

Germany in the Eyes of the World

Key findings of the GIZ survey

'Germany viewed from abroad – the implications for international cooperation'



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FOREWORD

In an increasingly globalised world that is politically, economically and socially more complex and more tightly knit than ever, it is becoming more and more important to find out where one stands in the eyes of others and to expand relations with other countries. Few of the political and economic challenges of today lend themselves to a unilateral solution; whether it is the euro crisis, global warming or the skills shortage, we need others to help us secure our prosperity and to win recognition in the world for our values and our views on the regulatory role of the state.

However, whether or not we will be able to continue to exert influence and protect our interests in the world depends crucially on other countries' expectations and hopes, fears and anxieties in regard to Germany. What do they see as Germany's strengths? What role should Germany play in the world? In the Dialogue on Germany's Future, when considering how we want to live together, how we want to sustain ourselves and how we want to learn, we must also look beyond our borders and ask ourselves how the world will let us live and from what, and how is it helping us learn.

Against this background, as part of the Expert Dialogue of Federal Chancellor Angela Merkel, the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) set out in search of clues to Germany's current image in the world. To supplement existing studies (conducted by the BBC and the Goethe Institute, and academic studies of a literary and cultural nature) the GIZ survey focused on Germany's role in the international community and the options that are open to it in specific topic areas. One hundred and twenty interviews were conducted in 21 countries around the globe with business people, policy-makers and members of civil society. They were asked about their own personal images, hopes and expectations of Germany.

The findings of the survey are important for German policy-makers and Germany's economic actors, and for an organisation like GIZ. As a federal German company, we help the German Government to achieve its goals in international cooperation for sustainable development. International perceptions of Germany and the policy options and constraints that follow from them are important indicators for us in our day-to-day work.

The survey throws up a kaleidoscopic picture of German strengths and weaknesses, of opportunities and risks. The image that appears in the mirror of international perceptions comprises far more than clichés and stereotypes, and what is surprising are the highly nuanced views of the interviewees,

combined with a very high regard for Germany and its people. The expectations of Germany's future role in Europe and the world that follow from this generally very positive view of Germany are correspondingly high.

METHODOLOGICAL BACKGROUND

The methodological design of the qualitative research survey 'Germany in the eyes of the world' is based on a social science research design for analysing qualitative data. This methodological approach involved a series of interlocking processes which used objectifying, intersubjective discourse to extract higher-level images and hypotheses from quantitative base data. The aim was to develop realistic assumptions for practical application. It was not about reviewing existing assumptions, but developing new ones: assumptions on what it is about Germany that people really appreciate, what the country could contribute to a world in a state of upheaval, and where there is need for action.

With this aim in mind, interviews were conducted around the globe with specially selected personalities and individuals who know Germany well.

Four key factors were combined in the methodological approach taken:

- Choosing a group of countries with a wide range of views overall;
- Obtaining interviews with highly discerning individuals in each of those countries;
- The interviewing – documenting – evaluating technique;
- Setting topic areas for discussion.

The four factors – choice of country, interviewees, technique and topic areas – will be explained in more detail below.

Choice of country

Twenty-one countries of different typologies were selected from four continents to build up a detailed picture of how others see Germany. The selection criteria used were: Germany's historical ties with these countries; economic relations; and the countries' importance in terms of bilateral and multilateral policy-making processes. Moreover, as many cultures, ethnicities and religions as possible were to be represented. The following 21 countries were selected:

- France
- United Kingdom
- Netherlands
- Spain
- Poland
- Turkey
- Palestine
- Israel
- Morocco
- Kenya
- South Africa
- Russia
- Kazakhstan
- China
- India
- Republic of Korea
- Indonesia
- Japan
- Brazil
- Chile
- USA

Interviewees

There were up to six interviewees in each of the 21 countries. In order to get a really high-resolution picture, interviewees came from a wide variety of fields – business, politics, science and research, and civil society – and were deliberately chosen for their independence: from a young Brazilian student to the Turkish holder of the Order of Merit of the Federal Republic of Germany, from an Indian environmental activist to a former Indonesian head of government. Most of the interviewees had outstanding expertise and experience that qualified them to speak knowledgeably about Germany. Either they had lived and worked in Germany, or else they had had a great deal to do with Germans in their own country. But the interviewees also included people who had obtained their knowledge of Germany through public media or other information channels. Other criteria applied when choosing interviewees were a generational balance and a gender balance. One hundred and twenty highly interesting interviews were conducted in total.

Topic areas and interview methodology

The interviews were conducted between October 2011 and March 2012. The semi-structured interviews lasted between one and two hours. All the interviews were divided into three core phases.

A first phase, of open content, aimed to determine how and in what categories the interviewee viewed Germany. Questions like, ‘What comes to mind when you think of Germany?’ gave the interviewee scope to recount his or her personal experiences, impressions and general perceptions, without being confined to a predetermined line of thought. The second phase of the interview covered the following 10 topic areas:

- Democracy and citizen participation
- Security and development
- The economy and sustainability
- Energy and climate
- Education, training and working life
- Research and innovation
- Mobility and infrastructure
- Migration and integration
- Culture and family
- Faith and ethics

The third and final phase brought the interview to a close with free reflection, above all about the major opportunities and risks for Germany in the period until 2020, the expectations of Germany and advice for German politicians.

Evaluation phases

Each GIZ interview team consisted of two individuals. They conducted the interviews and recorded the responses of the interviewees. Immediately following each interview, key statements were noted which summarised the relevant passages of the discussion for each topic area. All the statements were then entered into an electronic evaluation tool, producing a database of 2,691 different substantive statements sorted by topic area and 'statement type' (description, expectation, strength, weakness, etc.). The three-phase process of evaluation moved from the specific to the general and then back to the detail:

- Phase 1: Individual screening of all key statements
- Phase 2: Analysis, evaluation, discussion
- Phase 3: Advanced detailed analysis of the topic areas

Phase 1 consisted of individual review and in-depth study of all the key statements collected, sorted by country, topic area and statement type (strengths, weaknesses, etc.).

Phase 2 consisted of a permanent critical/analytical discussion among participants, aimed at identifying and better understanding the general underlying patterns, with the help of the categories set. Thus, working hypotheses were generated from the 'raw' key statements and data, and in the course of the process these hypotheses were repeatedly reviewed, weighed and compared with the collected data. This produced seven assumptions about Germany, some of which reveal significant differences compared with Germans' own self-image and time-worn clichés.

In phase 3, the 10 key topic areas were analysed again and further edited in the light of the newly gained assumptions on Germany.

NEWLY GAINED ASSUMPTIONS

From the summary, comparative analysis and interpretation of the key statements we derived general images of Germany – condensed statements of how we believe Germany is perceived abroad. Of course, these have no claim to universality in the sense that they are not based on a representative survey. Rather, they are reality constructions which were systematically derived from qualitative interviews and intersubjectively validated, and as such are very likely to be accurate. The salient elements of Germany's image as seen from other countries are described below.

