be a world power by 81 per cent of respondents. However, only 57 per cent believe that it will still have this role in the year 2020 (which amounts to a change of -24 percentage points). Conversely, China is able to add 10 percentage points to its significance, reaching 55 per cent, and expectations concerning its future world power status are thus on a par with the United States. The importance of India (+12) in particular and, to a lesser extent, Brazil (+5) is also expected to increase. In addition to the United States, the significance of the United Kingdom (-11) is expected to decrease markedly. The positions of Germany, Japan and France are also expected to deteriorate (reflected in a decline of about 5 percentage points).

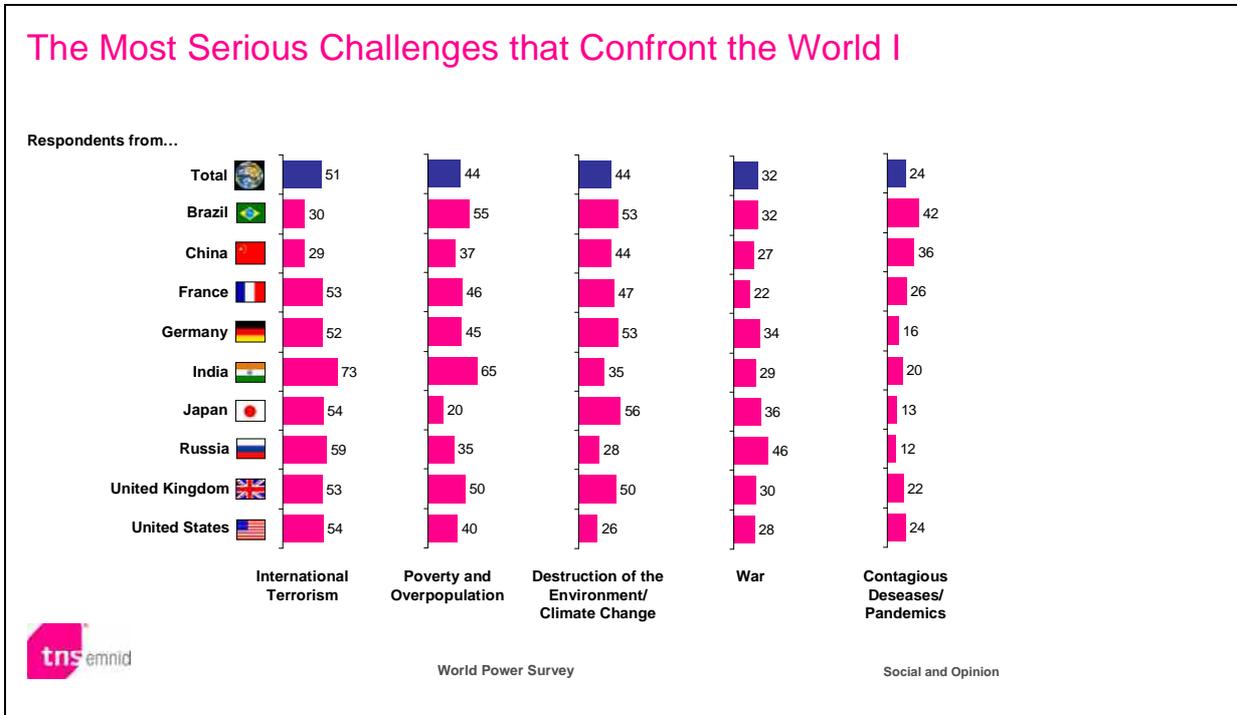
The status of the EU and the UN remains largely unchanged. Neither is expected to increase its world power status by 2020.

An analysis of what people said in the various different states reveals that Americans are clearly more pessimistic about their own future role as a world power than the views of the Germans and the British concerning the United States.

On the other hand, there is widespread confidence in future national strength in India and China. 76 per cent of Indians believe that in 2020 India will be visibly ahead of the United States and China. In China 71 per cent of the population is of the opinion that it will be in first place and almost 30 per cent ahead of the United States. Other powers are no longer of importance as far as China is concerned.

3.3 The Most Serious Challenges and Threats that Confront the World

- **Terrorism, poverty and climate change are the most serious challenges confronting the world. National perspectives influence the awareness of the various problems.**



Question: What are the main challenges and threats confronting the world today? Name the three greatest challenges and threats.

Legend: The results from the various states in which populations were surveyed are aligned from top to bottom – in alphabetical order. The top line, which is labelled “Total”, is the mean value derived from the individual results and can be used as a benchmark with which to interpret the results from the various countries. From left to right are the individual threats and challenges that confront the world, arranged in descending order on the basis of the average frequency of the responses.

