

GfK Verein

## Challenges of Nations 2015 – a GfK Verein study

From inflation to unemployment  
and right up to poverty





## Challenges of Nations 2015 – a GfK Verein study

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## Challenges of Nations 2015 – a GfK Verein study

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After the study *Challenges of Europe* was expanded to the *Challenges of Nations* in 2014, some further countries outside Europe were also included this year: In addition to the three BRICS countries Brazil, Russia, and South Africa, the population-richest democracy, multi-ethnic India, is now also part of this study by the GfK Verein, which examines the concerns of citizens and consumers worldwide. With South Korea, Indonesia and Iran, three further “Next Eleven Countries” have also been integrated into the *Challenges of Nations*.

With the integration of additional emerging market economies, the focus of concern moves away from topics dealing primarily with the maintenance of the respective economic prosperity levels and towards the problems of inadequate functioning of the basic services of a community, such as health, education, internal security, the supply of drinking water and electricity - and corruption. And one challenge, which has currently been lost from view in Europe and the United States, is gaining on a massive scale globally due to countries such as India, Indonesia or Iran: Anxiety regarding price development and the concomitant purchasing power of consumers.



The responses to this study make it clear how the significance of individual topics has changed over time in the public - and *published* - perception, for 25 years now in Germany, since the turn of the millennium in many other European countries, and currently in the global context of altogether 22 countries.

Due to recent events, this report also includes the results of a *Twitter analysis* on the following issues: Migration, immigration and asylum for Germany, Austria and Switzerland. In the three countries mentioned, these challenges take top spot in the list of concerns in 2015. Twitter has established itself in the last few years as an important political and journalistic platform for opinion-formers, and has now become indispensable as a source for traditional media such as print, TV and radio stations. This additional analysis (p. 100 ff) informs you of the type of content and the thrust of the debate, as well as the actors determining the public discourse on the issue of immigration, and who are therefore influencing the opinions of citizens.


Ronald Frank /// GfK Verein

# Nations at a glance /// Challenges 2015

## Top 10 – Summary of all countries


Weighted by population; (unaided replies; in %; rounded; multiple responses possible)



Price/ purchasing power development 32 

Education policy 10 


Unemployment 27 


Health service 09 

Corruption 20 

Traffic policy 08 

Crime 18 

Politics/ government 07 

Economic stability 11 

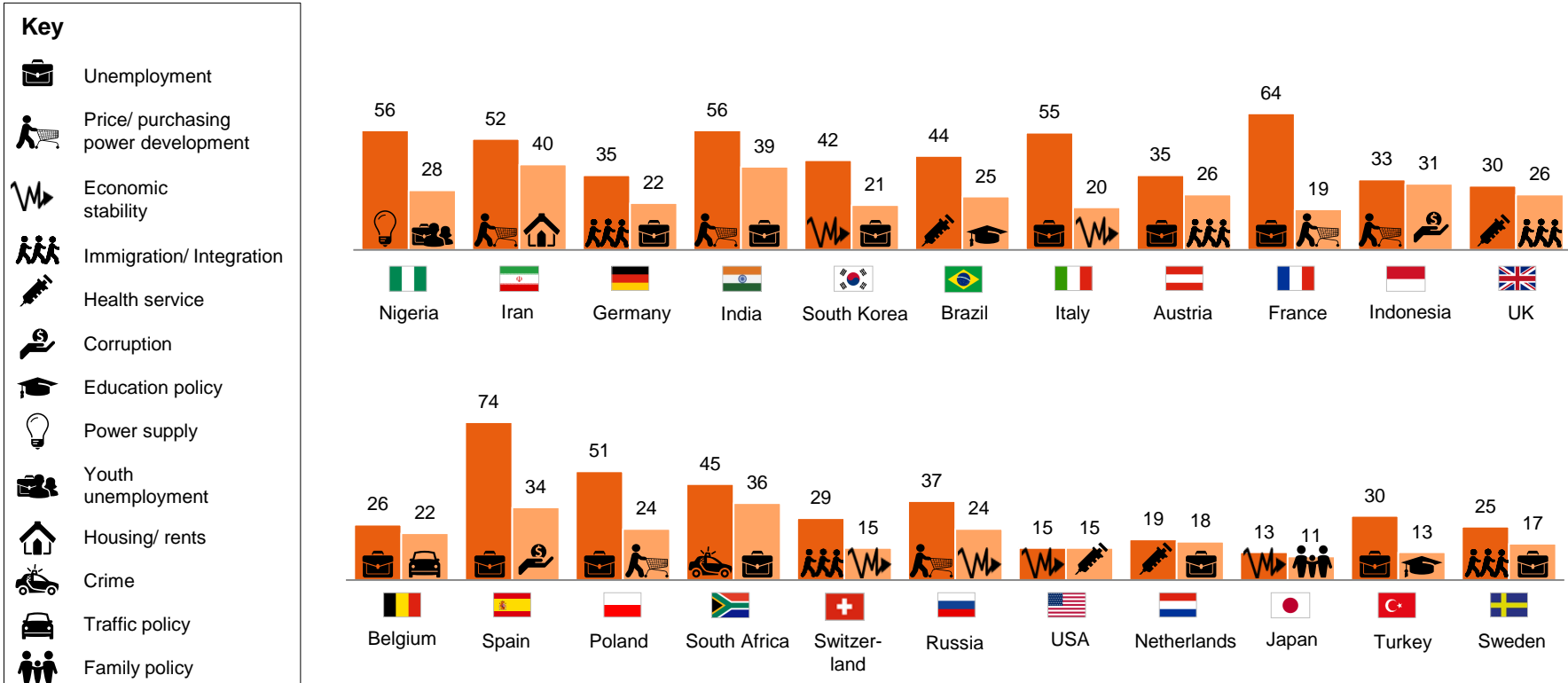
Poverty 06 

Basis: 25,454 resp.

# Nations at a glance /// Challenges 2015

## Top 2 of each country

(unaided replies; in %; rounded; multiple responses possible)



Basis: 25,454 resp.

# Nations at a glance /// Challenges 2015 (1)

## Top 10 Total – number of responses

(unaided replies; in %; rounded; multiple responses possible)



	Total	Nigeria	Iran	Germany	India	South Korea	Brazil	Italy	Austria	France	Indonesia	UK
Price/ purchasing power development	32	16	52	16	56	19	21	5	14	19	33	7
Unemployment	27	26	37	22	39	21	4	55	35	64	14	13
Corruption	20	26	7	0	36	4	20	11	2	0	31	0
Crime	18	23	1	10	31	20	23	15	7	14	12	9
Economic stability	11	7	4	15	6	42	2	20	12	9	17	8
Education policy	10	25	1	15	11	9	25	4	12	8	10	10
Health service	9	12	14	9	2	1	44	8	5	5	7	30
Traffic policy	8	27	1	5	15	0	4	0	1	1	8	5
Politics/ government	7	22	5	6	2	9	23	18	10	6	5	8
Poverty	6	13	7	15	6	7	1	4	4	7	8	6

Basis: 25,454 resp.

Total Nigeria Iran Germany India South Korea Brazil Italy Austria France Indonesia UK

# Nations at a glance /// Challenges 2015 (2)

## Top 10 Total – number of responses

(unaided replies; in %; rounded; multiple responses possible)



	Total	Belgium	Spain	Poland	South Africa	Switzerland	Russia	USA	Netherlands	Japan	Turkey	Sweden
Price/ purchasing power development	32	8	2	24	2	7	37	6	2	3	7	0
Unemployment	27	26	74	51	36	11	8	11	18	1	30	17
Corruption	20	1	34	2	14	0	4	1	0	-	0	-
Crime	18	12	2	1	45	4	1	5	9	1	5	1
Economic stability	11	9	14	10	1	15	24	15	9	13	10	5
Education policy	10	6	11	2	6	8	4	6	5	2	13	12
Health service	9	4	14	23	3	7	6	15	19	3	3	8
Traffic policy	8	22	0	1	1	6	4	1	4	0	4	0
Politics/ government	7	15	11	9	4	4	1	13	4	4	5	2
Poverty	6	13	4	2	7	3	1	4	8	3	1	2

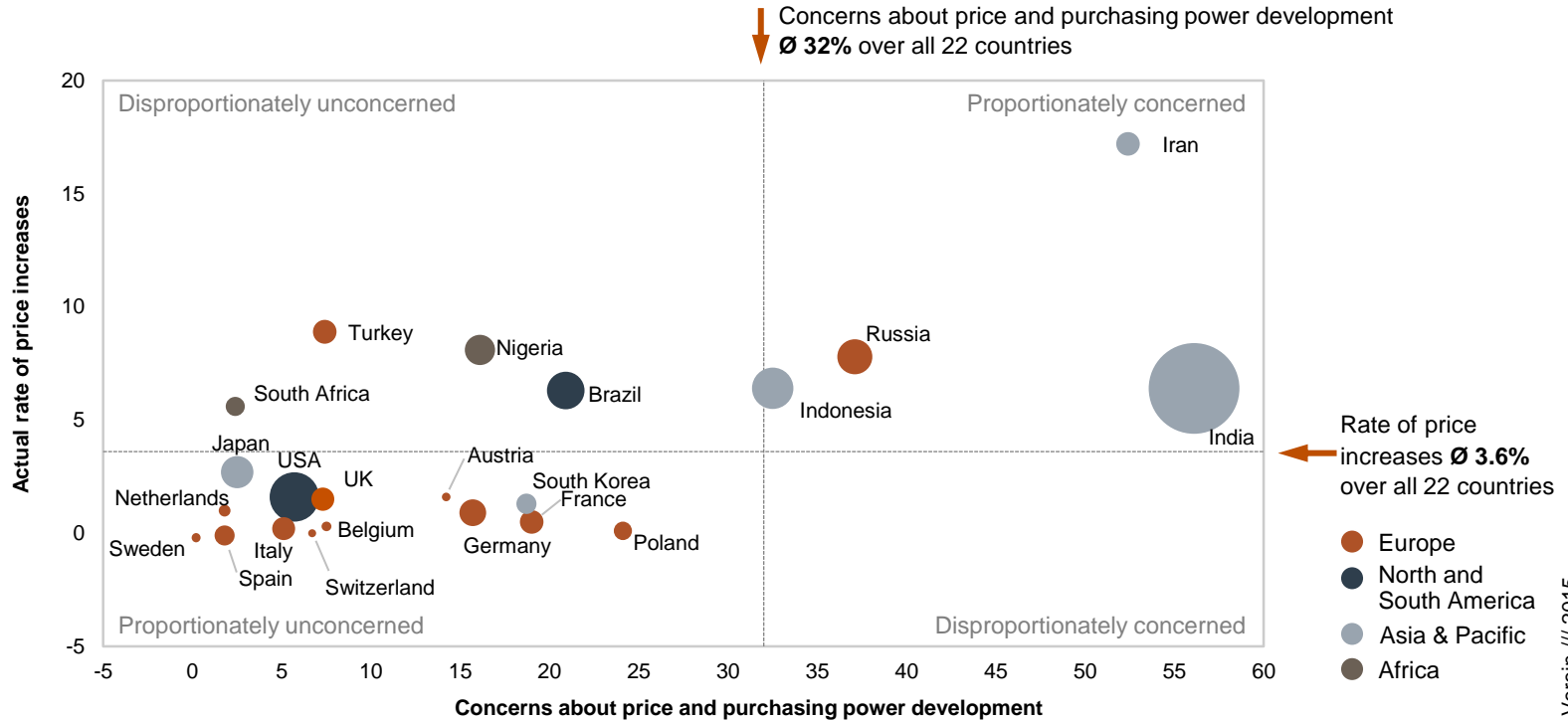
Basis: 25,454 resp.

Total Belgium Spain Poland South Africa Switzerland Russia USA Netherlands Japan Turkey Sweden



# Nations at a glance /// Comparison of concerns about price and purchasing power development with the actual rate of price increases\* in %

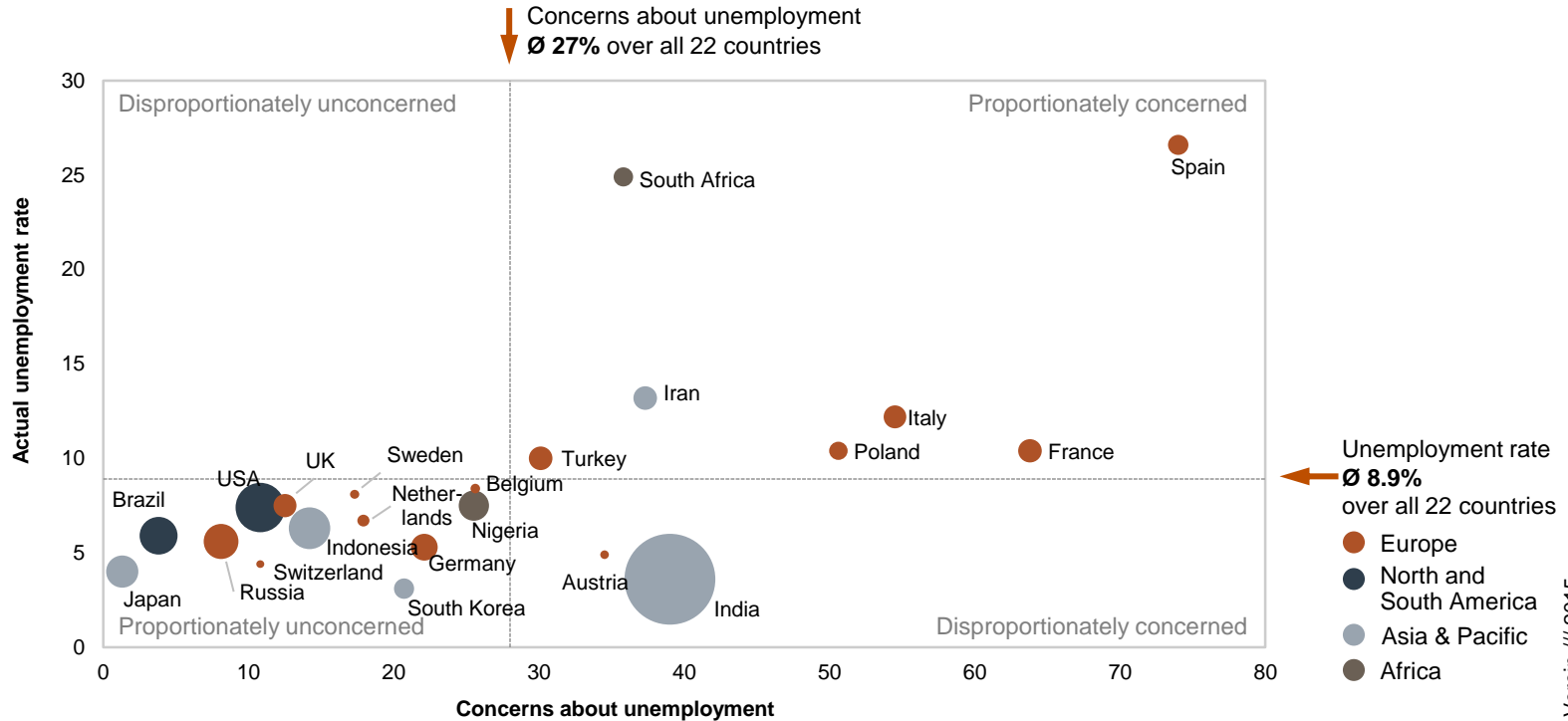
(Concerns about price and purchasing power development: unaided replies; in %; rounded; multiple responses possible)



Size of dots represents proportion of population  
\*World Bank (2014, as of May 2015)

# Nations at a glance /// Comparison of concerns about unemployment with the actual unemployment rate\* in %

(Concerns about unemployment: unaided replies; in %; rounded; multiple responses possible)

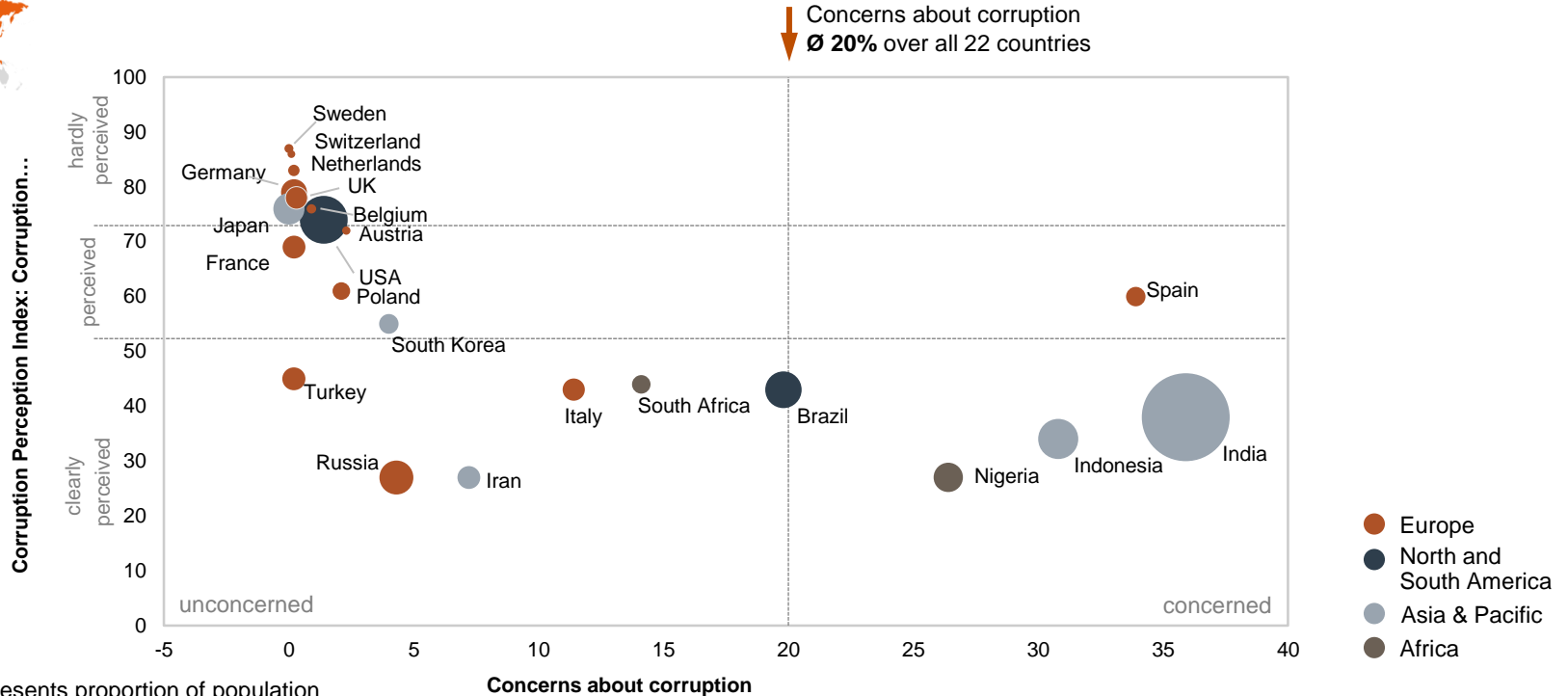


Size of dots represents proportion of population

\*International Labour Organisation (ILO) (2013, as of May 2015)