'The American Dream means everyone can realise their personal goals. The German Dream means everyone can enjoy Germany's benefits: social security, infrastructure, freedom, a healthy environment and quality of life.'
(Israel)

Assumption 1

'German freedom' – a special product of discipline and performance

Germany is viewed by most interviewees as having a well-nigh unsurpassable level of personal freedom. It is clear from the outset that this is a very special definition of freedom: those who abide by the rules and laws and do their bit, i.e. do their duty, have the right to be free in Germany.

The state benefits system is an important factor in external perceptions of 'German freedom', as, with basic needs met, individuals are able to focus on self-realisation. A health and welfare system that also covers the poor, a highly developed public transport system, a high level of public security, the

'What is this idea of freedom? Here in Brazil we know we don't have many freedoms, but we make better use of those we do have. In Germany people often fail to appreciate what they have, including freedoms.' (Brazil)

availability and affordability of life's basic necessities and access to quality education all allow Germany's citizens to feel free. But Germans are also thought to define their concept of freedom very much in terms of what they are free from. Freedom from worry, sickness, unemployment and war are some of the examples given.

'In Germany people can move freely; it also has a high level of social security – compared with France.'
(France)

This specific form of freedom, however, comes at a price in Germany; it is hedged about with conditions. Critics on the outside point to side-effects that give cause for reflection.

One of the items other nations enter on the cost side is the conspicuously strict discipline that is enforced where rules and regulations and social expectations are concerned. The high level of compliance with rules gives rise to a curious foreign perception of the Germans: a fairly inflexible

people who when championing their own standards make up for what they lack in delicacy with an abundance of conviction, vigour and obstinacy. Other interviewees make the point that people who cling too mechanistically to rules run the risk of forfeiting both their critical and their creative faculties. The point is also made that many migrants come from countries where the prevailing view of freedom is quite different.

'I would not like to live in Germany, there is little freedom, there are controls and penalties for everything, there's too much control for my liking. It's as though even the mushrooms in the woods are counted and labelled.'
(Kazakhstan)

The German concept of freedom described above also has far-reaching implications for Germany's perspective on the future of Europe. A vision of Europe as a 'well-oiled machine based on rules' is not understood or not found attractive by many other member states. Behaviour that simply complies rigidly with existing rules but makes no sense in the situation at hand is regarded as absurd.

From foreign perceptions such as these Germany could learn to use the freedoms it already has to foster a critical faculty, creativity and mutual sensitivity – at home, in Europe and in the world at large.

'Germans adhere blindly to rules and regulations, for example at pedestrian lights – they will wait at a red light even during Carnival in Cologne.'
(France)

Assumption 2

Emotional distance – love at second sight

Germany is often seen abroad in terms of products, systems and sets of rules. At first sight Germans appear to be aloof and sober-minded. They work hard and are organisationally and technically efficient. The mention of Germany seldom triggers emotions. Initial responses are almost always at the rational level.

When other countries go in search of German feelings, they discover a strong sense of duty and responsibility, commitment, reliability and trust, as well as some fears: fear of losing the cherished achievements of the welfare state, fear of failure and fear of making mistakes. A sense of guilt for the Holocaust is said to still weigh heavily on German shoulders. Apparently Germans do not spontaneously radiate joy, euphoria or affability. Many respondents were surprised to see spontaneously smiling faces during the 2006 football World Cup or the Carnival in Cologne.

'Now and again, however, you feel like giving the Germans a good shake and asking them what's up, what's happened to their emotions and their enthusiasm for the future. You get a sense of saturation, at a high level of comfort.' (Israel)

Nevertheless, almost all respondents credit the Germans with being very reliable, respectful, helpful and quick to show solidarity. It is only on closer inspection that this positive side of the German soul is revealed. Those who succeed in winning the friendship of a German can be sure it will be steady and enduring.

Some respondents found that Germans like to keep a 'healthy distance', which safeguards privacy and fosters mutual respect. Germany has so far proved adept at making economic capital out of such attributes. Restrained marketing strategies are closely linked to the image of the 'cool and methodical operator'. What's more, a reputation for detachment is useful in foreign policy when it comes to dealing with tricky issues impartially and objectively.

'The magical summer of 2006 really made me think again – the Germans were suddenly so spontaneous and emotional!'
(Poland)

'The Germans take a while to open up, but they are basically warm-hearted and once they have accepted you as a friend, the friendship will last. It is worth being patient!' (Kenya)

Nevertheless, Germany is undergoing a quite deliberate transition, and is beginning to do more to meet the expectations of the rest of the world. The world wants to see a tangible and authentic Germany, it wants close contact with its people, and it wants to trade arguments with it – without eschewing the tougher issues.

The example of Berlin is often used to show that a youthful Germany enriched by outside influences is in the process of finding a new understanding of itself. Sebastian Vettel's easy-going manner and relaxed smile is taking over from Michael Schumacher's poker face and deadly seriousness. Germany's robotically efficient soccer squad of the 1980s and 1990s, which held little appeal for the outside world, has become more multi-cultural and plays a more exuberant and varied game that better reflects the self-image of the new Germany.

'Germany sells too much of its mind (technology, business, etc.) and not enough of its heart (fun, nature, art and culture, orchestras, movies, music, etc.). Germany must embark on emotional story-telling, in order to win hearts.' (India)

Assumption 3

From back-seat to front-seat driver – leading from behind is no longer enough for Germany

Many countries have high expectations of Germany and see it playing a bigger role in Europe and the world. Yet in the eyes of the world Germany does not appear to be prepared to take on that role, or does not seem entirely comfortable with it.

It is apparent in the discussions that Germans are not clear about their role. This lack of clarity – sitting in the driving seat but still trying to drive from the back – is a source of misunderstandings at international level. Germans' own fear of finding themselves out of their depth, coupled with the lack of clarity about their identity, is not conducive to the confident balancing of interests with other partners. Yet almost everyone

'Germany has become THE voice of the EU. It will be closely watched and held responsible. I regard this as the greatest challenge. There is only one lion in the ring at the moment – and that's Germany!'
(India)

'Go ahead, try on the larger shoes – you'll find they fit!' (USA)

'These are interesting times for Germany in which the national character must be redefined. Germany must become stronger in its emotional role, it is already robust in economic and other areas. It also needs new partnerships to help it fill this role.' (India)

expects Germany to take on a major role. Few respondents voice reservations stemming from the country's former striving for hegemony and Nazi crimes.

Because Germany pays too little attention to the many opportunities on offer to engage in new relationships as a result of its newly imputed role, disappointment inevitably results and is voiced unambiguously. Germany is perceived throughout the world to be an honest broker, with no hidden agenda. Expectations that Germany will in future take on the role of honest broker more frequently are astonishingly high – not just for 'politically safe' areas like energy and climate, but also on highly controversial issues like Iran and Syria.

Germany is also credited with the ability to frame and credibly advocate a convincing vision for Europe's political and economic future. In this context, Germany is expected to play a leading role in revitalising the EU and streamlining its bureaucracy.

Moreover, more and more people – especially in emerging economies – think it desirable that Germany should become less dependent on its alliances.