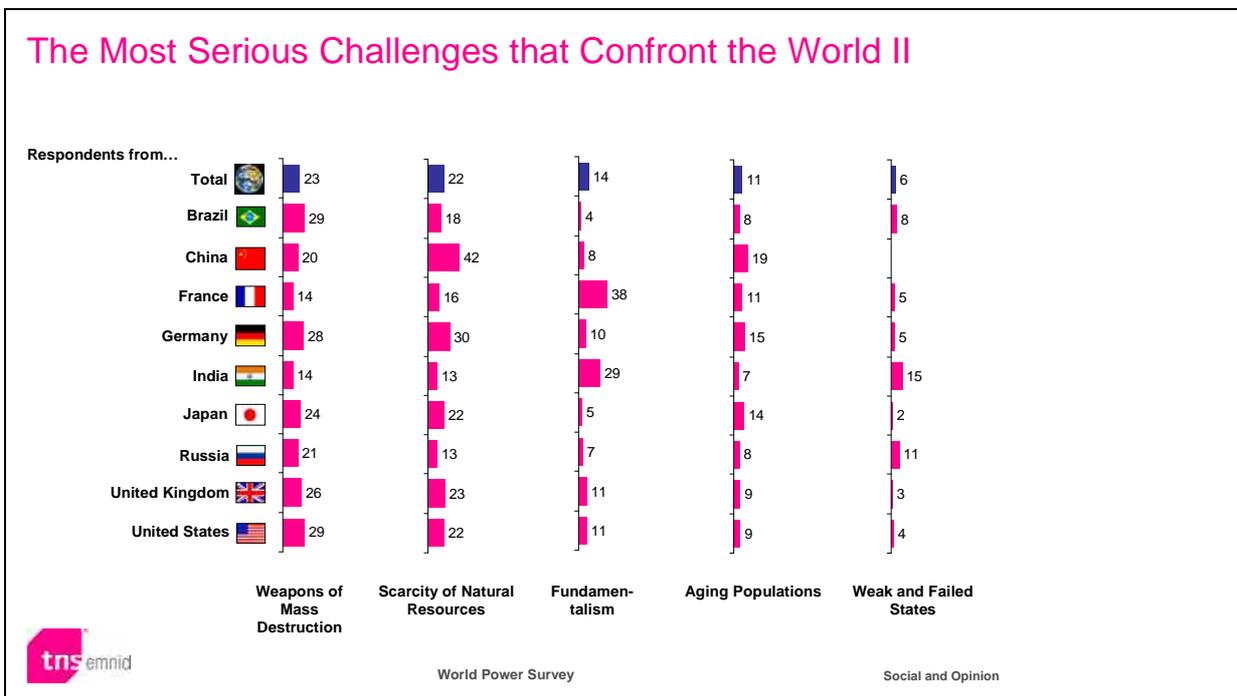
On average (“Total”) 51 per cent of the respondents consider international terrorism to be one of the three greatest threats that confront the world, whereas in India 73 per cent are of this opinion.

Note: The population in China was not asked to comment on “weak and failed states”.

A summary of the results from the states participating in the survey shows that on average the most serious threat to the world comes from international terrorism (51%). On the other hand, almost 50% of respondents do not include international terrorism among the three greatest threats confronting the world. Thus the populations surveyed see international terrorism as an important threat, though not as a predominant one. 44 per cent of the population believe that the clusters of “poverty and overpopulation” and “destruction of the environment/climate change” constitute important global challenges.

An examination of the results in the various different countries reveals some very divergent threat perceptions. The threat posed by international terrorism is

considered to be of great importance by the Indian population (73%), and of relatively less importance by the Brazilians and the Chinese.



Indians and Brazilians consider poverty and overpopulation to be almost equally serious challenges. On the other hand, poverty is of relatively low importance to the Japanese. The latter put environmental degradation and climate change at the top of the list (56%). Here there are marked differences between the Japanese and the Americans, who, like the Russians, believe that environmental degradation and climate change pose only a minor threat.

Compared to other states, Russian respondents believe that war constitutes a serious threat to the world, whereas the French accord the least importance to this question. Brazilian and Chinese respondents noted contagious diseases and pandemics as a global challenge with above-average frequency. Here the Russians have the fewest concerns, followed by the Japanese and the Germans.

In none of the states in the survey is the existence and proliferation of weapons of mass destruction currently deemed to constitute a leading threat, and is mentioned by only a fourth of the respondents.