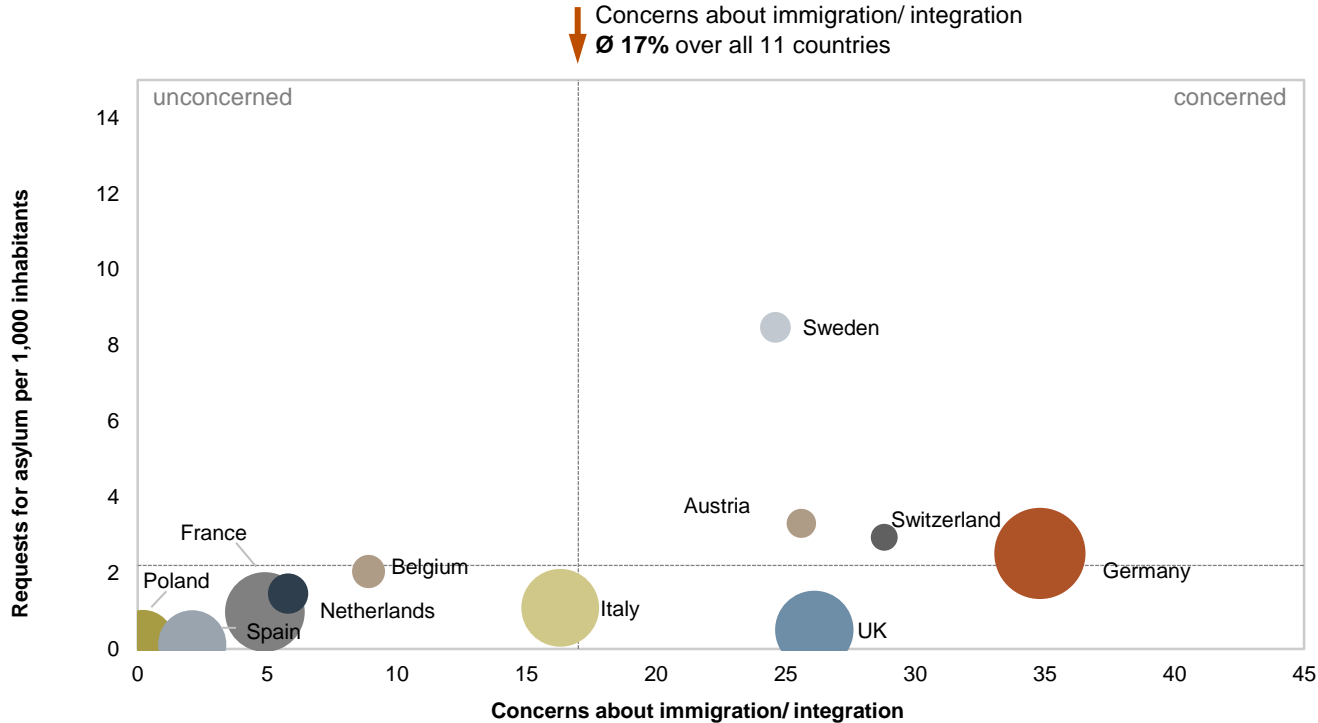
# Nations at a glance /// Comparison of concerns about Corruption with the Corruption Perception Index\*

(Concerns about corruption: unaided replies; in %; rounded; multiple responses possible)



# Nations at a glance /// Comparison of concerns about immigration/ integration with requests for political asylum\* in EU + Switzerland

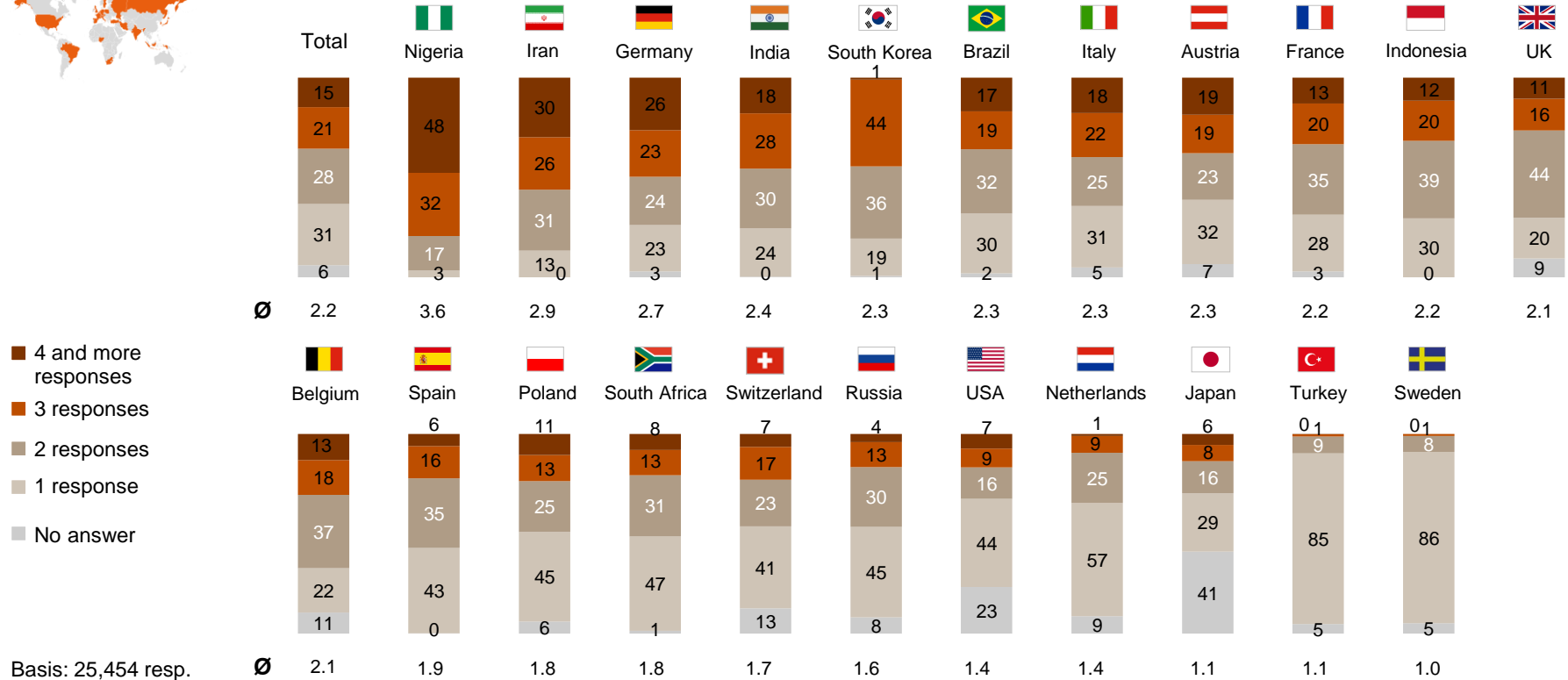
(Concerns about immigration/integration: unaided replies; in %; rounded; multiple responses possible)



Size of dots represents proportion of population  
\*Eurostat (as of May 2015)

# Nations at a glance /// Number of responses 2015

Number of problems mentioned per person and country in %



Basis: 25,454 resp.



The present study "Challenges of Nations" includes **22 countries** worldwide since 2015. Five Asian countries have been added: **India, Indonesia, Japan, South Korea, and Iran**. For the second time, the African continent is represented by South Africa and Nigeria, North America by the United States, and South America by Brazil. In **Europe**, Germany, France, Italy, Spain, Austria, Poland, Great Britain, Belgium, Russia, the Netherlands, Sweden, Turkey and Switzerland continue to be part of this study. In these countries, a representative total of 25,454 persons were interviewed. To facilitate a **global examination**, the results of the individual countries are shown weighted according to their respective populations. The responses therefore represent the societal, economic, and political challenges from the perspective of more than **two billion people** worldwide.

The international list of concerns in 2015 is headed by the **development of price and purchasing power**, at 32%. In four countries, this topic is seen as the greatest challenge, including India, Indonesia and Russia - three of the five most populous countries in this study. The greatest concern is in India (56%) and -

closely followed - in Iran with currently 52%. Inflation rates are correspondingly high there. For instance, the prices in Iran rose by at least 15% in 2014, the highest increase of any country in this study. Russia and Indonesia also have to contend with high rates of inflation (see page 9). This is also reflected in the extent of the concern - 37% in Russia and 33% in Indonesia - which also means this is the top concern in each country. However, as Japan shows, there is also an Asian country in which citizens have hardly any concerns - just 3%. And in Spain, the Netherlands, South Africa and Sweden, this issue currently plays a minor role.

In second place worldwide is **unemployment**, with 27%. This topic is the most important problem in seven of the 22 countries covered in 2015. At the top of the list of concerned nations is Spain, at 74%, followed by France at 64%. And at least half of the population in Italy and Poland see a need for action on the labour market.



Due to the high unemployment rates in the countries mentioned, this high level of concern is no wonder (see page 10). South Africa is a little unusual in this respect, because in this country with the second-highest comparative unemployment rate, the concern is at 36% significantly lower than, for instance, in Spain. At the other end of the scale are Japan and Brazil with just a few concerned citizens - and a relatively low unemployment rate.

The concern regarding **corruption** is in third place globally, at 20%. This topic is perceived as particularly challenging in India (36%) and Spain (34%). Above-average concern is also expressed by the population in Indonesia at 31%, and in Nigeria at 26%. According to the Corruption Perception Index, corruption is also clearly perceived in India, Indonesia and Nigeria - in Russia and Iran too, but the publicly expressed concern is less here (see page 11). Italy and Turkey are the only European countries in which there is also a clearly perceived corruption, although this concern is relatively low in both cases - 11% in Italy and less than one percent in Turkey.

Stepping up the fight against **crime** is currently demanded by

18% of citizens, placing it at rank 4 in the international comparison. This issue is only at the top of the list of concerns in South Africa, at 45%. However, 31% of people in India are also very concerned about this. This is followed by Nigeria, Brazil, and South Korea, each with around a fifth of concerned citizens.

Fifth place on the international agenda is the concern for **economic stability**, at 11%. For South Koreans, this is even the main concern in 2015, at 42%, as well as in the United States, at 15% and in Japan, at 13%. Economic development is also seen as a problem in Russia, at 24% and in Italy at 20%. In Indonesia, 17% of the population are concerned with this topic, and in Germany, Switzerland and Spain this also applies to about 15% in each case.

About 10% of people worldwide are concerned with **education policy** (rank 6). Nigeria and Brazil stand out here. In both countries, one quarter of the population criticizes the condition of education. In Germany, 15% see a need for improvement in terms of training and education. The people in Iran have expressed the least concern, with just 1% responses about this issue,



On the seventh spot of international concerns is **health service**; 9% are concerned about this. The greatest concern is in Brazil, at 44%, followed by the United Kingdom at 30% - and in both countries, this topic has top rank. In addition, around a quarter of Poles think their health system should be improved. Trailing at a distance are the Netherlands (19%), the USA (15%) and Iran (14%).

Concerns regarding **traffic policy** currently places this topic in eighth position of the problem list, at 8%. Nigerians are the most concerned, at 27%, similarly the Belgians, at 22%, although with different criticisms of the infrastructure.

Rank 9, at 7%, is occupied by concerns related to **politics and government**. Brazil and Nigeria lead the field here, at 22% and 23% respectively. But also 18% of Italians, 15% of Belgians and 13% of US-Americans see a need for action here.

Tenth place is occupied by concerns about **poverty** (6%). Once again, this concern is greatest here in Germany, at 15%, followed by countries as diverse as Belgium and Nigeria, at 13% each.

In the majority of countries, the fight against inflation, unemployment or another Top-10 challenge represents the main concern, but there are some exceptions to this: For instance, the **stability of the energy supply** is at the top of the list of concerns in Nigeria, at 56%.

In Germany, Sweden and Switzerland, however, **immigration or integration** is perceived as the most important issue. In total, just 4% of all countries list immigration as a main problem, although in Germany 35% of the citizens perceive a need for action here, as well as 29% in Switzerland and 25% in Sweden. Concern is also high in Austria, at 26%. In terms of the number of inhabitants, these four countries in Europe are currently faced with the most asylum-seekers (see page 12).





With the “Challenges of Nations” study, not only differences regarding the importance of the single topics can be interpreted between countries, but statements can also be made regarding the **diversity of problems** in the countries. The average number of problems perceived by the people in their respective countries varies between 1.0 and 3.6 topics per person. This enables conclusions to be drawn about the problem pressure in the countries, whereby cultural differences, such as the willingness to openly criticize, certainly play an important role as well. Cross-nationally, **an average of 2.2 topics** were criticised by those surveyed this year, just as in the three previous years.

By far the most problems, with an average of 3.6 responses per person, were currently expressed by the **Nigerians**. This is due to the fact that, in addition to the dominant topic of energy supply, five other topics were mentioned by at least one quarter of respondents. In newly surveyed **Iran**, citizens mentioned an average of 2.9 topics. Here, four topics from the top 10 list were given very high priority in at least a quarter of all responses.

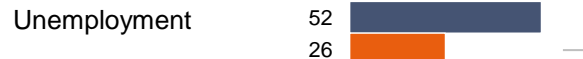
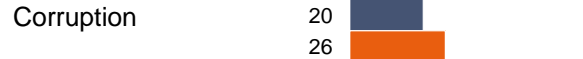
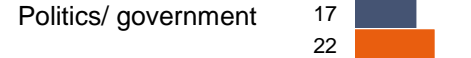
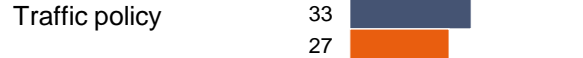
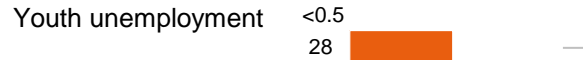
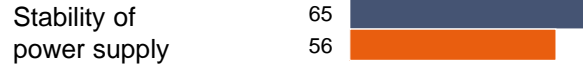
Once more, Germany proved to be the “most critical” European country. The respondents mentioned here an average of 2.7 problems, approximately as many as last year. There is also a slightly above-average problem pressure in the newly surveyed countries of India and South Korea, with 2.4 and 2.3 challenges mentioned.

In contrast, the lowest problem pressure was recorded for **Sweden, Japan** and **Turkey**, with 1.0 and 1.1 responses per person. Turkey also exhibits the most significant decrease, because last year citizens there listed 1.5 topics per person on average. Also in France, the number of topics per person decreased from 2.5 to 2.2. The greatest increase is in Austria (from 2.0 to 2.3 topics).

There are a number of very different reasons for these changes: In some countries, the people focus more on a specific, particularly important problem area. And in other countries, new or more varied topics arise. The following chapters describe the problems perceived to be most important by citizens in the various countries - also as perceived over the course of years.

# Nigeria /// Challenges 2015

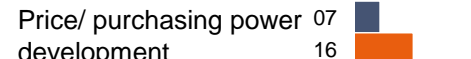
... % of respondents mentioned as the most urgent problem to be solved in Nigeria: (unaided replies; in %; rounded; multiple responses possible)



Unemployment  
Total  
2014: 52%  
2015: 53%

■ 2014  
■ 2015

Base 2015: 1,000 resp.





Nigeria, Africa's most populous country, remains economically, ethnically and religiously divided. The Boko Haram Islamic terror militia has put the country in a state of fear and anxiety for a long time. In attacks in January 2015 alone, hundreds of people were killed and thousands fled. This threatened internal security to such an extent that the presidential elections scheduled for February 2015 were postponed until the end of March. In this election, held approximately two months after the survey period of this study, the Muslim challenger Buhari replaced the previous Christian incumbent Jonathan. The new president is regarded as a decisive corruption opponent and has announced tough action against terrorism. Both of these topics can be found with an increase in concern among the top 10 challenges. And with an average of 3.6 challenges mentioned, Nigeria is also in first place in the global comparison of the 22 countries surveyed in 2015.

Position 1 on the list of concerns, just as in the previous year, is the stability of the **energy supply**, although compared to 2014 this concern has slightly decreased, from 65% to 56%. The private sector should be involved more closely in the development of the

electricity sector, which should result in a more stable power supply in the coming years. Electricity generation, at almost 5 gigawatt per year, is still low in relation to the total population. Power outages often last for hours, and companies must compensate primarily by using their own diesel generators.

An unvarying 53% of Nigerians in this year demand a fight against **unemployment**. 26% in total mentioned the issue of unemployment, putting it at position 5. The result shows a significant shift in the direction of **youth unemployment**, hardly mentioned explicitly in 2014, but now in second position at 28%. According to the ILO definition, the total unemployment rate in 2012 was 7.5%; the rate for 15 to 24 year-olds was significantly higher at 13.7%. The younger generation is therefore primarily affected by unemployment and lack of perspective. And more so in the northern regions than in the south with its rich oil reserves. However, even when people work hard, their earned incomes are hardly enough to survive for many of them. More than half of all Nigerians live below the poverty line, and the trend has been increasing in the last 10 years.



At currently 27%, the concern regarding **traffic policy** has fallen by 6 percentage points. The road network is in a poor state in the whole country, even in the economic centre in the Niger Delta. Thus, about 6% of the citizens criticize the transport infrastructure. During the election campaign, the new president Buhari announced the construction of new roads and motorways, so the situation may improve in future.

The issue of **corruption**, on the other hand, has gained in urgency: After 20% in 2014, currently 26% of Nigerians are concerned with this – and this means position 4. According to Transparency International, a CPI of 27 attests to a clear perception of corruption in the country. The new president Buhari, with his reputation as a fighter of corruption gained 30 years previously during the military dictatorship, was therefore able to score points with voters.

Increasing concern is also apparent with regard to **terrorism**. In this year, 17% of the citizens demanded the suppression of terrorism; in 2014, it was only 5%. As the military could do little against the last attacks of Boko Haram in the North of the country

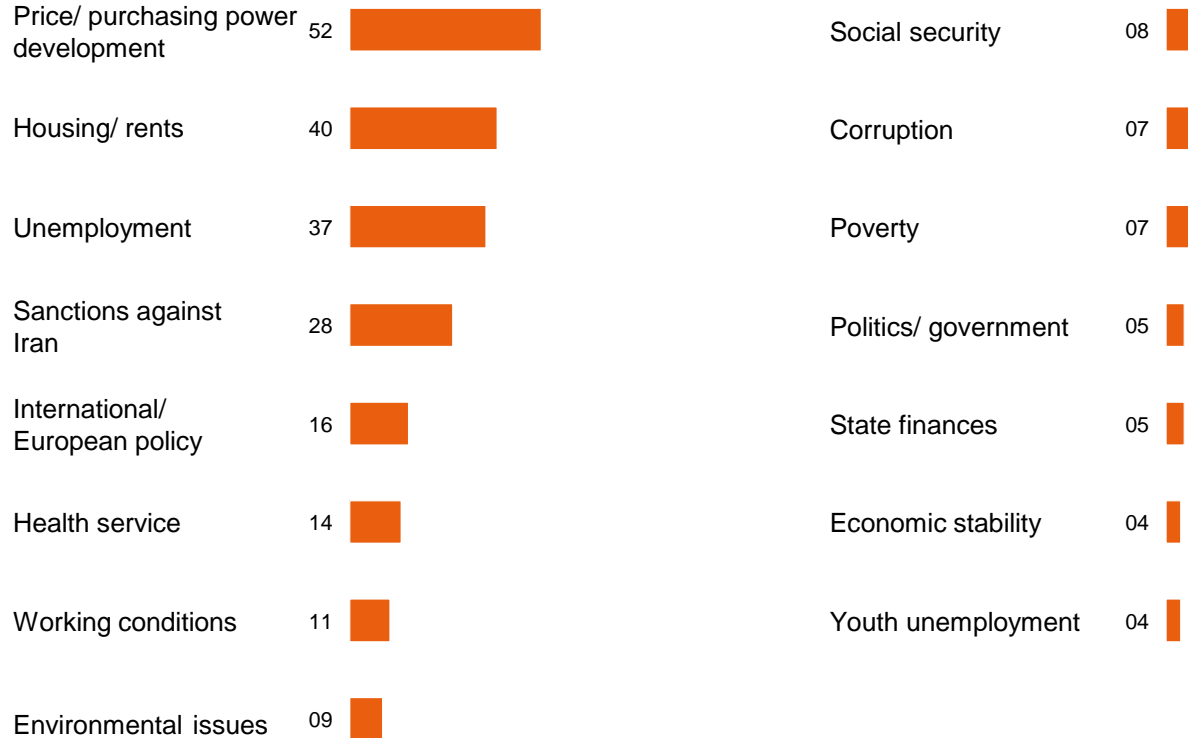
in January 2015, internal security was therefore the central election issue. However, concerns with regard to **crime** have fallen to the same degree - but these two topics have a close connection to each other in Nigeria. The original aim of the Boko Haram terror militia was the founding of a theocracy, but it is transforming itself more and more into a crime ring that finances itself by bank-robbery, kidnapping/extortion and arms trade. President Buhari's success will depend on whether he can fight terror more successfully than his predecessor.

