

Second survey

Germany in the Eyes of the World

Key findings of the second GIZ survey (2015)

*»If Germany were an animal, it would be
an elephant or a rhinoceros. It's large, you can't
miss it, it can live for hundreds of years,
and you have to be careful how you deal with
it, but it doesn't move quickly enough.«*

Netherlands

Germany in the Eyes of the World

Key findings of the second GIZ survey (2015)

Executive Summary

The way Germany communicates is a source of astonishment to observers outside the country. The 179 people interviewed for this second *Germany in the Eyes of the World* study feel that when it comes to marketing its goods and services, Germany is often too low-key, too traditional and too unimaginative. And when it comes to communicating its political standpoints, they say, Germany fails to explain itself or to listen to other points of view and lacks vision. Germany, it seems, is expected to act with circumspection but also show greater courage and a greater presence.

This view was also reflected in the role foreign interviewees would like to see Germany play in global economic and political relations. A trend already apparent in the first study was confirmed and, indeed, appears to have become more marked. People wish to see Germany as a strong global player, and although the country is credited with making progress, the feeling is still that it is not utilising its full potential. One new aspect to emerge from this latest survey is that many observers already see a de facto German dominance, at least in Europe, but that the majority do not view this as a cause

for concern or fear. Rather, this dominance is interpreted as grounds to expect more of Germany, with observers becoming more emphatic and more critical in their views. Because of its economic power, something that many interviewees alluded to, Germany is expected to show greater political presence and vision – primarily within and for Europe, but also beyond Europe's borders. Interviewees frequently called on Germany to use one of the things it is best known for – its ›soft power‹ – to step up its involvement in the resolution of military conflicts.

Outside Germany, the country's prevailing image is that of a high-performing, dynamic player with excellent innovative capacities and the innovation landscape to match. But interviewees felt that this, too, is an area in which Germany still has much untapped potential. The causes are seen in the characteristic German reticence and risk aversion, which are at least partly rooted in the country's history. Observers look in vain, for instance, for any German players at the forefront of the digital revolution. By contrast, they feel (with some reservations) that the country is making progress in the field of migration and

integration but call on it to play a key role in resolving the European refugee crisis. The quality of life in Germany, measured in terms of internal security, progressive health care, effective rule of law and a culture of democratic dispute resolution, is seen as exemplary. Germany is ranked as one of the top nations in the field of international cooperation and the sharing of knowledge and experience. Foreign observers identify one core competence in particular that helps Germany achieve stable solutions – the typically German tendency to think and act systemically.

Indeed, the people interviewed around the globe base many of their observations on the typical German character traits that they see as being responsible for the way Germans act in a wide range of fields. ›Secondary virtues‹, such as the German love of order, punctuality and discipline, are seen in other countries as a strong and robust foundation for predictability and security and are valued, if not universally liked. Recently, however, new contours have been added to these images, some of them contradictory. This will make dealing with Germany a more nuanced prospect in future.

These are the four main sets of findings to emerge from the second worldwide qualitative survey conducted by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH in 2014/2015. Once again, interviews were conducted with people from a wide range of professional backgrounds and various levels of hierarchy on five continents. They shared their opinions of, and attitudes to, Germany in face to face interviews. Their responses generated 4,560 key statements. The study, which was first published in 2012 as part of Chancellor Angela Merkel's *Dialogue on Germany's Future*, is to be repeated at regular intervals to provide a time series survey. GIZ sees this as an additional service in the context of its international cooperation work for sustainable development. The findings offer valuable pointers for political actors inside Germany and beyond its borders. They are intended to provide food for thought and generate impact through their unique tone. They should also, however, be seen as a snapshot that depends substantially on the prevailing context at the time the interviews were conducted.

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Foreword

Anyone exploring crucial aspects of the way Germany should shape its future is well advised to look beyond the country's borders: Germany is so inextricably connected with the rest of the world – economically, politically, socially and culturally – that its international relations are not only the logical consequence of mutual dependencies but are also shaped with its own vital interests in mind. Germany needs, seeks and maintains a wide variety of relations with other states around the world. Learning is a joint venture, and mapping out the future is a task to be shared.

These convictions moved GIZ to conduct a first qualitative worldwide survey in 2011/2012. The main results were published as *Germany in the Eyes of the World*. The survey was produced in the context of the *Dialogue on Germany's Future*, an initiative launched by Chancellor Angela Merkel. The Chancellor was seeking answers to three questions: How do we want to live together in future? How do we want to earn a living? And how do we want to learn? Our study made a substantial contribution to the initiative, which included 18 working groups of experts.

Now, three years later, we are able to bring you the findings of the second GIZ survey. But why are we conducting this study? What does it add to the conclusions supplied by the large number of German and foreign analyses, books and articles that have already explored the images people around the world have of Germany?

With this study, GIZ aims to provide an additional qualitative service. In our capacity as a federal enterprise in the field of international cooperation for sustainable development, we operate in more than 130 countries around the globe. On behalf of the German Government, we foster development and transformation throughout the world and work to achieve long-term political, economic and social stability. Our programmes and projects bring us into contact on a daily basis with a huge number of non-German experts, staff members, partners working for other organisations, and people living in both urban and rural settings. These working relations represent a treasure trove of experience that the German Government can use to shape its bilateral and international relations. In this study, we go a step further by asking straight out how Germany and the Germans are perceived in other countries. We want to know what others expect and demand of Germany and what they would like Germany to do and be. We want to know what the world thinks when it thinks of Germany, what it views as an irritation, and what stands out – both

positive and negative features. We want to know how we Germans are seen to interact at inter-governmental level but also at interpersonal level, what habits and stereotypes are dominant, and how we can gradually move away from long outdated images.

8 These are all factors that are extremely important for the future of international relations. In developing countries and emerging economies, but increasingly also in industrialised countries, we see interest in, and a need for, dialogue and systemic advisory services with a view to enhancing development processes within society. Our work in implementing international cooperation programmes around the globe has taught us that countries must work together to devise effective solutions to global challenges. Increasingly, we must re-examine our own standpoints in interaction with others, hone these where necessary, modify them or indeed reject them completely. By comparing the way we see ourselves with the way others see us, we can begin to identify our own blind spots. This helps us gain a better understanding of the leeway for action that others may be prepared to give us, and enables us to turn our attention to areas where reform may be needed.

For this second survey, we conducted face to face interviews in 26 countries both in Europe and around the world. Our 179 interviewees were our most valuable resource in pinpointing how Germany is perceived. We would like to take this opportunity to thank them warmly for their willingness to give us insights into how they see Germany, for the open and frank way they spoke about their relations to Germany, and for the many experiences and sometimes curious anecdotes they were willing to share with us. Not least we would like to thank them for their time and their patience. With their help, we have been able to distil a kaleidoscope of impressions into a differentiated view of our country as it is seen by outsiders. You will find a list of all the interviewees in Annex 2. Statements quoted in the report itself are not directly attributed to specific interviewees, honouring our pledge of a maximum level of anonymity.

In the following chapters, we set out our findings based on these interviews in an effort to identify how Germany is currently perceived in the eyes of the world. This report is intended to enrich the ongoing discussion as to Germany's role. We present here what we discovered in the course of our numerous interviews, what made us stop and think, and what took us unawares, in more senses than one. On the one hand, we were surprised by what people in other

countries associate with Germany. But we also found ourselves questioning our own expectations. What did we expect to hear, and how do we feel about what we actually heard? Our aim is to convey what people in other countries consider to be important with respect to Germany. There is no true or false, right or wrong. Instead, we have endeavoured to detect patterns in the responses we received, to form hypotheses and to interpret the material gathered. In the final chapter, we look at what is expected of Germany in future, and why.

The findings of the study appear to us to be as relevant to German policy-makers as to economic and civil society actors. In the years to come, we intend to repeat this type of survey to regularly update the information we have on the world's perception of Germany. We would ask you, our readers, to come up with your own ideas and draw your own conclusions. We aim to widen the debate on the way Germany is seen in the world rather than closing it down. A lively dialogue should produce new insights.

I hope that this report will provide stimulating reading and look forward to the ensuing discussion.

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

Dr Christoph Beier

Vice-Chair of the Management Board

Introduction

In April 2015, a short item in the *Süddeutsche Zeitung* reported that the celebrated Italian designer Giorgio Armani had praised the new fashion consciousness of the Germans in a magazine interview. He was quoted as saying that Germans have a very pragmatic style and that they now dress more intuitively, less rigidly but always correctly. Pragmatic, correct and intuitive – these are terms and associations that we, too, came across repeatedly while working on the second survey on *Germany in the Eyes of the World*. It would appear that Germany is increasingly coming under more detailed scrutiny from other countries – even in terms of its fashion scene, where the talk is more usually of other nations.

Second survey conducted three years later

In the second GIZ study of how Germany is perceived, we once again take a vantage point beyond Germany's borders. Three years have passed since we conducted our first study in 2011/2012. In those three years, the global political situation has changed radically. And in those three years, debate as to Germany's

role on the global stage has clearly grown in line with its economic growth and higher political profile within Europe. The number of perception studies – surveys conducted by a number of different institutions to capture the way external actors perceive countries, regions or alliances – has increased significantly in recent years. Most of these surveys, though, are based in industrialised countries and focus on bi-national or bi-regional perceptions – how Israel and the Palestinian territories perceive Germany, for instance, or Asian impressions of Europe and vice versa. Studies of this sort are often conducted by foundations or opinion research institutes. Increasingly, universities too are becoming involved. In individual cases, studies on a specific topic are commissioned, for instance exploring how emerging economies view Germany's ›Energiewende‹ (the transition away from nuclear power and towards more sustainable sources of energy) or comparing self-perception and external perception in working life. The vast majority of studies are quantitative in nature, with surveys conducted by telephone or online. Most aim to establish indices and rankings. A typical example is the Country Ratings Poll

»Germany always takes a really thorough and strategic approach to things. The very fact that it's conducting a qualitative survey shows that it's looking ahead.«

Romania

12 conducted annually by the British broadcaster, BBC World Service; for its most recent survey in 2013/2014, some 25,000 people were asked to rate 16 countries. Few studies are based on face to face interviews and only in isolated cases do they go any further than the image of the country in question.¹

Increase in media interest

Media interest in how Germany is perceived in the world also appears to have increased significantly. The most recent piece of evidence to point in this direction is the May edition of the monthly French publication *Le Monde diplomatique*, which compiles articles written by various authors to produce an image of Germany. It was entitled ›L'Allemagne, puissance sans désir‹ (›Germany, a reluctant power‹). Most of the articles published in *Le Monde diplomatique* focus on foreign policy issues, including the role of Germany in Europe and on the international stage, as have previous dossiers

published in *DER SPIEGEL*, *Handelsblatt*, *The Guardian* and other media.

A number of recently published books also look at Germany. For example, much attention has been paid to the 190-page essay *Macht in der Mitte. Die neuen Aufgaben Deutschlands in Europa* (›The power at the centre. Germany's new role in Europe‹) by the celebrated and influential political scientist Herfried Münkler, whose favourite topics include ›German myths‹². Many publications also focus on the historical roots of national stereotypes, which were and remain good raw material for devising an image of other nations as ›the enemy‹.

Unique global view

To supplement treatments of this type and provide an alternative to quantitative surveys, GIZ has conducted a second series of open-ended interviews with people around the world who have links with Germany.

1 BBC World Service: Poll. Negative views of Russia on the rise: Global Poll. June 2014.

2 Herfried Münkler: *Macht in der Mitte. Die neuen Aufgaben Deutschlands in Europa*. Kindle Edition. March 2015.

The added value of this approach is that it delivers a global, qualitative view of Germany that none of the above surveys can match in breadth and scope. Since Germany's role in European politics has attracted a great deal of attention in recent years, this survey focused in particular on the topic of Europe.

The interviews supplied responses to important questions. What do people around the world see as Germany's strengths and opportunities and what are its weaknesses and the risks it faces? In the eyes of other nations, what responsibilities should Germany be shouldering in the world? And what role, in the broadest sense, should Germany play in future in a changing world?

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A snapshot of Germany

The responses shed light on that changing world. The interviews conducted for this study took place against the backdrop of a wide spectrum of events between 2012 and 2015, many of which had at least an indirect link to Germany. Our interviewees' observations should thus be seen as a snapshot and not in isolation from the prevailing global political situation. Indeed, the economic and financial crisis in the eurozone, Europe's refugee problem, the conflict in Ukraine, the onward march of the terrorist organisation ISIS, the Middle East crisis, the civil war in Syria, and the Ebola epidemic in West Africa were explicitly cited by many interviewees to underpin their image of Germany. In fact, these factors are currently a defining element in how Germany is perceived. Events such as the creation of the European Stability Mechanism (ESM) in October 2012 have had a marked influence on the responses of European partners

»Germany has to do some ›big politics‹. And if you do ›big politics‹, the world changes, even if it's only by small steps.«

DRC

in particular. The change of government in France, Vladimir Putin's return to power as Russian President, Barack Obama's re-election in the USA over this period, and the elections to the European Parliament in mid-2014, which strengthened the hand of right-wing populist parties, provided the backdrop for the interviews. Of course, the German parliamentary elections in 2013, which resulted in a Grand Coalition between the CDU/CSU and the SPD and returned Angela Merkel to office as Chancellor, have also influenced the way Germany is seen from abroad.

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And finally, cultural events had an impact: Germany won the FIFA World Cup in Brazil in 2014 and gained massively in popularity around the globe as a result. The celebrations in Berlin to mark the 25th anniversary of the fall of the Berlin Wall had a similar effect. In the USA at least, the publication in 2013 of Edward Snowden's revelations about the scale of American espionage seems likely to have had an impact, with several interviewees stressing that the NSA affair had tangibly and negatively affected transatlantic relations.

The findings in four main chapters

The events on the global, European and German stages outlined here provide the context to the second GIZ study of how Germany is perceived in the world. They affect what interviewees say and how they say it. In the following chapters, we present the findings of the survey. Because of the qualitative nature of the study, the frequency of any given response is not significant. The study aims rather to understand individual perspectives, especially those that appear remarkable and surprising, and views that provide food for thought. It also aims to present these findings comprehensibly and in a way that helps

us gain further insights. Our findings have been broken down into six chapters: an overview of the methodology used in the study is followed by four main chapters that look in depth at the results obtained, while the concluding chapter considers what is expected of Germany in future. The first of the main chapters revolves around what are perceived as typically German character traits. Patterns emerge, indicating how these attributes play out in the eyes of non-German observers.

The second chapter focuses on German abilities and the attractiveness of Germany as a »service provider«. The third chapter goes on to explore the role that Germany is currently playing in the eyes of foreign observers and the role they would like to see Germany play on the international stage in future.

The fourth and final main chapter then looks at aspects of Germany's global marketing of itself, in particular the capacity ascribed to it as a political mediator. The concluding chapter looks at the broad lines to emerge from the study. It draws together the expectations voiced by interviewees and indicates what path they expect Germany to take – and thus offers a good starting point for further reflection and discussion.

*»German football has been transformed.
To me, it now combines the two positive things
about the country: a well-structured and
disciplined sense of order but also a creative
and innovative pragmatism.«*

South Africa

Methodology

This is GIZ's second worldwide survey. It builds directly on the survey conducted in 2011/2012³. Further studies are envisaged as part of a time series. The interviews for the second study were conducted between August 2014 and January 2015.

This study has applied the methodological design of its predecessor with practically no changes.⁴ It is empirical rather than theory-driven and uses qualitative methods. The study is shaped by four main factors and the coherent way these were combined. The countries were selected with a view to ensuring a wide variety of perspectives; discerning interviewees were hand-picked in each of these countries; the interviews, systematic documentation and multi-stage evaluation were performed according to a clear methodology; and a predetermined framework of topics was used for the interviews. The various elements and sequences of the study are set out in **Figure 1**.

179 interviews in three phases

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In total, qualitative interviews were held with 179 individuals from 26 countries. Each interview was conducted and documented by a team of two. On average, as for the first study, seven interviews were conducted per country. Each interview took an average of one and a half hours. Subsequently, the main thematic lines were identified and recorded in the form of consolidated core statements, using an evaluation tool. An average interview produced about 25 documented core statements. The spotlight was on recording and consolidating relevant aspects mentioned by each interviewee. A total of 4,560 core statements were generated; they are the ›raw material‹ on the basis of which the evaluation was conducted. Core statements were registered both by topic area (see below) and by type of statement (description, expectation, strength, risk, etc.) and so were assigned two separate codes (one for the topic area and one for the type of statement).

3 Germany in the Eyes of the World. Key findings of the GIZ survey ›Germany viewed from abroad – the implications for international cooperation‹, Bonn/Eschborn, May 2012.

4 See Annex 1 for a more detailed explanation of the methodological approach.

Figure 1

Sequences of the study

1

Study design

(including list of key questions and selection of interviewees)

2

Interviews

Free associations • 11 topic areas • Future expectations

3

Evaluation

Stage 1

Reading,
analysis,
pre-structuring

Stage 2

Feedback,
discussion,
initial evaluation

Stage 3

Cross-comparison,
discussion,
processing findings

4

Study report

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

5

Discussion

With very few exceptions, the interviews were conducted on a face to face basis. All interviews were based on a semi-structured questioning technique. This allowed the interviewers to pick up on statements in order to request further information or produce narrative statements. Each interview involved three phases. The initial, open phase was designed to determine how and in which categories the interviewee perceived Germany and how he or she assessed the country. Key questions like ›What comes to mind when you think of Germany?‹ offered scope for spontaneous, intuitive and personal impressions, experiences and general perceptions. The second phase of the interview focused on a range of different topics. **Figure 2** lists all 11 areas. Each interviewee was offered a set of 11 cards and asked to select those that he or she personally felt to be most relevant. Interviewees were then asked to associate freely on how the selected topics connected with Germany. The 11 areas reflected major aspects of society and built on experience gained from the first study⁵. An explicit reference to additional observation areas that the interviewees could choose freely – a ›wild card‹ – made it clear to interviewees that they were free to touch on other topics. The third and final phase of the interview was used for an open discussion and reflection to sum things up. Questions like ›In conclusion, where do you see the greatest opportunities/risks for Germany?‹ and ›What would your main advice to the German Chancellor be?‹ were intended to encourage interviewees to look ahead to 2020 and to express their own individual expectations and recommendations.

26 countries with a special focus on Europe

The 26 countries were selected using essentially the same criteria as those adopted for the first study: historical links with Germany, economic interdependence, and the importance of the countries in bilateral and multi-lateral political processes. As well as G20 states, ›pivotal powers‹ were chosen: these are states that play a key regional role as a result of their geostrategic position, their population, their economic potential and their political weight. They act as economic hubs and are instrumental in shaping the contours of future global policy. The widest possible range of cultural areas, ethnic backgrounds and religions was included in the study. Some countries that met these criteria were nevertheless not selected because the security situation on the ground made it inadvisable to send interviewers there.

Compared with the first study, there is a greater focus on Europe. In the three years since the first study was conducted, European issues have taken on a wider significance (for example, as a result of the ongoing European economic and financial crisis) and have had a crucial influence on the role Germany plays. Ten of the 26 countries selected were European, compared with seven selected for the first study. Precisely half of the states (13) taking part in this study were also involved in the first study. **Figure 3** shows the number and geographical distribution of the countries participating in each of the two studies.

5 A detailed list of the topic areas from both studies is reproduced in the Annex.

Figure 2

Topic areas

- > Infrastructure, technology and digital change
- > Education and professional life
- > Research and innovation
- > Migration and integration
- > Culture and lifestyle
- > Health and quality of life
- > Political order and administration
- > Family and values
- > Internal and external security
- > Energy and the environment
- > Economy and finance

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

Interviewees paint a picture of Germany

Because the study aimed to produce an image of Germany based on actual experiences, a

certain amount of knowledge about Germany was important. The majority of interviewees had either lived or worked in Germany for an extended period or had close business contacts with German companies or family links with Germany. A small number of interviewees had acquired most or all of their knowledge of Germany from the media or other information channels. The interviewees included a great many decision-makers who were particularly well qualified to speak in an informed way about Germany as a result of their special capacities and experience. The interviewees taken as a whole, however, represented a very wide spectrum, and this was intentional. By way of example, they included a former British ambassador to Germany, a student from Brazil who had worked for several months in Germany, a German-speaking Turkish lawyer and former Member of Parliament, an artist

from China with a second home in Berlin, a Congolese banker, and an Indian environmental activist with long-standing professional contacts with Germany. The fact that we interviewed primarily people who know Germany well might have produced a higher percentage of positive attitudes to Germany than we would have found had we taken a random sample of interviewees. It was a conscious decision, however, since as we have already stated, this study aims to produce an experience-based image in contrast to other existing perception studies.