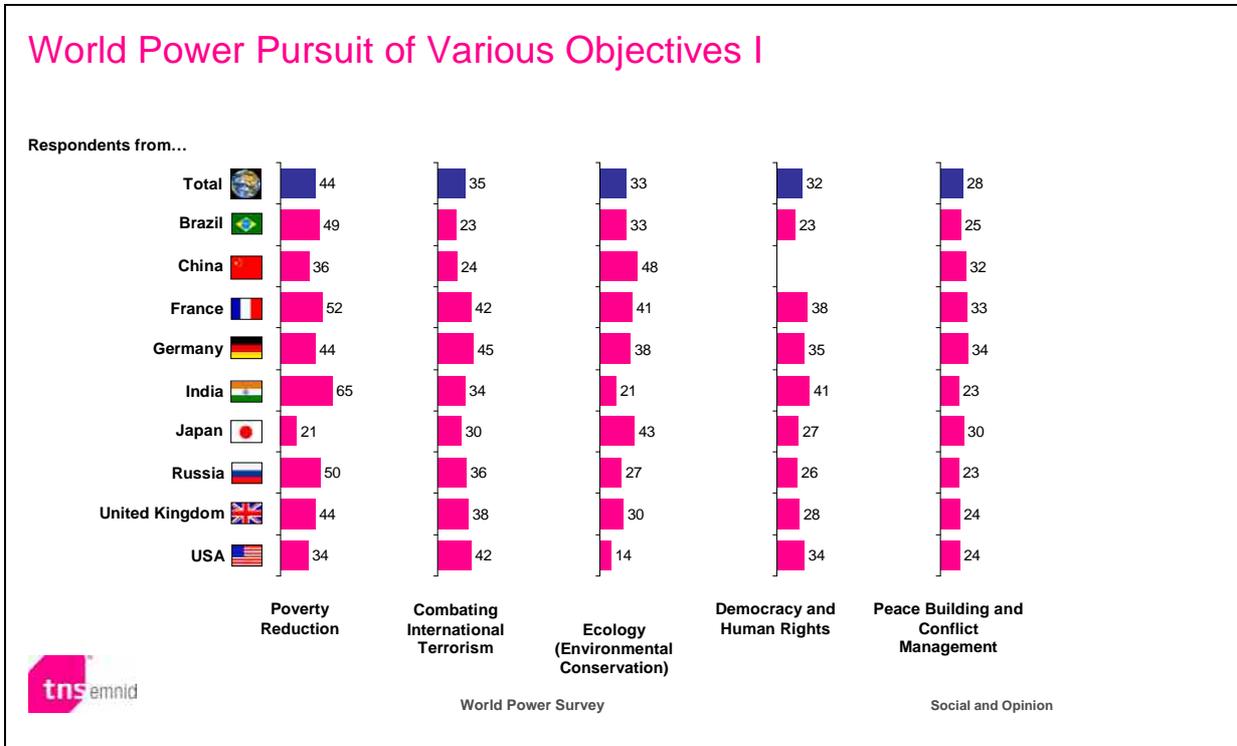
It is very much the same with dwindling natural resources. Compared with other countries, this is only emphasized by China and comes after environmental degradation as the second most serious challenge.

Fundamentalism is given special emphasis by the French and the Indians, which means that this challenge is placed ahead of “aging populations” and “weak and failed states”.

It should not be forgotten that perceptions of challenges and threats diverge and are influenced by national background. As a result, according to the data, there is no singular challenge that is unanimously recognized by all surveyed countries as the leading threat currently confronting the world.

3.4 Objectives that World Powers Should Pursue

- Reducing poverty, combating international terrorism and protecting the environment are viewed as the three most important tasks of world powers



Question: What are the main objectives that a world power should pursue? Name the three most important objectives.

Legend: The results from the various states in which populations were surveyed are aligned from top to bottom – in alphabetical order. The top line, which is labelled “Total”, is the mean value derived from the individual results and can be used as a benchmark with which to interpret the results from the various countries. From left to right are the objectives that world powers should pursue, arranged in descending order on the basis of the average frequency of responses.

On average (“Total”) 44 per cent of respondents believe that world powers should pursue the objective of “poverty reduction”, whereas 49 per cent of Brazilians are of this opinion.