Nigerians are also more concerned in 2015 with **prices** and **purchasing power**: This concern has increased by 9 percentage points to 16%, of which 8% is due to the price of gasoline. As in many emerging markets, petrol is heavily subsidised in Nigeria. However, the state can only afford this if revenues from the oil business, which account for 70% of all government revenues, continue to flow. Perhaps people fear that with the drop in the oil price, fuel could be significantly more expensive, even if on the face of it that seems paradoxical.

# Iran /// Challenges 2015

## Top 15

... % of respondents mentioned as the most urgent problem to be solved in Iran: (unaided replies; in %; rounded; multiple responses possible)



Base: 1,000 resp.



“A beacon of hope in a critical situation”, is the description of the Berlin Institute for Population and Development regarding the current situation in Iran, with its 77 million inhabitants. Almost all inhabitants are Shiite Muslims. Islam is also the state religion in the so-called Islamic republic, whose head of state the Ayatollah is the revolutionary leader for life. The Democracy Index 2014 lists the country under those with authoritarian regimes. The Iranian calendar lists the current year as 1394, and the fiscal year is from March to March. The following data from official statistics therefore relate to this period. Since the inauguration of the new President Rohani in 2013, the climate between Iran and the West has improved again and a lifting of the economic sanctions due to the nuclear agreement signed in July 2015 is now only a matter of time.

Economic isolation is therefore also the cause of the most urgent concern of Iranians, the **price and purchasing power development**, at 52%. This great concern is related to the high rate of inflation, which considerably increased in particular during the phase of economic isolation. According to the World Bank, this was approximately 39% in the fiscal year 2013. For 2014, a price-

increase rate of 15% was published in the Iranian media, but other estimates start at around 23%. Approximately every tenth person sees the high petrol prices as a problem. In 2014, the second stage of a subvention reform initially introduced in 2010 resulted in increases in energy and water prices. The abolition of subsidies was intended to stabilise the economy, to relieve the financial burden on the state, and to reduce energy consumption. However, these objectives could not be achieved so far, which is also due to the fact that the subsidies were replaced by direct payments that each citizen could apply for. So, although the state spends more than in the past for subsidies, fuels still appear to be too expensive in the perception of many Iranians.

Low and medium income earners are hit particularly hard by such high price increases. This is also surely why 8% of citizens are concerned about **social security**; this concern is therefore in position 9. And 7% of Iranians are explicitly concerned with regard to **poverty** (position 11).



The **problem of housing**, at 40%, is higher than in any other country in this study. Particularly in the big cities there is a shortage of affordable housing. For this reason, the government started a project for the construction of social housing, but it was stopped again in 2013. According to official information, it served the middle class more than the poor of society. The prices for large homes are now dropping, but the demand for small homes by young people is very high. Families on the other hand are moving to less urbanised surrounding areas, also because of the strong environmental pollution caused by traffic and smog in the cities. Perhaps this also is why 9% of Iranians mention **environmental protection** as an urgent task (position 8).

Another important topic in Iran is the labour market: **Unemployment** is a matter of concern for altogether 37% of the people, and a further 4% mentioned **youth unemployment**. According to the World Bank, the unemployment rate in Iran in 2013 was around 13%. According to official data, it is currently about 10%. And according to the Foreign Office, about three quarters of the unemployed are between 15 and 29 years old

although many young Iranians are currently studying, and they will enter the labour market in the next few years - and will then not be able to find an adequate job. These poor prospects mean that today many young people emigrate, and Iran now has the world's highest brain drain. In addition, 11% are concerned regarding **working conditions**; employment contracts in particular are mentioned as the problem here. For a long time, Iranian trade unionists and workers' organizations have criticized that more and more employers only issue fixed-term employment contracts.

An important issue is also the **sanctions against Iran**, which concerns 28% of the people. The reason for the approach of the West against the country are doubts about the peaceful nature of its nuclear program. Existing sanctions were expanded in 2012, especially affecting the oil and financial sector - and revenues from oil are the main source of revenue for Iran. Iran's foreign trade balance therefore indicated a deficit in 2013 for the first time in several years.



According to estimates by the Iranian government, GDP shrunk in 2012 by more than 5 percent, and the Foreign Office expects a further decline in 2013. A rapprochement with the West seems to be within Iran's grasp with its new president Rohani. For instance, the American President Obama has declared his willingness to enter into discussions with Iran, and recognized its right to the peaceful use of nuclear energy. In return, Rohani stressed a willingness towards more transparency. Additional progress was made by the journey of the Iranian foreign minister Zarif to the UN General Assembly in New York in 2013. The Atomic Energy Agency (IAEA) noted that the pace of uranium enrichment has slowed markedly. A joint action plan was decided together in Geneva in November 2013. It includes that the further expansion of the nuclear program is to be stopped, and the existing program partially reversed. In return, the sanctions would be partially suspended for the duration of the agreement. These measures were extended to June 2015 to facilitate further negotiations. As a result, the exchange rate stabilised, which in turn had positive effects on the economy. However, if no agreement is reached by

the end of June 2015, the Iranian foreign minister Sarif will refuse an extension of nuclear talks - although Rohani and Ayatollah Ali Khamenei have supported the negotiations to date.

The improvement in the climate between Iran and the United States does not just seem to be a pressing issue for the president, but also for the citizens: 16% mentioned **foreign, European and world politics** as a challenge and 6% explicitly addressed the relations with the United States.

The **health service** is in position 6 of Iranians' concerns, at 14%. For the citizens, the interest is focussed in particular on hospitals (8%). The equipment seems to be a problem here, because according to media reports, the hospitals often do not offer all of the required medical services under one roof.

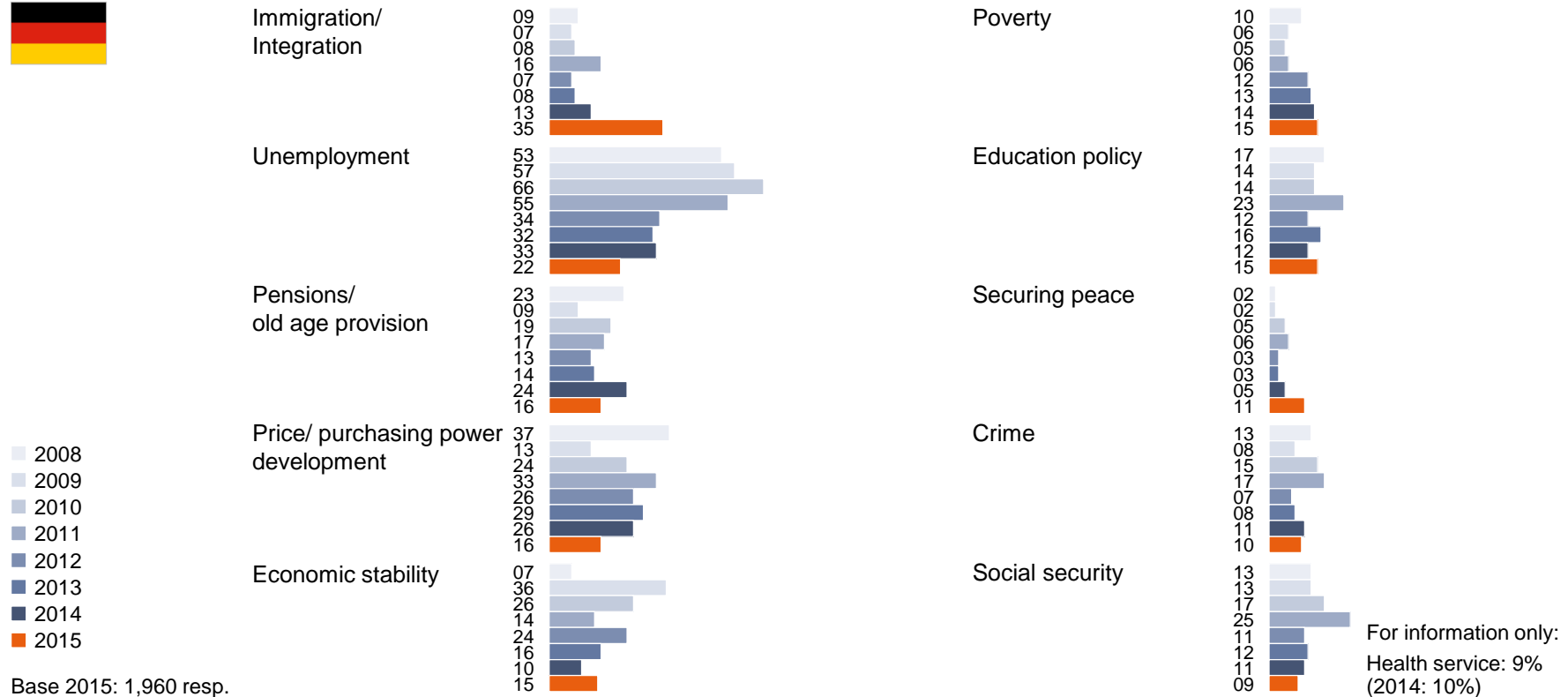
With almost three **concerns**, Iran is in position two in the international comparison of the concern ranking. The first place is held by Nigeria with 3.6 concerns, and in total the average is 2.2 mentioned problems per person.



# Germany /// Challenges 2015

## Top 10 – Overall assessment East/ West Germany

... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)

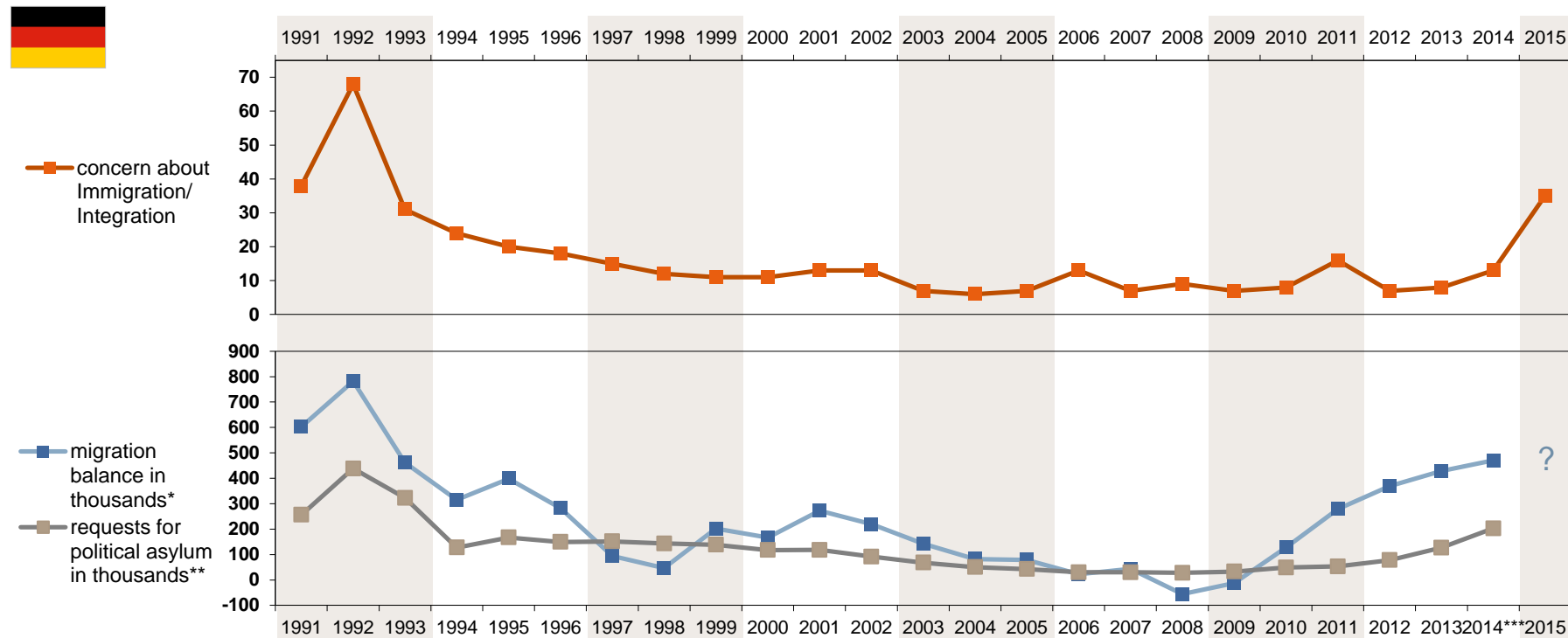


Base 2015: 1,960 resp.

For information only:  
Health service: 9%  
(2014: 10%)

# Germany /// Immigration/ Integration 1991-2015, 1992 and 2015 1st place: Comparison between concern and migration balance / requests for political asylum

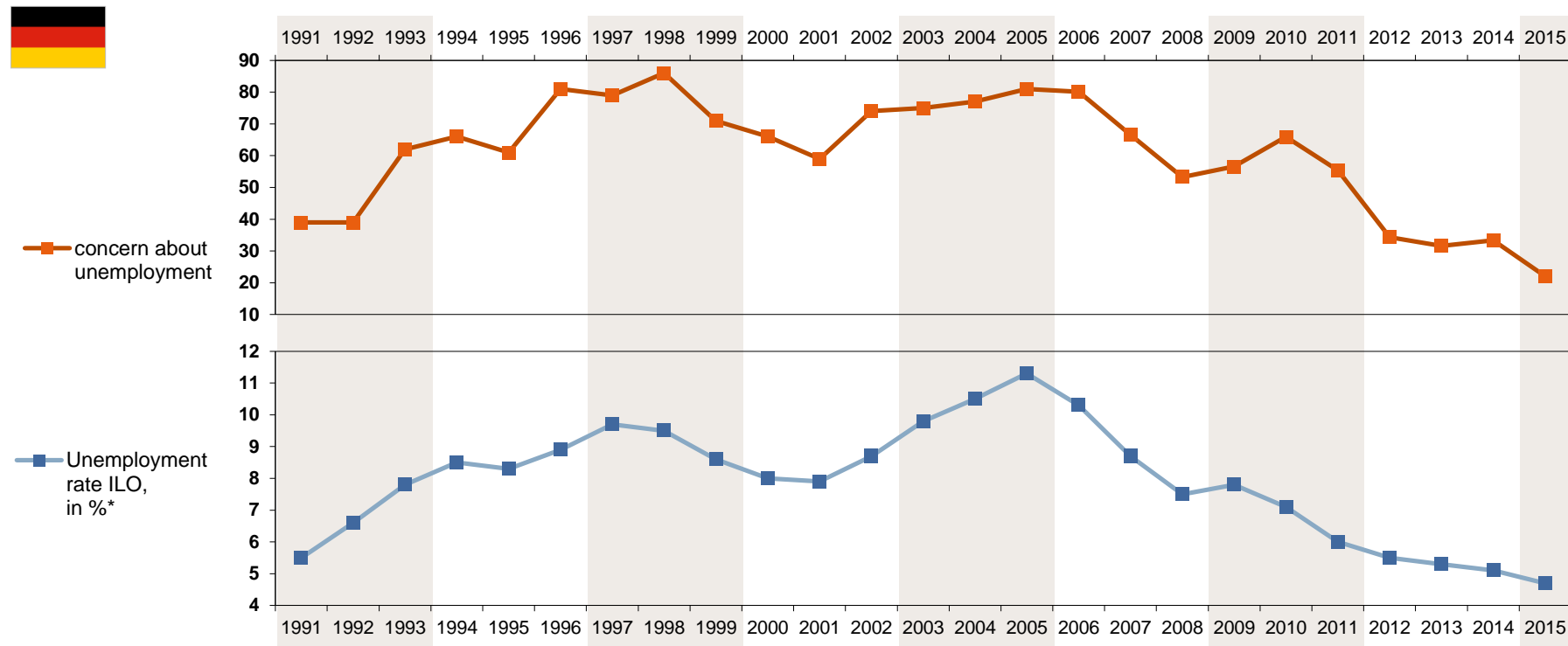
... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)



\*Source: Statistisches Bundesamt (German Federal Statistical Office); \*\*Source: Bundesamt für Migration und Flüchtlinge (German Federal Office for Migration and Refugees);\*\*\*anticipated minimum for 2014 according to a press release of the Statistisches Bundesamt on 02/21/15

# Germany /// Unemployment 1991-2015, 1st Place (except 1992 and 2015): Comparison between concern and unemployment rate

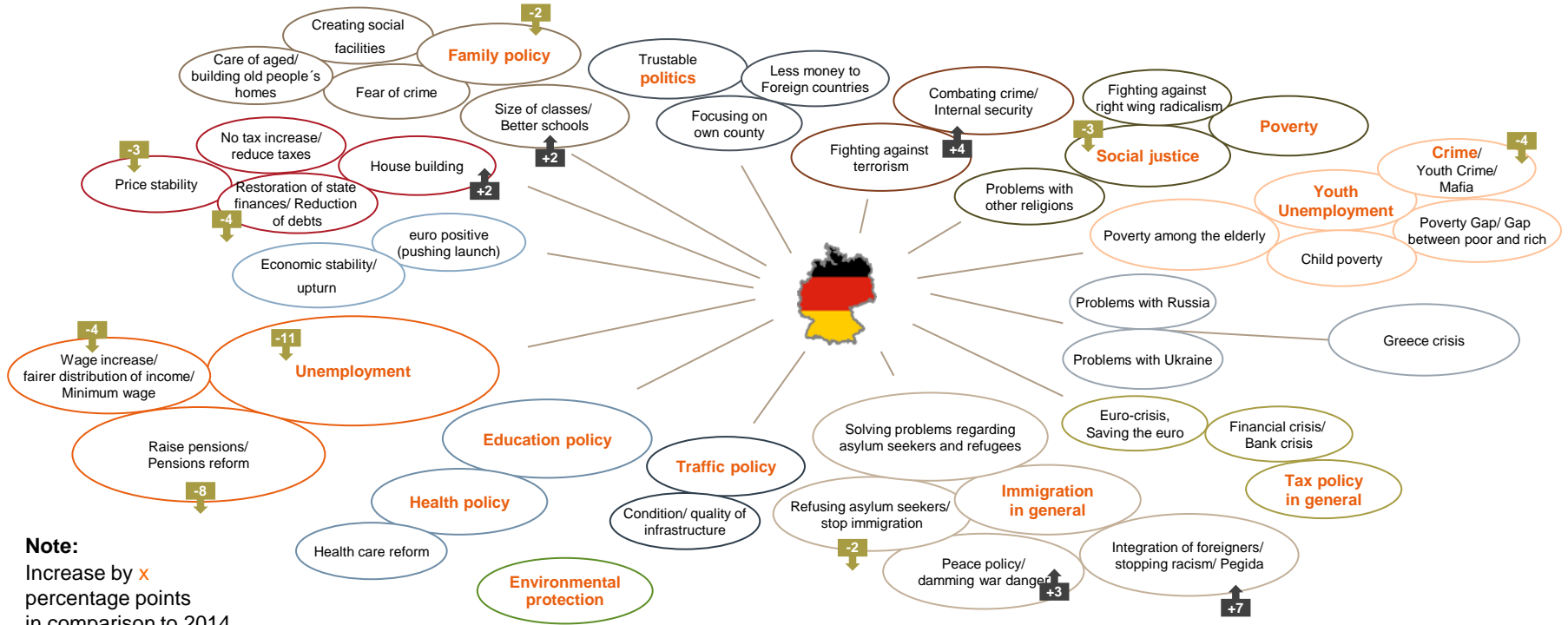
... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)