Multi-stage evaluation

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

1. **Reading, analysis and pre-structuring:** individual perusal of all core statements,

detailed analysis of each topic area and drafting of initial observations;

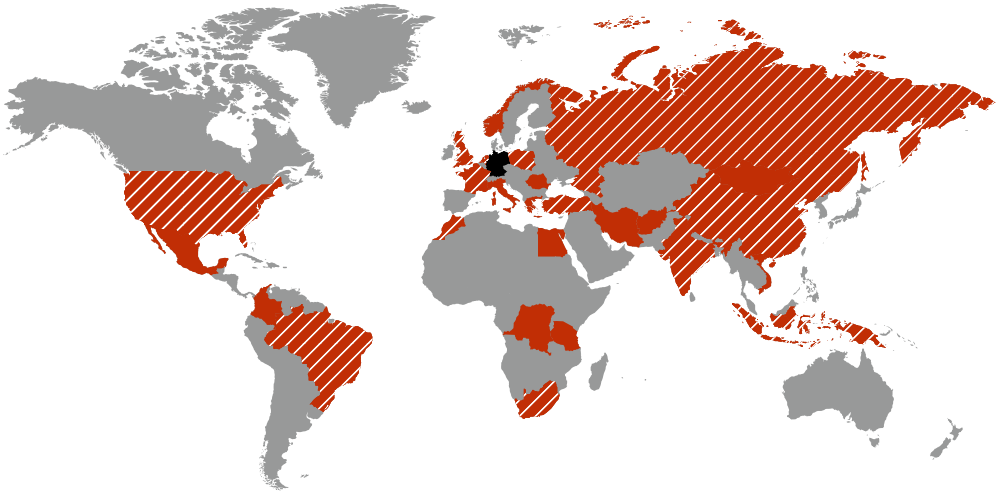
2. **Feedback, discussion and initial evaluation:** the groups of interviewers reviewed the initial assumptions and produced open hypotheses in overarching interpretation fields;
3. **Cross-comparison, discussion and processing of findings:** the group of interviewers reviewed the findings and explored these in greater depth on the basis of the raw material; structuring of study.

All interviewers, about a dozen in total, were involved to varying degrees in the evaluation. The intention was to relate the hypotheses back to the interview context experienced by individual interviewers while preventing individual distortions as far as possible by involving the entire group of interviewers. The three-stage evaluation procedure moved from the concrete to the general and back to the individual experience.

The study report consists of four main chapters, which set out overarching thematic contexts gleaned from more than 4,500

Figure 3
Countries selected

- ▨ country also involved in first study
- country involved only in second study



22

America

- Brazil
- Colombia
- Mexico
- USA

Europe

- France
- Greece
- UK
- Italy
- Netherlands
- Norway
- Poland
- Romania
- Russia
- Turkey

MENA

- Egypt
- Morocco
- Iran

Africa

- DRC
- South Africa
- Tanzania

Asia

- Afghanistan
- China
- India
- Indonesia
- Mongolia
- Viet Nam

core statements: how other countries see the Germans; Germany's abilities and attractiveness; Germany's role on the international stage; and the image Germany projects abroad.

In contrast to the first study, findings on the 11 topic areas listed above in **Figure 2** are not presented separately here. Instead, they feed into the four main chapters. This is because the substantive evaluation indicated that compiling the material according to overarching themes would produce a more meaningful result. The reader may expect three things of the following chapters. Firstly, core statements or excerpts are used; these are in double quotation marks⁶, stay close to the original source and represent the initial observations of the interviewees. Readers should, however, take into account that we have not transcribed verbatim the original statements made, but have consolidated the contents of the individual interviews into core statements. These are not attributed to any one interviewee since all interviewees were guaranteed anonymity. Second, generalised observations are drawn from the core statements to reveal patterns. In some places, particularly remarkable or striking individual statements appear next to the generalisations; this is noted in the text. Finally, higher-level correlations are presented in the form of assumptions or hypotheses. Wherever comparisons are made with the findings of the first survey, this is stated in the text.

The following four main chapters should be seen as offering both a snapshot and a kaleidoscopic view of worldwide observations and

reflections on Germany. They give readers scope to make their own deductions and to interpret the material in their own way, while encouraging them to take a critical look and ask their own questions.

6 Single quotation marks are used for terms and sentences that originate from the author and not from the interviewees.

Typical character traits –
*how other countries see
the Germans*

A high level of agreement exists around the world with respect to the character traits attributed to the Germans. The so-called ›secondary virtues‹ of love of order, discipline and punctuality are held to be typically German, while the majority of interviewees associate rationality, thoroughness, perfectionism and efficiency with the German people. These features were also mentioned during interviews conducted for the first study. At first sight, then, the German character would appear to be relatively constant.

Many statements reflect a sort of respect and admiration, for instance when interviewees state that many societies have abandoned their values, but that »these values still exist in Germany, quite apart from the German virtues«. Other sum it up by saying »Punctuality, order, rigour, performance, and discipline – that is why Germany is where it is today« or »The Germans always respect deadlines and plan everything meticulously. If we could learn from them, we would go a long way«. These and similar statements reflect the idea that character traits like these will facilitate progress in a society.

Like a piece of high-precision engineering

25

The statements made during the interviews also give good grounds to assume that German characteristics are not only seen as a series of long-standing stereotypes. The same attributes that allegedly apply to Germans at the individual level are frequently also associated with German products, institutions and even societal sub-systems, such as the legal, economic, education, and academic and research systems. These are all reputed to be well regulated, efficient, successful and exemplary. Outside Germany, there is often felt to be a two-way correlation between German virtues and German products and systems – as though they were mutually reinforcing. One Afghan interviewee, for instance, told us that Germans are, in the way they behave, »as precise as their machines; every other nation is weaker in this context«. One example that is frequently mentioned in this context is the local public transport system, which foreigners often describe as exemplary: »Local public transport is wonderfully well organised. Everything is fast and the system is kept simple. Everybody always

seems to do the right thing at just the right time. But this not only applies to people working on trains; waiting staff and other workers all do their job extremely efficiently.« What this statement, taken as an example of many similar utterances, demonstrates is that excellent German hardware, such as the high-speed *ICE* train, is combined in Germany with ingeniously devised routes and timetables, and that everything – including the workers – is perfectly coordinated. If we take this one step further, we could therefore assume that the punctuality of the transport system encourages efficiency in the working world, thus fostering both the work ethic and the quality of finished products. This mutually reinforcing effect is felt by some outside Germany to be very positive.

Inspiring trust

The character traits outlined above make Germans particularly reliable and predictable to many non-Germans. This generates trust at individual level, as numerous interviewees stated: »Even if you sometimes get bogged down in rules and regulations I never have any difficulty in trusting you.« Other interviewees even perceive a social impact, as the following example indicates: »In smaller towns, we were astonished not to be asked for our passport or credit card in hotels. People are incredibly trusting. I think it is a cultural thing. In Germany, children are brought up to trust one another.«

This positive image does have its limits, however. When it comes to trust, some interviewees saw a certain imbalance depending on whether trust was to be exercised at home or abroad. »Values such as professionalism, trust and reliability are very important to Germans

»There's nothing negative to say about trust: a German means what he says and says what he thinks.«

India

»Germans don't always see the bigger picture. You can't imagine the boatman on the Río Caguán also being a guerrilla – and there's no way he'll give you a proper receipt, even if you do need one to claim back your travel expenses!«

Colombia

in their own country, but not always in relations to other EU countries.« These same traits, precision and efficiency, can also give others the feeling of coming up against their own limits, as illustrated in the following statements: »Germans always come straight to the point. That makes it painfully clear to us that we forgot to plan«; »We always feel inferior compared with Germany, we don't feel that we can live up to German expectations. We're not punctual, we don't know how to behave, we don't keep our distance, our roads have potholes, etc.« We could conclude that when the German side attaches too much importance to efficiency, there is a risk of alienating the other side, which will be an obstacle to any genuine dialogue among equals.

The ›square‹ German

This is linked to the frequently mentioned German perfectionism. We were told, »This is part of their mentality. Every German is under pressure to succeed. Germans never emphasise past achievements but always the difficulties still to be overcome.« Because the character traits of Germans tend towards perfectionism, there is often a risk that their

positive attributes, such as efficiency, actually become negative ones. This can end up alienating others in some cases, as this example from Brazil shows: »A German values his work above all else. It is always on his mind. He is constantly wondering how he can become even more efficient. Sometimes Germans are so efficient that they are just too fast for others.«

This implies that, provided these make Germans predictable and reliable, they are felt to be a strength. If, however, they are seen to be imposed on and expected of others, they are perceived as negative – excessive and inflexible. This would be the case, for instance, when a German refuses to modify his own standpoint. Interviewees also said that, with their perfectionist tendencies, Germans not only make life more difficult for the other side; if they are excessively anxious to achieve something and rigid in the way they go about it, they can also end up limiting their own freedom and thus actually harm themselves. The image of the ›square‹ or ›square-headed‹ German is often mentioned in this context: »In China, we say that Germans have a square head – they are too

*»Germans can be spontaneous, too,
but it's not something they find easy.«*

Mexico

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orderly. I think when everything is orderly, there are no gaps, but it is important to have these gaps if we are to have new ideas.« Other interviewees also tentatively questioned whether Germany will be able to cope in an increasingly differentiated world. Many foreigners not only see what they perceive as excessively rigid German behaviour patterns as immobile or stubborn but also believe that these patterns are unlikely to help Germany achieve its own goals and feel that they might be symptomatic of Germany's limited ability to embrace change and cope with future challenges. In India we were told, »Germans act cautiously, but at times of rapid change, that is no longer enough.« Sometimes though, the image of the »square-headed« German is simply mentioned with a benevolent smile. A popular question abroad is why German pedestrians will wait for a green pedestrian signal before crossing the road, even at night when there is no traffic on the roads.

Rigidity makes Germans inflexible

Foreign observers sometimes feel that the German »secondary virtues« are too rigid and severe. Before closer and more intensive

contacts develop, Germans' detachment, dispassion and rationality are more likely to be interpreted as standoffishness, doggedness or even unfriendliness. »This way of dealing with one another is sometimes too confrontational for us,« said an interviewee in Egypt bluntly. Germans are also believed to think more often in terms of pigeonholes or in black and white, whereby the many nuances or shades of grey are simply not registered. Observers know that there are no malicious intentions behind this but believe that Germans need to approach things in this way »so that they know how to deal with the other side, how to classify them«. Do Germans only feel happy within a straitjacket of strict rules and regulations to which they have become accustomed as individuals and as a society? Do these rules give Germans the security they need to operate vis-à-vis others? Does the German system of rules and regulations generate a certain rigidity, a lack of flexibility and, therefore, limitations? Is Germany only open to the degree of progress that is commensurate with the distinctive German character traits? Their restrictive attitude sometimes gives Germans »tunnel vision«, which focuses on strict compli-

ance with procedures and rules rather than thinking outside the box to identify new solutions or questioning things to a greater extent. The interviews demonstrate that Germans who consistently aim for perfection run the risk of regulating creative scope for new ideas out of existence; a German who always acts on a purely pragmatic basis is not believed to be genuinely capable of vision. In Turkey we were told, »Germans could achieve so much more if they were driven more by hope.«

The heavy burden of the past

Many interviewees still see the explanation for the nature of the Germans in the country's history. Their characteristics are initially perceived as predictable and thus positive, although in some ways also as constricting and restrictive. This explanation was also frequently voiced in the first study: »It is possible that Germany is often reticent because it still feels the weight of the collective guilt arising from German history.« While this view from India cautiously tiptoed around the question of German history, other interviewees responded more decisively.

Germans, they declared, have developed an extremely strong will: as one interviewee in Indonesia put it, »How else can you develop so positively after such a terrible war, to become one of the top global players?« The prevailing opinion abroad is the positive impression that Germany has faced up to its historic guilt and come to terms with the crimes of the Nazi period in an exemplary way. In Mongolia, we were told that the way Germany has overcome totalitarianism is an important experience and »exemplary for democracy«. Germany has managed »to develop a democratic system that is immune to fascism«. Yet many feel that even now, Germans cannot really shake off their past and the burden of guilt of genocide: »Germans carry the heavy burden of their past with them. They see it as a personal attack if people tell jokes about Hitler.« Indeed, some of the statements recorded imply that that is perhaps why Germans focus so much on more rigid virtues and values – discipline, compliance with rules and regulations – to prevent certain lines being crossed in future. An Italian interviewee, by contrast, sees rather more balance, maturity and responsibility: »Germans appear

to be very well balanced. They can look back at their history and use it as the basis for self-confidence, while still being able to look forward to the future.« With this opinion, however, this particular interviewee was in the minority.

The sub-text here seems to be a piece of advice that the interviewees would like to give the Germans: ›It's high time you got over the war!‹ Today the world trusts the Germans and believes that Germany can play a key role in shaping the world, one that goes beyond perfect planning and smooth operations. More recent German history, particularly reunification, has also had a major impact. The process of reunification, which is often perceived outside Germany as successful, is felt to have been undertaken with the same strength of character as the post-war reconstruction of the country. In Italy, for instance, one interviewee declared, »Reunification has demonstrated what Germany is capable of. It could be taken as a model for integration in the EU. Today, Germany is very stable.« In Mexico, an interviewee told us, »Germans are very disciplined. It starts at school and can also be seen in the way they have mastered reunification – now they can reap the first fruits of the many years of discipline!« Meanwhile, a Colombian interviewee said, »Germany is an important point of reference for us, not only in sport but in the way they have dealt with their history and with reunification. We would very much like to take the experience gained in Germany with reunification and reconciliation and use it for ourselves.« The way Germany has come to terms with its history is, then, seen as a success and a model for international relations. In the eyes of foreign observers

this would be a good way of putting the past to positive use.

Personal freedom – enigmatic or expedient?

The image foreigners have of the Germans has another interesting aspect, which does not follow automatically from the stereotypical love of regulation and, indeed, would appear in part to contradict it. Foreigners note that Germans attach great importance to individual freedom and that they strive to act independently. This begins with aspects of everyday life, including the freedom to drive as fast as you want along German motorways. One interviewee saw a deeper symbolism in this, »the freedom to act responsibly«. Others raised questions: »What I don't quite understand is how Germany can have so many rules and regulations, earnestness and rigour and yet create a subjective feeling of greater freedom.« An interviewee in France said, »There is an interesting gap between the way children are brought up, which is very laid back and emphasises freedom, and the straitjacket that Germans appear to be happy to don in their working lives. That is a great mystery to me.« In Iran, the interviewee was more decided: »Germany is associated with security, order and self-discipline. In Germany, you can learn that a free spirit and self-discipline are not mutually contradictory.« Have Germans resolved this dichotomy and could they be more multifaceted than they might appear at first sight?

One thing, however, is clear to a great many interviewees. Because Germans see individual freedom as a valuable asset, they are also willing to give others maximum freedom.

»There is an interesting mismatch between the way children are brought up, which is very laid back and emphasises freedom, and the straitjacket that Germans appear to be happy to don in their working lives. That's a great mystery to me.«

France

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This leads to reciprocal consideration, which can again be observed in everyday activities: »In [cafés or canteens in] Germany, everybody takes their own tray back and nobody expects anybody else to run after them and clear up. In Germany, it is important to accept responsibility for your own actions. I think that is a good thing.« Statements like this could be interpreted to mean that respect is important to Germans. They strive for individual freedom, which they want to see respected – their own freedom and that of others. As one interviewee in Mexico put it, »Germans love their freedom and their rights, but they have understood that rights or entitlements also imply obligations.«

The wagging finger

But here, too, the same applies as has already been stated elsewhere in the study. Seen from abroad, German compliance with rules and regulations often remains the dominant feature – even in the context of freedom. As soon as freedom is restricted unilaterally, the German ›wagging finger‹ is often mentioned. Germans are often perceived in this context as pedantic or, indeed, patron-

»The Germans think they've seen it all, but they're not really very international, particularly not outside Europe. Yet they continue to wag their finger at the rest of the world.«

China

»I think the best way of describing Germany's relationship with France is to think about the film and the song ›Je t'aime moi non plus‹. What the French are really thinking is ›You're so good, it accentuates my shortcomings.«

France

ising. They are seen as ›know-alls‹ who always think they know what is best for others. Many reject this overbearing attitude, which they feel is inappropriate: »The typical weakness of the Germans is their lack of flexibility and their tendency to lecture others.« Only a few interviewees can see anything positive here, and then only where they believe that the person who knows best actually has the common good at heart. One British interviewee reported, for instance, »When I first came to Germany, I was very surprised to see complete strangers in the street stepping in to make sure that everybody behaved correctly, for example that dogs were on the lead or that people didn't drop their rubbish in the street. At first, I took it all very personally, but gradually, I came to see that it was all for the common good, and that it was actually very positive.«

Things appear to be changing

For many of our interviewees, it was clear that the German character is changing to a degree, in spite of the constancy we attributed to it at the start of this report. Foreign interviewees no longer perceive the German char-

acter quite as unambiguously and consistently as they used to. Could it be that Germany's high level of immigration is bringing it into contact with other cultures, and that it is changing as a result? One South African speculated, »I don't know whether Germany will still be recognisable as Germany in 50 years' time. Maybe it has made a conscious decision to allow itself to be flooded by foreigners.« Whether or not that is the case, traditional character traits are being overlaid by new features that are not always easy to interpret and that leave in their wake a degree of bewilderment or at least surprise. In some places, Germany is credited with a new laid-back feeling which is no longer associated purely with the ›cool‹ city of Berlin, as was still the case when our first study was conducted. The frequently mentioned stereotype of the humourless German is juxtaposed with the image of a »subtle German humour«. Many observers stress that since reunification, a new, more relaxed attitude has crept into the German character: »Germany has relaxed; the country is happy with itself, which makes it one of a kind in Europe.« German football is often taken as delivering evidence of this change. The 2006 fairy-tale summer

when Germany staged the FIFA World Cup projected a new image of the Germans, associating them with fun, joie de vivre, humour, tolerance, hospitality and a joyful attachment to their own nation. In the first study, several interviewees mentioned steps towards a new, positively received form of German national pride. This second study, too, identified this phenomenon, reflected in this view from South Africa: »The World Cup in 2006 allowed Germans to show their patriotism in a new positive form. I see it as a psychological rebirth: the World Cup was a sort of coming out party for the German soul.« The same interviewee stressed that German football has changed again since 2006. »Today, I see it as embodying the two positive German souls – perfectly structured and disciplined order, but also creative, innovative pragmatism.« The German character is transformed – and the evidence is the nation's football.

Ambivalence on the rise

The statement above about German football also reflects another facet of the image of Germany in the eyes of the world: the unambiguous, one-dimensional, traditional attrib-

utes are giving way to something more diverse and differentiated. The first study revealed an element of ambivalence, for instance the fact that although Germany is a secular state, religion plays a very important part in the country, as reflected in its church tax. This second study gives the impression that these apparent contradictions are becoming more pronounced, thus strengthening the ambivalent nature of the assessment: »Germany is admired for its respect for the law and its love of order, although these character traits are also perceived as inhuman. Germany is admired for its strength and independence, which can equally be seen as arrogant or even fascist.« As we have already said, the Germans' very preference for clear rules and regulations is felt by some to be worthy of emulation, while others fail to see the attraction. One interviewee in Mexico summed up these feelings of uncertainty as follows: »The image of the Germans is not coherent, as far as I can see. I cannot fully understand it; there is always something that doesn't fit.« And in the USA, we were told, »Given this hesitancy and scepticism, how can we explain the success and the sheer innovative force of companies like BMW, Mercedes and Volkswagen? There

In the driving seat

There is one person it is almost impossible to overlook when contemplating Germany: »Angela Merkel personifies the typical German. She is disciplined, constant and is not lining her own pocket. She is the very embodiment of a system that works.« This statement from Brazil sums up what was expressed in numerous interviews conducted for this study. In the eyes of many, the Chancellor stands for, and indeed personifies, what are seen by many as typical German traits, especially in terms of »secondary virtues«. She is seen to be disciplined, pragmatic, honest, reliable, authentic, and generally resolute, though occasionally a little hesitant. Consequently, the German nation is led by a personality whom many see as the mirror image of its people.