'Germany should campaign for three official EU languages in which all documents have to be issued: English, French and German. What sense is there in having every single document translated into all 27 languages? A horde of translators are employed and processes are slowed down enormously!'
(United Kingdom)

'Why is half the European Parliament in Strasbourg and the other half in Brussels? Germany must do something to put an end to these inefficiencies!'
(United Kingdom)

'If Germany could attract more foreign students into the country it would help people from all over the world to develop a softer world view and see differences not as a threat but as an asset.' (USA)

In view of its solid position, Germany is credited with having major opportunities in the evolving dynamics of inter-state relations. It is often suggested that the outside world's experience of Germany could be enhanced and diversified

through exchanges between people in a wide range of fields – from the set designer to the orientalist, from the wastewater engineer to the fund manager. Better knowledge of others is rightly regarded as a prerequisite for entering into closer or new alliances. Positive experience with people from all over the world would make it easier for Germans to prepare themselves for Germany's new global role, based on a broad social consensus.

'Germany is still too strongly oriented towards the USA, UK, France and the EU. When it takes a step forward it always turns round to see whether these partners are still there. We feel left out. Germany should become more independent, not least of existing alliances. Germany reminds me of a 50-year-old son – handsome, well educated and with a good income – but still living with his parents because some traumatic experience in childhood has prevented him from moving out and making a life of his own!' (India)

Assumption 4

Germany is selling itself short

'Made in Germany' clearly stands for quality.' (Turkey)

"Made in Germany" is a matter of personal experience rather than of the marketing of the German brand. Other countries are better in this respect.' (South Africa)

'To put it simply, where Germany is concerned, you could say that the most visible – if not the only – external communication comes from the automobile industry.' (Morocco)

Germany is associated with the functionality, quality and durability of its products, with performance, efficiency and reliability. But Germans are apparently only moderately good at advertising and marketing these qualities and skills. Germany enjoys the highest level of trust in the fields of environmental and renewable energy technologies, mechanical engineering and pharmaceuticals – and is often market leader. The 'Made in Germany' label continues to enjoy an excellent reputation, though it is increasingly

associated with the 'classics' among German products and less with new products, designs and ideas. Seen from the outside, China and Japan are regarded as the technology frontrunners, and the USA has a stronger presence in research. Only the German automobile industry is clearly visible from abroad, and it is still always the first thing people associate with Germany.

Germany's shortcomings in advertising and marketing crop up again when it comes to putting across a political stance or message. Some critics even claim that Germany

'Germany plays a strong and responsible role within the EU, but it must put it across better.' (South Africa)

lacks the skills required for political mediation at international level – in contrast to those who believe Germany should and can play a bigger role as mediator because Germans are respected for being very structured, methodical and rule-oriented.

'The Goethe Institute does some very good things, generally speaking, but Germany is not adept at putting across its culture and making use of German alumni abroad.' (Indonesia)

'Germany is barely present in the Brazilian media. It is also significant that the largest Brazilian TV station has no correspondent in Germany, only in France and the UK. The newspapers report on Germany's economy, but not on life in Germany.' (Brazil)

While other countries are more closely associated with their own culture, it is thought regrettable that Germany does not make greater use of its own cultural diversity to communicate its identity and values to the outside world. Respondents expect a bigger commitment on the part of German institutions abroad, like embassies and the Goethe Institute, a more intensive cultural exchange and a stronger media presence.

The desire to participate more widely in 'German knowledge' and learn from German experience is voiced again and again. A sharing of knowledge and experience in the economic, science and research, political and social fields would go a long way towards improving the visibility of Germany as a brand name.

German reticence is largely attributed to the country's past, the marks of which remain visible to this day in state and society as a result of a strong culture of remembering. They

'Germany is a knowledge power house. Germany should do a lot more to exchange knowledge with its partners at the international level.' (United Kingdom)

are also seen to be reflected in political action and the representation of national interests. The Germans' concern not to give the appearance of pride or a desire to dominate, or even to show leadership, prevents them from putting across the German position or advertising German skills. Indeed, the sober, rational and reticent manner of the Germans is an obstacle to the proactive marketing of German products. A love of communication, a degree of justifiable pride and enthusiasm are lacking. Unlike other nations, Germany prefers to concentrate on the 10 per cent it has not yet quite achieved than on the 90 per cent that has already brought it success.

Assumption 5

Cracks in Germany's old image – Berlin as the symbol of new shades of colour

Germany's varied facets go largely unnoticed in other countries. Traditional strengths in the economic, research and cultural fields are mentioned fairly frequently, especially German classical literature, music and philosophy. But beyond current reporting on the euro crisis, few German brands impinge on international consciousness.

The Nazi past is still an integral part of Germany's image, but so too are its efforts to come to terms with the past and

'When I think of Germany I think first and foremost of small, neat, clean towns and not big industrial cities. So Berlin took me very much by surprise when I first went there.' (Russia)

that wins it widespread approval. Different generations, though, are perceived as having a different approach to dealing with the Nazi past. Interviewees thought the younger generation of Germans distanced themselves more from their own history, whereas the older generation tended to be more guilt-ridden.

Admiration for Germany's reconstruction and the associated economic miracle combine to form an image of Germany in which material and technological elements, such as the 'Made in Germany' label, German engineering and infrastructure, feature prominently, as well as social attributes such as solidarity and public-spiritedness. Since reunification – which is considered to be the logical consequence of reconstruction – Germany has been perceived as being much more self-confident and ready to articulate its national interests. The contemporary image of Germany is that of a people who are in touch with nature, are environmentally aware and are committed to environmental causes.

'Germany's history seems to have created an identity problem. But in my view Germans can hold their heads higher again. You don't have to forget, but you can disassociate yourself.' (Morocco)

'I was very impressed by the 2006 World Cup in Germany. It was a turning point for Germany and for the outside world's perception of Germany. I like this form of "soft patriotism". At last Germans can be proud of their country again and proud of their society.' (Israel)

Otherwise, little is known about life in Germany today. Many interviewees said they would like to see Germany, especially German culture, better represented in their country. None of the interviewees who have close connections with Germany can understand why the country makes so little use of these 'soft' factors to promote itself or to pave the way for cooperation in other areas, including commercial fields.

'Germany has become more relaxed and more likeable in recent years. Berlin is now Europe's most interesting and attractive capital city.' (United Kingdom)

'The Berlin lifestyle is fostered by the particular way in which a wide variety of people with a wide variety of interests manage to accept each other and live alongside each other.' (Chile)

Comments on Berlin are significantly and consistently different from the general perception of Germany. The image of Berlin is of a European cultural metropolis that attracts international attention and curiosity. Berlin symbolises inspiration, creativity, emotionality, diversity, multiculturalism and cosmopolitanism – the very opposite of what is usually attributed to Germany. The colourful, emotional perception of Berlin suggests that Germany's traditional image is beginning

to show cracks, a sign perhaps that new shades of colour and new features are emerging.

Assumption 6

German actions held in high regard rather than the Germans per se

Germany and the Germans are highly regarded throughout the world. The remarkable thing about the esteem in which they are held is that it is principally about recognition and respect, but not so much about affection. As one would expect, this high regard is felt for the Germans' achievements. Only on this is it undivided. Put bluntly, Germans are held in high esteem for what they do, not for what they are.

Evidence of this can be found in the qualities frequently attributed to Germans. They are said to be diligent, disciplined, systematic, straightforward and reliable, qualities that are directly related to their perceived work ethic. German virtues are derived from the way things are done.