\*Source: OECD, value for 2015: as of January 2015

# Germany /// Challenges 2015

## Analysis of the „Semantic Network“



**Note:**  
 Increase by x  
 percentage points  
 in comparison to 2014  
 (only significant changes >1)

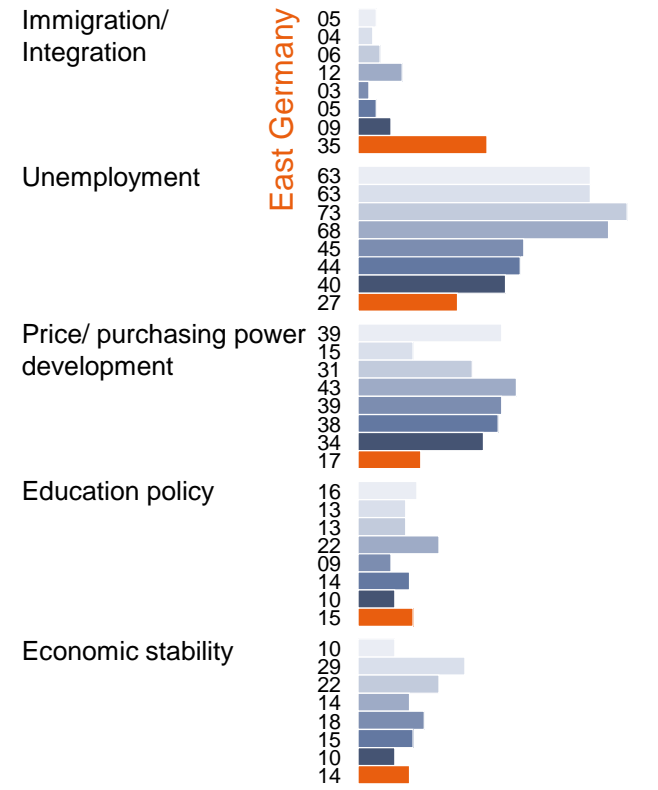
# Germany /// Challenges 2015

## Top 5 – East and West Germany

... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)



Base 2015: 1,960 resp.



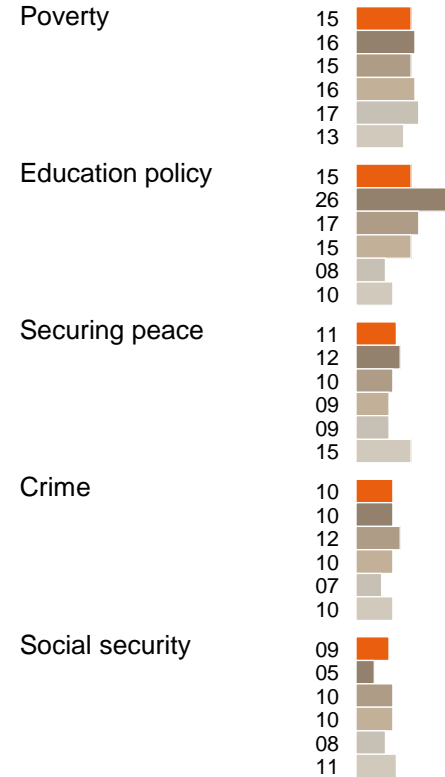
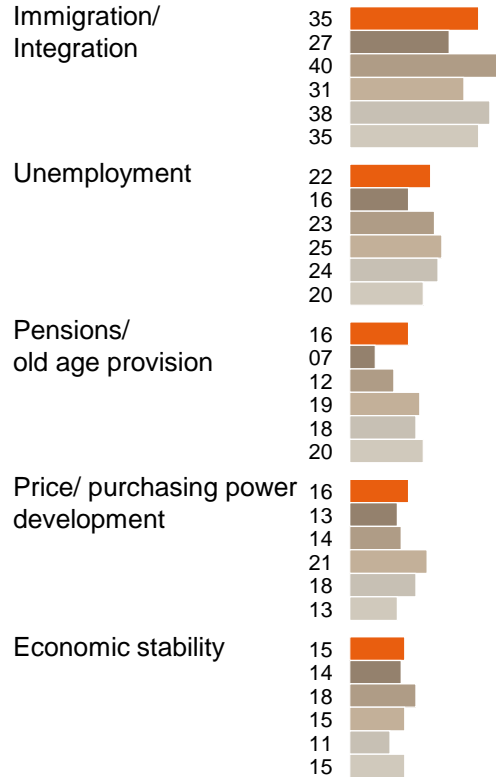
# Germany /// Challenges 2015

## Top 10 - Lifeworlds

... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)



- Total
- Young people in training/ students
- Higher social classes
- Middle social classes
- Lower social classes
- Pensioners



Base 2015: 1,960 resp.



This year, unemployment has been displaced from the top of the German concern ranking for the second time since 1990. And in both cases, the newly expressed main concern of Germans is: **Immigration and integration**. In 1992, 68% of the citizens were concerned about it. The reason for this at that time might have been the surge in the number of asylum seekers to 438,000 due to the Balkan Wars. Due to political crises and Islamist terrorism in the Middle East and in Africa, more refugees are now once again coming to Germany: While in 2012 there were approximately 78,000 asylum seekers, the number in 2014 has already increased to 203,000. Within the course of a single year, the concern of the citizens has almost tripled from 13% to 35%. The proportion of responses in which rejection and/or expulsion of asylum-seekers is explicitly demanded has however decreased slightly since last year (-2 percentage points), and is around 9% in 2015 - and has decreased significantly since the 17% in 1992. This survey doesn't indicate a majority of the population in favour of a general stop to immigration, such as called for by the Pegida movement. Since December 2014, demonstrations of this movement have

denounced the alleged Islamization of the West as a result of immigration. However, the number of participants has already decreased by the end of January 2015, and in many towns and cities there were just as large counter-demonstrations against xenophobia and for openness, hospitality and helpfulness. In this present study, the proportion of those demanding a suppression of xenophobia or better integration has increased strongly since last year, and represents just under 10%. Between these two positions, there are about 20% of responses that consider the introduction of an immigration law or voice concern about the refugee problem in general. The problem area is multifaceted: In September 2014, reports from North Rhine-Westphalia concerning abuses triggered a wide-ranging discussion about minimum standards and controls when accommodating refugees. And many first-reception centres are overcrowded, and cities and municipalities feel left alone when it comes to compliance with accommodation standards.



The previous top challenge, **unemployment**, is now in position 2 in 2015, at 22%. After a decline by eleven percentage points, this is the lowest value since the beginning of the survey. The same is true for the unemployment rate, which in a long-term comparison over the last 25 years is also at an all-time low of 5.0% (2014). The unemployment rate fell further in the second half of 2014, and was at just 4.7% in January 2015. Economists disagree on the further development of the labour market. On the one hand, the blanket minimum wage introduced at the beginning of 2015 might increase the number of unemployed. On the other hand, a continued robust economic activity is to be expected due to low oil prices and a weak Euro, which in turn increases the demand for labour. In addition, the demand for labour according to the Federal Employment Agency (BA-X job index) in spring 2015 was as high as never before within the last ten years.

Also considered significantly less urgent compared to last year is the topic of **pensions** and **old age provision**. 16% of the population are concerned with this in 2015, once more putting this topic in third place. The controversially discussed topics that heated

tempers last year were adopted within the framework of a pension reform in July 2014: This is the so-called “mother pension” and the deduction-free pension at 63 after 45 years of contributions. Thus, for the pension at 63, far more applications were received than previously assumed, which may burden the pension fund in future. However, because of surpluses, the contribution to the pension scheme has initially been reduced by 0.2% at the beginning of 2015. The further prospects are - at least in the medium term - not bad because in the Pension Insurance Report 2014, an average annual rate of increase of the pension by a sturdy 2% nominal is assumed for the coming years. Nevertheless, social organizations warn that on the long-term, the pension level will be reduced because the discrepancy between earned income and retirement income is growing.





Only 16% of Germans are currently concerned about **price and purchasing power development** (position 4). With a decrease of 10 percentage points, this is the lowest measured concern since 2009. The reason for this is likely due to the equally low rate of price increase. For instance, according to the OECD, prices in 2014 only rose by 0.9% in comparison to the previous year - with a decreasing tendency in the last few years. January 2015 even recorded a negative inflation rate of minus 0.4 percent. This is particularly due to the falling oil price, which has dropped by 19% in contrast to January 2014. However, what first appears positive for the consumer also inhibits the economy. In order to combat the risk of deflation and stimulate the economy, the European Central Bank decided at the end of January to provide the markets with money by purchasing bonds.

However, it is less the threat of deflation that worries Germans about **economic stability** in the current year. At 10%, this issue was in position 12 of the concern ranking in 2014 but currently, it is in position 5 at 15%. The growing concern is closely connected with the situation in Greece, explicitly mentioned by 7%

of respondents. The Greek Prime Minister Tsipras, newly elected on 25th January 2015 - and therefore just under 3 weeks before the start of this survey - already announced during the election campaign that he would loosen the austerity measures imposed by the EU and others, and would negotiate debt relief with Greece's international creditors. The general economic outlook for Germany is, however, rather positive: The growth rate of GDP was 1.6% in 2014. In addition, records from the ifo-institute and others indicate a positive picture of the German economy, and predict a sustained boom.

Despite the good economic situation, the Germans are concerned with **poverty**. Currently at 15%, this concern continues to increase slowly but steadily, and this topic is in sixth place. 6% of the population are explicitly concerned with poverty in old age. According to media reports, 3% of over 65-year-olds currently rely on additional state-aid, referred to in Germany as "basis subsistence income for the elderly".



Concerns about **securing peace** have also more than doubled. At 11%, this concern is back in the top 10 for the first time in 15 years, and is currently at position 8. In view of the Ukraine crisis and Russian policy, such concerns do not appear unfounded. For instance, the French President Hollande and the German Chancellor Angela Merkel spoke of the danger of a war at the gates of the European Union on the occasion of peace talks on the Ukraine conflict at the beginning of February 2015,.

But the Germans do not just look at the situation in Europe. 7% mention **international policy** as an important task, after just 4% in the previous year. This issue is therefore in position 12. Also the concern about **terrorism** is closely related to this. Although this is at position 14, a 6% increase shows an upwards trend of 5 percentage points compared with 2014. This growing concern may be due to the Islamic attacks on the editorial staff of the French satirical magazine Charlie Hebdo at the beginning of this year, or to the subsequent incoming terror alerts in the secret services, especially for Berlin and Dresden. But the causes of Islamic terrorism are due to the crises in the world - and this brings us full

circle to this year's main concern, **immigration**: The world is moving closer together, so the consequences of conflicts and disasters in other continents are also increasingly felt locally.

# Germany /// Main results (5)

## A comparison of East and West Germany



25 years after the reunification of Germany, there are still differences between the new and the old federal states with regard to the above-mentioned topics and the extent of concern - but also much common ground.

In both parts of Germany, the concern ranking this year is no longer spearheaded by unemployment, but by **immigration** and/or **integration**. The proportion of Germans concerned is 35% in both parts of the country, with a larger increase in the new federal states. In the eastern part of Germany, the proportion of those who want a stop to immigration is also slightly higher than in the west, where slightly more citizens are calling for improved integration.

The second position is also identical with the same concern in the two regions: **unemployment**. Despite the decline in the east and the west, the concern remains higher in the east, at 27%, than in the west, at 21%, thus continuing the trend of the last few years.

There are also differences in the third and fourth positions. While in the west of Germany the topic of **pensions and old age provision** is at position 3 with 16%, it is only at position 7 of the concern list in the east, at 14%. In the east, the third position with 17% is the concern about the **development of price and purchasing power**, which is only in position 6 in the west at 15%.

As in the previous year, **poverty** is in fourth position in the old federal states, while this topic is in 10th position in the east, at 12%. Here, **education policy** is in position 4, although there is a similar degree of concern in western Germany, at 14% (position 7).

There is more agreement on the 5th position: **Economic stability** is a challenge for 14% of Germans living in the east and 16% of Germans in the west, although the increase is slightly higher in the west than in the east.

# Germany /// Main results (6)

## By social grouping



Looking at the living environments of the citizens, there are both differences and similarities in the perceptions of these topics. Usually these can be tied to the living situations of the respective population group.

The issue of **immigration and integration** is seen as the biggest challenge in all living environments. At 40%, the proportion is highest in the upper social class. This is also the group that is most concerned about integration and that has the lowest proportion of immigration opponents. The latter is more frequent in the middle and lower social strata. Overall, the least concerned about this issue, at 27%, are those who are in education or training.

Regarding **unemployment**, the second-placed issue, all living environments appear almost equally concerned. Only those in education or training are (still) a little less concerned (16%).

As expected, **pensions** and **old age provision** are also less of an issue to people in training or education (7%), as well as those in the upper social class (12%).

16% of the German population has concerns regarding

current **price and purchasing power development**, whereby this is slightly more of an issue in the lower and middle social strata (18% and 21%).

In contrast, **economic stability** is only of concern to 11% of persons in the lower social strata, whereas in the upper strata, 18% mention this issue.

Concerns about **poverty** is relatively equal across all strata. Also, today's pensioners are a little less worried about this (13%), probably due to the still comparatively good pensions.

By a large margin, **education policy** is particular important for students and trainees (26%), while only 8% of people in the lower strata mention this issue.



For the German results, the semantic network is once more based on a cluster analysis. **Four different information items** are shown in the graph:

- The size of the ellipses indicates how often a problem is mentioned.
- The distance from the centre indicates when a topic was mentioned. This means if an “ellipsis” is located close to the centre, this topic is often mentioned first.
- The topics lying on a line from the centre and that overlap are often mentioned in conjunction with each other - therefore, they form a common group of concerns.
- An up or down arrow indicates whether or not the relevance of a topic has significantly increased or decreased compared to 2014.

In this year, more different groups of concerns can be identified than in previous years. On the one hand, this is due to the slight increase of problem pressure, currently at 2.7 topics mentioned per person, while the number of mentions was only 2.6 in 2014. On the other hand, concerns about the previously dominant issue of unemployment have decreased significantly, which means concerns of citizens are therefore wider-ranging. The larger clusters are described in the following.

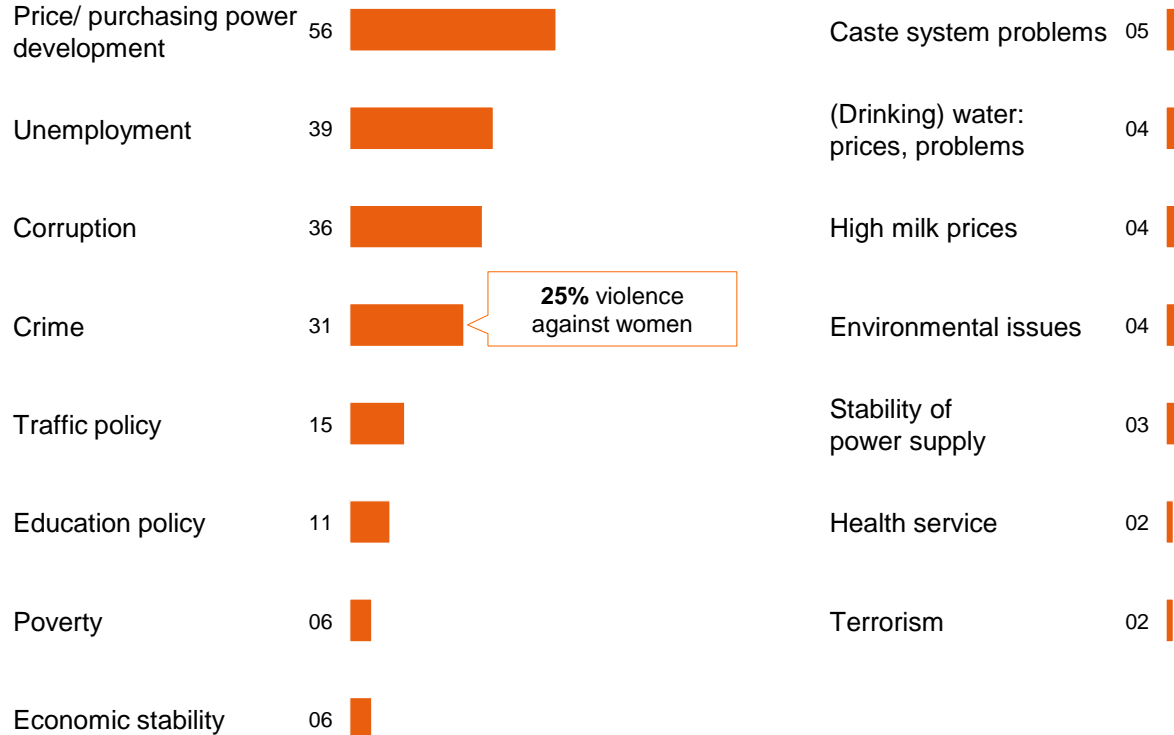
**Unemployment** is often mentioned in conjunction with pensions and the distribution of income. All single topics in this group of concerns at the bottom left are declining significantly. There is a large group of concerns on the top left, and it can be summarized with the keywords **family policy, care of aged and social institutions**. The fear of crime is also mentioned in this context.

There are two groups of concerns on the upper right dealing with all aspects of the issue of **poverty**. The upper group is more concerned with **social justice** as such, while the second group of concerns is more concrete: Here, **poverty among the elderly or child poverty** is a frequent topic in particular, but also the **gap between rich and poor** as well as **youth unemployment**.

On the bottom right you'll find the group of concerns clustered around the main concern of this year: The solution of the **refugee or foreigner problem** is often mentioned first. There is a significant decline in the demand for an **immigration-stop**. Instead, **integration** of foreigners and the **suppression of xenophobia** are mentioned significantly more often than in 2014,.

# India /// Challenges 2015 Top 15

... % of respondents mentioned as the most urgent problem to be solved in India: (unaided replies; in %; rounded; multiple responses possible)



For information only:  
Politics/ government: 2%

Base: 1,038 resp.



With the inclusion of India this year, the largest democracy in the world, both in terms of size and population, has become an integral part of the Challenges of Nations. Furthermore, the country is one of the most pronounced expanding economies in the world, even if the growth rate has decelerated since 2011 and was just 4.7% in 2012 and 5.0% in 2013 according to the World Bank. The concern for **economic stability** is currently in position 8, with a share of 6%. Although growth rates previously were temporarily even in the double-digit range, slower growth combined with a growing balance of payments deficit and high inflation are now causing economists concern. According to the OECD, the price increase was 6.4% in 2014, almost equivalent to a halving compared to the years since 2009. At 56%, **price and purchasing power development** is a concern of more than every second Indian. In addition, 4% of Indians have complained about the high **prices for water and milk** respectively.