Angela Merkel was widely praised by our interviewees for her political style, which many described as resolute, determined and courageous. She is even respected by those who distance themselves from her politics: »I believe that Angela Merkel is extremely competent; she is a great politician. She impresses me, although I do not share her political views.« This image of a »great politician« and a »world leader« was shared by many. The reasons advanced are that Angela Merkel is »very resolute and uncompromising in foreign policy and that she holds everything in balance on the domestic front«. Another interviewee said,

»Angela Merkel is a tightrope walker.« For one interviewee in Russia, she is »German politics personified«. Angela Merkel has done much for Germany's good reputation and, as one British interviewee said, the result is that the political elite look to her and to her government but »not to the German parliament«. When it comes to Europe, there is really no way past her, because as a US interviewee said, »Who else is there with whom you can discuss the future of Europe?« Our interviewees clearly considered it possible that Merkel »will make Europe's future her legacy«. But, as some interviewees remarked, for this she will need a vision; she will have to shrug off some of her hesitancy and carry things through to the end. In Italy, for example, one interviewee said, »To be a truly great politician and to earn her place in European history, she will have to move away from her electorate and make hard decisions to bring Europe together.« In a similar vein, one observation from Poland can probably be reasonably construed as a call for Germany and the Chancellor to be consistent in dealing intelligently and responsibly with the high level of attention Germany gets: »In uncertain times, all European states look to Berlin, to what Angela Merkel is doing. But Germany doesn't understand this. Leadership is there for the taking, but they don't take it.« Finally, an interviewee in Mexico told us, »Sometimes she could take a few more >

› risks, give some new impetus. What is her vision? I don't know. I just know that she wants to win the next election. She is an election machine.«

The fact that Angela Merkel engages to try to find peaceful solutions to conflicts gives her a high level of credibility at international level. Sometimes, though, there is an element of the mystical, as though people cannot quite explain how she has come so far. One British interviewee drew parallels between Margaret Thatcher and Angela Merkel: »Neither of them set out to lead the world and neither of them was initially known for her charisma – yet both of them took on the role of leader.« The image of a great politician sometimes blends with small human gestures, such as the time Merkel dropped a croissant on the floor at a breakfast buffet during a state visit. She simply bent down and picked it up:

»That says a lot about her attitudes. The Chinese find this very remarkable.«

Despite all the admiration for Angela Merkel, the Chancellor's image remains primarily sober and objective, rather than emotional; she is not associated with emotion, sympathy or vision. This also applies to statements about her as a person in relation to the issue of women leaders. Some interviewees underlined the strong resulting symbolism. For one interviewee in Congo, Angela Merkel is »the very prototype of the strong woman«. In Mexico, she is appreciated as »a great example, a constant factor in politics«. Yet other interviewees see it as »an absolute strength of Germany that Angela Merkel, as a woman, could make it to the top job in politics«. There is only one thing that she could do better according to one Brazilian interviewee: »Maybe she should smile more often.« ■

is some part of the German character that cannot ultimately be defined but that is very successful.«

Let us look in more detail at this slight bewilderment on the part of foreign observers. Where previously it was easy to predict what Germans would do, this is no longer the case. Foreigners are puzzled when they read about large-scale German projects failing, something that would appear to be massively at odds with the fabled German precision in planning and strength in implementation. What is the cause? Individual interviewees

suggested that the necessity of conducting debates right across society might be responsible: for critical decisions that mark a major turning point for many, if not all members of society, Germans prefer to achieve a consensus. This is time-consuming, say our informants, and it slows down the development of innovation. On the other hand, as in the first study, Germany's decision to end the use of nuclear power in the wake of the nuclear disaster in Fukushima was criticised by many as a rash political step that does not appear to be based on any thorough or balanced calculations. The much vaunted and

publicised ›Energiewende‹ or energy transition in Germany (the move to put energy supplies on a more sustainable basis), which is often deemed to be a global model (see also additional information on pp. 49–52 illustrates the fact that Germany means well and has set itself ambitious goals. But it is currently bumping up against a number of different constraints, showing that reality has caught up with it. Or, as one interviewee in the UK put it, »Germany has made a serious error with the energy policy shift. I do not understand how Germany could have manoeuvred itself into such a situation. I see it as a panic reaction. They will end up paying the price.« A panic reaction? That is not what we usually hear about Germans. Once again, we have an example of a more differentiated image, a change in the perceived German character, which is mentioned increasingly frequently by interviewees.

Does Germany have a hidden agenda?

Some people are even more uncertain. Not only do they see a hitherto unknown ambivalence, but they also suspect that there is something more behind it. Some interviewees,

for instance, felt that Germany's high-profile role as protector of the environment is an attempt to deflect attention from the fact that as a leading industrialised nation, it is one of the world's major polluters. Germany's energy policy appears hypocritical in view of the huge quantities of lignite that are still used in the country. And sceptics suspect that the image that Germany projects around the world as the green superpower is simply a cover for a slick economic promotion strategy. Germany's actions in another policy field too – foreign and security policy – are deemed to be every bit as inconsistent in terms of substance. Germany's policy goal of worldwide peace does not tally, for instance, with the country's massive arms exports. And the comparatively poor level of equipment available to the German armed forces contrasts starkly with the country's technological and economic potential. Some interviewees felt that Germany uses its ›military poverty‹ to justify its reluctance to become involved in military operations, thus keeping policy in line with the consensus that exists within society.

These examples clearly illustrate the fact that Germany today is not immediately compre-

*»Germans are not very spontaneous.
If you want to try out a new move in your
dance class, the Germans will always
complain, ›But we haven't learned that yet!«*

hensible to all interviewees. Some suspect a hidden agenda or double standards, as demonstrated by this statement on the euro crisis from Poland: »I think it is hypocritical to pretend that there is no shared responsibility for cutting debt within the eurozone. That is not typically German. Germany was the first country to circumvent the euro convergence criteria. Others have merely copied it.« Many advise Germany to bring things out into the open, including the country's own political interests. Transparency, extending to Germany's own entirely legitimate interests, would put the facts on the table and give other countries a fair opportunity to react to them. Criticism was voiced of the questions Germany leaves in its wake with its sometimes contradictory actions abroad. Some interviewees remain uncertain as to whether Germany is genuinely using its economic and political strength to take on greater global responsibility, while others, previously convinced, are now unsure again. An interviewee in France voiced what is expected of Germany, articulating what was felt by many others: »Germany's prominent role in Europe is respected. A country that is economically so strong must take on more responsibility, and that means not only pursuing its own interests, but seeing the bigger picture.« The following statement from Afghanistan shows that this has already happened in many instances, in some cases even reflecting a sort of selflessness: »Unlike all other countries, Germany has supported Afghanistan for the last ten years without any agenda of its own. The other countries are primarily pursuing their own agendas in the support they give Afghanistan.« Such admiration and hope contrast with individual concerns and distrust of excessive German influence. At least in the eyes of its beholders,

Germany was able to prove during the period covered by this study that it has reconsidered and modified its long-standing behaviour patterns with respect to Europe's continuing financial crisis, the crisis in Ukraine, and the conflict in Syria and other trouble spots. However, we will go into this in more detail later in the report.

The search for a new identity

When we consider the German character, then, the overriding impression is that Germany is still seeking a new identity. Typically German character traits in the form of ›secondary virtues‹ are still very much appreciated and, in the eyes of the foreign observer, provide an enduring basis for predictability and security. They are seen as moulding Germany's profile and system and are welcome, provided they are not exaggerated and thus become inflexible – for Germany itself and in the shaping of international cooperation. At the same time, however, individual German actions are perceived as being contradictory, increasingly raising questions for observers who feel that they are now dealing with a less predictable partner. Yet the Germans still enjoy a high level of trust because of the exemplary way they have dealt with their history and with German reunification, and as a result they are met not with scepticism but with a degree of admiration.

Power to perform –
*Germany's abilities and
attractiveness*

Germany is a prosperous and progressive country, secure and politically stable, with a high quality of life. That is how, in general terms, it is seen from outside: the images of German society are positive across the board. Foreign observers are particularly interested in the fields of research and development, Germany's ability to innovate, migration and integration, and the position of women in society, and these areas were mentioned by many interviewees.

Germany – the country of systems

What are the main abilities and skills that observers abroad associate with Germany? Germany is appreciated above all else for the way its systems perform. The positive way German society has developed and the country's economic success are often attributed to the quality of the country's systems, whether the school and education system, the health system and other social welfare systems, the party system, or federalism. Germany appears to lead the world in establishing smoothly functioning, high-performing systems. This produces such remarkable statements as: »The entire world takes its lead from the

vocational education and training system in Germany« or »All of Europe looks to the quality of life and the health system in Germany.« The rest of the world sees in Germany a highly systematic and virtually universal delivery of all essential services. Everything works perfectly, right down to local public transport and recycling systems. Not only does this result in a high quality of life for the German population, it also has its benefits beyond the country's borders. Systems of this sort provide foreigners with clear guidelines and assistance for their stay in Germany. Internal security and the German health system are a source of admiration well beyond Germany's borders: »The quality of medical care in Germany is exceptionally good, and it has a comprehensive health insurance system. That is a major factor in the quality of life,« commented an interviewee from Mongolia.

The ability to think and act in terms of systems is often ascribed outside Germany to the »secondary virtues« mentioned above: because Germans attach great importance to order, thoroughness and discipline, they put in place systems that can give

*»Sex appeal? That's what Germany is lacking!
Germany is impressive for its industry,
its technology, its discipline and performance,
and its ability to overcome major crises.«*

Mexico

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them a smoothly functioning and regulated life. One comment on the nature of the German language is also interesting: »German grammar is extremely precise. That shapes the way Germans think.« Does the German language per se engender the German affinity for systems? Does the German language determine the way Germans think?

Of the many statements made about German systems, a large number relate to the education sector, with a marked focus on vocational education and training and the country's dual training system, as well as the health and social welfare systems and Germany's traffic and transport infrastructure. Also mentioned were the underlying principles behind Germany's political system: the social market economy and the concept of solidarity, the party and administration system, the interaction between politics and civil society, and Germany's federal structure and legal system. Individual interviewees also perceived systemic strengths in security policy and with respect to migration and integration, but we will go into these points later in the report.

Hope of salvation

What do non-Germans see as the strength of German systems? It would appear that it is the carefully thought-out combination of a number of different services coupled with a high level of attention to detail. One example that was frequently mentioned is vocational education and training. Germany's dual vocational training system forges a close link between theory and practice, with a cleverly devised curriculum, highly qualified teaching staff and well equipped facilities; as a result, non-academic occupations are well able to hold their own against those requiring a university degree and enjoy high status within German society. This last point in particular was raised by an Indian interviewee: »I would like to see this sort of technical training in India, because quite apart from the training per se, it accords the training occupations some dignity.« Training courses of this sort not only enable Germany to remain internationally competitive thanks to the high-quality products it manufactures, but also enable it to export the dual training system itself. Craft workers and technicians with the best possible training are very much in demand around the

world. The quality of German systems induced some interviewees to see them as offering a sort of salvation. There is even an implication that the resolution of global problems depends on Germany's ability to establish itself as world-wide system provider. One interviewee in Norway summed this up: »I see Germany's international role as an institution builder, building good systems, ensuring that the law is applied, and that countries are treated equally.« Germany's systematic approach, it would appear, predestines it to fulfil particular development tasks as a role model.

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Rules rather than freedom

Alongside all these positive attributes, though, there is often a ›but‹. This applies in equal measure to opportunities for individual self-fulfilment and to Germany's role in shaping international relations. Where systems with overly rigid rules and criteria that are not immediately intelligible to outsiders risk limiting the freedom of others, the rest of the world advises caution: »It seems to me that in Germany, the school decides whether somebody can go to university or whether they are destined for vocational training. That contradicts the principle of freedom. I was shocked that the state can decide what somebody does for the rest of their lives. People must be free to decide themselves.« Does Germany's attachment to its systems make it rather less liberal? Although the vast majority of interviewees very much admired the systems in Germany, interviewees occasionally and implicitly warned that the Germans should not go too far with their systems and their rules and pointed out the importance of remaining flexible. Some asked in astonishment whether a

»The first question a German will ask is often ›Where does it say that in the rules?‹ Germans will often stick to the law rather than bring a bit of human understanding to a situation.«

France

three-year training course is really essential for all occupations, just because this is laid down as the standard duration of training for all occupations: »Window dressers, for instance, train for three years. I'm sure they do a brilliant job at the end of it, but do they really need to train for three years to do a good job?« This one example clearly illustrates that in the eyes of non-Germans, the Germans' systematic approach can lead to an inflexible and thus blinkered perception of reality. Germany risks sacrificing individual potential on the altar of perfectionism. The ambivalence evident behind some statements is the same as the ambivalence seen with respect to German character traits: precision and the quest for perfection are appreciated, provided they don't go too far. Systems are good, but only as long as they offer clear advantages and remain flexible.

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German innovations – sound but unspectacular ...

In the eyes of outsiders, systems apparently determine Germany to such an extent that they are considered critical for its future viability. But are these systems nurturing the »right« innovations? Interviewees offered many interesting and multidimensional ideas on the question of innovation. The issue of Germany's ability to innovate was raised by a disproportionately large number of interviewees in the USA, a country perceived as a strong innovator.

In a global comparison of technologies, products and procedures in a wide variety of sectors of the economy, Germany is seen as being among the leaders in terms of its innovative capacities. A voice from Viet Nam stands for many others, listing the flagship

sectors of the German economy: »Germany is a leading innovator in the fields of environmental engineering, automation, automotive and mechanical engineering.« Here too, systems play a role: »What I like very much in Germany are the innovation and technology clusters. The idea of setting up strong networks for technology development with the region, the federal states, the academic and research community and strong partners from industry is excellent.« Another interviewee in Norway declared, »What sets German research apart is this thoroughness from start to finish, which results in a certain precision.« Germany is seen as a country with a secure future and sound but unspectacular innovation. The prevailing opinion abroad is that innovation in Germany reflects the character of its people and is conducted to the full extent permitted by the national context.

Outsiders see no major innovative leaps forward in German research and development but they do see Germany's strengths in a deep and wide spectrum of ongoing gradual optimisation of products, services, procedures and models. Incremental progress rather than radical innovation is the watchword. Germany is a world leader in fields in which technical and social achievements can be fine-tuned, for Germany itself and for others. »There are two reasons why Germany focuses on environmental protection and sustainability: overall, the Germans want better environmental quality, but they also invest a lot in research so that they can maintain their own lifestyle,« said one interviewee in Mexico. Another Latin American interviewee was of the view that »Germany invests strongly in education, the environment and technology. This has cultural and historical roots. Germans have always been strong in

»Germany performs much better when it comes to hardware than to software. The Germans can manufacture and sell machines, but they're not so good when it comes to software that requires rapid innovation cycles – social media, for example. And I think that has something to do with the German sense of perfectionism.«

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USA

»In Germany, a defeat is seen as a failure, but people in the USA take a more flexible view. We ought really to be celebrating all our defeats and failures!«

Viet Nam

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research; they want to make things better.« This interviewee welcomes »Germany's leading role in the field of technological and social innovations« and adds: »We would like to see more in future!« An additional factor, it is felt, might be the fact that Germany already enjoys a high level of prosperity and thus has a comfortable starting position. Whether or not Germany will remain competitive at global level in terms of its innovative capacities is a controversial matter in the eyes of foreign observers, however.

... and they've missed the digital boat

There is one point on which almost all observers agree – the Germans appear to have missed the boat in terms of the potential offered by the digital revolution: »The digital revolution takes place somewhere else, especially in the US. Where is Germany's Silicon Valley? Where is German innovation with regard to infrastructure in the digital age?« Many foreign observers struggle to find answers to these questions. Two possible explanations were offered. One interviewee in Norway pointed to Germany's failure to attach enough importance to user-friendli-

ness: »Germany will not be able to produce the best digital solutions because digital innovation calls for more user-friendliness, and the Germans aren't good at that.« In the USA, the opinion was voiced that Germans might not be entirely happy with digital technology as a result of their past experience of the Gestapo and the Stasi spying on the people, although there was a degree of understanding for this German »angst.« »Germans have a pre-digital understanding of data privacy and protection; they think of surveillance cameras and hidden microphones. Digital technology is new to them. It scares them and marks a radical departure from what is familiar. They would prefer to turn it off, banish it. It would be better to embrace the phenomenon and start to understand it at last. It's not going to go away.« In the eyes of outsiders, there seems to be a huge untapped potential in the digital sector, and they call on Germany to play a much stronger global role here, precisely because of its strength in taking systematic approaches.

The art of failure

Another question that concerns foreign observers is the spirit behind Germany's innovative abilities and innovation culture. Pure research is strong, but there are gaps between research, application and marketing. The view that Germany does in fact »venture into new projects and is sometimes prepared to do so without knowing exactly what the outcome will be« remains the exception. Particularly when the context is not clear cut, the Germans are said to lack curiosity and courage. An Indian interviewee gave us this example of what he sees as typical German risk aversion on a small scale: »My secretary in Germany only acts once she is 100% sure of doing the right thing. I say to her, ›Take a look at yourself. That's how bureaucrats act.« Most observers seem to believe that this risk aversion is part of Germans' DNA, with children being brought up to be risk averse and failure bearing an extremely negative stigma. Yet interviewees in the USA, for instance, point out that individual failure is no disgrace. In fact, the reverse is true: »Get used to the idea of failure, because it is a precondition for innovation. Start getting

your children interested in innovation at an early age. It can be learned – just like you can learn to play the piano.« Foreign observers go so far as to say that every failure ought to be celebrated. But ultimately, the German character comes into play again: »Pessimism and angst underpin everything for Germans. They ask what could go wrong rather than just doing it right.« The rest of the world feels that the speed of Germany's change and progress is unsuited to the modern world. At the same time, though, they recognise that the principle of double-checking everything offers protection against quick fixes and can stop people heading off impetuously down the wrong track.

Bureaucracy as an obstacle to innovation

Foreign observers have a clear opinion when it comes to German bureaucracy, which many see as a typically German system of rules, regulations and ordinances. In their view, the elaborate system of regulations first and foremost guarantees legal certainty. They also believe that the Germans are convinced that their system of rules is sensible and

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this in itself ensures they comply with it. As one interviewee in South Africa put it, »You respect rules that make sense.« That is not common practice in all countries, said another interviewee: »In Russia there are lots of laws too, but they are not always respected.« Yet in spite of the order and security that a system of rules and laws is recognised as guaranteeing, outsiders tend to see the resulting bureaucracy as an obstacle to innovation: »Everything is chewed over time and time again; it is all part of a process.« It seems that Germany's attitude is that the future is acceptable, but only if it is guaranteed and properly planned. In the eyes of some, this bureaucracy is a product of the belief in authority and thinking in terms of hierarchies still felt to be quintessentially German.

The differentiated image of Germany's innovative strength by no means negates the many positive comments we heard. Particularly in the green sectors (environmental engineering, climate and energy), Germany is seen to play a leading role at international level, as the first study had already highlighted. It is interesting to note that

the German energy policy shift continued to attract a great deal of attention in other countries in 2014 when the interviews were conducted. One interviewee went as far as to deem it »one of the five most important decisions of the 21st century«.