'When I think of Germany the things that spring to mind are quality, mechanical engineering and industry.' (China)

'The Germans are good at sport and ambitious. Even when they go out for a short jog in the woods they have some specific goal in mind.' (France)

'As an artist I go to Germany to concentrate and work undisturbed, and I go to France to dream.' (China)

'One explanation for Germany's sustained economic prowess could lie in its system of education and training. Its dual system is designed very much with sustainability in mind and is thought to be the basis of economic growth.' (USA)

'Germany's system of education and training is a model for Indonesia: apprenticeship, master craftsman. In Indonesia there is a skills shortage at the middle level. This is an export commodity we're very interested in.' (Indonesia)

'Germany also values manual and artisanal skills, thanks to the institution of master craftsman, and they enjoy a good reputation.' (Japan)

Further evidence of this is an apparently widespread desire to discover the causes and sources of the quality of German workmanship. This need is clearly apparent in the many different explanations that are put forward. In the first place, there is a general perception that work, including activities not requiring academic qualifications, is held in high regard by German society. Secondly, the explanations offered range from the emphasis placed in early childhood on certain forms of education such as arts and crafts, the successful dual system of vocational education, the tradition of skilled crafts and trades, an economic structure characterised

by small and medium-sized enterprises, and the interaction between research and industry.

The many offers of cooperation from other countries and the desire for knowledge and technology transfer testify to a high opinion of German efficiency and performance. The extent to which this opinion influences Germany's image suggests, conversely, that interest in Germany is heavily dependent on its performance capability.

Assumption 7

Germany needs Europe; Europe needs Germany

Many countries see Germany as being very closely and strongly networked with Europe, resulting in mutual economic and political dependence. Germany's central geographical location and its economic strength are axiomatic to its special importance for Europe. Moreover, it is often pointed out that as Europe's number one exporter, Germany has a special responsibility for the EU.

'Merkel should throw in her lot with Europe, even if Germany has to invest more in it than other countries. For Germany benefits most. If Europe fails, the economy will collapse and democracy will be in jeopardy.'
(Netherlands)

'It is a failure of German politicians that they do not explain properly to their voters that Germany's success and strength in Europe are the result of other EU countries buying German goods.' (USA)

The benefits of Europe for Germany seem perfectly clear to other nations. However, the perception

'One of Europe's problems is that it has no true leader. The UK has nothing to offer, Sarkozy is too preoccupied with domestic problems, that just leaves Angela Merkel.'
(Brazil)

in other countries is that the benefits of the EU are not made sufficiently clear to the German people by their political leaders. Germany is also called upon to make a clearer commitment to a strong Europe, and that should be reflected in an explicit European strategy.

The current financial crisis in the euro area has brought home to a large number of people that few nations apart from Germany have what it takes to play a leading role. Germany is considered capable of sustaining and securing the European project, so that Europe's voice is heard, strong and

'Germany should provide intelligent, consensual leadership within the EU; it should not tell other countries what to do or become overpowerful. Germany should build confidence and make a convincing case for an integrated Europe.' (Spain)

united, in the world. But there is also some scepticism about a leading role for Germany, and not just for historical reasons. There are calls for more partnership and more win-win thinking. Germany is called upon to lead, so long as its action is dialogue-based and in the spirit of Europe.

'For years Germany championed the European vision unconditionally and benefited enormously from integration of the European market. Today there is no clear commitment to the European vision.' (Spain)

Germany's strict stance on financial and budgetary rules in the current financial crisis is felt to require some explanation. Self-interest is suspected of being at the bottom of it, notwithstanding Germany's earnest endeavours to find an enduring solution to the crisis.

Beyond Europe's borders, there are many who would like to see Germany step up its global engagement and go in search of new partners. This expectation is widespread in the emerging markets, but also in neighbouring European countries.

'The abnormality (normality = self-interest) of German policy made the European normality possible. What would be the consequence of German policy becoming normal?'
(Netherlands)

RESULTS ON KEY TOPIC AREAS

In the second phase of the interview, the interviewees were asked their opinions about German politics, industry and society. The topic areas already specified provided a framework for questions and responses.

The breakdown of the key statements by key topic area is interesting. By far the largest number of responses were seen in the area of 'the economy and sustainability', while few interviewees commented on 'faith and ethics'. 'Culture and family' and 'democracy and citizen participation' occupied the middle ground, with 'research and innovation' and 'infrastructure and mobility' clearly in the lower third of the ranking. Most interviewees selected 'energy and climate' as their first topic.

About twice as many interviewees mentioned Germany's strengths as mentioned weaknesses. By selecting a wide spectrum of interviewees with different standpoints we attempted to reduce the risk of socially desirable responding. While the comments made on risks and opportunities were fairly balanced, a great many expectations of Germany were voiced. Few interviewees mentioned significant fears or other factors that could not be categorised.

Topic area 1

Democracy and citizen participation – are participation and federalism a model others could follow?

In other countries Germany is seen as a modern, stable and model democracy, which offers its citizens a wide range of ways of becoming involved and having their say. Although the many opportunities for participation do significantly slow down some political and administrative processes, they also generate a high level of acceptance for decisions made. They reflect a general preference for consensual decision-making, which foreign observers appear to find characteristic of Germany society.

Another feature of German political culture is seen to be a high degree of civic engagement and

'Collective decision-making processes come from Germany's cultural tradition. I very much admire this deep-rooted understanding of democracy within German society.' (Chile)

'Germany often stumbles over its own collective nature. They must achieve a consensus on everything, everything always has to be discussed and agreed with everybody – that blocks innovation and wastes time.' (France)

'Germans respect decisions once they are made.' (France)

organisation in the form of associations and clubs, non-governmental organisations and churches. A marked interest in local and regional issues and decisions was also felt to be typically German. Democracy, freedom of opinion and human rights are deemed to be firmly anchored from very early childhood and are an important part of the way German children are brought up. Finally, the traditional upholding of the rule of law in the Federal Republic of Germany and the efforts made to ensure that corruption cannot take root were both mentioned in a positive light.

The political landscape in Germany was described as fairly stable, and was felt to offer few openings and opportunities for extremists. The potential risks to the stability of democracy in Germany were felt to come more from the threat of an economic downswing, a break-up of the EU or the loss of importance of the major mainstream political parties, but even

'Within Europe Germany is the country that has made the greatest effort to deal appropriately with its own past and has been most successful in this. Germany has the most deeply rooted tradition of education for democracy.' (Poland)

these risks were mentioned by very few interviewees. The smoothly functioning bureaucracy in Germany, the five-per cent hurdle that prevents political parties with less than five per cent of the total vote from entering the German Bundestag, and the German welfare state were held to exert a stabilising influence. Interviewees also pointed to the emergence and popularity of the Green Party, the rise of the Pirate Party, and the debate surrounding the Stuttgart 21 railway project as evidence of the ability of Germany to innovate and change at political level.

Criticism was voiced of the consequences that German domestic political decisions can have on Germany's actions at supranational level. A causal link, for instance, was identified between the elections to the Baden-Württemberg state parliament and Germany's sudden decision to phase out the use of nuclear power. This was felt to call into question the reliability of Germany as a partner.