In spite of the positive economic development, the expected effects on employment for the majority of the population have not been forthcoming so far. This might explain why the issue of

**unemployment** is in position 2, at 39%. Only few of the working population in India have contractually regulated working conditions. Most Indians work in the so-called informal sector, without any rights to social security benefits or old age provision.

The situation on the labour market also has an impact on another problem in India - **poverty**. 6% of Indians are concerned with this (position 7). Incomes have indeed increased with economic development, and about a quarter of Indians are now counted within the middle class. But according to a poverty report from 2014, about a third of the Indian population lives below the poverty line. The enormous disparities between the urban middle class and the predominantly poor rural population has increased, despite the strong economic growth of recent years. The majority of the population works in agriculture, but this only contributes 14% towards the GDP. The services sector, however, contributes 60% towards the GDP, but only has a share of 30% of employees.



The fight against **corruption** is another central task from the point of view of the people of India; this topic is the focus for 36%. This is no coincidence, since a Corruption Perception Index of only 38 points in 2014 means a clearly perceived corruption. However, policy initiatives have already been introduced. Anti-corruption legislation therefore came into force in January 2014, establishing ombudsman locations to investigate corruption allegations against ministers, members of parliament and officials. In addition to the parties INC and BJP, the popular activist Hazare has also supported the law, calling attention to widespread corruption with demonstrations and hunger strikes since 2011. For the previously ruling INC party however, the law it initiated apparently came too late, because new prime minister Modi was able to gain points in the election campaign as a fighter of corruption. According to media reports, the climate in government circles has already significantly changed within a year, and become noticeably more transparent.

**Crime** is also a challenge to be solved urgently for almost every third Indian. Violence against women is viewed as particularly challenging (25%), and is mentioned explicitly by both women and

men alike. Violence against women in India, and also internationally, has already caused massive protests. The most common crimes are rape, trafficking in human beings and acid attacks, intended to make the victim "socially dead". To be able to combat this type of crime more effectively, the Indian government is planning the creation of special operations forces and the establishment of special courts for faster sentencing of the convicted offenders.

A further problem area in India, for 15% of its citizens, is **traffic policy**. In addition to chronic traffic congestion, the condition and cleanliness of the streets is also an important issue. With the five-year "Clean India" campaign started at the end of 2014, the new government wants to ensure better hygiene and cleanliness in the whole country. The long-term goal for India is to overcome its image as one of the dirtiest countries in the world.



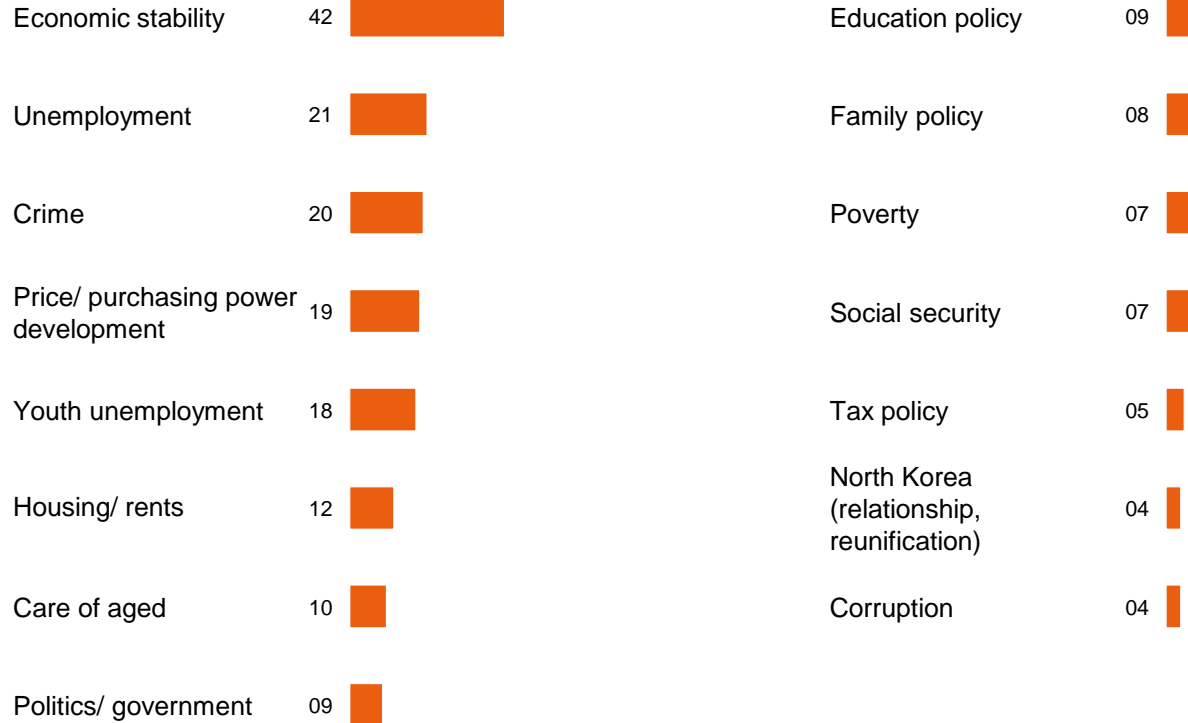


Around one in ten Indian citizens expressed their dissatisfaction with **education policy**, which is in sixth position of their concern list. Most recently, the higher education sector has been expanded considerably, and in primary education the literacy levels, at 73% in 2011, have been increased. The schools seem to present a problem, however: There has been a constitutional right to education since 2010, but in public schools this has led to a measurable drop in the levels of performance. As a result, all families that can afford it send their children to private schools. This development, however, reduces the chances of social advancement through education, chances that are absolutely necessary in the face of prevailing poverty.

# South Korea /// Challenges 2015

## Top 15

... % of respondents mentioned as the most urgent problem to be solved in South Korea: (unaided replies; in %; rounded; multiple responses possible)



Base: 1,514 resp.



The assessment of South Koreans regarding the most important tasks currently in need of solving in the country is now available for the first time in 2015. South Korea is today a wealthy and mobile industrial society with many Western influences, as well as one of the worlds most important high-tech locations. Its journey there was rapid, because as late as in the early 1960s this mostly agrarian country counted among the poorer nations of the earth.

With the division of the country into communist North Korea and the Republic of Korea, the consequences of the Korean War are still being felt today. The constant threat posed by its neighbour - as late as 2014, there were border crossings by North Korean ships, missile tests were carried out and there were vociferous accusations of espionage - leads to a policy of confidence building and military deterrence at the same time. A medium-term political aim is the stop of the North Korean nuclear program. In the long term, however, it is the reunification of the two Koreas. Among the top 15 of explicitly mentioned problems therefore, at 4%, is also the relationship to **North Korea**.

The positions at the top of the agenda, however, are occupied by economic topics: In position 1, at 42%, is **economic stability**. South Korea's economy is strongly export-oriented. Although the country was therefore hard hit by the global economic and financial crisis of 2008/2009, it has recovered well from the slump. According to the World Bank, GDP grew by 3.3% in 2014, and a similar positive development was visible in the previous years (2013: 2.9%, 2012: 2.3%, 2011: 3.7%). But there are also drawbacks, such as the demographic development: According to OECD forecasts, South Korea's society is ageing at a faster rate than any other highly developed industrial country and - comparable to Japan - this will have both social and economic consequences. In addition, the dependence on exports, which account for approximately half of GDP, as well as the dominance of large conglomerates and/or family businesses, should also be mentioned. The abandonment of this industrial system of "Jaebeols", to which, for example, Samsung or LG belong, and toward a knowledge-intensive society based on services will be one of the tasks required to secure future economic success.



At some distance, the next four positions are occupied by topics each mentioned by approximately one fifth of the citizens. Position 2 on the list of concerns of South Koreans is **unemployment**, at 21%, and at fifth position the special concern regarding **youth unemployment**, at 18%. According to the OECD, the unemployment quota remained static in 2014 with just 3.5%, a low figure compared with other industrialised nations. For the under-25 year-olds, the proportion of job-seekers has remained relatively stable, but is significantly higher than in the total population. One reason for this could be **education policy**: An important objective for pupils is to enter a renowned university, and they work toward this with great effort. The number of university graduates is correspondingly high. However, it is well-qualified skilled workers what is rather needed. A study by SERI, the research institute of the Samsung Group, even speaks in this context of "over-education". In a society in which social status strongly depends on the workplace and formal education, in which much has also been invested, it is fatal for the individual if this aspired goal is not reached. Appropriate measures have already

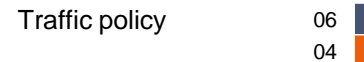
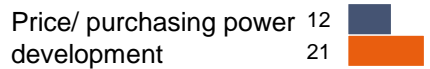
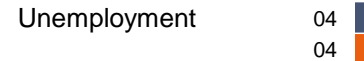
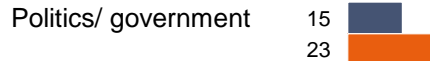
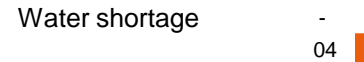
been initiated with the introduction of a dual Masters training according to the German model. However, it will take some time before there is societal acceptance of this new joint education and training method.

The third position on the list of concerns, at 20%, is **crime**. Overall, the crime rate in South Korea is low, but the desire for greater crime prevention is mentioned more often in large urban centres such as Seoul, Daejeon, Chungnam and Gyeonggi.

The development of **prices** and **purchasing power** concerns 19% of Koreans, placing this in position 4 of the concern ranking. The price-development rather worried the people in the large cities, in a similar way as unemployment and the **housing problem**, which comes in at position 6, at 12%. Prices rose in 2014 by just 1.3% compared to 2013, so the price increase has slowed compared to previous years. But for a long time now, wage increases have not been able to keep up with prices, resulting in a falling purchasing power.

# Brazil /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in Brazil: (unaided replies; in %; rounded; multiple responses possible)



■ 2014  
■ 2015

Base 2015: 1,000 resp.



At the top of the list of Brazilian concerns are the same three topics as 2014, but with decreasing concern. This visibly reduces the distance to the ensuing topics, whose importance is therefore increasing. The most important issue in 2015 remains the **health service**, although the concern has dropped by 11 percentage points to 44%. In particular, waiting times for treatment have become shorter, because compared with the previous year, only 7% explicitly complain about it. With the “Mais Medicos” program, which commenced in 2013, the government wants to create new places for medical students and to enhance specialist medical training. Additionally, more than 14 thousand mostly Cuban doctors have been fetched into the country, with priority in the rural regions. This means that by now primary health care is ensured for 50 million people. According to a survey, about 80% of patients are satisfied with this program. But the use of the Cuban doctors has been criticized as a form of modern human trafficking, because they were sent by their government and their salaries are paid directly to Havana.

In second position of concerns is **education policy**, which at 25% has decreased by 7 percentage points. After the population demanded an education reform during the protests of 2013, President Rousseff responded and conceded education a higher priority. In addition, a law was passed by which the revenue from the income from the oil fields off the coast of Brazil is to be used for education and the health service.

At 23%, concerns regarding **crime** came in at third position. It was therefore overtaken by education policy, and has fallen by 9 percentage points compared to 2014. However, this does not necessarily reflect an actual decline in crime. Most likely, this decrease is also an indication that because of the World Cup and the many international visitors last year, internal security was particularly strongly in political focus. The further development remains to be seen, especially with regard to the Olympic Summer Games, to be held in Rio de Janeiro in 2016. The murder rate in Brazil, however, still remains more than ten times higher than in Western Europe.



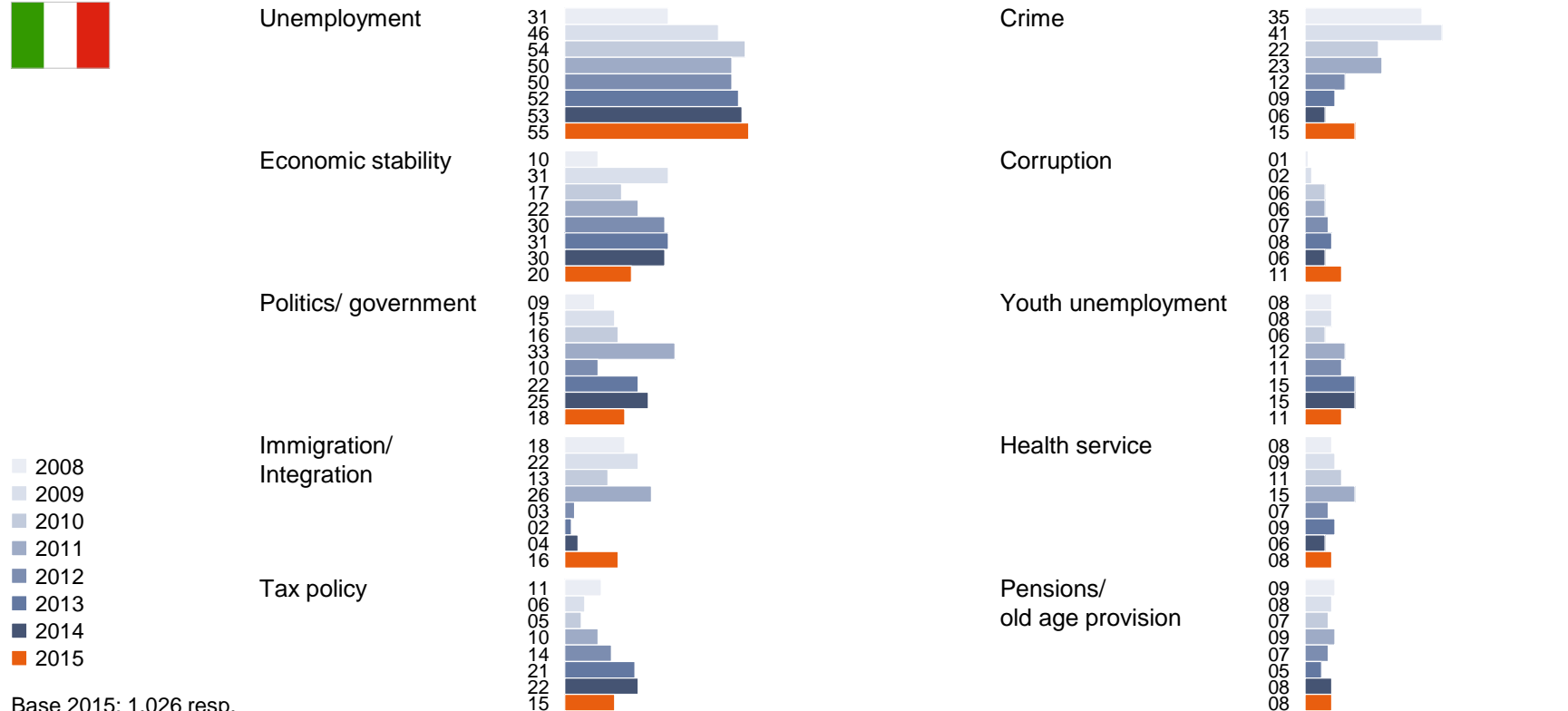
The criticism of **politics** and **government** is once again in position 4 in 2015, but this concern has increased by 8 percentage points to 23%. After President Rousseff just barely emerged as the winner in the October 2014 elections, she is now increasingly confronted with the dwindling confidence of the population. She and her government have been accused of involvement in the corruption scandal around the semi-state-controlled energy company Petrobras. This company bought a refinery in the United States at an inflated price in 2006, resulting in a loss of about one billion US dollars. Petrobras is also being investigated for accepting bribes, and because of its campaign contributions to the ruling party. Rousseff was a member of the Management Board of Petrobras from 2003 to 2010. Concerns with regard to **corruption**, at 20%, therefore occupies position 6 on the list of concerns - a measurable increase. Even the anti-corruption law passed in 2014 could not reduce the clearly perceived corruption (CPI of 43 points). Because of this corruption, and the rising cost of living, hundreds of thousands called for the resignation of the President during demonstrations in April 2015, i.e. after this survey.

In the light of these protests, the concern regarding **price** and **purchasing power development** in 2015 is understandably increasing, and is currently in position 5, at 21%. The expenditure programs of the government, high food prices and the devaluation of the Real have ballooned inflation. Already in 2013 and 2014, according to the OECD, inflation was over the 6% mark, and in February 2015 it rose once more to 7.7%.

The months-long drought, especially in the south-east, probably explains why the concern regarding **water shortage** climbs directly into the top 10 this year (position 8), at 4%. Especially in the big cities of São Paulo and Rio de Janeiro, the water reservoirs and dams are empty after months of drought and/or extreme heat. This is alarming, because 75% of Brazil's electricity is generated from hydropower. One hydroelectric power station had to be already switched off. This worst supply crisis in Brazil's history can be attributed to excessive water consumption, a dilapidated piping system with annual seepage of 40% - and the deforestation of the rainforest.

# Italy /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in Italy: (unaided replies; in %; rounded; multiple responses possible)



Base 2015: 1,026 resp.





Together with Spain, France and Poland, Italy is one of the European countries in 2015, in which the concern for the jobs has strongly displaced all other issues. **Unemployment** therefore remains the undisputed leader on the list of Italian concerns also in 2015: 55% of citizens are concerned about the situation on the labour market. This concern has once more risen by 2 percentage points, exceeding the previous peak from 2010. In fact, there is no sigh of relief when looking at the development in the number of unemployed: The unemployment rate in 2012 once again reached the 10% mark for the first time since the turn of the millennium, and continued to increase to reach a record level of 12.7% on an annual average in 2014. The job situation of under 25 year-olds is even worse: Here, the share of the unemployed in 2014 was 42.7%, also a record high. The explicit concern about **youth unemployment** declined by 4 percentage points to 11%, but this is more due to the fact that concerns have now shifted to other topics, such as immigration from the Mediterranean Sea.

For the fourth time in a row, **economic stability** is in second place in the Italian concern ranking. However, only every fifth Italian

expressed concern about the economic situation, which is a reduction by ten percentage points compared to 2014. Economic structural reforms of recent years are beginning to bear fruits, so the economy seems to be slowly recovering. The gross domestic product in 2013 recorded a decline by 1.7%, but in 2014, it only recorded a very low value of minus 0.4%. Besides, in December last year, the Standard & Poors rating agency predicted a growth of 0.2% for 2015. This would mean a small level of growth for the first time after three years of recession.

After a continuous increase in displeasure with **politics** and/or **government** since 2012, the situation here has also relaxed in comparison to the previous two years. The concern is significantly reduced by 7 percentage points to 18%, but still occupies third place.



The Italian Government approved the 2015 budget at the end of last year. The new “stability law” adopted by the head of government Renzi and his cabinet provides for tax cuts of 18 billion Euro. According to Renzi, this is the largest tax reduction ever enacted by an Italian Government. This tax relief is aimed in particular at the lower income groups and companies. This tax relief should not only have a positive effect on the image of the government, but it will also have reduced again concerns regarding **tax policy**. This concern has decreased in comparison to the previous year by seven percentage points, to 15%.