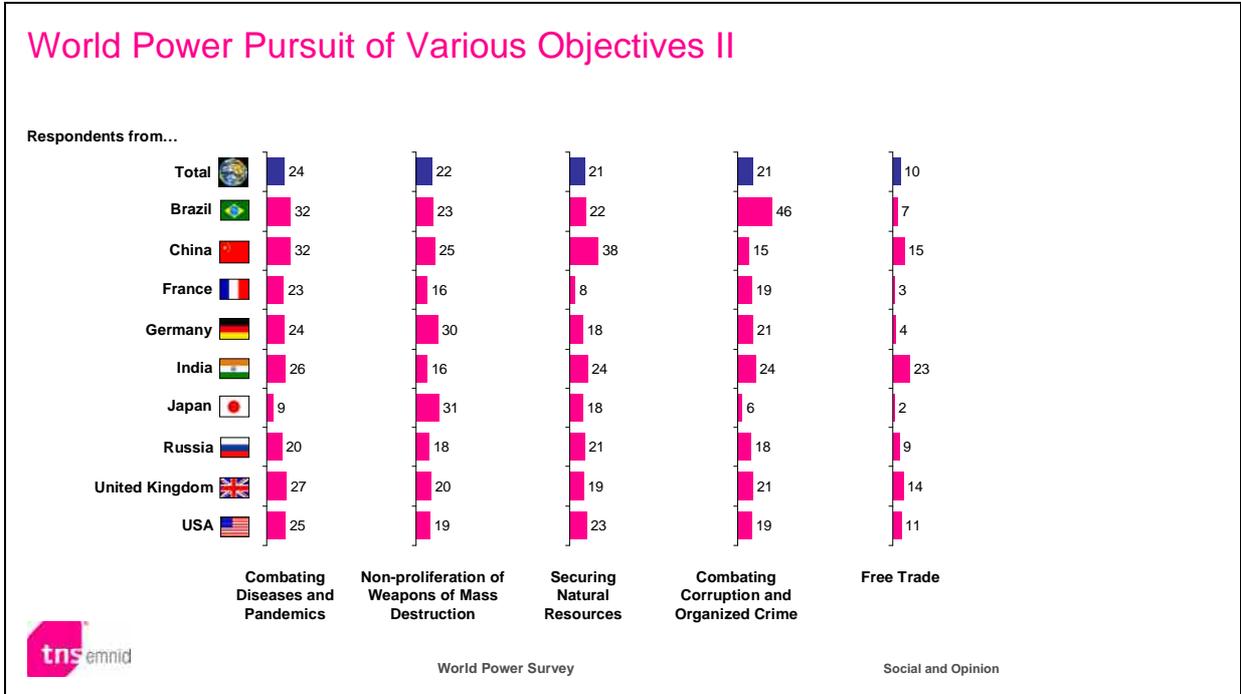
Note: The population in China was not asked to comment on “democracy and human rights”.

Populations in the countries surveyed believe that the three greatest challenges confronting the world are “international terrorism”, “poverty and overpopulation” and “destruction of the environment/climate change”, and respondents are also of the opinion that fighting these three threats should be the principal objectives of world powers, albeit in a slightly different order. Thus 44 per cent believe that poverty reduction should be one of the principal objectives supported by world powers, followed by the fight against international terrorism (35%) and concern for the environment (33%).

Here again the “world population” is unable to name a single predominant factor (objective). This is demonstrated by the fact that none of the stated objectives received a mean response level that reached the 50% mark.

There are considerable differences between the responses in the various countries. Whereas poverty reduction is emphasized by the Indian population in particular (65%), it is hardly mentioned by the Japanese (21%). Combating international terrorism is of below-average importance for Brazilians and Chinese, in contrast to the Germans, the French and the Americans. Yet even in the United States less than 50 per cent describe it as a principal objective. The environment is virtually of no significance as far as the Americans are concerned (14%), whereas for the Chinese it is the most important issue (48%). The objective “democracy and human rights” is on the whole of only moderate significance, although for the Indians and French it is of above-average importance. However, this question was not included in the questionnaire in China.

The objective “peace-building and conflict management” is on the whole of only average importance, with fairly similar results in the countries included in the survey.