'In the structure and financing of political parties Germany is a very good model for South Africa.' (South Africa)

'German federalism is interesting for Morocco, since it could give us ideas of ways of dealing with the Western Sahara.' (Morocco)

'German federalism is a good model. India could learn a lot from Germany.' (India)

Germany's success in swiftly establishing democratic structures, a critical and pluralist media landscape and a stable multi-party system after the Second World War is appreciated and admired abroad. This is one reason why so many countries are interested in harnessing Germany's knowledge and experience, particularly with respect to its federal political system, which is held to be efficient and decentralised and to take decision-making to the people. Representatives of other countries believe that Germany's federal model can be well realised and transferred to other countries, and would like to see it applied in their own countries.

Topic area 2

Security and development – a peace-loving nation

Most comments made on this topic area were related to Germany's security policy – in the European and international context. The Federal Republic of Germany is generally seen as a pacifist country with no particular inclination to intervene in other countries. Germany's pacifist leaning is seen to be

'Germany's voice is heard in international politics. Its balanced, discreet but sound manner is appreciated, but sometimes a more decisive approach would be desirable, say with respect to the Arab Spring.' (Morocco)

the result of its past (the Second World War) and of its military weakness, as well as reflecting German principles and values, the peace-loving attitude of the German people and the priority attached to economic factors. Responses covered a wide spectrum of attitudes, from satisfaction with Germany's current foreign policy and praise for Germany's contribution to peacebuilding to

the desire to see Germany taking a clearer and more forceful position in line with its role as a leading member of the international community. Interviewees expressed the wish to see Germany broker peace in the Middle East conflict, provide more active support for pro-reform forces in the Arab Spring, and do more to achieve a pan-European security policy.

Germany was not seen as a potential aggressor. Interviewees appreciated its unassuming manner, but it was criticised for being over-cautious. German military technology is very much appreciated, but the country's military capacities, at least in human terms, are seen as being very low or too low.

Germany's domestic security was considered exemplary by the vast majority of interviewees, both in terms of the generally perceived security and in terms of the level of

'Germany has no serious problems with poverty or security. Precisely because of this healthy position, Germany should play a more important part in international politics. Other countries must be involved to a greater extent in Germany's success. Lessons learned should be shared with a wider audience. Germany must capture the hearts of other nations.' (India)

'When my daughter started school in Germany I showed her the way a few times, as you are recommended to do. Then, at the age of five, she walked to school on her own. In Brazil you can't even let a 12-year-old do that because it's too dangerous.' (Brazil)

equipment of Germany's police force and the approach it takes. A few interviewees criticised worsening extreme right-wing violence. At least partly because of its diplomatic reticence in the field of international security policy, Germany is not seen as a target of terrorist groups.

Where German development cooperation was known at all, it generally came in for positive mention. Germany's efforts in the education, health, governance and economic promotion sectors were singled out for praise. A few interviewees noted that greater equality among cooperation partners would be desirable. Recommendations focused on making German development cooperation more visible, perhaps by integrating it into German foreign and security policy, stepping up knowledge and technology transfer, and becoming more open for mutual learning processes.

'Germany should sell its development cooperation better outside Germany – as part of its foreign and security policy. Germany's contribution to EU security policy is also development cooperation e.g. crisis prevention, reconstruction.'
(United Kingdom)

Topic area 3

The economy and sustainability – is Germany's economic power sustainable?

'Sometimes I ask myself how they manage with all their holidays and part-time working models and so on. But I admire them, because we waste a lot of time here with inefficient activity.' (USA)

Germany's strong and consistent economy was described as excellent pretty well across the board. One reason why the nation enjoys such a good reputation is the speed at which Germany managed to rebuild the country after the Second World War. Special mention was also made of the social dimension of Germany's economic system, with many interviewees expressing admiration for the work-life balance Germans have achieved.

It is this social dimension of Germany's market economy along with the country's strong pro-environment orientation (at political and economic level, but also firmly anchored in the awareness of the German people at individual level) that makes Germany a credible advocate of sustainability in the eyes of many interviewees, and a country they would like to see as a partner in this field.

'Germany has the wherewithal to find a way to make industry genuinely sustainable, even if no economist in the world currently takes into account externalised environmental costs.' (India)

Germany's *mittelstand* or medium-sized businesses are very much admired by the rest of the world. Many consider the *mittelstand* to be the locomotive of Germany's long-standing economic success. These businesses are also held in great esteem for their innovative force, especially in technical niche

markets. Some interviewees actually went so far as to term the German *mittelstand* an essential component of the country's stable and equitable democracy. It was felt to be a pity, however, that the *mittelstand* does not enjoy a higher profile outside Germany, especially in emerging economies.

Traditional German virtues such as diligence, good quality work, orderliness, precision and efficiency appear to be appreciated in industry. They underpin Germany's widespread reputation as a producer of excellent but expensive goods. This also applies to the German industry standard seal TÜV. The German automobile industry, manufacturers of household appliances and renewable energy technologies in particular enjoy a positive image around the globe. Representatives of some countries, however, warned Germany about the equally high-quality and innovative

'Germany is an innovative country that manufactures good products which are actually useful. What do we in America do by comparison? Facebook goes public and some fantastic figure is put on it, but what is behind it? It's the greatest lottery of all times. It has nothing to do with real, good, sustainable products or services. The Germans are genuinely productive.' (USA)

'Germans always want to deliver perfect quality. If things go wrong they have no Plan B to fall back on. But often flexibility is more important than quality, and improvisation is essential. In Brazil you need a quick way to address your customers. Germans give the impression that they would prefer to lose their customers than lower their quality standards.' (Brazil)

competitors they face in Asia. Without pausing to draw breath, interviewees went on to complain that German businesses, especially in emerging economies, lack the flexibility they would need to take into account the features of local markets at an early stage, far less harness the profit potential offered by these markets. Asian countries were frequently felt to respond more flexibly and more swiftly.

In the interviews it also became clear how little is generally known about German brands, products and companies. Interviewees stressed that although a great many innovations doubtless come from Germany, nobody associates them with Germany.

'The MP3 player was developed in Germany – but nobody knows!' (Brazil)

'Short-time work is a highly effective instrument that takes a long-term approach to short-term economic crises. There are times when profit cannot be the absolute priority – short-time work is also an expression of solidarity. If people keep their jobs they live a much more fulfilled life. And that is important for society as a whole.' (USA)

Many interviewees see the structural mechanisms that are in place in Germany to reconcile the divergent interests of employers, the workforce, trade unions and politicians as a great strength of the German system. The way this helps hammer out a consensual solution acceptable to all sides was much admired and was seen as a reason why society in Germany is far less divided than in other countries, like the United States of America.

Interviewees from the UK and USA in particular made positive mention of the fact that the German economy is still far more focused on developing, producing and trading in ‘real’ commodities, rather than trading in nebulous communication or financial services.

Topic area 4

Energy and climate – progressive technology to meet ecological ambitions

Germany’s image in the field of energy and climate is good across the board. Germany is seen as a ‘green nation’. The German people are felt to be extremely environmentally aware and to bring up their children with this awareness. With a view to conservation and climate change mitigation most interviewees see Germany as a European or indeed a global technological trailblazer and political pioneer. This is a field in which Germany is seen to lead the world.