German research institutes – »We love them!«

Another element of Germany's innovation landscape came in for a great deal of praise. There was a general consensus on the question of where Germany has a competitive advantage with respect to innovation – German applied research institutes, which attracted positive comments practically across the board. Establishments such as the *Helmholtz*, *Fraunhofer* and *Max Planck* institutes and other similar facilities are felt by many interviewees to be the drivers of innovation in Germany: »In the United Kingdom, there is a great need to invest in innovation. Centres have been set up to this end that are modelled closely on the Fraunhofer Institutes. In this context, Germany is indubitably an example to follow and a benchmark for us in the UK.« While university-based research >

Opinions divided on Germany's energy transition – the ›Energiewende‹

On the one hand Germany's energy transition policy triggers curiosity; on the other, it engenders scepticism.« This statement from an interviewee in the USA is indicative of the wide spectrum of views about Germany's approach to energy, energy policy and energy technology, especially the decision to end its use of nuclear power. A remarkable number of interviewees chose this topic to illustrate their relationship with Germany and their views of the country. Their views can broadly be broken down into three categories: admiration, praise and respect; individual concerns and an element of scepticism; and, in isolated cases, rejection and anger. One factor cannot be overlooked: the greater the distance from Europe, to countries which themselves have excellent potential for the use of renewable energies and are interested in making their energy systems innovative, the more positive the opinions become. In these countries Germany is seen as a pioneer, a trailblazer, a model country, a shining example, number one, progressive, a world leader. The particularly strong political will is singled out for praise, as is the fact that the policy shift was based

on a cross-party decision-making process, which in turn built on a consensus within society: »Germans have the gene across the political spectrum to focus on this policy shift. And this by itself is amazing, when you can get a cross-political spectrum consensus on such an important issue.« The »entire German nation« supports renewable energy, we were told in India. Germany is recognised to have launched a discussion on sustainable energy long before dwindling fossil fuels forced other states to try to identify alternative solutions. Time and again, it became apparent that Germany is felt to have a certain farsightedness and a systematic approach regarding innovative and politically important areas. Interviewees again traced this back to the character traits felt to be typically German. In China, the view was that Germans demonstrate »a very strong will« with respect to the energy policy shift. In the Netherlands, »the will to take decisions« was noted, while from India, there was praise for the »resolute« way Germany has acted.

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Given all these positive responses, it will come as no surprise that many countries

»Everyone admires the way in which Germany achieved its energy policy shift and set its targets. But it also did this without consulting anyone else.«

Netherlands

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would like to cooperate with Germany in this field so that they can learn from the country that they see being ›top of the class‹ as regards energy policy. They would like to share Germany's uncontested competence, both with respect to products and technology and with respect to policy advisory services and systematic change. One interviewee in Tanzania said, »I would like to see Germany export more green technology. We could learn a lot from them, such as how to make better use of solar power.«

One factor, however, is a source of uncertainty in other countries – Germany's radical rejection of nuclear power. While some ask cautiously whether Germany has really thought through the decision, or whether it will not itself ultimately suffer, others are more blunt. Like one interviewee in the USA, they consider the idea of the energy shift to be revolutionary, but not its practical implementation. Success is by no means certain, because it owes its existence to »ideological conviction« rather than being seen as a driver for the economy. Others see this decision

as an »emotive response« to a terrifying scenario, in spite of the fact that »Germany does not have tsunamis«. Yet others speak of »a daring political decision« and add, »The ›Energiewende‹ was a very un-Merkel-like decision. A panic decision in the face of the Baden-Württemberg elections.« Outsiders, then, ask how such a hasty, un-German response was possible. How does Germany think it can meet the energy needs of the mainstays of its industry, the automotive and the chemical industries, in the long term on a cost-neutral basis until such time as renewables are a genuine alternative to fossil fuels or nuclear power? Dependencies remain, pointed out one interviewee in France, speaking for many others: »Even if Germany has come further in developing renewables than others, it is never going to close the gap.«

Genuine curiosity can be seen in other statements, mixed with a hint of doubt: »I am following with great interest how Germany will act as a trailblazer in the field of energy policy. I am very interested to see if the theory will be consistently

translated into practice. A clear legal basis will be needed for the energy policy shift and regulations that don't change every two years.« In Romania, interviewees made no secret of their initial scepticism, but ultimately, they believed that the Germans would be able to manage the energy shift successfully because of the analogies with other sectors: »Initially, we doubted that Germany would be able to sustain the decision to end the use of nuclear energy. But it has developed the technology to tap into alternative energy sources and has set new standards. It was equally successful in developing low-emission cars and improving the water quality of the Rhine.«

There is also plenty of criticism of the energy transition. While our interviewee in Indonesia was merely »somewhat astonished by the shift, because France intends to continue to use nuclear energy, and Indonesia is planning to build its first nuclear power plants«, our interviewees in Europe in particular were angry. Germany, they argued, did not consult its European partners before announcing its intention to end the use of nuclear power;

no attempt was made to forge »European alliances«; and German energy policy is »destabilising« European energy policy or is »driving it to the wall«. What is advantageous for the German system is not necessarily good for others – and this, they believe, should be a matter for negotiation and for remaining flexible. One interviewee in the United Kingdom put it in a nutshell: »Basically we are all in favour of liberalising energy markets. When it gets down to the nitty gritty, though, things always get difficult. The energy shift makes it all the more difficult to put in place a single European energy market; the Germans have always closed their energy market to outsiders.« And in Poland we were told, »The future is what Germany has proposed – but not in this short timescale. Germany has to realise that we are still developing. We expect others to understand developments in Poland.« This raises an issue which we will look at in detail later: the wish to see more communication, more mediation and negotiation. Even if the above statements reflect bilateral irritation, there is another reason why Germany should not go it alone on energy

»Large companies around the world often have a poor reputation, but Germany's managed to build a more positive environment through its small and medium-sized enterprises.«

USA

› does less well in terms of its perceived role in innovation, these institutes are deemed to be excellent or world class: »Germany possesses genuine gems in its research institutes, such as the *Fraunhofer* Institutes. Without *Fraunhofer*, German industry would not be where it is today.« Many interviewees would like to see this sort of market-affiliated research and a strong link between research and industrial practice in their own countries. In this field, then, there is enormous potential for academic, scientific and economic cooperation with Germany.

Another old friend is mentioned frequently when we raise the issue of innovation and economic power – Germany's ›Mittelstand‹ or small and medium-sized companies. The Mittelstand comes in for a good deal of praise, as it did in the first survey in 2011/2012. In fact, it is felt to be practically the heart of Germany's economic performance: »Medium-sized companies in Germany are the engine for research and innovation. In Romania, these are the companies developing components that provide crucial innovation in the value chain.« It would appear that small and medium-sized

companies are the real innovators rather than the larger and much better known transnational businesses, which are less flexible: »Listed companies do not reflect the true nature of Germany's economy. The Mittelstand does. It sets great store by quality and reliability.« Observers outside Germany are fascinated by the sheer diversity of these companies in very specific sectors, where they are often the hidden champions. Yet, although the huge success of the Mittelstand raises the question for foreign observers of ›how Germany does it‹, the answers they put forward tend to be somewhat nebulous. The small number of statements that touch directly on the Mittelstand is surprising in itself. Has the importance of the Mittelstand for Germany's economic power become so axiomatic that it need no longer be mentioned? Or is its aura still difficult to grasp for many foreign observers?

Sustainability – environmental protection and beyond

The statements on innovation with respect to another purportedly German issue – sustainable development – are also inter-

esting. In the past when interviewees were asked what they associate with ›Made in Germany‹, the issue of sustainability was often mentioned. This is a field in which Germany sees itself as a pioneer. The first finding here is that foreign observers still have a great many positive associations and often relate these to environmental aspects of sustainability: »Germany is an international leader in environmental protection; everything is regulated there. Germany has a good environmental balance and is geared to sustainability,« said one interviewee in Mongolia. This form of sustainability is seen as being very praiseworthy, and many would like to emulate it, partly because it is held to be extremely credible, with a strong basis of social support that makes it effective. Germans are believed to have a genuine interest in nature and in resource conservation – which is accepted as being in line with their own interests too. The second finding, though, is that there appears nevertheless to be a gap between the macro and micro levels or between the aspiration to a holistic approach and the optimisation of individual implementation processes. In India, we were told, »Rather than contin-

uing to specialise in individual fields of research, Germany should focus more on research into holistic, systemic sustainability solutions. The incentive system should also be developed in this direction. Germany is not quite there yet.« By contrast, an interviewee in Colombia stressed precisely the systemic nature of Germany's approach to sustainability: »Germany is really strong in the field of sustainability – from building construction to environmental training at universities and wide-ranging innovations relating to renewable energies.« The third finding is that Germany's commitment to sustainability is seen by foreign observers not only to have long-term elements but also to embrace societal and social components: »In Germany, sustainability is seen as the promotion of renewable energy to fight climate change. In Poland, by contrast, sustainability in the energy supply is understood to mean the use of appropriate technology with a spotlight on economic efficiency, underpinning prosperity and ensuring a secure energy supply.« So sustainability may go well beyond the environmental context. The principle of sustainability, it may be concluded, has permeated many parts of society and often

Lasting solutions based on inner conviction

When the issue of sustainability is raised outside Germany, a whole series of associations generally spring to mind. The environmental protection and resource conservation aspects loom large: indeed, sustainability is often reduced to these factors. External observers, however, explicitly apply the term to everything possible – to Germany's attitude to financial systems, technologies and production processes, education and training, tourism, approach to dealing with minorities, and policy-making in Europe. »I hope that Germany can assume a leading role in establishing a more sustainable financial system, with watchdog institutions for the financial sector,« said one interviewee in Norway. Another interviewee told us, »China's economic development over the last few years has been based on strong support from Germany, for instance with respect to the legal system.

Many important concepts and systems have relied on assistance from and coordination by Germany.« What this implicitly suggests is vision and a long-term view, thinking and acting in terms of a longer timescale. Germany, interviewees underline, is interested in gearing its actions to achieving maximum stability and permanence in the long term. It is more a question of how to achieve sustainability than about what sustainability

actually is. Observers believe that sustainability is understood and practiced more systematically and more conceptually in Germany. This is perceived as Germany's strength. Although none of our interviewees referred specifically to the three aspects of sustainability (environmental, social and economic), the topic areas mentioned above make it clear that sustainability is seen as being broader in nature than purely environmental. Germany is seen as a trailblazer in the environmental aspect, but beyond this, foreign observers see Germany as acting sustainably in a way that will benefit future generations and does not lose sight of the prosperity of the world, as this view from Brazil illustrates: »The Germans are happy to put their achievements at the service of others. Look at the example of eco-efficiency in business. They like to share, so that the human race as a whole makes progress.«

We will conclude with the opinion of one Indian interviewee who emphasised that Germany works for sustainable development because of its inner conviction and on the basis of its own motivation: »Germany is a true believer in sustainable development. Its compliance with sustainability is based on action, not on international pressure.« ■

56 has a distinctly German touch. Sustainability seen from this angle has much to do with enhancing the quality of life.

Quality of life – in the small things and in the big things

The admiration for Germany as a country that was obvious in many interviews is not limited to the hard factors of quality of technology, engineering, research and development, the economy and infrastructure. Soft factors, too, do much to make Germany attractive, including the quality of life German society offers. First and foremost, foreigners appreciate its comprehensive internal security, ranging from legal certainty to the protection afforded by the police and the individual willingness of normal freedom-loving and order-loving citizens to help others. It is scarcely surprising that interviewees from less democratically governed states most frequently admire this security. In Germany it is quite normal, they noted, for women to be able to go out at night alone, which would be out of the question in some countries. German towns and cities offer foreign visitors a high quality of life,

since they not only provide security and cleanliness (a fact often mentioned) but also offer a well-integrated public transport system, parks and recreational areas, cycle paths, attractive cultural and leisure activities, and local medical care. It comes as no surprise, either, that Berlin is mentioned disproportionately often as being attractive. But smaller German towns, too, contribute to this positive image. Germany's reputation thus benefits enormously from ›soft‹ factors. This is reflected for some in increasingly egalitarian structures and a higher level of tolerance within society, vis-à-vis homosexuals or alternative lifestyles, for instance. »Germany is egalitarian rather than elite,« we were told in Viet Nam. »If elites can be found at all, then it is at local level. Hamburg's elite is not considered an elite in Munich.«

The rule of law and the democratic system are deemed by foreign observers to be the foundations for a high quality of life in both small things and big things: »Democracy, transparency, openness, the concept of coalitions and cooperating with the opposition all make Germany a good example to follow.« The

»Germany is the only country where you can drink the tap water without a second thought. That's unusual, and it shows how well designed and safe German processes and products are.«

Mongolia

country is seen to have a genuine parliamentary system coupled with a strong government and a self-assured and active civil society. One interviewee in Mongolia took this view to the extreme when he said, »Germany is an island of peace; human rights are respected, there is freedom of speech and freedom of religion, public authorities work well, there is no corruption, and citizen participation is very high.« Foreign observers praise Germany's understanding of democracy and the fact that it is genuinely part of everyday life; Germany, they say, is »marked by a deeply rooted civic awareness. Germans are very willing to demand their rights.«

Integration – better than others, but not good enough

How does this deeply rooted awareness of law and order, openness and transparency, and human rights play out in dealings with other nations and cultures? In the eyes of many interviewees, Germany today has a reputation for being liberal and tolerant vis-à-vis foreign visitors, as this view from India shows:

»When I came to Germany 20 years ago I felt a little insecure. Today, Germans are more

tolerant and more ready to accept difference.«
Is this a general feeling vis-à-vis foreigners? Many interviewees expressed their opinions on the question of migration and integration. This would appear to be more topical than ever for foreigners looking at Germany. The increasing tensions caused by worldwide refugee crises at the time the interviews were conducted are bound to be partly responsible. It should be noted that the PEGIDA movement (Patriotic Europeans against the Islamisation of the West), which began to attract attention at the end of October 2014 and which is felt by many observers to have xenophobic traits, had no impact on many of the earlier interviews.

All in all, there are wide discrepancies in the opinions held abroad regarding migration and integration, ranging from respect for what has already been achieved to criticism of obstacles to immigration and warnings against an excessively tolerant approach to multiculturalism. Five observations from abroad are particularly interesting in this context. Firstly, a positive trend is apparent. A great many interviewees stated that Germany's integration efforts have improved

»You can't really talk about migrants being integrated in Germany, because Germany's version of multiculturalism could be summed up as ›Live and let live‹. At the same time, some people in Germany are more German than others, even though they've all got German passports. There's a glass ceiling for individuals with a visible migrant background.«

Norway

significantly in recent years. Xenophobia is no longer particularly widespread in German society. Foreigners generally feel happier visiting Germany than they did a few years ago, when xenophobia was seen to be more prevalent. They also believe that, all in all, Germany is doing better in this respect than some other European states. This view, incidentally, was also advanced by Italian, French and British interviewees. »The integration of foreigners in Germany is a major success. Germany has taken in a large number of foreigners and integrated them without a big fuss. This is all the more remarkable given that Germany has not traditionally attracted large numbers of immigrants and does not have any experience of its own with migration,« as one Italian interviewee put it. The reasons advanced are both the positive role of politicians and the public debate. In this context, it seems likely that one factor is that right-wing populist parties chalked up significantly greater successes in other countries at the 2014 European Parliament elections than in Germany. Germany is, then, at least credited with good will in the way it deals with immigrants.

The second observation is that the hurdles that must be overcome by foreigners wishing to live in Germany are extremely high. They face a long and difficult path before they can settle down in Germany. The widespread impression is that Germany does not make it easy to migrate. The problems begin with the fight to obtain a visa and culminate in the ultimate hurdle of acquiring German citizenship. The language barrier also does its bit to make not only immigration but also social integration more difficult. All this provokes concern outside Germany and makes for irritation. It is also difficult to perceive

Germany as a culture that actually welcomes migrants. Although the country is credited with making improvements, one observation from Turkey is representative of many others: »The culture of welcoming migrants must be the concern of the government. It must come from the top.«

The third observation is that while migrants can live relatively well in Germany, Germans tend to leave them to their own devices rather than granting them genuine participation. One interviewee spoke of a metaphorical glass ceiling, and argued that in Germany, »You cannot really call it integration, because almost everything is permitted.« What he meant was that, since Germans demand a high level of individualism and personal freedom, they accord this to others too along the lines of ›live and let live‹. This does not necessarily go hand in hand with personal encounters or familiarity, of course, although this was not explicitly criticised in our interviews. Indeed, the fourth observation would appear to imply the reverse. Seen from abroad, Germany now attracts a great deal more understanding for difficulties in integrating immigrants than was evident in the first study. Some interviewees even warned Germany against any ill-conceived multiculturalism: foreigners should want to integrate into German society and culture, and German society should not allow its own culture to be watered down too much. Germany – a country that is seen to be too liberal and tolerant on immigration? These are comparatively new arguments and seem likely to reveal a discrepancy in Germany between our own perception of ourselves and the way we are perceived from abroad.

»I think it's awful to see job advertisements where the company says it will give priority to women and people with disabilities.«

Russia

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At the same time, interviewees outside Germany are critical of the refugee problem, which takes us to the fifth observation: more German involvement is needed in the (European) refugee question. Within the EU, the southern European states feel that they have been left largely alone to tackle this problem by the rest of Europe in general, and by »strong Germany« in particular. They mention an incipient »crisis of trust that is also a political crisis«. Non-European states, too, are calling on Germany to become more actively involved in refugee questions in view of its economic power. Many interviewees did credit Germany with a refugee policy based on the actual needs of people: »Germany has a strongly humanitarian migration policy. Refugees from crisis affected areas are taken in without any difficulty and receive support.« In the eyes of others, however, the well-known argument of strong systems is relevant, and it is felt that these systems ought to be put to better use in connection with refugees. Since Germany has managed to successfully integrate refugees in some regions, towns and communities, these now offer suitable structures that could be used to facilitate refugee management in future:

»It is considerably easier and more economical to integrate Syrian refugees in Germany. They do not need to start from scratch. They find family structures already in place. The distribution of refugees in Europe should take account of these realities,« argued one interviewee in Italy.

What emerges is once again a differentiated image of the way that Germany is dealing with the challenges posed by migration and integration and by the refugee question. Yet an increasingly positive, more appreciative image of Germany in this context is apparent. It encourages the view of some that they could learn from Germany as a role model in terms of dealing with migration, and culminates in the idea that Germany ought to »act to a greater extent as a facilitator at international level on integration issues. Integration could be a German or European export.« This latter opinion was expressed by only one interviewee, but several recommended that Germany should take a more proactive stance on attracting migrants. After all, interviewees argue, the country urgently needs foreign skilled workers to plug gaps in its economy.

Policy on women – untapped potential

As with the issues of migration and integration, this survey spotlighted to a greater extent than the first survey the status of women in Germany. Many statements explicitly addressed the status of women within society, gender equality, work-life balance, and family policy. Roughly half of the statements were attributable to interviewees from European countries and half from non-European countries. The picture that emerged was by no means clear cut but suggests that observers in neighbouring European countries and in the English-speaking world take a far more critical view of the extent of genuine gender equality in Germany and the opportunities women have in professional life. Some of our neighbours see Scandinavian countries as offering a better example to follow in terms of gender equality. Interviewees identified the reasons for stagnation in the status of women in Germany as the adverse political framework and the absence of any real debate within society. The lack of viable childcare facilities forces women to stay at home to look after their children or means that they can work part-time at best, meaning that »a lot of talent is lost« to the labour market and the potential offered by these women goes untapped. This raised the question for some observers of whether conservative role models in German society are responsible for the male domination seen in working life in Germany. An individual opinion expressed in the United Kingdom was the most extreme: »Trying to combine family and working life in Germany is an absolute disaster. At the policy level, attempts are being made to change course, but there must be a rethinking within society. The traditional gender roles are still very firmly

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»Women still don't have equal status with fat old white men. It's time women played an equal part in business and politics.«

USA

rooted and they prevent any real progress in this field.« Although other statements are less vehement, the impression remains that foreign observers expect Germany to adopt more progressive action and gender roles. They are astonished to find that the reality is quite different from what they expect from the German powerhouse. The observation that so few women and men in Germany even bother to protest about this imbalance is a cause for puzzlement outside the country.