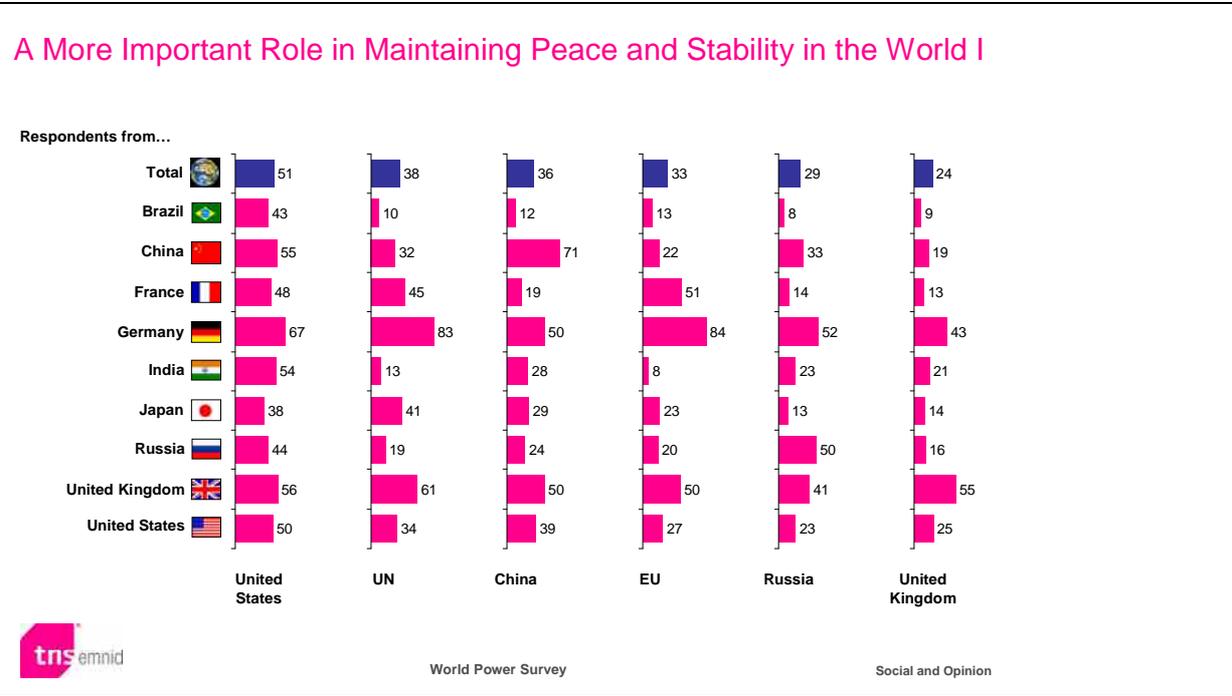
Combating diseases and pandemics is given special emphasis in Brazil and China. The Germans and Japanese believe that world powers should pay particular attention to preventing the spread of weapons of mass destruction. Securing natural

resources plays a central role in China, and fighting corruption is an important topic especially in Latin America (for example, 46% in Brazil). Finally, only 10 per cent of respondents are of the opinion that free trade is a principal objective that world powers should pursue.

Thus, according to the populations surveyed, the objectives that world powers should pursue are in line with the global challenges identified above. Yet here again we come to the conclusion that there is no such thing as one single objective as far as world powers are concerned, for the priorities in different states are clearly divergent.

3.5 States or Organizations that in Future Should Play a More Important Role in Maintaining Peace and Stability in the World

- **There is above all a belief that the United States should play a more important role in maintaining peace and stability in the world. West Europeans in particular are in favour of greater UN and EU involvement. 73 per cent of the Germans would welcome a higher German profile in this area.**