Germany’s reputation as a centre of technology is reflected in the many positive mentions made of German capacities in the field of environmental and energy technology. A large number of those interviewed underlined the expertise of German industry in the renewable energies and energy efficiency sector, with

‘Germany’s potential in the field of alternative energy is vast. We have realised one joint initiative in the field of bio-diesel, and exchange and cooperation in the field of solar power would also be exciting.’ (Indonesia)

solar and wind power coming in for special praise. Interviewees from Asian states in particular expect that Germany technology will be able to harness large-volume export markets, and would like to see extensive cooperation and know-how transfer in this sector. Specific mention was also made of

‘When it comes to the environment, Germany thinks long term. The move towards alternative energy sources is an excellent thing. Even if Germany only achieves 80% of its targets rather than 100%, it will be a success for Germany and an example for the rest of the world.’ (Palestine)

construction and building technology, waste management, water management and methods of reducing energy consumption.

Interviewees associated the issue of energy and climate first and foremost with Germany’s plans to phase out the use of nuclear power, however, and the decision to radically step up the use of renewable energies. Most statements made were positive. Germany’s efforts to avoid the risks posed by nuclear power and to tap more environmentally friendly energy sources were welcomed. Germany is considered to have the environmental ambitions, the progressive technology and the prosperity it needs to achieve the fundamental shift in its energy mix towards renewables. Several interviewees saw Germany’s decision to phase out the use of nuclear power – in response to Fukushima and the Baden-Württemberg state elections – as an example of the way German democracy works, and the

influence citizens can exert on national politics. Equally though, this point came in for criticism, with the German Government standing accused of political manoeuvring and the abrupt shift in the energy mix seen to be ‘precipitous’, ‘unrealistic’ and ‘naïve’. Germany’s failure to consult with its neighbours was criticised, and it was pointed out that the country’s dependence on Russian gas and Arab oil represent a serious risk for German industry, especially for energy-intensive branches. Individual interviewees accused Germany of adopting double standards – ending the use of nuclear power within Germany only to import nuclear power generated abroad, while Germany continues to export the technology needed to build nuclear power plants. This is seen as a conflict between national policies and the pressure of the market.

‘German industry delivers good solutions in the field of energy and climate, but the politicians are not pulling their weight. They also have double standards – nuclear power is to be phased out inside Germany, but it’s OK to import it.’ (Israel)

Yet in spite of the criticism, Germany’s international role as a pioneer and an example in the field of climate change mitigation and energy came in for extensive praise. Germany is seen as the European leader, in terms of political communication, and at moral and technological level. Outside Europe’s borders, representatives recommended that Germany state and defend its positions more clearly and more vigorously, and that German solutions be better marketed and brought into line with local conditions.

‘Germany should invest more in developing new environmental technologies. It might seem like a risk today, but in the long term it will underpin Germany’s leading role.’ (Japan)

Numerous interviewees reported that the world was adopting a ‘wait-and-see’ attitude to the German model – some calmly confident that it would succeed, others more sceptical of its chances of success. Many interviewees see possible avenues of cooperation between their own countries and Germany, and recommend above

all closer cooperation within the EU. They believe that the move towards alternative energy sources should be made a European project, because Germany cannot go it alone.

A large number of interviewees felt that if Germany is to manage to put its energy mix on a new and more sustainable footing, a more holistic approach will be needed. Politicians, industry, the research community, the education system and civil society will have to work hand in hand. This is an area where there is still seen to be room for improvement in Germany.

‘Within the EU Germany has managed to give Europe a voice in international climate policy. Its ability to shape policies at international level is, however, still pretty weak.’ (Chile)

Topic area 5

Education, training and work – German crafts and trades setting an example

The overwhelming majority of interviewees were full of praise for the German education system. The fact that education and training from primary school to university are entirely free of charge and still of a high quality was underlined by many as being very positive.

'The German education system is exemplary. It is one of the few countries where you can send your children to a state school with a good conscience.' (India)

The dual vocational training system in particular is well known, and is also seen as an important element of the German education system, and a genuine alternative to a university degree. Many see the reasons for Germany's sustainable economic prowess in the way the dual training system dovetails theoretical training and industry-based practice. Interviewees approved of the way German society greatly respects the skilled trades and crafts. There is a very high level of interest in discovering more about the German system of vocational education and training and transferring it to other countries.

The practice-based vocational training and university education offered in Germany, that is geared to meeting the needs of industry, is generally felt to be positive, although it was pointed out that an overly pragmatic approach currently stands in the way of top-level and pure research.

'Germans learn from a very early age to work independently and systematically. The Chinese are also highly qualified but often unable to write a text independently. Germans are taught to study independently.' (China)

Interviewees also admired the way German children are taught from an early age to be self-reliant, to think and act independently, and to have the courage to try out creative methods. These points were raised in particular by individuals who have themselves had the opportunity to sample the German education system first hand.

One problem was, however, felt to be the age at which German children are forced to choose between several different forms of secondary school. Interviewees felt that Germany's education system streams children too early, and that it is very difficult to move from one form of secondary school to another at a later date. This impacts negatively in particular on children from an immigrant background.

The German language remains the single largest challenge in the country's education system. Many interviewees underlined the fact that German is a major obstacle to foreigners entering the German

education system, especially through exchange programmes for school pupils or students. There was a clear wish to see more courses at German universities taught in English, which would make it easier for foreigners to study in Germany. There was no uniform pattern to the assessment of German university education. While German universities were felt not to produce

'Germans enjoy a wide range of welfare benefits, yet their system is very efficient.' (USA)

'Welfare benefits for the unemployed in Germany are very good. On the other hand they might make people lazy!' (Kazakhstan)

an effective elite, and do not figure in international ranking lists, they were nevertheless believed to have a very good general reputation. University education in technical subjects in general, and specifically in energy- and environment-related subjects, was quite clearly seen to be good.

The majority of interviewees described working conditions in Germany as very good. The advantages specifically mentioned went from maternal leave, parental leave regulations and flexi-time and part-time working options for parents, to the stability of the labour market and the financial support available in the event of unemployment. German virtues including precision, punctuality, and a sense of responsibility and duty were very much appreciated in the working world. Equally though, some warned that too much discipline and single-minded pursuit of a predefined goal can block creativity and innovation.

Topic area 6

Research and innovation – excellent research institutes with links to industry

For the most part Germany is seen as having a highly developed capacity to innovate. High quality standards and the efficiency and credibility of German brands reflect Germany's strengths in realising technical solutions and in production.

'Germany's innovative force is very strong, but they simply cannot shake off their rigidity, which stands in the way of genuine creativity. They should open up more.' (Indonesia)

Yet these advantages are partly offset by a lack of flexibility and rigid regulations which can make it difficult to introduce innovative processes and products. Productivity and a technological orientation do not necessarily spawn

innovation. The 'Made in Germany' label is still seen as proof of the quality and durability of a product, but it is not necessarily associated with innovation. More and more people are warning Germany that the BRICS countries are catching up fast.