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It was noticeable that the interviewees expressed very differentiated views on this topic and that sweeping generalisations were very much the exception. Policy on women and families seems to play a major part in shaping Germany's profile – but not always in a positive way. It is not contested that there is scope for progress. Some foreign observers also felt that the fact that Germany has a woman at the helm, in Angela Merkel, is highly symbolic. This generates some emotive statements, like this one from Egypt: »I am happy every time I see Angela Merkel. She is an example for women around the world. She stands for hard work and commitment to her country, for strength.«

Germany – substance, not headlines

What, then, defines Germany's profile? What is the lasting impression of German abilities and skills? It is undoubtedly the image of a strong and progressive country that is admired for its economic performance, its leadership on green issues, its quality of life, its rule of law and its culture of democratic debate. Germany's individual and societal values and its state-regulated respect for the law, which occasionally leads to an excessive respect for authority, shape Germany's

systems. They make the country extremely competitive, even if it is thoroughness rather than nimbleness that defines its innovative strength in the context of globalisation.

The reason for this is thought to lie in a general aversion to risk, a »learnt behaviour« attributed largely to Germany's history and to an education system that does little to stimulate its pupils. At the same time, observations by our interviewees around the world communicate the image of a decent neighbour who is friendly to migrants, behaves correctly, and, in the role of star pupil, is working hard to get »top marks« – sometimes with excessive zeal. On balance, though, the view is positive – after all, he's trying to do things right. As one interviewee put it, »Germany does not make many headlines, but over the last 40 years it has become a good global citizen.«

»Even abroad, people find some major construction projects funny, such as the new Berlin airport or the new Elbe Philharmonic Hall. We ask ourselves how on earth the Germans manage to make such a mess of things?«

Norway

Aspirations and
responsibility –
*Germany's role on the
international stage*

Beyond its borders, Germany's role in the world is the object of great interest and many different interpretations. While this topic was relevant in the first survey, there was scarcely an interview for this second study in which the interviewee did not comment on German influence, power and responsibility. The issue seems to be an extremely potent one outside Germany. There is no lack of critical opinions or of statements expressing clear expectations of Germany. A number of interviewees raised the subject of Germany's economic power and linked this directly to the country's status within the European Union. The statements then move on from Germany's economic performance to the question of political responsibility – for Europe but also worldwide. This was often followed by the obvious step of evaluating German influence within multilateral alliances. And this leads to the question of how well Germany plays its part in the field of foreign and security policy and why it is sometimes reluctant to do so. Here again, German history comes into play.

A driver and guide for Europe

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Germany, our interviewees told us, is the strongest economic power in Europe. It is described as a powerhouse, the locomotive, the driver, the engine and beating heart of Europe. It is solid as a rock amidst the turbulent waves of constant challenges, Europe's mouthpiece and its guide, a beacon, a sometime rescuer in the European financial crisis and sometime ›wallet‹, a bull in the European arena, and an older brother. Metaphors abound when interviewees reflect on Germany's role in Europe. Some even went as far as to maintain that Germany ›is the only thing holding Europe together‹ or ›that all major developments within the EU originate in Germany‹. On the basis of Germany's uncontested economic dominance, which is implicitly recognised in most statements, many external observers perceive Germany as assuming a position of general leadership. They note that Germany led Europe out of the financial crisis with ›discipline and a no-nonsense approach‹, ›pointing the right way forward‹. Only Germany, some say, was in a position to master Europe's crisis. It remains unclear whether the view that the EU

is, in the final analysis, »an extended D-mark zone« is intended critically or benignly.

More frequently, the suggestion is that Germany has worked hard for the great respect it commands today around the world and that it has earned its unprecedentedly positive image. Interviewees also thought that Germany does not focus solely on economic strength but also on values such as »social responsibility« and »solidarity«.

You can have too much of a good thing

Around the globe, it would appear, the economic dominance of Germany and its resultant leadership in Europe have been noted and produce responses that range from neutral to positive acknowledgement. This marks a change from the first study: three years ago, the need to defuse fears of a new dominance of Germany was still seen as a major challenge. Germany's dominance appears to have become reality without raising concerns. Indeed, it has triggered expectations and demands of Germany. Today some interviewees, not only outside Europe but also in neighbouring countries in Europe,

even see a strong Germany as necessary. These interviewees stressed that although not all European partners are in agreement with, say, Germany's austerity policy, »things aren't going to happen in Europe unless Germany is involved«. Overall, then, the country would appear to be appreciated for its role in helping to ensure economic stability in Europe. Individual interviewees even said they were »grateful« that Germany played such an active part in the European financial crisis. They asked how Germany has managed to be the only country to weather the crisis without sustaining any major harm and admired the fact that it now stands »like a rock in a stormy sea, strong and stable – that is truly remarkable«.

Yet the European states in particular also warn against excessive German power, against the country taking an overbearing and high-handed approach, and against special arrangements that benefit only Germany because of its pre-eminent role. They criticise this sort of intellectual superiority and egotism and, in some cases, resoundingly reject it. Other countries wish to see more respect and say that their readiness to follow Germany

»Greece's perception of Europe is largely shaped by Germany. Germany determines what Europe is.«

Greece

will be dependent on this. Chancellor Angela Merkel, too, should not ostentatiously flaunt German power in Europe, they say, but should seek to act together with other key actors in Europe, like France, the UK and Italy, to achieve greater effectiveness. Interviewees in France, for instance believe that nothing can be achieved without France: »We are the second largest economic power and political relations too must be maintained.« The need to agree on a common line with other states is an interesting point that we will look at separately in the next chapter.

Even interviewees in Europe who see Germany's actions, including the austerity policy in the eurozone, as »dominant« and are critical of them, do not offer any genuine alternative. Rather, they note soberly, states with economic power can expect to claim a prerogative in other areas too. Or, as we were told in France, »Germany is seen as an unstoppable neighbour who means well but tends to be a little hard of hearing. We know that we are going to have to deal with whatever Germany does.« This reflects both realistic respect and a certain feeling of powerlessness.

An economic giant, but a political dwarf?

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One thing appears to be evident. As clearly as foreign observers recognise Germany's economic power, they also expect a resulting commitment to offer active political leadership: »Germany exports the most and provides the least political leadership at international level.« Some interviewees are reluctant to accept this and would like to see more balance. In the near future, Germany is going to be measured in terms of how it fulfils the role of political leader. Many interviewees expressed doubts as to whether Germany was currently offering enough leadership. Basically, however, the country is felt to have the capability to lead from the front. One interviewee spoke of a sort of automatism: »Germany's economic power lends it political legitimacy.« Another interviewee perceived a favourable »moral foundation« in Germany and yet another saw the »responsible global citizens« who will enable Germany to assume a prominent role as a political leader in the world. Individual voices were of the opinion that Germany knows how to provide political leadership and can play this role very well

*»Germany has the upper hand in the EU.
It's swallowed up almost all of Europe.«*

Iran

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when it accepts it. But there appears to be a feeling that it needs to be pushed a little. It will not come forward of its own accord. As one interviewee in Mexico said, »Germany is a rising power that is not yet used to this power and still has to learn its part.« Are there other reasons though, apart from the unaccustomed role? Is Germany hesitant because it is endeavouring to avoid any negative impact?

Leadership has never been as easy for Germany as it is today

Germany does, then, enjoy a high level of trust around the world – to such an extent, indeed, that it is felt to be able to shape »big politics« and »make things happen in the world«. As one interviewee in India put it, taking this view to the extreme, »Germany has the confidence of the world to play a larger role for everybody's benefit.« We could almost conclude that the situation has never been as favourable as it is today – but equally, the situation has never before been so complex. The global audience is, of course, fully aware of the huge number of explosive (geo-)political, religious and social

crises around the world, from Ukraine to the MENA region, the onward march of the terrorist organisation ISIS and the Ebola outbreak. This is exactly why political leadership is needed – and why Germany is being called on to act. The era of the ›reluctant hegemon‹ identified in our first study appear to be over. The calculation could be summed up as follows: power is indivisible and entails far-reaching responsibility in economic, political, cultural and military spheres. You cannot cherry-pick, is the implicit message – or, as one US interviewee noted soberly, »As Germany's power and influence increases and its role in the world gains a higher profile, it will attract hostility. It is the fate of powerful nations to become targets for terrorist attacks in the short or long term. In the long term, Germany will be no exception. Welcome to the club.«

Two things should be noted here: firstly, the trust that has developed over a long period and is now vested in Germany, and secondly the unmistakable call for Germany to act in line with its status in the world and demonstrate an appropriate presence.

Leadership only in partnership with Europe

It is clear that foreign observers are putting their faith in concerted European action. Germany going it alone would not be to everybody's taste; there appears to be a consensus that German leadership can only work with and from a European base. One interviewee rephrased Thomas Mann's words to express this: »Do we want a European Germany or a German Europe?« Many appear to want to see Germany at the helm of Europe, where its economic power already puts it, but are equally adamant that the other EU member states and their interests must be taken into account and must play an active part in shaping global politics. So Germany should act as part of Europe. Why? Interviewees provided positive or even favourable answers along the lines of »Germany is a relatively small country, but Europe as a whole is also wealthy and rich in resources,« and »Germany can only exist with Europe. If Europe becomes stronger, Germany has a bigger say too.« The message would appear to be that European diversity must take precedence over Germany going it alone. Sceptical and negative voices point to German interests. It is not a good idea to bolster German prosperity, expressed in its massive balance of trade surplus for instance, at the expense of the EU. One interviewee in Poland put it like this: »Germany can lead within the EU, but only within the framework of the EU. If Germany attempts to push through its own national interests, we no longer have any control. Within European structures, Germany is a leading state, an economic power, but only provided Germany respects its neighbours. Without this policy, there will be no acceptance.«

»Germany's history is the reason for its reticence on the international stage. It wants to remain neutral, and that's not easy. Hats off to Germany for the line it's taken.«

Brazil

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However, there are also voices that say that Germany must not hide behind Europe. From all we have heard, the following image emerges: Germany, as ›top dog‹, must be able to stand alone and withstand the pressure of others. Or »Germany can no longer find its answer by referring to the EU. Germany ought to be Germany and it ought to be showing its influence on the world,« as it was formulated. It would appear that, outside Germany, people want to see an emancipated Germany that acts appropriately depending on the context, sometimes German, sometimes European. As one interviewee in the Netherlands put it, »Germany should take the lead in Europe, but softly.« Individual interviewees appreciated the fact that it is not always easy to find the right balance when they said that Germany has »a very difficult position in Europe: on the one hand, it is the economic driver which allows it to push things through, but on the other hand, it has to hold the EU together and exercise diplomacy in geopolitical terms.«

Prospects of a European dream

There is another aspect to the expectations relating to Germany's role in Europe,

however. Not only economic input is called for but also political and cultural cohesion, which points to a revival of the European ideal. Europe as a political union is greater than the sum of its parts, as several interviewees told us. One interviewee in France believes that the European project is still thriving, according Germany a major role in this. Greater vision, structure and cohesion in Europe are urgently needed so that the European Union can gain greater influence in the world. Germany is thought to have the skills and authority to push ahead with this European ideal. After all, Germany stands for values that could also be the pivotal values of Europe and adopts a »very multi-layered, nuanced approach in its policies«, for instance, with regard to the Middle East, where Germany is felt to adopt a »much appreciated moderate position«. Given these comments, one might be inclined to believe that the European dream cherished by some can only work with Germany – or not at all.

There is a more widespread feeling that Europe today lacks a shared vision and a common strategy. Does Germany always >

Cooperation with Germany – from participants to partners

Many countries have positive experiences of Germany and appreciate their dealings with the country. They have a good idea of what they can expect from Germany. But they also see some wrinkles in their cooperation that could be ironed out – for example by making political positions clearer.

If we look more closely at the statements made about German cooperation with other countries, various facets can be identified, depending on whether the focus is on bilateral cooperation with a developing nation or emerging economy, or with an industrialised state. Nevertheless, it is clear that, irrespective of whether the statements come from Indonesia, South Africa, Iran, Russia or Italy, there is an interest in a lively and even more intensive dialogue with Germany at economic, academic and political level. A distinction is often made between bilateral relations with Germany, which are appreciated, and those with the EU. While developing countries and emerging economies would like to see more cooperation in the field of knowledge and technology transfer,

and joint ventures to work on specific solutions, industrialised nations seek more dialogue on issues that will shape the future, including energy, digitalisation and resilience. That does not come as a surprise, since trends like these depend on the development status of the countries involved.

Germany's partners agree on ›how‹ they envisage cooperation. They all want to see cooperation between equals. They do not want to be lectured to. They want to be given advice on how they can use Germany's advanced knowledge and experience for themselves and to be able to compare these services with those available from other countries. Germany, they say, can only win if it adapts to a greater extent to conditions in partner countries, if it asks questions rather than rushing in with the answers, if it does not try to lay down the law unilaterally, and if it leaves more scope for new ideas. In principle, Germany is on the right track, said one interviewee from Egypt: »In contrast to other international donors, the Germans are more interested in understanding their partner's point of view. Cooperation with Germans

is marked by common interests and mutual respect.« And individual interviewees see another advantage: Germany apparently makes less use of tied aid than other countries. One interviewee in Indonesia told us, »It is easier for us to negotiate with the Germans than with other European partners. They are always interested in trying to understand our position. There are no difficult preconditions that have to be met in advance.« In South Africa, cooperation with Germany in the health sector is seen to be »refreshing« compared with cooperation with other countries: »They are interested in the local conditions and provide a lot of valuable information about their own system.« From Turkey, we heard, »Germany is our largest trading partner. We like working with German companies, because they respect the rules and set clear standards and you can trust them. That is a good basis for successful cooperation.« Here, German virtues are once again to the fore. It is unclear whether this contribution from Morocco was intended as criticism or more light-heartedly: »Germany is seen as being serious, strict and productive (in contrast to France and Spain). When you cooperate with Germany, you have to work hard yourself.«

Interviewees raising the issue of cooperation often alluded to German character traits. One South African, for instance, sees German cooperation partners as being »very systematic and very correct«, adding »Those are the same attributes we're already familiar with from a BMW«. In Colombia, cooperation with Germans is appreciated because of »their methodological strength«. However, this is also seen as a limiting factor: »Sometimes, though,

they cling too much to their methodology and are not particularly open to change.« Sometimes, cooperation »could be less overtly moralistic and more understanding«, said a Russian interviewee. In some cases, there is a glimpse of emotional warmth alongside the more typical German mix of virtues, as illustrated by this Russian interviewee: »In the many years I have worked with Germans, I have experienced them as people who enjoy life, accept responsibility and demonstrate good will.« Many external observers perceive German players as being interested, earnest and responsible. They say that in spite of some shortcomings and a certain reluctance to accept its responsibilities, Germany is by and large playing its part well.

But, as is so often the case, there is still room for improvement. A Brazilian interviewee, for instance, expressed the wish that Germans should more often show others how they managed to get where they are. Others would like to take a look behind the scenes and not just see the results and be advised to follow suit: »That would be very helpful in cooperation between Germany and Brazil. Background information like this would redress the balance and foster greater cooperation.« Many interviewees also mentioned the need to be clear about the profile and requirements on both sides. Supply should be balanced with demand, giving with taking. In other words, the days of paternalistic bilateral cooperation are long gone. Even less developed states voice their demands with great confidence. Yet the perspective of most developing countries is still surprisingly supply-driven. Services are requested in those areas in which

»Cooperation between Russia and Germany should be realistic. It should be rather less moralistic and concentrate on deeper mutual understanding.«

Russia

Germany is strong so that these countries can benefit. The most frequently mentioned fields are, therefore, vocational education and training and degree-level education, along with all aspects of the environment and energy. Other countries feel that their independence is assured when the maxim of cooperation is »Don't preach to us; we want to learn from you!«, as an Indian interviewee put it. The interviewee added that, »In this context, Germany is more progressive than other states because it doesn't force itself on its partners«, confirming that Germany is making an effort to meet these demands.

Germans do not appear to have the reputation of forcing themselves on others in any case. Quite the reverse is true, in fact: a large number of interviewees wondered why Germany is so reluctant to blow its own trumpet, considering the achievements it can point to. Some people focused chiefly on greater openness and better access. One interviewee in Iran, for instance said that Germany »should become more cosmopolitan. This also means more exchange at scientific and

research level, and setting up offices to handle the paperwork for foreigners interested in studying in Germany.«

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The key concept of forcing oneself on others also forms part of a much wider context. Some foreign commentators made it clear that they would like to see Germany play a more active and more proactive role in terms of taking up clear positions on the political stage. Why, asked one US interviewee, did Germany keep such a low profile during the Ebola outbreak in West Africa, even though Germany is thought to have such a high level of capability in fighting epidemics? Why does Germany, which is known to prefer civilian crisis management to military options, not use opportunities like this to demonstrate what it can do? It is now too late for the Ebola crisis, continued the same interviewee, »but you could learn from this example. Wake up and use the opportunities you have. Don't spend so long weighing up the pros and cons of getting involved. Talk about what you do in international cooperation, publicise it, reap the rewards. Look at America. We do good –

and we talk about it. Germany could learn from this.« This example makes it quite clear that, in the view of many foreign observers, a larger role for Germany in international relations should go hand in hand with a more proactive stance. The message from abroad is that strong countries must offer their services. And that does not only apply when a country actually sees itself as leader in a certain sector: »Cooperation begins with developing things together and carrying them forward.« So the advice is not to wait until others come knocking on your door but to be proactive and offer services and stand up to competition. An interviewee in Russia said, »I expect Germany to bring its own issues and positions to cooperation with Russia to a greater extent.« It is a question of making participants into genuine partners: »In bilateral cooperation with India, Germany can always win points when it does not approach India with ideological demands. For India, it's about understanding and then making Indians genuine stakeholders.«

All in all, the trend would appear to be that other countries no longer wish to cooperate with Germany only in individual sectors, such as the environment, health or security, but that they would like to see a comprehensive dialogue between partners, with interests negotiated and entirely new fields of activity developed. Germany, advised some interviewees, can always be successful if it operates in areas that reflect its character and its strengths – or, as we heard in Turkey, »Germany should focus on international cooperation in areas that suit its body language. What I mean is, the Germans are good in all processes

where it is a question of rules and regulations and standards and norms, and these are fields in which they can bring their reputation and credibility to bear.« ■

»Germany has no vision or long-term agenda for Europe. What will become of Europe over the next few years? Too often, we get distracted from this question by all the day-to-day business.«

Netherlands

› know where it is heading, and why? Does Germany not, in fact, seek to conceal its paucity of ideas and vision by being reticent? Interviewees who raise these questions suspect that Germany does indeed have a strategy and knows what its goal is. The very fact that Germany is subjecting itself to a qualitative study, the findings of which we report here, demonstrates in their eyes the country's strategic and far-sighted approach: »For other countries, it is quite enough to know whether they are perceived in a positive or a negative light.« Often, however, the speculations voiced were nebulous and relied largely on hope rather than fact: »I assume Germany does have a clear vision for Europe, but I don't know what it is.« Some would feel happier if this European giant had a well-developed concept to hand: »Germany should articulate more clearly what the vision is and where we are heading and should paint a positive image of the future.« But the question of Germany's ability to produce a strategy remains unanswered, at least as far as Europe's concerns go. One French interviewee distrusts overly vague hopes: »In practical terms, Germany enjoys hegemony over Europe, but it doesn't really know what to do

with it. Or it does know and it isn't saying. But in my experience, when people don't say what they are planning to do, it is generally because they don't know themselves.« However, Germany's actions and mediation in the Ukraine conflict were recognised by several interviewees, who were well aware of all the challenges involved. Generally, interviewees expressed their respect for the actions of Chancellor Angela Merkel, which they see as a »German trademark that combines a hard line with dialogue«; this is what they also expect of German foreign policy in the European context. Other EU states are more sober and more critical in their assessments: »There is no common European foreign policy. In the Ukraine crisis, Germany speaks for the EU without having consulted with its European partners.«