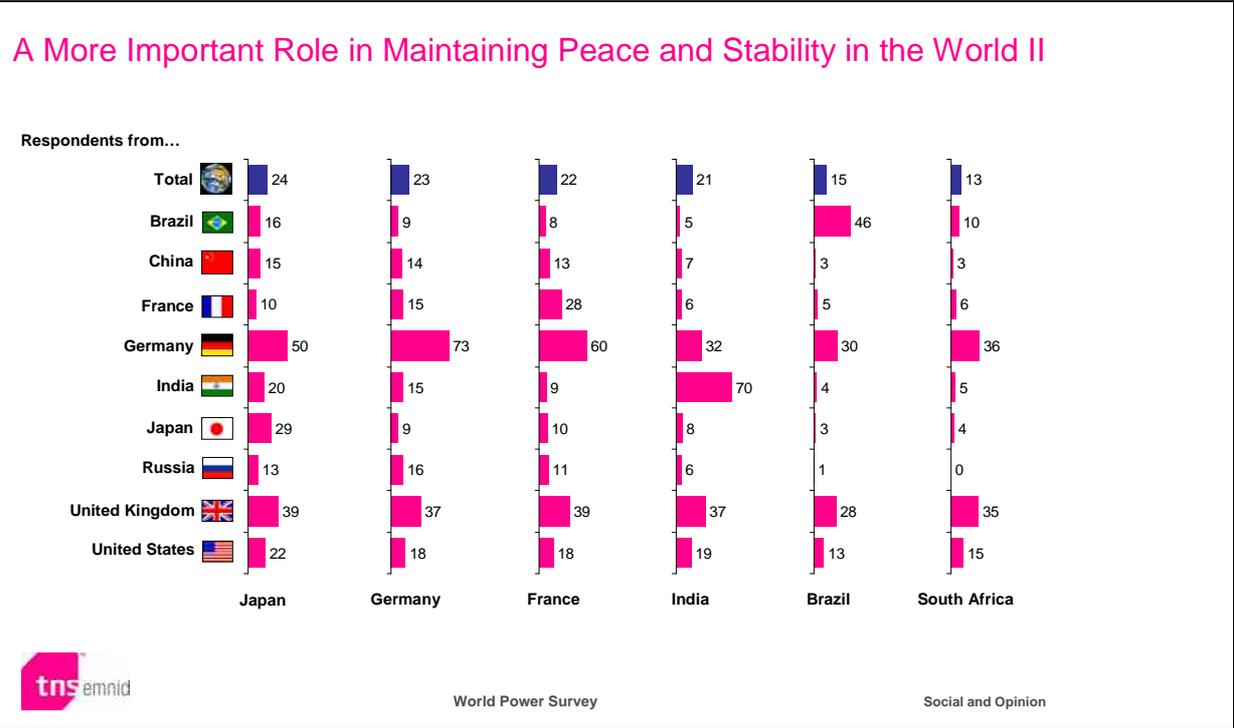


Question: In the future, what country or organization should play a more important international role in maintaining peace and stability in the world?

Legend: The results from the various states in which populations were surveyed are aligned from top to bottom – in alphabetical order. The top line, which is labelled “Total”, is the mean value derived from the individual results and can be used as a benchmark with which to interpret the results from the various countries. From left to right are the various states and organizations which should in future play a more important role in maintaining peace and stability in the world, arranged in descending order on the basis of the average frequency of the responses.

On average (“Total”) 51 per cent of respondents would like the United States to play a more important role in the maintenance of “peace and stability”. 67 per cent of respondents in Germany are of this opinion.

51% believe that the United States should play a greater role in maintaining peace and stability in the world. This confers certain obligations and responsibilities on the United States, a country that is currently deemed to be the predominant world power - and which will still have this role in 2020.



While respondents by and large do not view the UN as a world power either now or in 2020, it is a different matter when the focus shifts to securing peace and stability. Here 38 per cent are in favour of a more prominent role for the UN. China, the country with the greatest accrual of “world power potential”, follows with 36 per cent. The EU comes in fourth place. A third of the populations surveyed would like the EU to play a more important role in maintaining peace and stability in the world.

The countries surveyed are more or less in agreement about the role of the United States in this regard. However, opinions differ in various countries especially with regard to the future role of the EU and the UN.

More than any other country surveyed, British and German respondents believe that international actors should assume a more important international role in maintaining peace. This is demonstrated by the high levels of response among British and German interviewees, who mentioned on average five to six states or organizations. Conversely, the Japanese in particular gave low levels of response to this question. On the one hand, 37 per cent do not answer the question at all, and those who do reply mention on average less than two countries.