Positions four, six and seven are occupied by three topics have noticeably increased in importance within the space of a year. For example, the issue of **immigration** and **integration** has been catapulted with a jump from 4% to 16% from position 12 to position 4. Due to the constant flow of immigration to Italy, this rapid increase in concern is not surprising. As one of the central reception centres in Europe, immigration presents an almost impossible challenge to Italy. According to the Italian Interior Ministry, more than 170,000 refugees arrived on the coasts of the

country in 2014. The state program “Mare Nostrum” for the safe passage of refugees was cancelled at the end of 2014. The program cost the government about 100 million Euro per year, and has contributed to the rescue of about 100,000 lives. Because a reduction in the influx of refugees is not to be expected in the medium term, Italy is calling for a European solution to these challenges. The EU special summit of April 2015 indicates just how difficult this task will be: There was consensus among the countries that traffickers had to be fought harder, and a tripling of the funds for refugee aid was also agreed upon. But in many other aspects of asylum and refugee policy, in particular regarding a refugee quota, European countries have widely diverging views. Whether under these circumstances the situation for Italian citizens becomes less of a concern in future, remains to be seen.

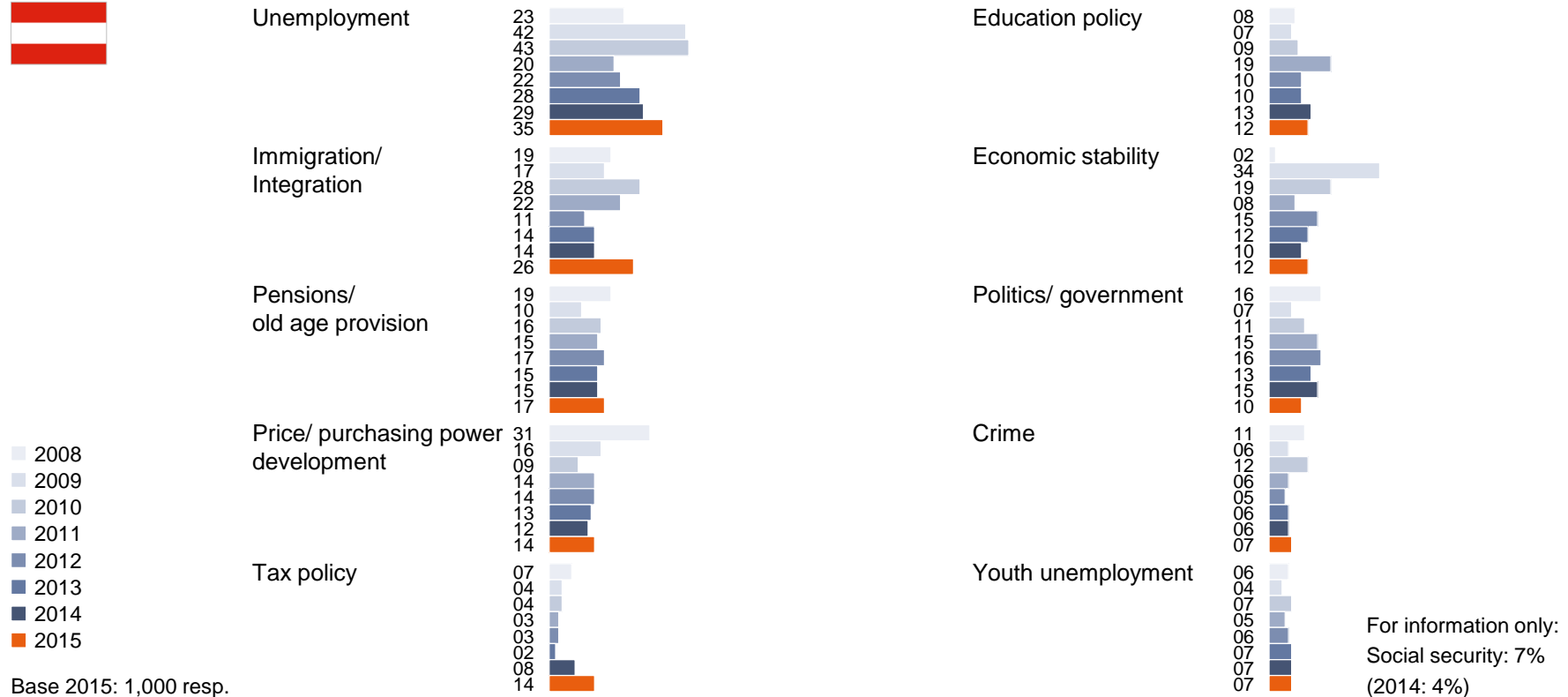


The topic of **crime** was once again of higher importance in 2015, at 15%. Just last year, this concern was at 6%, its lowest level since the launch of the survey. As recently as December 2014, the detection of a Mafia network that was claimed to have blackmailed immigration centres for public funds, shook the population. The fraud reached right up to the highest levels of Rome's local government ("Mafia Capitale").

Closely linked to crime is the issue of **corruption**, which was a cause of concern for 11% of Italians this year. According to the Corruption Perception Index (CPI 2014), which reflects the perceived corruption in the country, this country is on the same level with Greece, Turkey or the Balkan countries. In May 2014, due to irregularities in construction work for the Expo 2015 in Milan, several businessmen and former politicians were arrested. And also in the course of construction of the flood control measures before Venice, 34 politicians and several building contractors with ties to the Mayor of Venice were arrested. So it is not surprising that the concern regarding corruption has risen again by 5 percentage points compared to the previous year.

# Austria /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in Austria: (unaided replies; in %; rounded; multiple responses possible)



Base 2015: 1,000 resp.

For information only:  
Social security: 7%  
(2014: 4%)



For the fourth year in a row, the concern regarding **unemployment** is at position 1 in the Alpine republic, and is currently at 35% (trend: upwards). According to the OECD, the unemployment rate was 5.6% in 2014, and has therefore increased again slightly in comparison to previous years (2012: 4.9%, 2013: 5.4%). Austria therefore occupies second place after Germany with regard to the EU-wide lowest unemployment rate, but as 2015 is an election year - with state elections in Burgenland, Styria, Upper Austria and Vienna - this topic is very much in focus of the public.

Also an issue in the election campaign is **immigration** and **integration**. Net immigration since 2008 indicates a growing trend, at around 55,000 people in 2013. According to forecasts by Statistics Austria ("Statistik Austria"), the proportion of the foreign population, which was 16.2% in the year 2013, will continue to increase. And without immigration from abroad, Austria's population would shrink. The number of asylum-seekers has also increased: Just 1,100 requests for political asylum were recognized in February 2014, but in November this number already tripled, to approx. 3,500. In addition, a wave of refugees from the Kosovo in

February 2015 heated up the political debate about immigration. In the future, the government is planning to fast-track procedure to decide on asylum applications coming from so-called "safe countries" of origin, such as Kosovo. The concern about immigration and integration, at 26%, is in position 2 and therefore increases once more, by 12 percentage points compared to 2014. 7% of respondents explicitly mentioned an end to the flow of refugees coming to Austria as an urgent task of the country. This rejection of immigration is also reflected in the increasing popularity of right-wing populist parties, such as the Austrian Freedom Party (FPÖ), which placed the problem of foreigners and refugees at the centre of its election campaign and in doing so - as recently shown - recorded strong gains in the first two state elections of 2015.

This concern is followed in position 3 - just as last year - by the concern for the **pensions** and **old age provision**. Currently it is at 17%, and has therefore remained constant at this level for six years now. Austria's population is ageing, mirrored accordingly by a growing imbalance within the pension system.



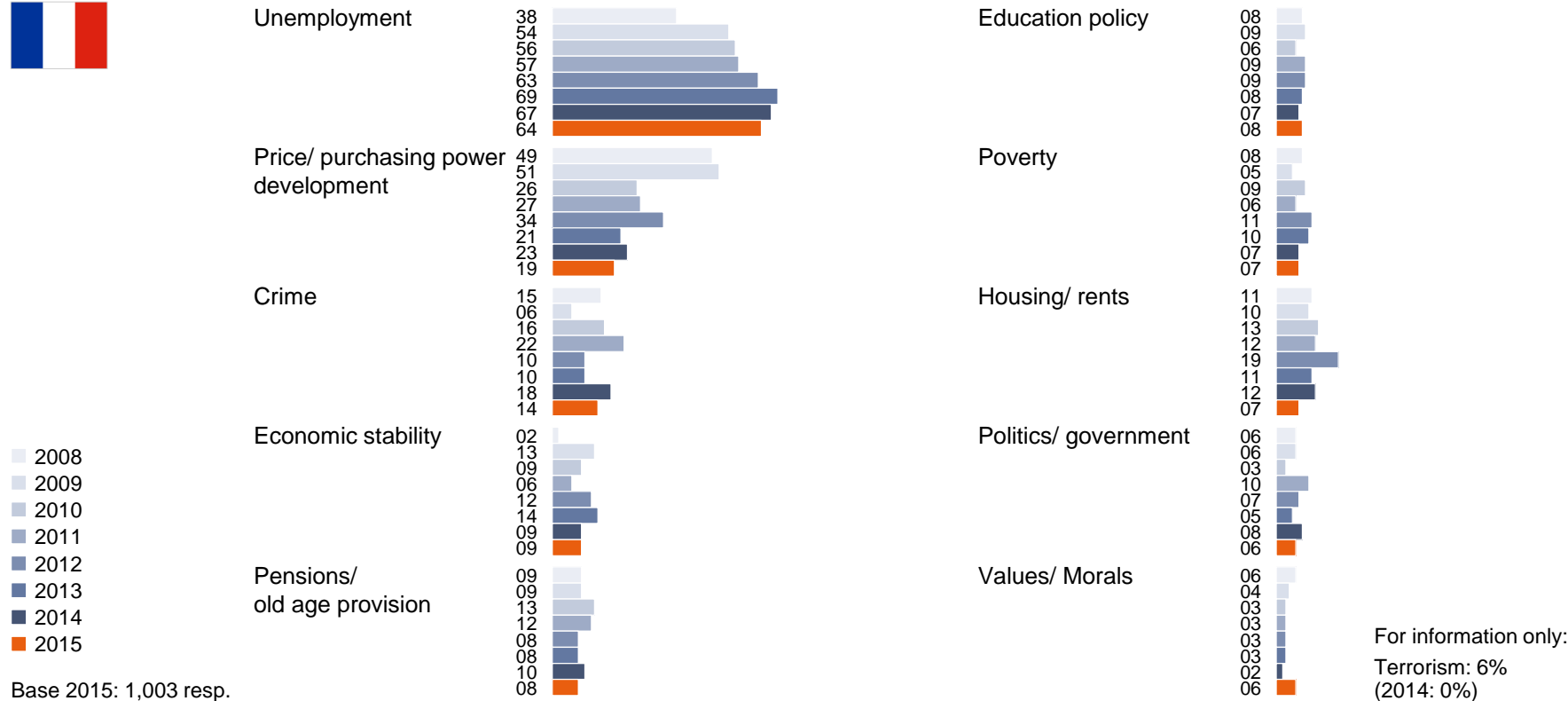
In the “sustainability” category of the Global Pension Index, the country is only in second-last position. 30% of pension payments are now taken from the state budget; without reforms, the system will be ever more difficult to finance. The population will have to expect further pension reductions or increased contributions.

There has been a sharp rise in concern related to **tax policy**. With an increase of 6 percentage points, this concern now sets an all-time record of 14%, and is in the top 10 for the first time (position 5). This is certainly due to the tax reform negotiated by the government at the time of this survey, which was omnipresent in the media. The negotiations of the grand coalition of the Austrian People’s Party (ÖVP) and the Social Democratic Party of Austria (SPÖ) were a drawn-out process, and sometimes threatened to fail. According to a survey conducted by the “Standard”, a quarter of Austrians fear they will be negatively impacted financially by the tax reform. The slightly higher concern about the **price** and **purchasing power development** could be related to this, as this increases slightly in 2015 and lands at 14% in position 4. The

government expects the tax reform to reinvigorate the economy, and assumes annual revenue increases of approximately EUR 850 million. This money should then be enough to finance promised tax benefits. Whether or not the relief promised to citizens actually materializes will only become apparent in early 2016, when the reform enters into force, with many modifications. Among other provisions, the reform package includes a reduction of the minimum tax rate from 36.5% to 25%; on the other hand, the top tax rate will be increased to 55%. Furthermore, an intensified fight against tax fraud and social fraud was decided. But an increase in the VAT rate from 10 to 13 percent for currently subsidised expenditures, such as museum and theatre tickets, flowers or overnight stays in hotels, is also likely to unsettle citizens. However, the absolute rate of price increases is likely to be less in the focus at the moment - this reduced steadily in the last few months and was only 0.5% in February 2015 compared with the same month of the preceding year.

# France /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in France: (unaided replies; in %; rounded; multiple responses possible)



Base 2015: 1,003 resp.

For information only:  
Terrorism: 6%  
(2014: 0%)



This year, concern has reduced slightly for the majority of topics in France, and the average problem-pressure has decreased from 2.5 responses per person in 2014, to a current 2.2 responses. But there are two topics whose importance has increased: **Terrorism** as well as values and morals. Although these two concerns are in position 10 and 11, they are at the beginning of this report. Because it appears that the strong focus on **terrorism**, also from the media, has pushed other problems into the background. In the last few years, the French were hardly worried about terrorism at all, but this concern has now increased to 6%. This is certainly due to the terrorist attack on the satirical magazine Charlie Hebdo in Paris in January 2015. Two perpetrators, who later identified themselves as members of Al Qaeda, forced their way into the editorial offices, killed and injured several present, and then murdered a police officer as they fled from the building. In another attack, a terrorist shot a policewoman and next day held up a Jewish grocery store in Paris, where he killed four people and took hostages. The result of these attacks: 17 dead in three days.

This made the whole world, but especially France, question how to respond to these events. Probably this is also why 6% of respondents are concerned with **values** and **morals** - which mean an increase by 4 percentage points. France is traditionally characterised by the values of the Republic, freedom, equality and fraternity, and these values are now being discussed. Here, we see different aspects: The attack on the satirical magazine was also because of the Mohammed caricatures it published and can therefore be understood as an attack on the freedom of expression. As a symbol of unity - or of fraternity - people all over France gathered in the aftermath of the attacks at funeral marches, including many foreign heads of state. However, an analysis of the curriculum vitae of the Charlie Hebdo assassins shows that social inequality in the form of unemployment and poor educational opportunities very possibly contributed to their radicalization. According to media reports, both of them only came into contact with Islamism during imprisonment, a fact that should also stimulate the discussion on **crime**. This problem is in position 3, at 14%, indicating a slight decline.





According to the PISA study, social inequality is reinforced rather than balanced-out in French schools. It remains to be seen whether or not the introduction of the school subject “civic education” in response to pupils sympathetic with the perpetrators will change this situation. The new school subject is designed to teach religious facts - in France there is no religious instruction - and to improve the critical faculties of pupils. 8% of citizens are concerned with **education policy**.

The concern about **unemployment** continues to occupy position 1 of the French concern ranking by a large margin: 64% of French respondents are concerned with this topic. This concern has therefore dropped for the second time in a row, but remains large. The unemployment rate was roughly unchanged at a very high level of 10.2% in 2014. Apparently, the reforms introduced by the government in 2014 have not yet borne fruit. For example, the “Pact of Responsibility” was intended to relieve companies with regard to their social security contributions, thus initiating falling labour costs and more jobs. But contrary to expectations, these reliefs were used primarily for salary increases. This might also explain why the concern about the **development of price** and

**purchasing power** is decreasing, reaching 19% this year. Because these salary increases, together with a decrease in inflation, strengthen the purchasing power of the French. The absolute rate of price increases in 2014 was only 0.5%, the lowest value since 2009. In addition, the government attempted to boost the economy, for example by the liberalisation of shop opening hours on Sunday, or by tax cuts for low-income earners. But so far, this has not been able to reverse the weak growth rates of 0.3% and 0.4% in the last years. Regarding **economic stability**, 9% of French respondents were concerned with this - the same number as in last year (position 4).


Probably also due to the economic situation, the socialists under President Hollande had to accept heavy losses in local elections in early 2015, while the republican party (UMP) of former President Sarkozy was the strongest force. The far-right National Front party did relatively badly, possibly also due to the anti-Semitic statements of its founder Jean-Marie Le Pen, who has now been requested to leave the party. The issue of **politics and government** was mentioned by 6% of French respondents, placing it in 9th position in 2015.

# Indonesia /// Challenges 2015


## Top 15

... % of respondents mentioned as the most urgent problem to be solved in Indonesia: (unaided replies; in %; rounded; multiple responses possible)




Price/ purchasing power development 33 


Corruption 31 

Environmental issues 18 

Economic stability 17 

Unemployment 14 


Crime 12 

Addiction problems 11 


Education policy 10 


Poverty 08 


Traffic policy 08 

Health service 07 

Social security 05 

Politics/ government 05 

Problems between anti-corruption commission and police 05 

High rice prices 04 

Base: 1,041 resp.



With Indonesia, the fourth most populous country in the world is now part of the Challenges of Nations. The largest - moderate - Muslim country is also the largest archipelagic state in the world. Furthermore, Indonesia is economically in the third place in Asia, after China and India. Indonesia is rich in natural resources and is therefore among the main exporters of raw materials worldwide, such as copper and nickel. But it is precisely its distinctive geographical features that lead to a divergence in the living conditions of the inhabitants on the various islands.

Therefore, a third of the Indonesian population see a need for action with regard to the **development of price and purchasing power**. After a provisional reduction to 4.3% in 2012, the inflation rate rose again to 6.4% in 2013 and 2014. According to the OECD, it was at 7.0% in January 2015 and even at 8.4% in December 2014. In particular, the high cost of living is a problem, explicitly mentioned by 25% of respondents. The high **rice prices** is explicitly mentioned by 4% of Indonesians. Rice is one of the staple foods in Indonesia, but it must be imported. In order to be less dependent on other countries, rice imports are to be continually reduced until 2017. According to the government, the increase in

price by 30% at the beginning of 2015 was primarily due to the machinations of the so-called “rice Mafia”. These actors want to continue to benefit from the previous system and are trying to hamper the import ban by producing an artificial shortage in the country.

**Corruption** is in second place of the list of concerns, at 31%. According to Transparency International, Indonesia has a high level of corruption, with a CPI of 34 points. President Widodo began his term of office in 2014 with the promise to act against corruption and nepotism. He is the first president not to originate from the old Suharto elites, and had never himself been associated with corruption. The suspicion of corruption against a police commissioner he himself appointed therefore stunned and shocked many of his supporters. 5% of respondents also mentioned problems between the **anti-corruption commission and the police**, which could prove a burden in the fight against corruption. The latter proves to be even more problematic because according to a survey by Transparency International, around 90% of citizens think the police themselves are corrupt.



There is also very great concern for a very different problem: Again and again, the island state is affected by severe floods. For instance, 120,000 people in the province of Aceh had to flee from relentless floods of water in December 2014. Therefore, 16% mentioned the flooding problem as an urgent task to be dealt with, placing the overarching topic of **environmental protection** in position 3, at 18%.

Just behind, at 17%, is the concern for **economic stability**, coming in at position 4. After China and India, Indonesia is the most important Asian growth market. But after years of growth rates of over 6%, GDP growth fell to 5.8% in 2013 according to the World Bank, and a growth of only about 5% is expected for 2014. Most recently, exports have declined, both due to falling demand as well as due to the current ban on exporting unprocessed raw materials, in force since January 2014. The intention of this ban is to extend the value chain in their own country, in order to create more jobs in Indonesia.