A counterweight to American hegemony

It is interesting to note a divergence of views outside Germany on whether or not Germany is already making its voice heard in international relations. Some say, as did one Moroccan interviewee, that at international level, we see »little of Germany; the country is not very

keen to make decisions. Germany is an actor at regional level but not a global player.« Others, including one interviewee from Italy, perceive a change over the last few years, »from a very reticent, introverted and timid nation to a society that takes a stance even when this means going against the flow«. An Iranian interviewee put it in a nutshell: »Germany plays a leading role in the world, even if it is not on a par with the major powers. But Germany always has influence.« And in Tanzania, we were told, »Germany has shown the world that there is an alternative to the USA on the international stage. It is the only country that can show the USA that there are alternatives to violence.« In this and other comments, we can discern the wish to see Germany as a counterbalance to American hegemony. Germany is considered to be a »balancing factor« in international relations with its »more neutral« position. This often goes hand in hand with reference to Germany's soft power and a focus on dialogue rather than military might. And Germany is appreciated for its different social system and culture and for different forms of cooperation. This was summed up by one interviewee as follows: »Thanks to its soft power,

Germany has repositioned itself very cleverly as a power that stands for what is good in the world.« One thing that would appear to be important to several interviewees is that a neutral stance should not be equated with a lack of interest or indifference. A Polish interviewee gave the following warning: »The greatest challenge facing Germany is societal change. There is a fear that Germany will become an indifferent society. The Poles would like to see positive attitudes to democracy, respect for others and prosperity consolidated once more in German society. We in Poland have turned away from the USA and moved towards the Germans with positive expectations.«

More multilateral influence

A number of interviewees were also in favour of according Germany a greater presence in multinational organisations in recognition of its growing importance. A number of interviewees felt that Germany should become a permanent member of the United Nations Security Council: »It is high time that Germany got its act together and played an active role in the world. The world has

The touchstone for Germany's new role

The political crisis between Ukraine and Russia was highly topical when the interviews were conducted. Many interviewees mentioned the crisis and saw in it a new, stronger role for Germany. Most of them saw Germany as a high-profile protagonist, but wondered about its diffidence, as this interviewee in Indonesia put it: »Germany must play its new role in Europe – the primus inter pares. The Ukraine conflict is the litmus test. But Germany has retreated into itself. It doesn't really want the role.« The new role in the context of the Ukraine crisis means above all that it is seen to be acting independently from the USA, which is much appreciated. Thus, in the eyes of foreign observers, Germany is moving more into the position other countries expect it to occupy – a leader with its own position that does not merely react to the hegemon, the USA. In this context, though, it is also clear that Germany's European neighbours expect to be involved in foreign policy matters that affect Europe as a whole. They want to be informed and consulted. Some interviewees consider that this has happened in the Ukraine crisis. One interviewee in Poland said: »For the first time we have the same goals and we are working together to achieve them.« Another, in the Netherlands, told us, »We agree on the euro crisis and the Ukraine crisis. That is good.« One interviewee in the USA said,

»Without Germany, Europe would never have spoken with one voice and wouldn't have made its embargo policy credible and kept it up.« This interviewee went on to ask, »Who else can organise Europe? It's all up to Germany.« In Turkey, one interviewee was convinced that it is good that Germany is setting the tone. It seems clear that Germany, in its capacity as »key European actor«, is almost instinctively ascribed the leading role in the Ukraine crisis. Once again, interviewees underlined that a leading economic role in Europe obliges Germany to engage at foreign and European policy level too. In the eyes of the world, German virtues – a sober and rational approach and the ability to keep a cool head – will stand Germany in good stead in helping avoid armed conflicts. Does Germany sometimes demonstrate too much consideration, though? A partner in the UK was of this opinion: »Germany is already playing the part of leader within the European community, but your humility and your modesty mean that you do so in an almost unstable way. You're reluctant to say anything about the Ukraine crisis, although Putin would listen to you!« In general, however, foreign observers already see Germany as an important facilitator, playing a significant coordinating role and negotiating intelligently as a »lawyer behind the scene«. Others see Germany as a »moderating force«. >

➤ Foreign observers trust Germany to do a lot and put their faith in its ability to prevent the use of force by deploying diplomatic instruments. One commentator in Mexico set the bar even higher: »In the Ukraine crisis, Germany should stop Russian geopolitics, including by means of military pressure.« The same interviewee did concede however, »I can understand Germany. It's not easy to act as policeman.« A small number of interviewees criticised »contradictory signals« on Germany's part. »You can't expressly support EU enlargement and open the doors wide to Ukraine while maintaining good relations with Russia and then be surprised when Russia

reacts like that,« said one Italian interviewee. A clearer profile would be more helpful, interviewees indicated. One Russian observer was entirely frank, identifying »a whole series of errors to which Germany also contributed with a position that is too close to the USA's. In the west, too, questionable decisions were taken in terms of international law. That strengthens Putin in the course he has taken.« The impression gained is that leadership on foreign policy matters is today more complicated than ever before. A lot is expected of Germany, but the country has also earned respect for the way it has proceeded so far. ■

been ready for this for a long time. Even a seat on the UN Security Council is something Germany should aim for again.« At the same time, foreign observers hope that Germany will »make wise use« of the right of veto this would bring with it. Do we hear a sceptical undertone here about whether Germany might abuse power if granted too much? There is no clear answer to this question, but those who see Germany as being well on the way to becoming an »enlightened world power« are in the majority. They believe that Germany's membership of international alliances serves firstly to enable the country to accept more responsibility in line with its greater political relevance. They also hope, however, to advance their own interests through Germany, and thus help counter the dysfunctional aspects of the UN system.

The tricky question of military power

Foreign observers appear unable to reconcile alleged German pacifism with Germany's massive arms exports around the world. This is a field in which interviewees demand greater caution and expect Germany to subordinate its own economic interests to global interests. Otherwise, they suggest, Germany will lose credibility and create security risks that will have to be resolved elsewhere: »Germany sells arms and builds its prosperity on the taxes paid by the arms industry; they sell weapons to fragile states, and that is hypocritical.« However, the weapons supplied to the Kurds to help them defend themselves against ISIS – which was highly topical when the interviews were conducted – was mentioned by several interviewees and almost

unanimously welcomed. Observers saw this as one instance in which Germany has demonstrated how to reconcile its pacifism at home with its international responsibility in an increasingly conflictual world. One interviewee even praised this political decision in Germany as an »act of liberation«. But, if we are to believe our foreign interviewees, interventions like this will remain the exception in future – the equipment of the German armed forces is too poor, indeed »shameful« or »absurd«, for such a powerful country. Others expressed a degree of understanding for this, recognising that Germany places its faith first and foremost in dialogue, as a result of which military equipment takes the back seat.

A number of statements that take Germany's »military poverty« and turn it into something positive, thus reflecting the country's own attitude, are worthy of particular note. An interviewee in the Netherlands, for instance, argued that it is important not to reduce security policy issues to military interventions alone: »The power factors in the future will no longer be military force, economic power and monetary policy. There are other factors in security.« This interviewee was

referring to security risks triggered by such factors as climate change or dwindling resources. In avoiding conflicts of this sort and in dealing with global challenges with foresight, said several individuals, Germany can authentically develop its aspiration to achieve sustainable development in policy-making and can offer dialogue platforms for debate about forward-looking forms of security policy: »Germany must make the most of its soft power. It has no prospects of success in terms of hard power.« Statements like this reflect various options for Germany's foreign and security policy actions that do not involve military interventions. Yet Germany is also called on to become more involved in international peace missions and in resolving international conflicts. Foreign observers consider Germany has a duty to live up to its global role. Its aim of preventing wars through diplomacy and the fact that it sometimes succeeds in doing so is a core competence and an advantage offered by German foreign policy. One interviewee in India paints a very clear picture of the Germany that could do most for the world in the field of security: it should be strong in terms of its policies, its compassion for

»Because of its past, Germany is too self-conscious about getting involved militarily in conflict resolution – even in peaceful solutions.«

Iran

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other nations, its innovative and research spirit, and its culture: »That's the role that I want Germany to play.« Interviewees also understand that this is more a vision for the more distant future. Nevertheless, in the light of military setbacks in recent and ongoing conflicts, some raise the question of whether the military reticence demonstrated by the Germans might not be a much better idea in future: »While other countries were bickering about whose fighter jets are the fastest, Germany was producing quality.«

It's time to act – in spite of the past

When people outside Germany ask why Germany is still finding its place in the fields of foreign and security policy, the answers are broadly similar, but multifaceted. Once again, interviewees point to Germany's war history and its Nazi past to explain the Germans' current reticence. It is abundantly clear to interviewees on all continents that the Germans are still marked by their history. They still feel the burden of guilt for the war and the atrocities committed, as a result of which they proceed very cautiously and

reservedly so that no doubt arises about the fact that their particular history must not be repeated. »Germany has a complicated history. I totally understand German reticence in military matters,« said one interviewee. Yet all the understanding expressed for Germany's position is outweighed by impatience. Interviewees thought Germany, like all other major powers, must not forget its history but learn to take a courageous stance and to play a more decisive role in international security despite its history. As one interviewee put it, »History does not repeat itself. The times for apologising are over. It's time for Germany to act.« It is at least in part a question of sharing burdens rather than standing on the sidelines and watching, which could also be interpreted as undiluted egotism.

With power come obligations

Several factors come into play when we attempt to sum up the ways others perceive Germany's international role. Firstly, we are currently seeing such a rise in the number and severity of international crises and conflicts that the rest of the world is unwilling to forego German power and its foreign policy clout. Our interviewees argued that Germany is now too influential, especially as a leading actor in Europe, for it to (continue to) hide its light under a bushel. With power come obligations. Many see it not merely as an option but as a duty for Germany to build a healthy alternative to American hegemony within Europe. Because of German history, commentators understand German reticence, particularly in military matters, but they also feel that the time is now right for Germany to act. There can be no doubt that this may mean using soft power rather than hard power; the impoverished state of Germany's armed forces alone effectively makes any other approach unrealistic. For that, however, Germany will need a higher profile elsewhere, for instance in multilateral alliances or by offering dialogue facilities. After all, Germany today enjoys a robust level of trust that is unprecedented since the Second World War. It can build and act on this basis. As one interviewee in Poland said, »What could be better? This incredible acceptance is the evidence that everything has gone well in Germany.«

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»For me, Germany is like the doorman at a popular club: there you are, at the door, and you can hear the party going on inside. There are bound to be all kinds of really great people inside – but you're stuck outside because you can't get past the doorman!«

Colombia

»Famous without
being known« –
*the image Germany
projects*

How does Germany present its abilities and achievements abroad? How is the German ›brand‹ perceived beyond the country's borders? And how does Germany communicate its image to partners within Europe and elsewhere in the world in terms of its foreign policy? Does it allow others an insight into its strategic approaches, its mind-set and the way it thinks? How proactive or defensive is it? The interviews threw up a large number of interesting points regarding the way Germany markets itself abroad and matters of German public diplomacy.

›Made in Germany‹ is still a brand to trust

Our first finding is that German industry can relax – the ›Made in Germany‹ label still seems to be well-known and well-loved and equated more than anything else with excellence. It is associated with the quality of German products, primarily in the technical and engineering fields including mechanical engineering, the automotive industry and infrastructure. German products, in the view of many interviewees around the globe, are known for their ›endurance,

functionality and high quality‹. The long list of German brands felt to be synonymous with quality ranges from Bosch and Fissler to Mercedes and BMW. Top German exports are believed to be premium products that deliver what they promise. That is why customers abroad are often willing to pay a comparatively high price: ›At the end of the day, it can actually be cheaper to buy expensive German equipment and to do the job once than to buy in cheap equipment that breaks when you try to use it.‹ High quality also makes for very simple pricing policy: ›Germans always sell for exactly the price they want, because they can afford to do so. Germany is synonymous with high quality.‹ One interviewee in France even said, ›I would rather buy German appliances than any others.‹ Statements like this bear witness to a high level of recognition and respect.

Strong brands must be maintained

Product quality goes hand in hand with ›brand equity‹: a large number of German companies appear to have succeeded in establishing themselves as brands with an excellent reputation in other countries. The German automo-

tive industry is a particularly good example of genuine brand equity. Important factors are not only high-quality production and marketing but also the underlying German engineering and research, which are seen as trailblazers and form part of the extremely positive attitude to German cars. In the eyes of many of our foreign interviewees, German engineers, skilled workers and craft workers understand their business. They are admired for their technical skills and abilities: »If you have a technical problem that you can't solve, you need to go to a German specialist.« The conviction is that a German expert can always solve the problem.

It is obvious that German companies enjoy an excellent starting position among their global competitors, both in terms of their products and in terms of the skilled staff that produce them. But Germany cannot afford to rest on its laurels for too long. Interviewees in Africa sounded the first warnings: »The competition never sleeps, and people now also have good experience with other manufacturers.« Interviewees felt German businesses urgently needed to actively face up to competition and to continue to invest in

marketing. If Germany were to let up in its efforts in this context, it would be recklessly gambling on the future of currently strong brands. One interviewee in the USA felt that poor marketing is a serious German short-coming: »In Germany, you have all these nice places – Fraunhofer, Max Planck. The people who come out of these labs are whizz kids, but where is their marketing capacity?«

Show more of the soft side

Elsewhere, too, it was apparent that Germany is felt to be somewhat reticent or indeed downright complacent when it comes to actively marketing itself. This reaffirms a key finding from the first study. Three years ago, foreign observers were incredulous at the lack of German marketing activities and advised Germany to employ more soft skills. Why, they asked, is Germany not self-confident in emphasising cultural factors as well as the quality and image of the products themselves when marketing its goods and services abroad? One interviewee commented, »In Indonesia, the Germans only talk about exporting arms and about ports. The Germans don't always show their soft side.

*»I'd love to see more German culture.
We seldom see artists, poets or
writers from Germany in this country.«*

Egypt

It's always only about business...« And this criticism is not unique to Indonesia. In the view of foreign observers, Germany should make more of its cultural values. They point to Germany as the country of poets and philosophers and note that Germany used to produce more Nobel laureates than it does today. They also point to the fact that Germany has a »broader repertoire« in foreign cultural policy than, say, the USA and that this should be used to shape European relations. Finally, as individual interviewees pointed out with respect to the German education system, it can be an advantage at interview to stress that you have lived in Germany and undertaken part of your training or education there. »Citing »Made in Germany« is always helpful and opens doors,« we were told in Morocco. But many consider that there is too little consistent advertising of the opportunities that German education offers.

This is reflected in Germany's fairly low profile in foreign media. Some interviewees note that Germany's image is low-key compared with the role it plays at international level and indicate, above all, that a markedly undifferentiated picture is painted

of Germany in other countries. Even in France, which is after all Germany's immediate neighbour, one interviewee told us, »A lot of French people don't know how their neighbour lives.« It is difficult to find French schoolchildren who want to learn German, »because we don't really know who the Germans are«.

Whether we look at culture or education, there would appear to be a greater level of curiosity abroad about Germany than is currently satisfied by active marketing. Why is Germany not bolder in this area, our interviewees asked? Why does it not expand the image of its excellent products to embrace the prestige offered by highly cultured intellectuals? Our Polish interviewees told us that neighbourliness with Germany is now felt to be normal and positive and that no further effort is needed to generate cultural understanding: enough language courses, student and school exchange programmes and town twinning arrangements are already in place. The wish expressed far more often, however, especially in far flung countries, was to know more about Germany beyond the hard facts. Little if anything is known

»Greece has a very positive image of German culture, but the achievements of German culture are often out of kilter with the priorities of German politics.«

Greece

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about the country's cultural development over the last few decades. In India, for example, people look back to an otherwise largely forgotten pioneering work of a German academic: »Germany did India a massive service in the field of cultural history. Max Müller's transliteration of Sanskrit into Latin script did much to enable us to forge an identity and to become independent from the British Empire. Yet since Indian independence, Germany has more or less disappeared off India's radar.« This shortcoming and the underlying reasons were summed up by another interviewee: »Germany does not pursue an active marketing strategy in India, not even in tourism. So the average Indian knows nothing about Germany. Other nations do much better.«

Marketing beyond the classics

Many interviewees offered specific suggestions on how Germany could market its culture abroad and the means it should use. Films can convey much of the mind-set of a country, and music, literature and dance are the »best ambassadors when it comes to exporting German lifestyle«, one argued. Even

cooking programmes were felt to generate empathy with the country whose food is being presented. Unfortunately, interviewees told us, Germany lags far behind other states in marketing itself. The only cultural factors it tends to use are the old staples like Beethoven and Goethe, while observers search in vain for anything more modern. These and similar statements allow us to conclude that Germany is still an unknown quantity for many foreigners; it is not a country that generates warm feelings but rather retains its cold, technocratic image. Germany could market itself »far more effectively as a country of inventors and philosophers and of socialism, and thus gain a far more human and emotive reputation«, said an interviewee in India. Emotional, warm, human – once again, football demonstrated that these traits are not, in fact, alien to the Germans: »After the 2014 World Cup, we had a better impression of the Germans. The people in the town where they set up their training camp loved them. Maybe it was a marketing thing, but what counts are the good memories.«

The opinions voiced about the institutions that are responsible for promoting the

German language and culture abroad are extremely diverse. First of all, many interviewees were familiar with the *Goethe-Institut* and the broadcasting organisation Deutsche Welle, two mainstays of Germany's cultural and educational policy, with a number praising them for their good work and attractive services. For many, however, the German language remains an almost insurmountable obstacle to access to German culture. One interviewee felt that the »queues outside German consulates and the *Goethe-Instituts*« demonstrate the high level of interest in Germany but also how high expectations are, while another complained that Germany's cultural activities are »very much focused on Germany itself«, and a third judged that Germany's »intellectual presence« in his home country was inadequate: »What embassies and *Goethe-Instituts* do is not nearly enough.« But what is the benchmark?

The statements made by our interviewees indicate clearly that Germany should stop hiding its attractive cultural side at the expense of its economic power. The two aspects of the country ought to receive equal attention, in their opinion. It is with astonishment and regret that interviewees implicitly ask why Germany makes such little use of its cultural resources. While Italy has »operas and arias, Germany has symphonies«, said one interviewee. Another in China declared that in view of the complexities of the world we live in, Germany's holistic approach is more in demand than ever before: after all, we must »seek a solution for the overall situation and not start with tiny island solutions«. An interviewee in Romania said that Germany has the ability to speak out »for fundamental European values« in the urgently needed debate about and defence

»There's something very distinctive about the German language: you usually have to wait right to the end of the sentence to understand what it means. And that makes you listen to people; you have to wait until they have had their say.«

Brazil

The German language

An undervalued factor in cooperation

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For foreigners, the German language remains a controversial issue, with opinions diverging widely. Some see the complexity of the language as simply »impossible«, while others praise its expressiveness. On one point, though, there is a general consensus: anyone who can master the German language can access German culture, history and society. »In Germany mastery of the German language is the absolute precondition for participation in society and for employment,« said one interviewee in the Netherlands. A Brazilian told us that it is only possible to access such important eras of cultural history as German Romanticism if you are fully familiar with the German language. This is a point that many interviewees criticised. Far too few German works, literary or scientific, have been translated into other languages, they argued. And why are there still so few courses in English at German universities, despite a high level of interest? Germany is felt to be almost anachronistic in linguistic terms. Are language barriers secretly condoned in Germany? Many interviewees spoke of the obstacle posed by the German language, of barriers and difficulties encountered. We heard many vivid tales of the problems

of dealing with German officials: when dealing with German authorities, we were told, it is always a good idea to take a German friend to ensure that you really understand the finer points of what is going on. Only a few interviewees saw signs of improvement: one from Egypt said, »One of the negative things I have noticed is that the German language was always there as a barrier between me and the Germans. But things have changed dramatically over the last 20 years. I feel that there is much greater openness today.«

The overriding impression is the perception of a discrepancy – Germany's growing importance and the high level of interest in intensive cooperation on the one hand and its failure to make the German language more accessible and appealing to potential learners or to offer English-speaking alternatives on the other. The interviewees appeared to want to shake Germany up and warn the Germans not to miss the chance to advertise abroad or to encourage people to learn German: »If you don't, other states will step into the gap and ingratiate themselves with those who currently like Germany – and they are the people you urgently need!« ■

of European values. This country at the heart of Europe could be doing a lot more in this regard. A country of Germany's stature, we may conclude from our interviewees' comments, cannot be a shrinking violet in other areas. It must be willing to use its full potential in discussion and dialogue.