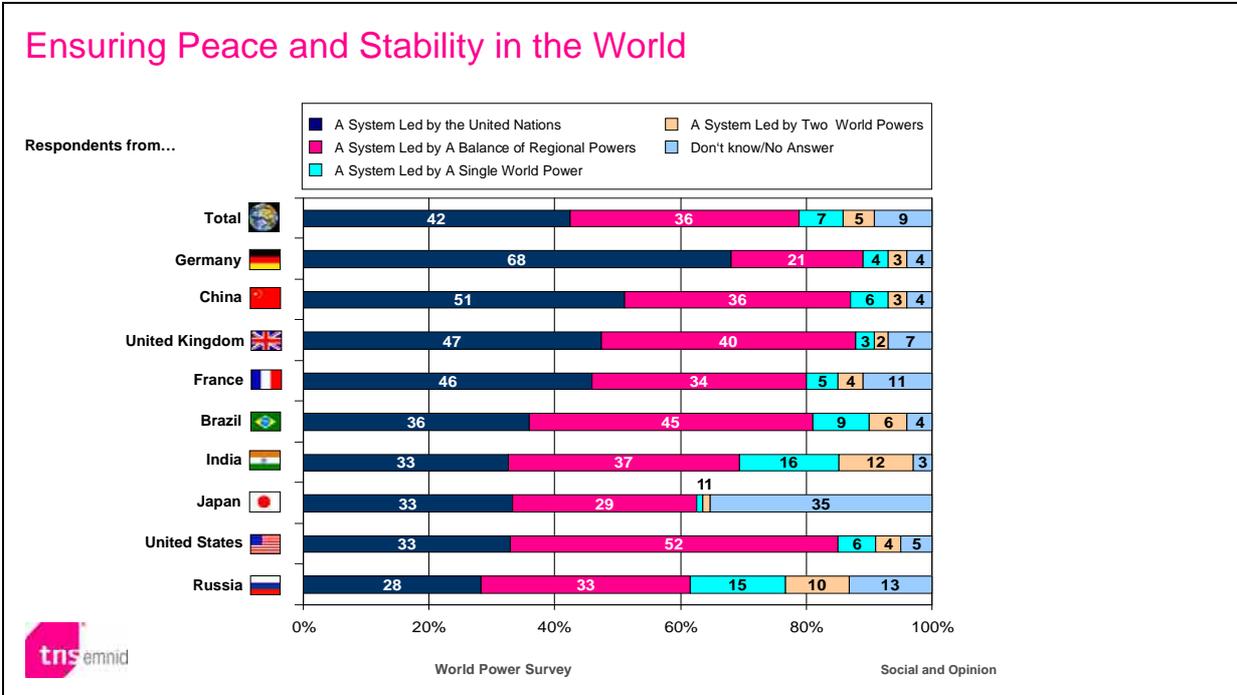
There are obvious differences between the states in the survey when it comes to expressing preferences about how the roles of various actors should be distributed. That the EU ranks fourth is primarily due to the high percentage of respondents from the European states France, Germany and the United Kingdom who provided this answer. The situation is similar in the case of the UN. Once again it is above all the European states and Japan who secure the second place for the UN.

These opinions are not shared by people in the other states, who are in favour of a greater role for the United States (in particular the Chinese, the Indians, the Brazilians and the Russians) or for their own countries.

Whereas the majority of the Germans and the British is in favour of greater involvement by their states (73% and 55% respectively), this is not the case with the French and the Japanese (28% and 29% respectively).

3.6 The Best Framework for Ensuring Peace and Stability in the World

- Only in Germany and China is a majority of the population of the opinion that peace and stability in the world can best be attained under UN leadership.



Question: What is the best framework for ensuring peace and stability?

Legend: The results from the various states in which populations were surveyed are aligned from top to bottom – in alphabetical order. The top line, which is labelled "Total", is the mean value derived from the individual results and can be used as a benchmark with which to interpret the results from the various countries.

On average ("Total") 42 per cent of respondents believe that peace and stability can be best achieved under UN leadership, and 36 per cent are of the opinion that it would be better achieved under the leadership of regional powers. 68 per cent of the German population... backs the idea of UN leadership.

42 per cent of the respondents believe that peace and stability can best be attained under UN leadership. On the other hand, 36 per cent believe that peace can best be achieved under the leadership of various regional powers. Thus the relative majority of respondents is in favour of an institutionalized international framework, though not the absolute majority. Here the exceptions are respondents from Germany (68 per cent in favour of UN leadership) and China (51%).