Germany is not always associated with high-tech products. It is seen more as a source of sensible, down-to-earth articles, like household appliances. Alongside the automobile industry, which

is still seen as the number one proof of German quality, a high level of trust is vested in German environmental technology. Emerging economies in particular, but also the USA and Germany's European neighbours expect Germany to produce innovative solutions in the field of alternative technologies.

'Germany is known for mechanical engineering – for smart-tech rather than high-tech.' (USA)

'The USA and the Far East lead the pack in biotechnology and high-tech. Germany is an "innocent bystander".' (Israel)

Seen from the outside, the strengths of Germany are quite clearly the effective links that have been forged between private industry and excellent research centres like the Fraunhofer and Max Planck Institutes. While German universities are generally not felt to foster innovation as a result of their rigid structures, their failure to promote excellence and their low level

'Germany applies for and holds more patents than any other country in Europe. That is the proof that industry and research work well together. A lot of research is sponsored by private industry.' (Spain)

of internationalisation, the research institutes are considered to be unique in the world, and come in for a great deal of praise as Germany's trademark.

Yet the prevailing conditions for (pure) research are seen to be deteriorating. In this important field, Germany is clearly losing ground to international competitors, especially the USA. Firstly the language, the low level of internationalisation, restrictions on immigration, and the poor working conditions with only short-term contracts on offer together pose an obstacle. Secondly, protracted official debates on ethical issues, for instance, and consultation processes make it difficult to develop something new.

'Short-term contracts for young academics are a problem, because they do not then have the peace of mind to get to grips with their subject. Three-year contracts would be good.' (Brazil)

'Germans think they know how to organise innovation, but they just don't think outside the box. What do other nations have to offer in terms of knowledge that could help German innovation?' (United Kingdom)

German companies with international operations are encouraged to make more use of their global network in order to better exploit their innovative potential outside Germany. Many companies stand accused of demonstrating too little flexibility in adapting to local cultures.

Across the many different topic areas, great expectations with respect to cooperation and knowledge sharing with Germany can be discerned. The interest in tapping into German experience, achievements and institutions is vast.

'Germany is a leader in the field of research and innovation. There should be more know-how transfer and cooperation in this area.' (South Africa)

Topic area 7

Infrastructure and mobility – Germany's excellent transport network is a competitive advantage

The responses relating to infrastructure and mobility are all positive, although few in number. One response is representative of this phenomenon: *'I have nothing to say on this topic – the infrastructure in Germany is simply excellent, as is transport technology – there is just nothing I can add!'*

Most interviewees associated infrastructure and transport in Germany with the *autobahn*, the general transport network and public transport systems. The quantity, quality and organisation of German roads impressed many respondents. Some individuals did express reservations about what they saw as the contradiction between the influence of the German automobile lobby and the country's environmental efforts.

'Germany has a practically perfect infrastructure and is a trailblazer in the field of technology – that is the key to the country's economic success.' (Kenya)

'German infrastructure and transport are enviable – vastly efficient, well structured and safe. That gives Germans incredible freedom.' (South Africa)

The German public system of local and long-distance transport was deemed positive across the board. The general level of organisation, punctuality, reliability, safety and cleanliness were praised in the highest tones. All of these factors make for a very high quality of living, it was pointed out, especially in Germany's towns and cities. Public transport systems are seen to offer Germany a competitive advantage as a base for business and industry, and are also felt to be the precondition for Germany's smoothly functioning decentralised system.

Some interviewees underlined the export potential for German traffic and transport technologies, while one or two individuals expressed the desire for closer cooperation with Germany, for instance in the railway sector (Turkey), cross-border links (Poland) and the field of transport infrastructure (India).

'If Germany manages to link the issue of infrastructure investment with the green economy, that will be an extremely successful business model for the country.' (China)

Few interviewees made any mention of German described it in very positive terms – *'excellent'*, *'top quality'* and *'leading companies'* were just some of the epithets used. The German power network, water and waste management and internet connections were also seen to be very good. A few interviewees saw shortcomings in the infrastructure for families, including the availability of nursery places for pre-school children.

Topic area 8

Migration and integration – immigration restrictions should be eased

Migration and integration are seen as one of the major challenges that Germany and Europe will have to deal with in future. Their importance must be seen in the context of the demographic trends that have been emerging for some time, and the concomitant shortage of highly qualified specialists and skilled workers.

'The burning issue for the next 20 years will be immigration and integration. Germany must act now to put in place a framework so that immigrants can integrate, have better access to schools, learn the language, etc.' (France)

'Germany needs a "German Dream", a vision or a system of values that give a direction to everybody, especially those with an immigrant background, and allow them to make their contribution. Maybe one day we will see a German with Turkish roots become head of state.' (Kenya)

'Reunification was a remarkable act of integration of people who had grown up in very different systems. That demonstrates that German society is capable of integration.' (Indonesia)

Even if Germany today is noticeably more open, tolerant and multicultural than it was 30 years ago, the high demand for highly qualified specialists and skilled workers does not appear to be reflected in Germany's attitude to the issue of immigration and integration. People outside Germany see the ongoing discussion about unregulated immigration policy as reflecting not the economic importance of migrants and the feeling that diversity is an enrichment, but as an expression of German concerns and fears of losing Germany

as they know it. All in all, they say, there is no genuine vision for the society of the future that incorporates migrants and allows them to identify positively with it.

The numerous hurdles that stand in the way of foreigners living and working in Germany are also felt to be excessive: the generally distant attitude to migrants, the evidence of qualifications demanded and the difficulty of having foreign qualifications accepted, the German language and many other difficulties from obtaining a visa in the first place to bringing the family. This makes it difficult for foreigners to emigrate to Germany and to establish roots once they are in the country. Even third-generation immigrants risk being seen as 'guests' in Germany.

'The Turks in Germany are no longer Turks. They are young Germans, who are often poorly educated, unemployed and without hope. Germany must solve this problem itself and accept these people as Germans. These young people with no hope of a better future are a threat to German society, but they offer a vast untapped potential.' (Turkey)

It is noted equally critically that Germany's selective school system and the low level of participation in political discourse do not exactly make it easy for migrants and their direct descendants to rise within German society. Nevertheless Germany remains an attractive destination for migrants.

Many countries would be interested in sharing experience gained with immigration and integration. Other countries with a high level of immigration hope that they can learn how to better master these challenges.

‘With a courageous integration policy, Germany could demonstrate that it is ready to become part of a globalised world.’ (India)

Topic area 9

Culture and family – a family-friendly country with too few children

Many interviewees expressed their regret that so little is known about German culture outside the country, especially about cultural life after the Second World War. Well-known German institutions like the Goethe Institute and German Embassies do too little to advertise these ‘soft factors’.

‘The only Germans you ever see are the shirt-and-tie businessmen. In the long term it would be better for Germany if we got to know the ‘soft side’ of Germany through cultural exchanges and so on. In future Germany will be called on above all to act as a soft power. Everything else in Germany is already perfect.’ (Brazil)

‘No matter how much the world changes, the Germans will still stick to their values of hard work, success through effort, collectiveness and thrift.’ (France)

Germany has a huge cultural potential, but makes very little use of this in its efforts to project an attractive image of the country. Around the world Germans are seen as successful businesspeople, purposeful and ambitious. Any other attributes remain nebulous though. Berlin at least is making an impact as a cultural metropolis, which offers great artistic diversity and in-depth intercultural exchange.