Communicating with transparency

What has been said about the marketing of German products, education and culture applies at least in part also to German diplomacy abroad. Many foreign observers do not feel that Germany is doing enough: »There are three key areas in which Germany can mediate at international level: the economic, political and social spheres.« Not only do they expect a greater German presence and higher visibility; more importantly, they call on Germany to make political decisions more transparent. Transparency ought to make for easier if not automatic acceptance. Some European states accept that with respect to the eurozone crisis, for instance, Germany is on the right track but they do not feel that they have been adequately involved. A lot more communication work is called for here.

»It ought to be Germany's job to mediate to a much greater extent in the euro crisis and to communicate more openly. The European crisis is also a crisis of communication,« said one partner in Italy. Appropriate communication means firstly listening and understanding what the other side thinks while also explaining what Germany thinks itself and convincing others – ideally in a balanced manner. With this as its communication strategy Germany would do what is expected of an »enlightened world power« and pursue progressive public diplomacy.

Interestingly, foreign observers often criticise Chancellor Angela Merkel's lack of public communication; too often, she is seen to act behind closed doors, and our interviewees feel that she does not adequately explain her decisions. Frequently, people find out from the media what political steps Germany intends to take. Rather than this, we were told in Norway that »the German government should be open about what it is doing and say clearly why. If people today are afraid of Germany as the new leader of Europe, it is because they have the feeling that politics is happening behind closed doors.« One interviewee in the

UK doubts that Germany is capable of demonstrating its presence on the centre stage rather than behind the scenes: »Germany likes to advance its own interests and ideas by acting and convincing others in the background but is not willing enough to defend its opinion on the open stage.« Is Germany afraid of its own courage? Does it feel less open to attack and thus stronger if it works behind the scenes? Or is it merely hiding behind the mask of the humility we know so well? One interviewee in India, though, noted wryly that when Germany's own vital interests are at stake, it is very much present.

The overall impression of Germany's actions on the open stage is multifaceted. Something does appear to be changing, even if it is difficult to pinpoint. Some people believe that they have seen a change recently, particularly a move away from a reluctant and timid Germany to a more determined and resolute country. The first study voiced a clear demand for Germany to take a more proactive stance; this would now appear to be happening to a greater extent. To quote one Indian interviewee, »Germany is a counter on the table that the world can't ignore. This is very, very positive.«

»Unlike every other country, Germany has supported Afghanistan for the last ten years without any agenda of its own. The other countries are primarily pursuing their own agendas in the support they give Afghanistan.«

Afghanistan

»Germany has to use sound arguments in order to mediate between extreme positions within the EU. That's the only way the EU can act on an equal footing with other major world powers, like China, the USA and Russia.«

Greece

A balanced political performance

Opinions still diverge as to whether Germany's increasing assertiveness should be seen in a positive or a negative light. Basically the same applies here as to the description of German character traits: Germans tend to over-emphasise what they feel to be the optimum and inevitable solution. What some people see as appropriate political decisiveness and communicative presence is felt by others to be clumsy; they feel that they are being lectured to and don't like it. In Europe, some voiced the fear that if Germany, the strongest economic actor, is always in the spotlight, there is a risk that Europe's cultural diversity will be lost. Others however, in Russia for instance, seek to reassure them: »I don't see Germany as lecturing others. As [Foreign Affairs Minister] Steinmeier has said, it is all about a new culture of responsibility. I think it is impressive that Germany accepts responsibility also for what is happening outside Germany.«

The implicit advice to Germany from developing countries and emerging economies is to keep things in proportion, especially to accept these countries' desire for dialogue

among equals and to develop an understanding of cooperation on this basis. Germans should not play the know-all when communicating their expertise and should not offer ready-made solutions but should help build something new from the outset – that would be the ideal. Precisely because Germans »go deeper« than other nations and aim to mobilise more local engagement, there are good foundations on which to build promising cooperation. Nevertheless, doubts persist: »Even the Germans do not really have the diplomatic finesse to avoid lecturing when communicating and sharing expertise in the field of good governance and democracy. But in that they are no different from others.« So what should we deduce from this? It would appear that finding a balance and keeping things in proportion are what is needed. The call for greater transparency, involvement and participation is impossible to overlook in both instances.

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Following through on communication

On which topics would foreign observers like to hear more from Germany in political debates? The topics we have identified are

those that are also deemed to be Germany's strengths: above all, European values, human rights, the social market economy, climate change and renewable energies. These are the issues our interviewees feel that Germany should be communicating on at international level, because, as one interviewee in the UK acknowledged, »I admire the social market economy. It is not something that was just there: it was invented and created by clever people. It was designed to prevent any one class emerging as overly dominant, and it is not a system that you find anywhere else.« But not everybody welcomes the above topics to the same degree. However, even if one interviewee in China told us that people are always a little concerned that the issue of human rights will be raised, the main criticism addresses Germany's failure to communicate and lack of vision: »It is partly due to uncertainty, but partly also stubborn pride. More communication is needed.« Foreign observers, though, do not wish only for crucial, initial impetus in communication; they would like to see this followed through consistently. Although Germany initiates a lot of debate at international level and has assumed the role of mediator, »it does not communicate the results of these processes well enough to the global audience afterwards,« criticised one interviewee in Mexico. This might appear surprising when Germany is generally deemed to have a great deal of stamina on the question of sustainable development concepts.

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Dialogue ›Made in Germany‹?

In the field of cultural and political communication, we might conclude that Germany should learn from its own experience in marketing its products. The progressiveness it demonstrates with respect to goods and services is not matched by its marketing pitch in cultural fields. A lot is expected of it in terms of the political image it projects abroad: it is expected to be as high-profile on important political issues and positions as it has been with its branded products. It is expected to be consistent, to show stamina, and to act with a sense of proportion, which involves both listening carefully and communicating with understanding. Then ›Made in Germany‹ would no longer only be a label for branded German products but perhaps also for a typically German style of negotiating: engaged and persevering, while bringing different sides together and ensuring reliability.

»German leadership and a more active role in world politics would make a major difference. I think Germany should even make another attempt to secure a seat on the UN Security Council.«

USA

What the world expects of Germany

How do foreign observers see the future when they look at Germany? Where do they see Germany's potential today and tomorrow? What areas should Germany be devoting greater attention to in future? Five main messages can be distilled from the survey and are presented here as food for further thought and discussion. They indicate that interest in Germany and its role in international relations continues unabated, and if anything has increased since the first study conducted in 2011/2012.

Firstly, Germany is clearly still a country that is held in high esteem around the world. It serves as a role model for many other societies because of its ability to guarantee democratic principles and the rule of law, to offer its citizens safety and security, and to deliver a high quality of life; and because all these things are based on broad-based, inclusive discussion within society. The implicit message to Germany is that it should retain these strengths and make greater use of their potential, so that it can continue to function as a beacon or anchor for other nations in future.

The **second** message is closely linked to the first. People in other countries are interested in learning from Germany and benefiting from its effectiveness. There is a desire to see broader dialogue at all levels, economic, political and cultural. It is inherent in this that Germany must become more proactive. The absolute precondition for this dialogue is that Germany treats other nations as equals because, as foreign commentators told us, there are alternatives; there is always more than one answer to global challenges such as climate change, population growth, urbanisation and health risks. The divergent opinions on the handling of the European financial crisis illustrate clearly that it is not always the German way that counts and that Germany's way is not always to everyone's taste. Because of its high level of development, Germany is often felt to set a very fast or even excessive pace. Other countries are very willing to learn from Germany's strengths but not when conditions are imposed on them. The second message is, therefore, that Germany should certainly offer its proposed solutions across the board, but that it should also take other countries seriously, listen to them carefully,

ensure a dialogue among equals, and act after reflection.

The **third** message revolves around advice to Germany to be bolder when it comes to breaking new ground. Germany's focus on its traditional strengths and its tendency to build on previous achievements is, it is true, often appreciated and still in demand. But at the same time, the rest of the world seems to want to urge Germans to take more risks and to forge ahead more enthusiastically with innovations, for instance in the digital sector but also on social issues, including gender equality. They call on Germany to invest in these areas rather than simply tinkering with the system already in place. Setting off for uncharted territory is an enormously valuable experience, even if there is a risk of failing along the way or, indeed, at the end of the road. A nation that is as effective and stable as Germany can find the courage to do this, foreign observers tell us.

The **fourth** message relates to Germany's global engagement. The clear demand from abroad is that Germans get more involved and accept a level of global responsibility commensurate with the country's new importance. While the call for greater engagement emerged clearly from the first study, it was balanced by scepticism with regard to any increase in German dominance. This no longer appears to be an issue for debate: for many Europeans, in particular, German dominance is already a fact but tends to trigger a self-assured reaction rather than fear. There are concrete ideas about the form this reality should take. A strong Germany is now expected to shoulder more responsibility. Part of the fourth message is, therefore, that Germany's engagement, strength and

capacity must also benefit others. Whenever Germany engages at global level, whether it is in humanitarian crises or economic conflicts, innovation strategies or sustainable development, foreign observers want to know that it is not only serving its own interests. While they consider it legitimate for a nation to pursue its own interests provided there are no double standards, they also feel that other countries must benefit too, for example in conflictual negotiations in which Germany's soft power often carries the day. What underlies this call for more global engagement is a huge trust in Germany's reliability and predictability. In particular, the way Germany has come to terms with its past is seen as exemplary and has led other countries to accord it a prominent position in global politics, to trust it to play this part, but also to insist on its doing so. There appears to be a slight discrepancy between what Germany is willing to give and what commentators abroad deem necessary, although the gap has narrowed since the first study was conducted. If Germany were to become more closely involved in multilateral systems, as many observers felt would be appropriate, the country would be able to take a more assertive stance. It would also be more visible, more confrontational and more vulnerable. A nation that wishes to be at the forefront of global politics must accept this.

The **fifth** and last recommendation is very closely linked to the fourth. Germany should communicate more actively and more openly with the rest of the world. This is linked firstly to the desire for more information about what Germany can do and what it intends to do, and secondly to the expectation that the communication of German interests and positions will open

up an opportunity to participate. Observers outside Germany often criticise the fact that Germany is reluctant to present itself clearly and to take the public stage. They feel that it should set out its advantages and achievements more emphatically and make them public. Some interviewees harbour the suspicion that Germany sometimes holds back on purpose, to enable it to manoeuvre unnoticed in the background and achieve competitive advantages or to circumvent debate and conflict at home as far as possible. The call for a higher-profile Germany relates not only to better marketing but also to a more open communication of and greater transparency with respect to German interests. Seen from beyond Germany's borders, this means firstly that Germany should share its agenda and its objectives to a greater extent, and secondly that it should register more closely the interests of other countries. In addition to this balancing act, foreign observers expect Germany to show greater staying power on the communications front. Processes initi-

ated by Germany must be more consistently followed through and followed up. They would also like to see Germany demonstrate greater vision in its political cooperation. For the future of Europe in particular, which must remain embedded in a comprehensive system of shared values, it is important to develop ambitious strategies and thus revive the ›European project‹.

All in all, this study confirms many of the trends seen three years ago and adds clearer contours. Today, there is a clearer perception abroad of where Germany leads the field, the obstacles it faces, the progress it has made and where it is holding back. Foreign observers are more confident about commenting on this and are prepared to make demands of Germany. It would appear that living up to such high expectations will be more challenging than ever. Germany's role in international cooperation is likely to remain an exciting and multifaceted one for the foreseeable future.

Annex 1:
Methodology

Germany in the Eyes of the World aims to provide indications of how Germany is seen abroad, where its specific strengths and weaknesses are perceived, and what expectations are linked to Germany's role in international relations against this background.

Methodological background

A qualitative design was chosen as being most appropriate for this explorative study. In contrast to quantitative opinion polls, the focus is not on using a group of respondents (a randomly selected, statistically representative sample) to identify statements deemed to be relevant for the group as a whole. We chose to look instead in more detail at a smaller number of hand-picked case studies in the form of selected interviewees.

The 179 interviewees were selected on the basis of the principles commonly used in theoretical sampling. Suitable selection criteria (nationality, sector, gender and age) were taken into account to ensure that a wide range of relevant perspectives was covered and maximum compliance with the study criteria assured (links with Germany, decision-makers). **Figure 4** illustrates four characteristics. The interviewees came from the political, business, science and research and cultural spheres and from civil society. A total of 113 interviews (63%) were conducted with men and 66 (37%) with women, giving a broad spectrum of contrasting views. GIZ's extensive network was used to select interviewees: GIZ country directors in particular tapped into their contacts, with the snowball principle used to produce a wide-ranging list of proposed interviewees. In countries in which GIZ has no official representation, interviewers' personal networks were used.

Special care was taken to ensure that the interviewees had no direct link with GIZ as a company.

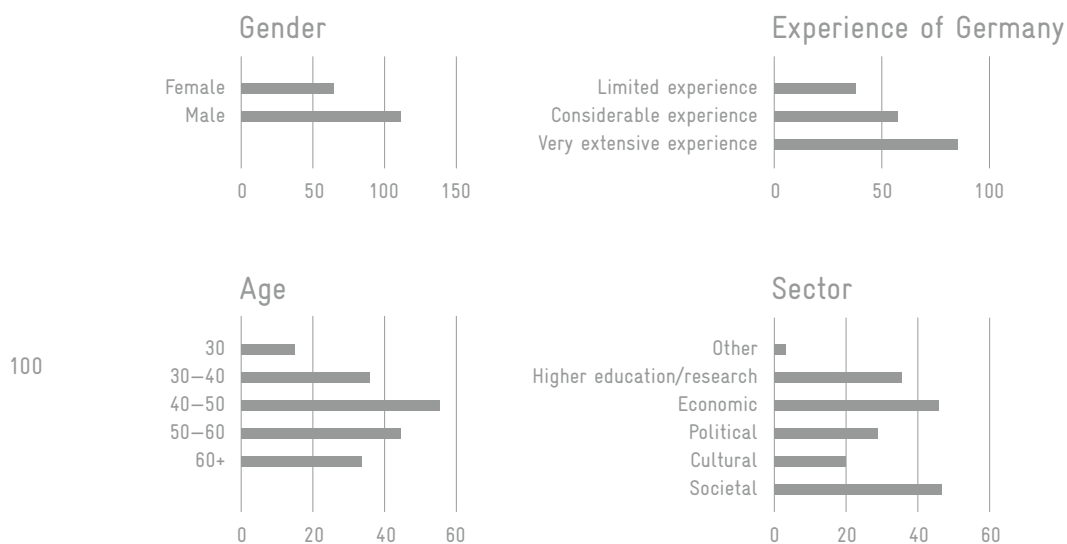
The countries were selected on the basis of their relevance for Germany (i.e. historical relations and economic links with Germany and the importance of the countries in bilateral and multilateral political processes). **Figure 5** below lists the countries included in the two studies.

Data collection

An open interview technique was used in the form of face to face interviews, setting this qualitative study apart from quantitative written surveys, which primarily use closed questions with predefined responses. The spotlight here was on gaining an understanding of the individual perspectives of the interviewees (a case study-based approach) rather than on any standardised recording of person-related features for a larger group of individuals (a variable-based approach). The advantage offered by this approach is the greater openness it offers for the object of the study – how Germany is perceived in other countries – and the chance to go into more depth, for instance by encouraging interviewees to clarify questions and produce narrative sequences.

Both the non-random selection of interviewees and the type of question mean that, in spite of the relatively large number of case studies (179 case studies do offer a certain statistical potential), we cannot simply draw conclusions for individual countries or continents or for the world as a whole on the basis of the study. Because interviewees were specifically picked with a view to the objec-

Figure 4
Characteristics of the interviewees



tives of the study, however, and because of the large number, we can assume a very good level of data saturation. It may be assumed that more data would not be likely to generate many new findings. It is thus quite legitimate to speak of substantial representativeness, i.e. to claim that the case studies selected are representative of the substantive aspects of the phenomenon that interests us, even though they cannot be taken to be statistically representative for the population as a whole. This meets the claim for a high level of substantial validity. We gathered the data we intended to gather.

Between August 2014 and January 2015, a total of 179 interviews were conducted in 26 countries. Following the interviews, the core statements (all relevant substantial aspects covered by each participant) were

documented using an electronic evaluation tool. The core statements were assigned to one of the eleven topic areas (figure 6) and coded for one of eight types of statement (a strength for Germany; a weakness for Germany; an opportunity for Germany; a risk for Germany; a positive for a partner country; a negative for a partner country; description or consideration; and recommendation or suggestion).

A total of 4,560 core statements were recorded, an average of 25 per interview. Since this was the second study of its kind, some of the interviewees who participated in the first study were once again included in the pool of interviewees for this study. They accounted for 20 of the 179 interviewees. This did not produce any disadvantage but rather tended to raise the number

Figure 5

The countries included

		First study (2011/2012)	Second study (2014/2015)
Africa	DRC		✓
	Kenya	✓	
	South Africa	✓	✓
	Tanzania		✓
Americas	Brazil	✓	✓
	Chile	✓	
	Colombia		✓
	Mexico		✓
	USA	✓	✓
Asia	Afghanistan		✓
	China	✓	✓
	India	✓	✓
	Indonesia	✓	✓
	Japan	✓	
	Kazakhstan	✓	
	Mongolia		✓
	South Korea	✓	
	Viet Nam		✓
	Europe	France	✓
Greece			✓
Italy			✓
Netherlands		✓	✓
Norway			✓
Poland		✓	✓
Romania			✓
Russia		✓	✓
Spain		✓	
Turkey		✓	✓
United Kingdom		✓	✓
MENA	Egypt		✓
	Iran		✓
	Israel	✓	
	Morocco	✓	✓
	Palestinian territories	✓	

Figure 6

Fields of observation used in the two studies

First study (2011/12)	Second study (2014/15)
Democracy and citizen participation	Political order and administration
Security and development	Internal and external security
The economy and sustainability	Economy and finance
Energy and climate	Energy and the environment
Education and professional life	Education and professional life
Research and innovation	Research and innovation
Infrastructure and mobility	Infrastructure, technology and digital change
Migration and integration	Migration and integration
Culture and family	Culture and lifestyle
Faith and ethics	Family and values
	Health and quality of life

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of particularly significant interviews. The fact that these individuals generally also made comparative statements with respect to the first study also contributes to a qualitative study that is intended as one in a series of observations over a period of several years.

Every individual interview was structured in three phases, as was the case in the first study: an open introductory phase with a focus on free associations with the relevant image of Germany; a second phase that looked more specifically at individual topic areas or fields of observation; and a final open phase, in which interviewees had an opportunity to speak about their expectations for the future and voice their own recommendations. The second phase covered eleven

fields of observation, which largely overlapped with those used during the first study. The observations fields from the two studies are set out in **figure 6**.

Individual areas and terminology were modified for the second study for two reasons. Firstly, during the first study, it emerged that some areas provoked few, if any, responses from a large number of respondents, probably because they were not clearly enough defined or not sufficiently comprehensible or because they were simply not transferrable to other cultural backgrounds where they generated no direct associations or quite different associations (e.g. democracy and citizen participation, security and development, and the economy and sustainability). Secondly,

the study team felt it would be opportune to offer certain, particularly topical issues for discussion; current societal developments make these fields especially relevant for the way Germany is perceived in other countries, such as ›infrastructure, technology and digital change‹ and ›health and quality of life‹.

As expected, the topic areas attracted very different numbers of statements. We should not be too quick to draw conclusions from this, however. There are many and varied factors involved, including the level of interest on the part of interviewees in individual topic areas, the high topicality and relevance of some issues, and the sheer breadth of individual fields of observation. Since it is not the frequency but the substance of the statements that is of interest for the purposes of this study, the frequency distribution of statements made is not relevant.

Evaluation procedures adopted

For the purposes of this study, which was not theoretically rooted and is of an exploratory nature, the main task in evaluating the data collected was to pinpoint assumptions relating to the views and images communicated in the interviews. The following sequence of steps, obviously much simplified, was followed:

1. Identifying the source material (the corpus of data)
2. Determining the direction and course of the analysis
3. Structuring and generalising data
4. Drawing up relevant hypotheses
5. Interpretation and review of findings.

The source material consisted of 4,560 core statements gleaned from the interviews, which were available to the evaluation team (consisting of all interviewers) in the form of cards and lists. No other sources were used, with the exception of the 2011/12 study, which was used to compare findings.