The issue of **unemployment** follows in position 5; 14% of people are concerned about this. According to the World Bank, Indonesia had an unemployment rate of 6.3 percent in 2013. Job scarcity, which will increase still further in the future, already affects younger Indonesians even more today, because the third largest working population in Asia, after China and India, will continue to grow. But manufacturing companies that could employ more people, thereby improving this situation, are lacking. Around 60% of the total number of employees are employed in the informal sector, somewhat relativizing the official unemployment figures.

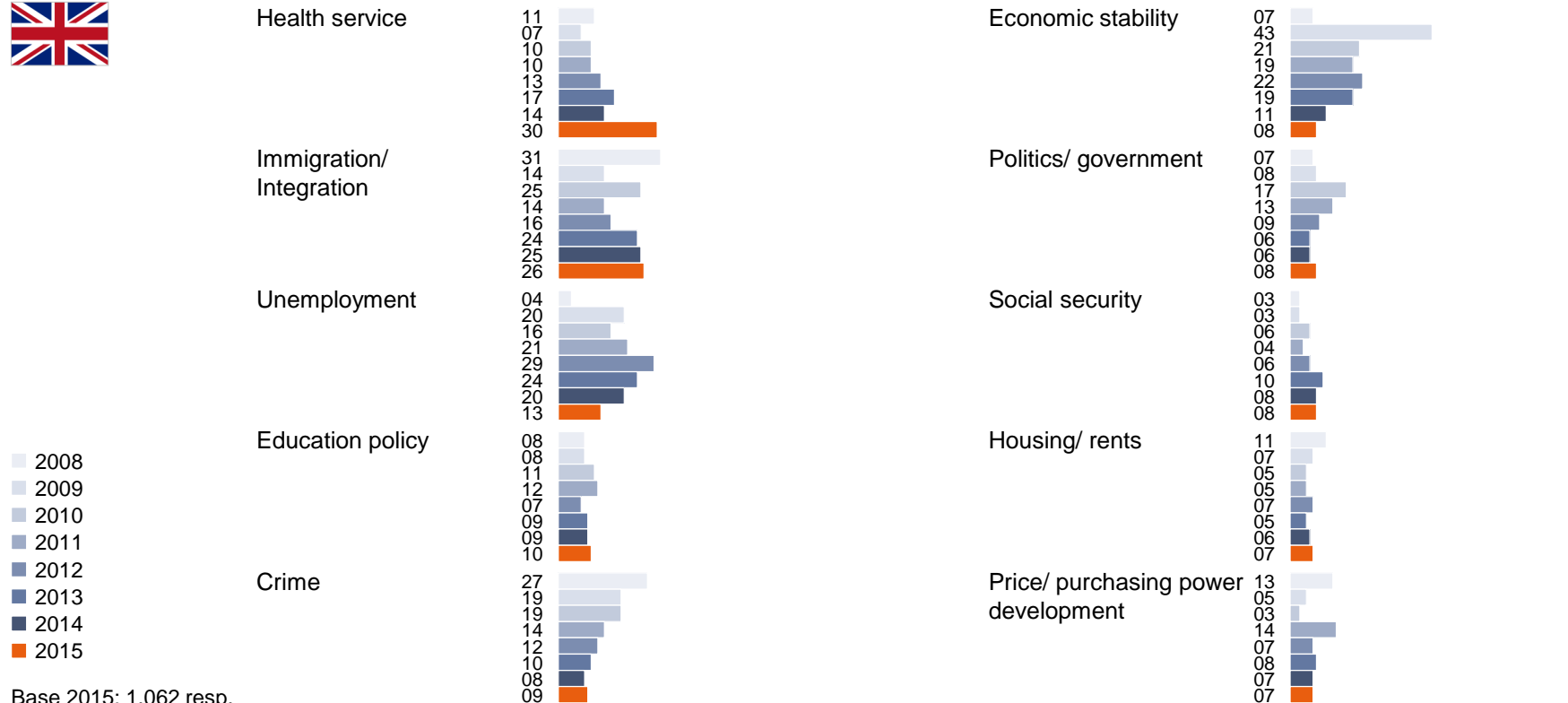
On the other hand, vacancies can often not be filled due to a lack of adequately trained candidates. 10% of Indonesians therefore think that the **education policy** could be improved. The OECD believes the Indonesian government has taken a step in the right direction in its commitment to extend the compulsory education period and to improve vocational training. Better education can also counteract another problem, because 8% of the respondents see **poverty** as an urgent task to be solved.



12% of citizens see **crime** as an urgent task to be solved. This may also be due to the religious composition of the population. While it is true that the majority is Muslim, and tolerant in their faith, religious minorities such as Christians, or Shiites are threatened again and again. There is a massive battle against drug-abuse in Indonesia, and strict laws are designed to prevent it. In December 2014, President Widodo announced that the death penalty would be consistently applied in the future against drug offenders, and pleas for clemency would be rejected. There is international protest against this change of course, especially because five foreigners were executed in January 2015. The topic of **Addiction problems** is in seventh place in the list of concerns, at 11%. In particular, the tourist centres of the country have developed into main trading centres of illicit drug trafficking. And the long external borders of the island state are almost impossible to control effectively.

# UK /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in UK: (unaided replies; in %; rounded; multiple responses possible)



Base 2015: 1,062 resp.



In the course of the parliamentary election campaign on 7th May 2015, the British **health service** was once more in the focus of public attention, and was discussed politically with some controversy. At the same time, concern about health care more than doubled from 14% to 30%, and rose from fourth position in 2014 to first position. The background for this debate is the ongoing re-structuring of the British National Health Service (NHS) since 2010. The NHS is to become modernized and more cost-efficient by cutting red tape, increasing competition with private care suppliers, and by transferring more powers to family doctors. Ultimately, however, the concomitant financial cuts meant that 80% of hospitals are under-funded. In addition, conditions have developed in doctors' surgeries and hospitals, whose consequences reach from incorrect diagnoses and medical prescriptions to unreasonable waiting times right up to a high infant mortality rate in comparison to the rest of Europe. Thus it is not surprising that the UK, compared with other central European countries such as Germany or France, underperforms in the Euro Health Consumer Index and is therefore only ranked in the midfield.

In addition to the debate on health care, **immigration and Integration** remained one of the most discussed campaign issues. Already since 2013, around a quarter of the British view this topic as a challenge in their country. In 2010, Prime Minister Cameron promised - "without ifs and buts" - to limit net immigration to below 100,000 persons per year. However, so far this has not been achieved: Currently, the number is around 300,000 immigrants. The EU-sceptical, right-wing populist party - the UK Independence Party (UKIP) - benefited most from this broken election promise in the run-up to the election by fuelling the mood against immigrants even further. In order to counter this, however, Prime Minister Cameron and the Conservatives had to move their position further to the right: He declared his government would act tougher against immigrants from the EU, among other things by restricting freedom of movement within the EU itself.



Obviously, David Cameron hit the right nerve of the British with his policy on these two sensitive topics; in the parliamentary election in May 2015, the British electorate expressed their clear confidence in him. The Conservatives could even obtain an absolute majority, and can now govern alone again. For the other parties, however, the election was a fiasco: The social-democratic Labour Party had its worst result in nearly three decades. But also UKIP and the Liberals suffered heavy defeats. As a consequence, the leaders of both of these parties resigned. The issue of **politics and government** remains relatively stable despite these events, at 8% (position 7).

At 13%, concern about **unemployment** remains at position 3, but with a growing decline in concern since 2013, currently by a further 7 percentage points. This is certainly due to the positive development of the labour market, which has now largely recovered from the economic crisis of 2008/09. The unemployment rate is now 5.6% (4th quarter 2014), as low as before this crisis. Even the youth unemployment rate decreased to 16.9% in 2014 (2013: 20.7%). It is also likely that concerns about the **economic**

**stability** in the country dropped to 8% in response to this trend. According to Eurostat, the growth rate of GDP was 2.8% in 2014, and thus about as high as most recently in 2007. Overall, the economic recovery appears to be contributing to a more optimistic mood in the population.

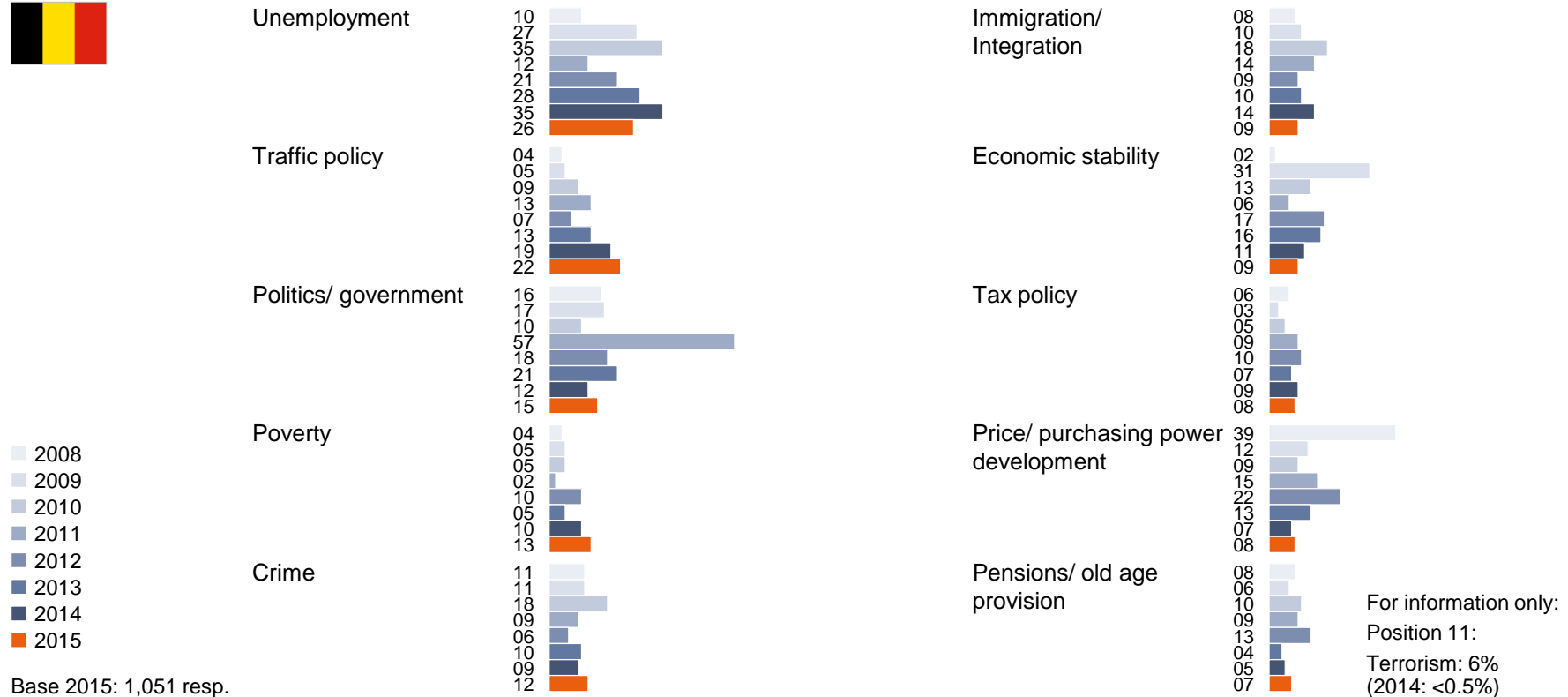
Concerns about **education policy** or training facilities remains stable at a value of 10%. However, in a global comparison study by Pearson, the British education system is performing very well, and is even in position 2 of the European countries. One point that still concerns the population, however, is tuition fees. According to the European Commission, fees in the United Kingdom are the highest within the EU.

After a sharp rise in 2014, the concern about **environmental issues** has reduced considerably, and is now at just 2%, which means that the subject is no longer in the top 10 of UK challenges. It seems that the numerous floods around Christmas 2013, and the resulting effects on the population, are no longer felt so keenly.



# Belgium /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in Belgium: (unaided replies; in %; rounded; multiple responses possible)



Base 2015: 1,051 resp.

For information only:  
Position 11:  
Terrorism: 6%  
(2014: <0.5%)



The issue of **unemployment** in Belgium remains challenge number 1, also in 2015. However, after a period of continuous growth since 2011, there is currently once more a decline in this concern, reaching 26%. Contributing to this decline is probably the fact that, on the one hand, according to the OECD, the unemployment rate in 2014 - after a rising trend in the last three years - has stagnated to the previous year's level of 8.5%, and also remains stable in the first quarter of 2015. On the other hand, the planned labour-market reforms of the newly-appointed centre-right government under Prime Minister Michel in October 2014, may have had a positive effect on the mood. The goal of these reforms was to ensure and create non-government-subsidized jobs. The reform measures were announced to relieve employers and to make the labour market more flexible, although this led to protests from the trade unions and the parties of the left.

Concern about **traffic policy** reached 22% after the third increase in a row, and therefore their highest level since the initiation of the survey in Belgium. This topic is therefore in position 2, as in the previous year. The INRIX study found in 2014 that

Brussels and Antwerp are the two cities with the most crowded streets in Europe and North America. Since many people are moving to the suburbs yet work in the cities, Belgian drivers in Brussels are in traffic jams on average 83 hours a year. Although Belgium already has one of the densest road networks worldwide, there is a lack of alternatives: For example, there are too few bicycle lanes in the cities, and for commuters, the railway is an inadequate replacement for their own cars. The trains are often crowded, arrive late or are out of operation entirely during one of the frequent strikes.

The third most important challenge for Belgians in 2015 is **politics** and **government**. 15% of respondents are therefore concerned with this, which is an increase of three percentage points compared to the previous year. As already mentioned, the aspired far-reaching economic and social reforms of the new government are not only met with approval. Next to labour-market policy measures, the government is also planning to increase the retirement age, which may explain why the concern about **old age provision** has risen by two percentage points.



Furthermore, there are also plans for a tax reform. Although this is intended to include a slight lowering of direct taxes, increases in indirect taxes, such as value added tax (VAT), are planned as countermeasure. Concerns about **tax policy** remain almost constant at 8% (position 8). Those with lower incomes are particularly hard hit by an increase in value added tax. Probably this explains why concerns about **poverty** have reached a new peak. With an increase by three percentage points in 2015, this concern lands in fourth place, at 13%. However, according to Eurostat, the proportion of people at risk of poverty in 2013 remained virtually stable compared to 2012 (15.3 and 15.1%).

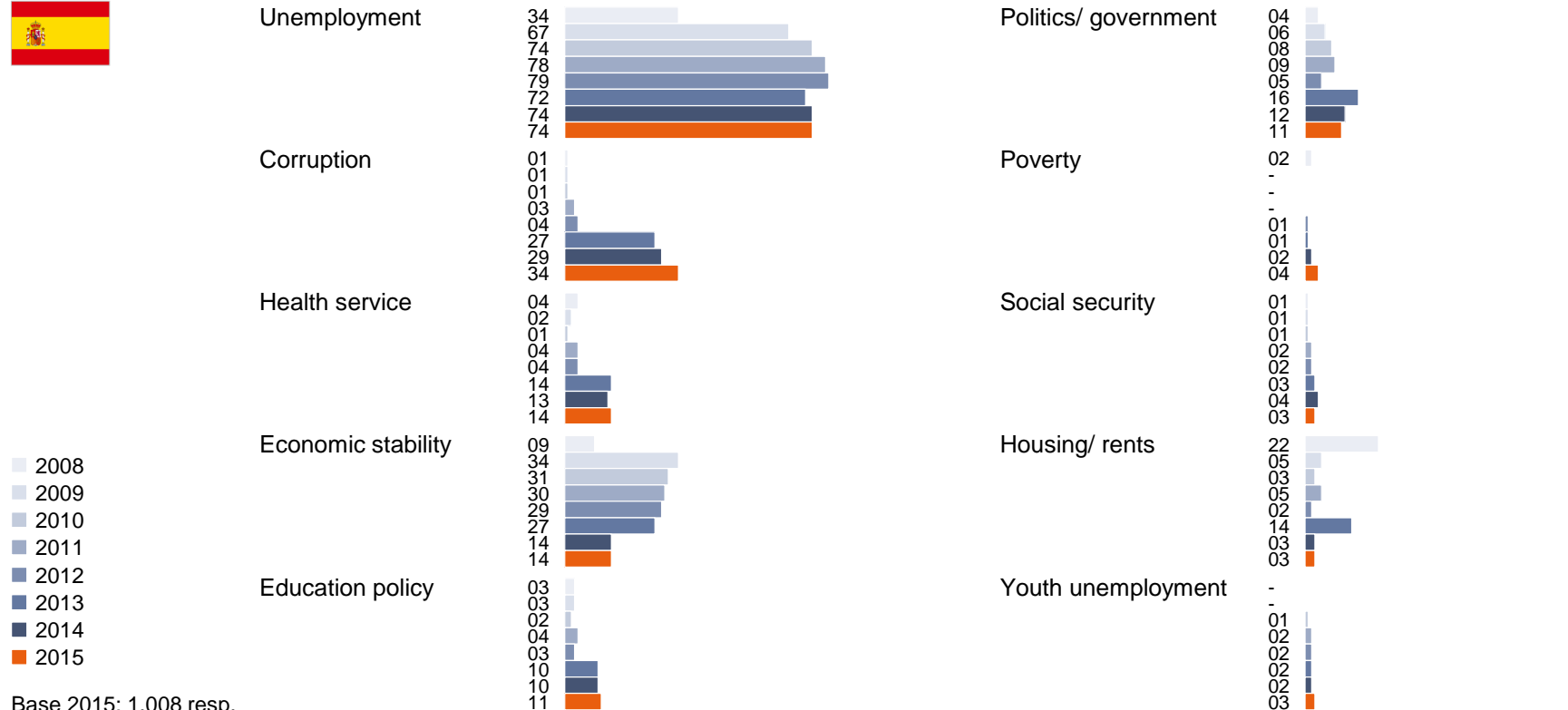
The topic of **crime** has also gained in urgency in comparison with the previous year. Just in seventh position with three percentage points less in 2014, this concern now completes the top 5 this year, at 12%. The rate of violent crime in Belgium as a whole is relatively low, although it is higher in larger towns and cities. However, increased concern about crime could also be related to **terrorism**, which now occupies position 11, at 6% (2014: <0.5%). This subject has most probably been placed into the focus of

attention after the attack at the Jewish Museum in Brussels at the end of May 2014, in which four people were killed. And in Vervier in January 2015, the police in one of the largest anti-terror operations in Belgian history, broke up a terrorist cell that had planned murders on police officers. In the course of this, the second-highest terror warning level was proclaimed for the entire country for some time.

On the other hand, there is a decline in concern about **immigration** and **integration**; just a little less than every tenth Belgian sees a need for action in this regard. According to Eurostat, the number of asylum-seekers, which had fallen since 2011, has risen again in 2014 due to the international crises. However, the plans of the Belgian government to tighten immigration and asylum legislation may have contributed to this drop in concern. In Belgium, the number of asylum applications per 1,000 inhabitants is currently in the middle-field in an EU-wide comparison.

# Spain /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in Spain: (unaided replies; in %; rounded; multiple responses possible)



Base 2015: 1,008 resp.



Spain continues to present itself with 1.9 of mentioned concerns in the average of European countries. Only the concern for **corruption** has clearly increased, with a plus of 5 percentage points. And responses to the issue of poverty, in the top ten for the first time in 2015, doubled from 2% to 4%, but are still at a relatively low level.