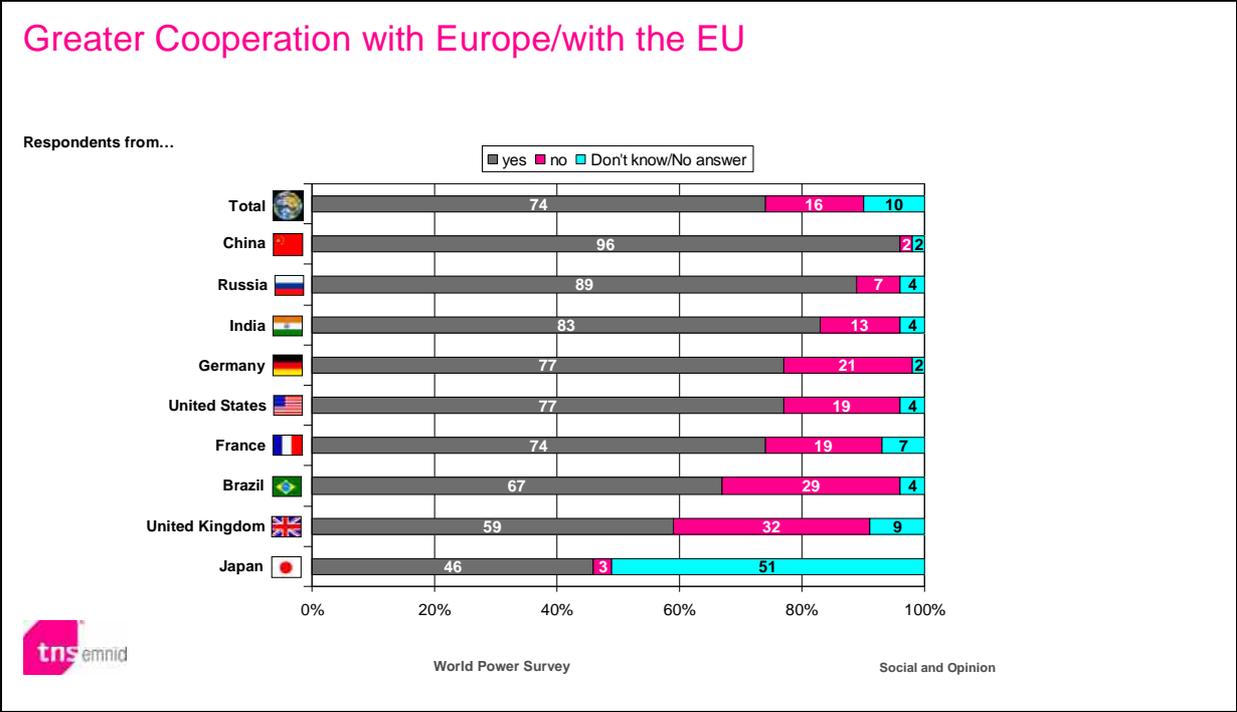
Conversely, the relative majority of respondents from Brazil, India and Russia is in favour of maintaining peace and stability under the leadership of regional powers. The high percentage of respondents who either do not know or provide no answer is noteworthy.

The absolute majority of the American population is in favour of maintaining peace under the leadership of various regional powers. The United States has no interest in assuming the leadership role on its own. Only 6% of Americans vote for this option.

Unipolar or bipolar constellations are not generally seen as being capable of maintaining peace and stability. Supporters of such notions of order are most numerous in India and Russia.

3.7 Cooperation with the European Union (EU)/Europe

- **Three-quarters of respondents are in favour of greater cooperation with the EU/Europe**



Question: Should your country strengthen its cooperation with the European Union/Europe?

Legend: The results from the various states in which populations were surveyed are aligned from top to bottom – in alphabetical order. The top line, which is labelled “Total”, is the mean value derived from the individual results and can be used as a benchmark with which to interpret the results from the various countries.

On average (“Total”) 74 per cent of respondents believe that their country should cooperate more closely with the EU/Europe. 77 per cent of Americans are also of this opinion.

About a third of the total population surveyed perceives the EU as a world power, either now or in the future. Similarly, a third of the population is in favour of stronger European role in maintaining peace and stability in the world. However, the fact that

these percentages are even this high is largely due to the strong responses given by the Europeans themselves.

The EU obtains significantly better results when the population is asked whether it is in favour of increased cooperation with the EU. In this case three-quarters (74%) are in favour of closer cooperation, including in particular China, Russia and India, with whom the EU is already linked by means of strategic partnership agreements.

The majority of the Japanese population is undecided with regard to cooperation with Europe (however, those who respond are, with a ratio of 94:6, in favour of greater cooperation). The population of the United States takes a different view. In this case 77 per cent are in favour of greater cooperation with Europe.

4. SUMMARY

The representative survey in nine carefully selected countries in Europe, America and Asia comes to the following conclusions:

- **Population in the countries surveyed are of the opinion that the economy, politics and research/education are the central factors that determine world power status. The military power of a country plays only a subordinate role.**
- **There is recognition of the current predominant position of the United States. China and Japan are clearly on a lower level. The EU and the UN occupy “mid-range” positions in the ranking of world powers.**
- **In future the United States is expected to lose its current position as undisputed leading world power. Survey respondents believe that China’s growing importance will enable it to become an equal partner. The positions of the EU and the UN remain basically unchanged.**
- **Terrorism, poverty and climate change are considered to be the most serious challenges confronting the world, though national perspectives influence the awareness of the various problems.**
- **Reducing poverty, combating international terrorism and protecting the environment are singled out as the three most important tasks of world powers.**
- **Survey respondents believe that the United States should play a more important role in maintaining peace and stability in the world. Europeans in particular are in favour of greater UN and EU involvement. 73 per cent of Germans would welcome a higher German profile in this area.**
- **Only in Germany and China is a majority of the population of the opinion that peace and stability in the world can best be achieved under UN leadership.**
- **Three-quarters of respondents are in favour of greater cooperation with the EU/Europe.**