The direction and course of the analysis followed from the qualitative objectives of the study. The aim was not to identify quantitative features on the basis of which patterns could be discerned and assumptions made. The key analytical step was to structure and generalise the data gathered. We sought to observe not a single phenomenon (the image of Germany) but a large number of phenomena (the eleven topic areas listed above). Structuring was made easier by the fact that the data were allocated a dual code, as explained above, when they were first registered, firstly attributing them to one of the eleven fields of observation listed and, secondly, classing them in terms of the eight types of statement listed above. For the first step of the evaluation, a two-day preparatory workshop was staged with seven interviewers, who went through and structured all core statements. This raw material was then used to draw up separate hypotheses for all eleven fields of observation.

The next step involved generalising and drawing up assumptions and hypotheses on the basis of the structures, categories and concepts that emerged from the preparatory workshop. To this end, two further evaluation workshops were held with the entire interviewer team, each lasting two days. A basic distinction can be made between three forms of generalisation:

1. Statistical generalisation
(sample to population generalisation)
2. Analytical generalisation
3. Case-to-case transferability.

While the qualitative design of the study made the first of these inapplicable, the other two were used. The process of analytical generalisation involved taking phenomena that emerged in individual cases and combining these with others through a process of inductive reasoning, abstraction and identification of corroboratory evidence in other statements to produce concepts held to have a broader significance. Case-to-case transferability involves a form of generalisation in which similarities in individual-specific features or other context-related factors (location, time, environment, etc.) are used to allow the analyst to draw conclusions for another case or a group of cases.

The study team expressly assumed the following tasks: the main challenge of generalisation is the risk of drawing ill-considered and uncorroborated conclusions (not thinking further than the initial 'eureka' moment) as well as the risk of ending a process of reflection because it is convenient to do so rather than achieving theoretical saturation. There is also, of course, the risk that subjective bias might lead analysts to become enthusiastic about entirely artificial correlations. Moreover, even in a qualitative study, the contextual information available is often not sufficiently differentiated to make case-to-case transferability possible.

The formulation of hypotheses was then the findings-oriented stage of the work of evaluation. At each of the two-day workshops, the study team looked at the

generalisations produced and drew up hypotheses in the form of brief texts, which were made available for further editing after the workshop.

The interpretation and review of the findings took place at several levels. Firstly, at the end of the preparatory and evaluation workshops, the findings were critically appraised. Secondly, when the study report was produced, the team constantly referred back to the raw material to check their assumptions and achieve a greater degree of precision.

The result of the entire process is this study report, which is intended to encourage more discussion and debate.

Annex 2:

*List of interviewees*¹

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

Afghanistan

Prof. Nasratullah AKBARZAD

Professor and Independent Consultant •
Faculty of Agriculture, Kabul University

S. Shafiq GAWHARI

Managing Director • Moby Group

Yousuf KARGAR

Head Coach • Afghan National Football Team

Rohullah DARIZADA

President • Afghanistan Independent Bar
Association (AIBA)

Baktash SIAWASH

Member of Parliament • Wolesi Jirga

Brazil

Sonia CHAPMAN

Sustainable Development • Braskem S.A.

Ernani KUHN

General Coordinator of Financial Management and
Accounting, Executive Secretariat (SECEX) • Ministry of
the Environment

Fabiana PARANHOS

Institutional Coordinator • Institute of Bioethics,
Human Rights and Gender (ANIS)

Carla PEREIRA

International Relations Specialist • National
Confederation of Industry (CNI)

Cristina SCHACHTITZ

Executive Vice President • Edelman Significa.

Marcello SERPA

Managing Director, Art Director • AlmapBBDO

Clara Cristina SOUZA RÊGO

Student • University of Brasília (UnB)

China

FENG Xingyuan

Senior Researcher and Vice Director •
Unirule Institute of Economics

HAN Wei

Director • Beijing Laiyinruibo International Cultural
Exchange Co.

JIANG Dayuan

Vice Director of the Central Institute of Vocational and
Technical Education (CIVTE) • Ministry of Education

KANG Bingjian

Division Director • Ministry of Commerce (MOFCOM)

LI Lei

Volkswagen AG

SUN Lihui

Director External Communication Department •
China Chamber of Commerce of Metals, Minerals and
Chemicals Importers and Exporters (CCCMC)

YUAN Shun

Artist • 798 Art District

ZHU Hong

Journalist

Colombia

Ligia Helena BORRERO RESTREPO

Deputy Comptroller General of the Republic • Office of
the Public Prosecutor

Luis CARRASQUILLA

Student • Pontifical Bolivarian University

César CONTRERAS

Production Manager • Mediimplantes

Padre Dario Antonio ECHEVERRY GONZÁLEZ

Secretary General • National Conciliation Commission
(CCN) of the Roman Catholic Church

Lina GARCÍA

Head of the Working Group on Victims and Post-Conflict •
National Planning Department (DNP)

Maria del Coral PÉREZ ORDÓÑEZ

Coordinator of the Entrepreneurship Office • Faculty of
Industrial Engineering, Pontifical Bolivarian University

Patricia SIERRA

Executive Director • Pies Descalzos Foundation

Nelson VERGARA

Associate Professor • School of Arts & Architecture,
National University of Colombia

DRC

Patrick Missassi KABWITH

General Director • Academy of Fine Arts, Kinshasa

Jean-Claude KIBALA

Minister • Ministry of Public Service

Marie Marthe LEBUGHE

Change Manager • Central Bank of the Congo

Colonel Déogratias LUKWEDO MBOGO
Consultant • Ministry of Defence & War Veterans Affairs

Pamphile Mabilia MANTUBA NGOMA
Professor of History • University of Kinshasa (UNIKIN)

Luc-Roger MBALA BEMBA
Journalist • Observer

Alexis MUSHILA
Professor of Economics • The Congo Protestant
University of Kinshasa

Egypt

Soraya BAGHAT
Founder • Tahrir Bodyguards

Zina EL NAHEL
Senior Community Officer • Tahrir Academy

Mohamed EL SAWY
Director • Culture Wheel

Dr Mohamed Salah EL SOBKI
Head of the Energy Research Center •
Faculty of Engineering, Cairo University

Dr Anhar Ibrahim HEGEZI
Head of the Cabinet's Energy Efficiency Office •
Information and Decision Support Center (IDSC)

Ashraf SWELAM
Director • Cairo Center for Conflict Resolution and
Peacekeeping in Africa (CCCPA)

Manal TIBE
Director • Egyptian Center for Housing Rights (ECHR)

France

Claire ALEXANDRE
Head of Commercial & Strategy, Mobile Payments •
The Vodafone Group Plc.

Dr Anne DURAND
Lecturer of German Philosophy • Sorbonne University

Prof. François GODEMENT
Director of the Asia and China programme •
European Council on Foreign Relations (ECFR)

Raphaël GOULET
Head of Information and Communication Unit •
Directorate-General for Regional Policy,
European Commission

Philippe GROS
Chief Economic Advisor • Court of Auditors

Claudine LEPAGE
Senator • Senate of France

Peggy ROLLAND
Programme Coordinator • German Academic Exchange
Service (DAAD)

Greece

Stefanos ISAIAS
CEO • Enterprise Greece

Panayiotis KAKOLYRIS
Press Officer • Konstantinos Karamanlis
Institute for Democracy

Angelos KOVEOS
Journalist • To Vima

Dr Antonis METAXAS
Chair of EU Law, Visiting Professor of Energy Law
at IHU • University of Athens, International Hellenic
University (IHU)

Vissarion THEODOROU
Head of Sales Greece • Enercon

India

Subhash AGRAWAL
Editor • India Focus Strategic Analysis & Forecasts

Rita ROY CHOUDHURY
Senior Director and Head Environment, Climate Change,
Renewable Energy • Federation of Indian Chambers of
Commerce and Industry (FICCI)

Vimlendu Kumar JHA
Executive Director • Swechha – We for Change
Foundation

Dr Surinder KAPUR
Executive Chairman • The Sona Group

Arun BHARAT RAM
Chairman • SRF Ltd.; Co-Chair of Indo-German
Consultative Group

Dr Leena SRIVASTAVA
Vice Chancellor • TERI University

Dr Shashi THAROOR
Member of Parliament • Parliament of India

Indonesia

Dr Ilham HABIBIE
CEO • PT Ilthabi Rekatama

Noke KIROYAN

Chief Consultant • Kiroyan Partners

Dr Chusnul MAR'YAH

President Director • Center for Election and Political Party, Faculty of Social and Political Sciences, University of Indonesia

Wally SALEH

Commissioner • Sugih Energy

Dr Natalia SOEBAGJO

Executive Director • Centre for the Study of Governance (UI-CSG), University of Indonesia

Sandhy SONDORO

Musician and Singer

Jongkie D. SUGIARTO

Co-chairman • Association of Indonesia Automotive Industries (GAIKINDO)

Ria WIDATI

Deputy Director of Bilateral Foreign Funding • National Development Planning Agency (BAPPENAS)

Iran

Dr Kayhan BARZEGAR

Director • Institute for Middle East Strategic Studies (IMESS)

Noushin FOUROUTAN

Artist

Seifali GHAFARI

Managing Director • Simin Barragh Co. Ltd.

Dr Ebrahim HAJIZADEH

Head of Unit • Department of Environment

Naghmeh HOSSEINI

Journalist

Moghtadi KERMANSHAHANI

President • German-Iranian Chamber of Industry and Commerce

Butagh KHANBODAGHI

Vice President • German-Iranian Chamber of Industry and Commerce

Alireza RAHIMIZADEH

Managing Director • InduSup GmbH

Italy

Antonio ARMELLINI

Ambassador (retired)

Elisabetta BELLONI

Ambassador and Director General for Resources and Innovation • Ministry of Foreign Affairs and International Cooperation

Massimo BUSUOLI

Head of ENEA-EU Liaison Office • Italian National Agency for New Technologies, Energy and Sustainable Economic Development (ENEA)

Prof. Giovanna CERPELLI

Associate Professor at the Department of Philology, Literature and Linguistics • University of Pisa

Prof. Andrea DE GUTTRY

Director of the International Training Programme for Conflict Management • Scuola Superiore Sant'Anna di Studi Universitari e di Perfezionamento

Marco MÜLLER

Artistic Director • Rome Film Festival

Dr Nathalie TOCCI

Deputy Director • Institute of International Affairs (IAI)

Mexico

Cintia GIL GUTIÉRREZ

Consultant for the Paralibros Programme • National Council of Culture and Arts

Luis Antonio HUACUJA ACEVEDO

Head of the Study Programme on the European Union • Faculty of Higher Education Acatlán, National Autonomous University of Mexico (UNAM)

Pablo MONTERRUBIO

Capacity Building Coordinator • Proyecto Tierra

Lorena RUANO GÓMEZ

Director of the Department for International Studies • Centre for Economic Research and Studies (CIDE)

Erika RUIZ SANDÓVAL

Adviser to the Undersecretary of Foreign Relations • Secretary of Foreign Relations

Gerhardt VEERKAMP

Managing Director • Grupo Veerkamp

Elizabeth Oswelia YÁÑEZ ROBLES

Chair of the German-Mexican Friendship Group • Chamber of Deputies

Mongolia

Temuujin KHISHIGDEMBEREL
Minister • Ministry of Justice

Zolzaya PUNTSAG
Chief Judge • Tenth Court of Civil Appeals

Chimed-Ochir BAZARSAD
Representative • WWF Mongolia

Jargalsaikhan DAMBADARJAA
Journalist

Tumen-Ayush JAMIYANSUREN
General Director • Hasu Megawatt LLC

Ninjarav ENEBISH
Dean of School of Civil Engineering and Architecture •
Mongolian University of Science and Technology (MUST)

Munkhtsetseg AMARJARGAL
Student • German-Mongolian Institute for Resources
and Technology (GMIT)

Morocco

Fouzia ASSOULI
President • Federation of the Democratic League for
Women's Rights (FLDDF)

Karim EL ASSEFRY
Ministry for Energy, Mining, Water and Environment
(AGDAL)

Rachid EL BOURY
Ministry of Higher Education, Scientific Research and
Management Training

Fatema MERNISSI
Author

Dr Maâti MONJIB
Political historian • Institute for African Studies,
Mohammed V University, Rabat

Netherlands

Rachaad BARRI
Compliance Professional • Rabobank

Prof. Dr Paul DEKKER
Head of Sector • The Netherlands Institute for Social
Research (SCP)

Hans DE KONING
Managing Director • Max Bögl Nederland B.V.

Juurd EIJSVOOGEL
Journalist • NRC Handelsblad

Marnix KROP
Ambassador (retired)

Gerbert KUNST
Director of European and International Affairs •
Ministry of Economic Affairs

Prof. Dr Ton NIJHUIS
Scientific Director • Duitsland Instituut Amsterdam

Norway

Trond-Olav DAHL
Projects Developer • Siemens plc

Runa EGGEN
Consultant within Travel and Tourism •
Innovation Norway

Sten Inge JØRGENSEN
Journalist and Author • Morgenbladet

Christoffer RAMBO
Professional Handball Player • GWD Minden

Maria VEIE SANDVIK
Curator • Gallerie Maria Veie

Trine Lise SUNDNES
Federation Chair • The Norwegian Confederation of
Trade Unions (LO)

Dr Asle TØJE
Director of Research • The Norwegian Nobel Institute

Dr Nils Morten UDGAARD
Journalist • Aftenposten

Petter VILSTED
Senior Sustainability Adviser • Norfund

Poland

Wojciech GRACZYK
Head of Regulatory Management and Legal Affairs •
RWE Stoen Operator Sp. zo.o.

Basil KERSKI
Director • European Solidarity Centre (ECS)

Dr Agnieszka ŁADA
Head of the European Programme •
Institute of Public Affairs (IPA)

Prof. Dr Krzysztof MISZCZAK
Chair • Foundation for Polish-German Cooperation

Dr Anna SOBECKA

Research Associate, Curator • Faculty of History (History of Art), University of Gdansk

Romania

Alina ENE

Adviser to the President • National Agency for the Roma (NAR)

Anca HOCIOTĂ

Manager of Membership Services and Vocational Training • German-Romanian Chamber of Industry and Commerce

Christian MATEESCU

Directorate for Commerce and International Relations • Ministry of Economy

Alexandru SAHIGHIAN

Translator • Romanian Writers' Association

Dan SUCIU

Government Spokesperson • Government of Romania

Prof. Dr Dr Adrian TANTAU

Dean of the Faculty of Business Administration in Foreign Languages • Bucharest University of Economic Studies

Russia

Svetlana BASTANZHIEVA

Director • Centre for the Development of Economics, Politics and Law

Dr Vladislav BELOV

Director of the Centre for German Studies • Institute of Europe of the Russian Academy of Sciences

Julia LARINA

Journalist • Moskauer Deutsche Zeitung

Dr Elena NEMIROVSKAYA

Director • Moscow School of Civic Education

Alexis PLATANOV

Director for Strategy and Operational Development • ERGO Russia

Elga SYKIJAJNEN

Consultant in the field of Law and Good Governance

Dr Dmitri TRENIN

Director • Carnegie Moscow Center

South Africa

Tuning LEE

Owner, Publisher and Editor • Kickstart Magazine

Dr Erich LEISTNER

Director (retired) • Africa Institute of South Africa (AISA)

Grace MATHLAPE

CEO • Love Life

Warren NEBE

Director of Drama for Life • University of the Witwatersrand

Yacoob ABBA OMAR

Director of Operations • Mapungubwe Institute for Strategic Reflection (MISTRA)

Dr Robin PETERSEN

CEO of the SAFA Development Agency • South African Football Association (SAFA)

Pieter ROTMANN

Consultant • Ernst & Young SA

Tanzania

Clara IBIHYA

Founder and Managing Director • Claphijo Enterprise Ltd.

Lusungu Leonard MBILINYI

Youth Programme Leader • Zanzibar Interfaith Centre

Rev. Dr Leonard MTAITA

General Secretary • Christian Council of Tanzania

Adelina NYAMIZI

Student at the Tanzanian-German Center for Eastern African Legal Studies • School of Law, University of Dar Es Salaam

Shafi Adam SHAFI

Writer

Deepesh SHAPRIYA

Filmmaker

Turkey

Ciğdem AKKAYA

Managing Director • Linkturkey

Hakan ALTINAY

President • Global Civics Academy

Prof. Dr Necdet BASA

Attorney at Law • Union of Turkish Bar Associations

Ecem CAGLAYAN

Archaeology Student • Trakya University

Halit ILGAZ

Regional Representative • International Transporters' Association (UND)

Ahmet E. MÜDERRISOGLU

Managing Director • Ankon Consulting

Müberra OGUZ

Head of Division • Ministry of Education

United Kingdom

Graham MEADOWS

Policy Consultant • European Union

Dr Julie SMITH, Baroness Smith of Newnham

Director of the European Centre at POLIS • Cambridge University, Member of the House of Lords

Harriet TORRY

Sir Peter TORRY

Former Ambassador to Germany

Halina WARD

Head, Development Futures • Bond

Peter WATSON

Journalist, intellectual historian and author

USA

John BRANDING

Director of Government Affairs • BMW

Robert FENSTERMACHER

President and CEO • Cultural Vistas

Dr Daniel HAMILTON

Director of the Center for Transatlantic Relations • The Paul H. Nitze School of Advanced International Studies (SAIS), Johns Hopkins University

Dr Jackson JANES

President • American Institute for Contemporary German Studies (AICGS)

Laura LANE

President of Global Public Affairs • United Parcel Service of America, Inc. (UPS)

Rebecca PAYNE

Graduate of the BMW Center for German and European Studies (CGES) • Georgetown University

Colin STACKHOUSE

Stephen SZABO

Director of the Transatlantic Academy • The German Marshall Fund of the United States (GMF)

Lynn TAYLOR

Senior Vice President, Head of Global Government Affairs and Policy • Merck Serono

Viet Nam

DANG Lien

General Department of Vocational Training (GDVT)

DUONG Thi Viet Thang

Deputy Director of Department of German Studies • Hanoi University

Dr LE Dang Doanh

Economist • Ministry of Planning & Investment (MPI)

Dr MAI Huy Tan

Chairman and Director • ViDeBridge Co

NGUYEN Dinh Chinh

Journalist • vnexpress.vn

Dr NGUYEN Thien Nhan

President • Vietnam Fatherland Front

TRI Minh

Discjockey

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(GIZ) GmbH
T +49 228 44 60-0 (Bonn)
T +49 61 96 79-0 (Eschborn)

Registered offices
Bonn and Eschborn

Friedrich-Ebert-Allee 40
53113 Bonn, Germany
T +49 228 44 60-0
F +49 228 44 60-17 66

Dag-Hammarskjöld-Weg 1-5
65760 Eschborn, Germany
T +49 61 96 79-0
F +49 61 96 79-11 15

E info@giz.de
I www.giz.de

Responsible for content

Dr Christoph Beier

Idea/Concept

GIZ AgenZ

Project team

Alexandra Behns, Dr Mike Enskat,
Thorsten Giehler, Dr Oliver Gnad,
Regina Kallmayer, Stefan Opitz,
Anne-Valerie Peters, Nina Sarrazin,
Jörg Schindler, Andreas von Schumann,
Philipp Schwörer, Nikola Seiler,
Dr Mischa Skribot, Katja Suhr,
Dr Sabine Tonscheidt

Text/Editing

Dr Jochen Köhler, Dr Sabine Tonscheidt

Translation team

GIZ Language Services, Janet Fraser,
Lynne Jagau

Design

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»In Germany, everybody takes their own tray back in the canteen. The Germans think it's important to accept responsibility for your own actions.«

South Africa

Deutsche Gesellschaft für
Internationale Zusammenarbeit (GIZ) GmbH

Registered offices
Bonn and Eschborn

Friedrich-Ebert-Allee 40
53113 Bonn, Germany
T +49 228 44 60-0
F +49 228 44 60-17 66

Dag-Hammarskjöld-Weg 1-5
65760 Eschborn, Germany
T +49 61 96 79-0
F +49 61 96 79-11 15

E info@giz.de
I www.giz.de