The Germans are deemed to have a fundamental and strong sense of duty, more so than other nations and cultures. The

German identity is still associated with diligence, single-mindedness and precision. Family links and values are also considered very important. This is seen as the reason for Germany’s success in balancing the demands of working life and family life.

German children, the interviewees believed, are taught at an early age to be self-reliant and are allowed to become independent. Their paths follow clear values and morals, and are based on strong family links, but are also hedged with a large number of rules and duties. It is considered positive that most families prepare their children well for life and enable them at an early age to accept responsibility for themselves and others. An overly rigid corset is, however, also seen as possibly preventing children from evolving and excelling, and as an obstacle to developing creativity.

Although Germany is seen as a family-friendly country, the birth rate is de facto dropping to such a low level that Germany will have to cope with serious demographic challenges. Interviewees saw the reasons for Germany’s low fertility as the growing ‘independence’ of women, the lack of childcare

facilities and the increasing importance attached to material prosperity. It is interesting to note that the way people outside Germany perceive the role of women in Germany diverges widely. Some pointed to stereotypical gender roles, while others referred to the image of the working woman, often single and independent.

'The birth rate in Germany is too low. I'm a bit surprised to see that Angela Merkel, as a member of a conservative party, does not stand up for conservative values and set an example herself, especially in terms of family and children. Germany needs children, because children are the future.' (Israel)

Topic area 10

Faith and ethics – a secular society with church tax

'Church and religion play no real part in Germany. It is a secular society, but Germans are also too serious and single-minded – too ethical if you ask me (the work ethic).' (Israel)

The interviews revealed the fact that outsiders rarely associate Germany with faith and ethics. Most of them did associate Germany with single-mindedness and seriousness, but not really with any spirituality or deep-seated religious beliefs. Morals and faith in Germany appear to them to be based more on the country's regulatory and legal system than on any deep conviction at individual level.

On the one hand Germany is seen as a secular society, in which adherence to a confession is based on tradition or pragmatism. On the other, Germany is considered to have sound guiding values and a clear understanding of moral issues. Germans are seen as honest, responsible, loyal and with a sense of solidarity. They personify democracy, consensual politics and human rights.

'You think immediately of Germany when it's a case of right or wrong but not in relation to spirituality. That just doesn't sit with the Germans.' (South Africa)

'Germany is a microcosm of EU values – fundamental values like liberty, consensual politics, coalition building, democracy and human rights.' (United Kingdom)

Germany's strict value orientation has once again become apparent recently. Several interviewees pointed to the resignations of Karl-Theodor zu Guttenberg

'The resignation of President Christian Wulff because of accusations of corruption is symbolic of Germany's strong attachment to values.' (United Kingdom)

and Christian Wulff as good examples of the way Germany is not willing to tolerate breaches of generally accepted morals, but also as evidence of the fact that Germany's system of values is losing ground.

The interviewees believed that Germany deals very sensitively with its history, and invests a great deal in education and in efforts to prevent the past being forgotten and in shouldering the lasting

'I really admire the way Germans pass on their history to the next generation through their schools, art and culture.' (France)

responsibility for past actions. Equally though, there is a feeling that the younger generation could begin to shake off the feelings of guilt, without which they could look to the future with more confidence.

'It is astonishing how secular Germany is. Of course there are also Christian values, but in Germany they are more part of the culture. The huge exception is its curious church tax.' (USA)

The German church tax is a source of great amazement to foreigners, who see it more as an expression of the German sense of order than any reflection of religious fervour on the part of Germans. There was overwhelming consensus on this point – church tax would never be accepted in any other nation.

OUTLOOK – PERCEPTIONS, EXPECTATIONS, POTENTIALS

In many places Germany is still associated with the traditional stereotypes – German philosophers, the skills of German craftsmen and engineers, the barbarism of the 20th century, reconstruction and reunification. A lot of people outside Germany still see the typical German as being a serious lover of regulations and order, systematic and quality-aware, a bit stuffy and standoffish and not particularly creative. The traditional image of Germany is, however, beginning to crumble. Time-honoured clichés and stereotypes are increasingly giving way to the images of recent events – the festiveness that surrounded the FIFA World Cup in 2006 and images of Berlin as the cult(ural) capital, as well as the perception of Germany's strong regulatory role in the euro crisis, its recent turnaround on energy policy and Germany's efforts to broker peace and reconcile divergent interests in many conflicts around the world.

This complex, changing perception of Germany is linked to high expectations of Germany's future role in the world. This is what stands behind the huge interest in German experience, achievements and institutions in the form of a wide range of offers for cooperation and the strong desire for know-how transfer. The interest in exchange transcends established fields and embraces special features of the German democratic system and sustainable infrastructure and environmental technologies. People outside Germany want to learn and understand more about Germany, which is an important precondition for establishing international relations based on trust – relations that are vitally important for Germany.

It is also obvious to many that Germany can and should play a more important role in the world. Germany's unique economic and geographical place in Europe, and the credibility it enjoys in dealing with global challenges (such as climate change) both enable and obligate Germany to adopt a more active and higher-profile position. At the same time these hopes give rise to fears of renewed

German dominance. In Europe in particular, and among the former Allies, there is a feeling of uncertainty as to whether Germany will use its new strength and the options open to it, and if so how. In any case people outside Germany would like to see the country accept more global responsibility, focusing on dialogue that also takes into account the interests of smaller countries, and consulting and coordinating actions closely with partners, both old and new.

The central challenge then would appear to be to how best to make use of the positive perceptions of Germany and the great expectations of Germany's changing role in the world, while soothing fears of renewed German dominance. This will call for better communication with the outside world; good examples include German EU policy and Germany's attitude to crises such as the one in the Middle East.

Many respondents also felt it was a shame that so little is known about German culture abroad, especially German culture since the Second World War. And they recommend that German solutions be better marketed and adapted to bring them into line with local conditions.

Future foreign trade potential is seen primarily in the marketing of alternative environmental technologies, and infrastructure and transport concepts. Germany is already seen to lead the world in these fields.

In terms of domestic policy a need for action is seen above all in the area of immigration, where a combination of rising demand for highly qualified specialists and skilled workers and the lack of any vision for society that actually sees Germany as a country that welcomes migrants is held to be both the major challenge and an opportunity for Germany. An appropriate vision should be drawn up and restrictions on immigration eased, as well as making it easier for immigrants to rise in German society. It is also recommended that politicians make a greater effort to communicate to Germans the opportunities and advantages that a strong and united Europe can offer Germany.

ANNEX: LIST OF INTERVIEWEES¹**BRAZIL**

Carlos ALBERTO	Director	The Brazilian Service of Support for Micro and Small Enterprises (SEBRAE)
Gisèle SANTORO	Artistic Director	Secretariat for Culture, Federal District do Brasil
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¹ Some participants asked to be listed with their name only, in order to avoid the impression that they might be speaking on behalf of their employers.

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