Still undisputed number 1 is once more the concern about **unemployment** in 2015. Despite a slight easing of the situation in the labour market, this remains a concern for 74% of Spaniards. After a steady rise in the unemployment rate since 2008, a decline has now been measured for the first time: According to Eurostat, a reduction from 26.1% in 2013 to 24.4% in 2014. However, Spain still continues to have one of the highest unemployment rates in the Euro zone. There is even a slight relaxation in the labour market for under 25 year-olds: In comparison to 2013, the unemployment rate has declined from 55.5% to 53.2% in 2014. However, this decline should be interpreted with caution, since a large proportion of new hirings are to fixed-term contracts or part-time contracts. Furthermore, politics has so far failed to develop any

comprehensive re-integration or support concepts for the big problem of the long-term unemployed - and every second unemployed Spaniard has become one by now. Therefore, the population continues to be concerned.

The concerns of Spaniards with regard to **economic stability** remains consistently high with 14% of responses, albeit at a lower rank than in the previous year. In fact, the Spanish economy is recovering again and in 2014, after years of recession, has recorded a growth of GDP again for the first time. Eurostat estimates that there will be an increase in GDP of 1.4% in 2014, and the government also expects a further increase in 2015 of at least 2.5%. However, economists call for more reforms in order to promote growth and to reduce the high level of unemployment.

**Corruption** remains at position 2 of the list of concerns: 34% of Spaniards are unsettled by the sheer flood of corruption scandals that have become apparent to the public on an unprecedented scale. Thus, scandals related to nepotism, bribes, as well as tax evasion have eroded public trust in politics and the economy.



Only in October 2014, justice and security authorities have arrested 51 politicians, civil servants and entrepreneurs accused of bribery and corruption, including politicians from the governing “Partido Popular” (PP) party. At the same time, it was announced that the Bank “Caja Madrid” has been providing members of its Management and Supervisory Board for years with “black” credit cards, allowing managers to spend EUR 15 million untaxed for private purposes. In November 2014, to avoid further damage to the PP, health minister Mato resigned after revelations of her involvement in a bribery scandal. Investigations are even being conducted against the former treasurer, accused of managing secret accounts of the PP. Last but not least, the secretary-general of the party is accused of receiving illegal campaign contributions. These developments are also likely to be the reason why the country is only in position 37 in the 2014 Corruption Perception Index published by Transparency International, and why concern of the citizens continues to rise.

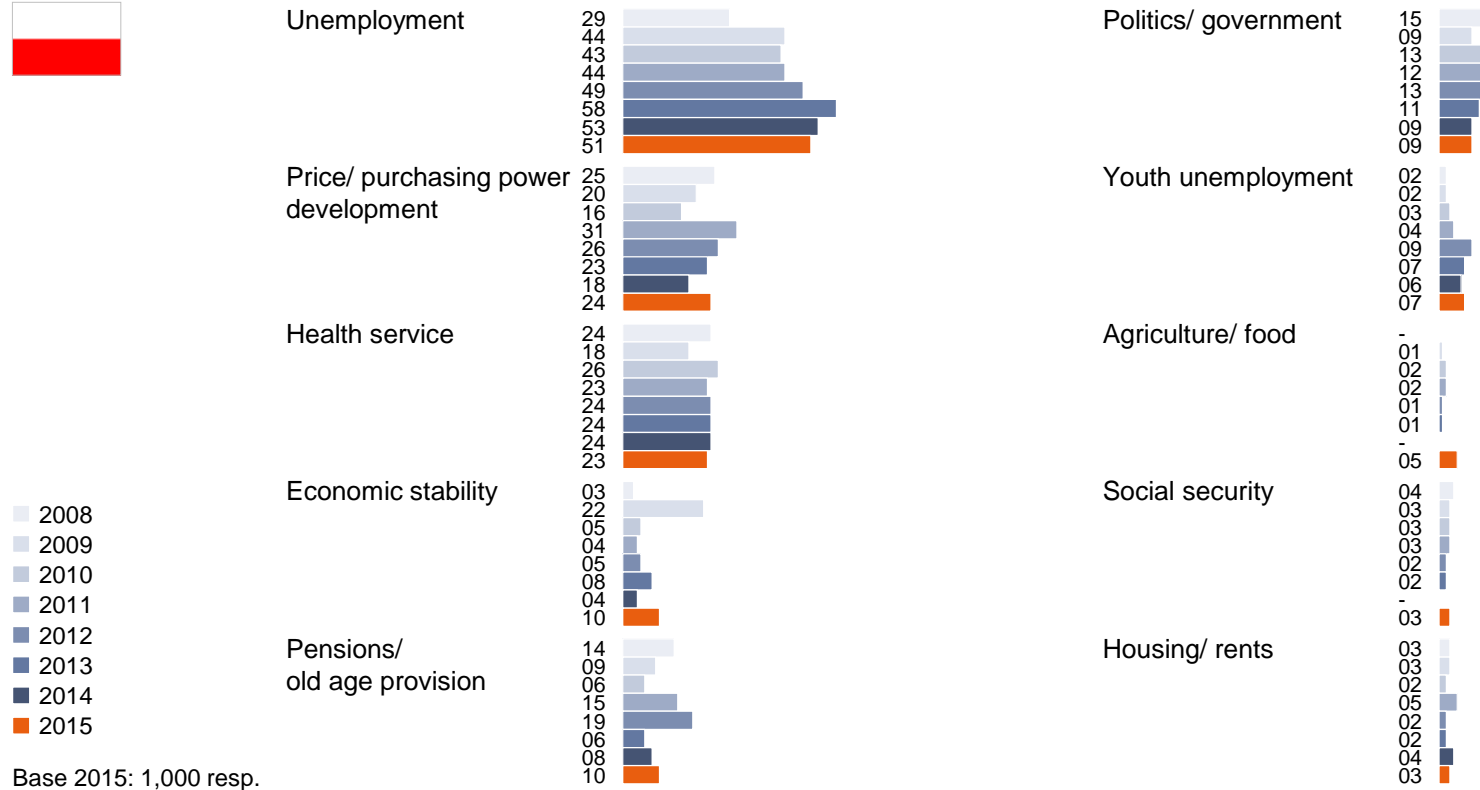
After a significant increase in 2013, however, the concern about **health service** has remained almost constant for three

years, and is currently at 14%. In the fight against the economic crisis, the government under Prime Minister Rajoy reduced expenditures in the health sector by almost ten percent within two years, further encouraging the privatization of the health care system. Overworked clinic staff, long waits and specialist treatment being provided by general practitioners are just some of the consequences of these actions.

**Education policy** has not been spared from the ongoing cost-cutting measures. Last year, for example, the PROA plan, intended to provide students tutoring, support and guidance, had its funding cut. The EU commission in 2014 also criticized the high rate of school drop-outs, as well as the high level of unemployment among graduates, even though many academics are already working below their educational level. Accordingly, the resentment of the population regarding education policy has not faded in the last three years. 11% of Spaniards are still concerned with the development in the education sector.

# Poland /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in Poland: (unaided replies; in %; rounded; multiple responses possible)



Base 2015: 1,000 resp.



The issue of **unemployment** remains unchallenged as the number 1 of the concerns in Poland but has, compared to 2014, declined slightly from 53% to currently 51%. This downward trend is also reflected in the unemployment rate, which in the course of the year 2014 has fallen steadily month by month. And, at an annual average of 9%, it has now reached its lowest level for four years. The youth unemployment rate has also declined in Poland: From 27.3% in 2013 to 23.9% in 2014. But, despite of this decline, people remain pessimistic here, because the level remains high and is still above the European average. So, the concern is stagnating at 7%, and seventh position.

Concerns about **prices** and **purchasing power** increases in 2015 to position 2 of the list of concerns, breaking the downward trend visible since 2012. The positive developments on the labour market, combined with the very low inflation of 0.1%, currently provide for an increase in real income. Still, 24% of the population is concerned. Although this concern is likely to have much more to do with the current dissatisfaction regarding the comparatively low wage levels and an unequal income distribution. Both wages and

purchasing power remain very different by region and occupational group: For instance, the country-wide average wage in Poland was 950 Euro in 2014; and since 2015, the legal minimum wage has been 420 Euro, which is still far removed from salary levels of Western European countries.

This possibly also represents the concerns, which were fomented by the national-conservative presidential candidate Duda during the election campaign: He warned against introduction of the Euro and, linked to this, rapidly increasing food prices. Negative impacts on currently positive economic development are also predicted by politicians. And according to a study, more than half of all Poles are sceptical about introduction of the Euro. This might also explain the growing concern about **economic stability**. At 10%, this issue achieved its second-highest value since 2009, putting it in position 4. But in actual fact, in 2014, Poland's economy doubled its GDP growth to 3.4% compared to the previous year.





Linked to the issue of prices, there is also explicit concern about **agriculture** and **food**. Poland's farmers are increasingly feeling the effects of the import bans on food imposed by Russia in mid-2014. Thousands of farmers took to the streets in February 2015 to protest for financial subsidies. With the previous top value of 5%, this concern now enters the top 10 for the first time, at position 8.

Virtually unchanged for five years are concerns about the **health service**. At 23%, this issue remains an enduring cause of concern, and is currently in third position. The public health service is deep in debt, and due to lack of funds can often only provide an adequate service with difficulty. Long waiting times for hospital and specialist treatment, as well as poor-quality treatment, can often only be avoided by paying private contributions or relying on private providers. In early 2015, thousands of doctors went on strike to protest against new rules and regulations, including among other things a restriction on medical consultation. In addition, an increasing workload coupled with low salaries have already contributed for years to the migration of doctors and nurses abroad.

The poor condition of the Polish health care system is also reflected in the Euro Health Consumer Index 2014, where Poland only occupies position 31 in comparison with 36 other European countries.

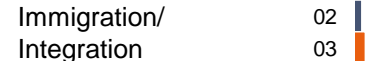
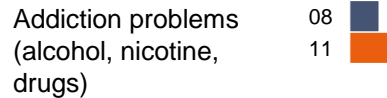
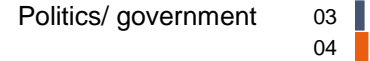
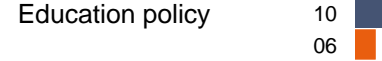
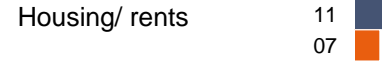
For the second time in a row, concerns about **pensions** and **old age provision** have increased, reaching 10% in 2015. The pensions issue was also in the spotlight again and again during the presidential election campaign. The candidate Duda promised, for instance, to reduce the effective retirement age, previously increased by the Tusk government in 2013 to 67 years.



While it can often be clearly observed from the Challenges of Nations study that concerns about government and policy increase at the time of elections in a given country, this effect was not seen in Poland - at least not at the time of this survey. Approximately, two months before the presidential elections in May 2015, the former acting President of the liberal-conservative Civic Platform, Komorowski, remained in the lead with high approval ratings. However, Komorowski's approval ratings increasingly dropped in the further course of the election campaign, and he was ultimately defeated by his challenger Duda. At a later date, an effect might have been measurable due to the head-on-head race between the two candidates. Thus, unchanged from the previous year, only 9% of Poles were concerned about **politics and government** in Spring 2015.

# South Africa /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in South Africa: (unaided replies; in %; rounded; multiple responses possible)



■ 2014  
■ 2015

Base 2015: 1,200 resp.

For information only:  
Health service: 3%  
(2014: 3%)



**Crime** is the main concern of South Africans in 2015. This concern, at 45% of all mentions, has almost quadrupled. In contrast, the related problem of **corruption**, at position 1 in 2014, has declined to the same extent. The perception of the population seems to have shifted here: According to official statistics from 2014, the murder rate has increased for the second year in a row - currently by 3.5% to 32 murders per 100,000 citizens. It is therefore more than five times higher than the world average. Economic development suffers equally from the consistently high violent crime rate of the past 20 years. Keenly followed in 2014 - far beyond national borders - was also the process against the Paralympics star Pistorius, who shot his girlfriend in 2013. The judgement was a restricted guilty verdict, which the majority of South Africans viewed as too lenient.

For many, the Pistorius case embodies the central problems of the country: The security forces do not appear to be able to handle the escalating level of violence, and detection rates remain low. This can also be attributed to understaffing, incompetence and corruption within the police force: For instance, the former police

commissioner Selebi was jailed for corruption, and his successor was removed from office for similar reasons. Even President Zuma himself was the subject of corruption allegations in 2014. Despite a shift towards crime, 14% of citizens explicitly continue to list corruption as a problem, putting it at position 4.

Both the unemployment rate as well as the concern about **unemployment** remain static at a high level compared to 2014. At 36%, this concern is once more in position 2. In 2013, the World Bank published an unemployment rate of 24.9%, and according to "Statistics South Africa" this was still at 24.3% in the fourth quarter of 2014. Currently, about half of young people between 15 and 24 are officially without a job.

The issue of unemployment is also connected with the concern about **poverty**, which has slightly increased to 7%, and takes position 7. Even 20 years after the end of Apartheid, there is still an unfair distribution of wealth, to the disadvantage of the black majority. The "Gini Coefficient" (63), as a measure of income inequality, remains very high in South Africa.



South Africa is an industrial nation *and* a developing country at the same time, which is apparent not only on social issues. Currently, the country is affected by the worst energy crisis since 2008: The state energy company Eskom is responsible for 95% of the power supply in the country. But years of failing investment, including in the construction of new power plants, can now be felt in energy shortages, and in some regions there are daily power outages for hours. This makes everyday life difficult and inhibits economic development. **Energy supply** therefore features this year as a new problem, and with 14% of responses, it is in number 3 position.

The **problem of addiction** is in fifth position, with a slight increase to 11%. This issue is also linked to crime and poverty in the country. The gap between rich and poor is also reflected in living conditions: The **problem of housing** follows in sixth place, although this concern has currently dropped from 11% to 7%. This could be due to the fact that housing construction is at the top of the national agenda, and improvement is therefore in sight. President Zuma just introduced a new construction program in 2014 to provide accommodation units for the homeless as well as

those at different income levels.

However, the high unemployment remains one cause of poverty - and the chance to find work depends strongly on education and training. In international studies on the quality of education systems, South Africa usually comes in at one of the last places: For instance, the country was in place 140 of 144 countries listed in the "Index of Global Competitiveness" of the World Economic Forum of 2014. The education system is suffering from bad material equipment of the schools, lack of teachers and the division of the school system into expensive private schools and poorly functioning public schools. The government has recognized this and is attempting to counteract it with targeted investments. Due to the lack of well-trained employees, companies are also getting involved in schools as sponsors. Additionally, the first private schools are now being created for low-income earners, providing them with good basic training and education at lower fees. These efforts are apparently being rewarded by the people, as the concern about **education policy** has reduced by 4 percentage points, to 6%.

# Switzerland /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in Switzerland: (unaided replies; in %; rounded; multiple responses possible)



Immigration/  
Integration



Education policy



Economic stability



Health service



Unemployment



Price/ purchasing power  
development



Environmental issues



Social security



International/  
European policy



Family policy



■ 2014  
■ 2015

Base 2015: 1,000 resp.

For information only:  
Traffic policy: 6%  
(2014: 12%)



As in the past year, the concern ranking in Switzerland in 2015 is also headed by the issue of **immigration** and **integration**, which concerns 29% of the population. Compared with 2014, this means an increase of four percentage points. After the “popular initiative” on the restriction of migration was accepted with a narrow majority in February 2014, during last year’s survey period, the government presented a draft law on the introduction of immigration quotas shortly before this year’s survey. The country would therefore like to limit immigration, most recently standing at approximately 80,000 people per year, with a quota to be determined on an annual basis. The aim is to prevent a further increase in the proportion of foreigners, which at last estimates was at just under 24%. However, migration statistics for the first quarter of 2015 indicate another rise by 14% compared with the same period last year.

But the implementation of the immigration regulation demanded in a referendum presents the government with a challenge: Such a restriction is inconsistent with the agreement on the free movement of persons with the EU, which could result in the

termination of other bilateral contracts. An end to the numerous bilateral sectoral agreements with the EU, which permit participation in the European domestic market, would have far-reaching consequences for the economy of Switzerland. The population also seems to be aware of the precariousness of the situation. As a result, the concern for **world and European policies** have risen in 2015 by three percentage points, to the current 10%. This issue has therefore advanced from position 9 in 2014 to position 5.

The risk of endangering economic relations with its European neighbours could also be connected to the dramatic increase in concern about **economic stability**. 15% of the Swiss express concern about this, almost twice as many compared to the previous year. This advances the topic from 7th to 2nd place of the list of concerns. For 2014, the OECD has predicted an economic growth of 2.0%. However, the very sharp appreciation of the Swiss Franc in January 2015 must also have contributed to the growing concern about economic stability. And thus, the OECD only predicts an increase of GDP by 0.8% for 2015.



After the Swiss National Bank raised the minimum exchange rate per Euro to 1.20 Swiss Francs, there were massive market reactions, including a slump in tourism and exports. The head of the Swiss National Bank considers a longer lean period for the economy as inevitable in light of the arising consequences of the appreciation of the Swiss Franc.

In addition to the dominant complex of concerns revolving around immigration and/or migration and economy, unemployment and environmental issues are in positions 3 and 4 of the concern ranking. **Unemployment** is invariably seen as a challenge in Switzerland in 2015, by 11% of the population. According to OECD data, the unemployment rate in 2014 was 4.5% and has therefore increased by 0.15 percentage points compared to the previous year, although it is still one of the lowest values of all OECD countries. 11% are also concerned about **environmental issues**, meaning that this concern remains static compared with the previous year. At the end of January 2015, the Swiss Federal Council published its current environmental report which, on the one hand, documented successes in the fight against harmful

substances in the air and water. However, on the other hand, it also points to major challenges in climate policy, in the conservation of biodiversity and on pressures to natural resources, such as the sealing of the soil.

In contrast, concerns about the **health service** have lost in urgency. Currently, about 7% of the population are concerned about it, four percentage points less than in 2014. According to the “Euro Health Consumer Index” 2014, the health-care sector of Switzerland continues to rank behind the Netherlands in position 2, and is therefore among the best in Europe.

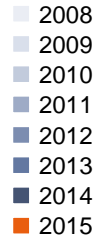
Similar to the health service, the Swiss are concerned to a similar extent this year about **education policy**, the **development of price and purchasing power**, **social security** and **family policy**. Consequently, these issues are at the bottom of the list of Swiss concerns.

Viewed overall, the problem pressure in Switzerland is in the lower third of the ranking, with **1.7 topics mentioned**, as opposed to an average of 2.2 problems across all countries.

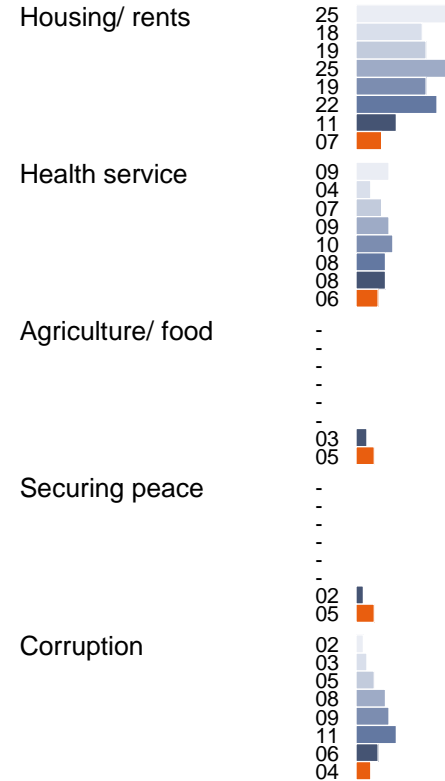
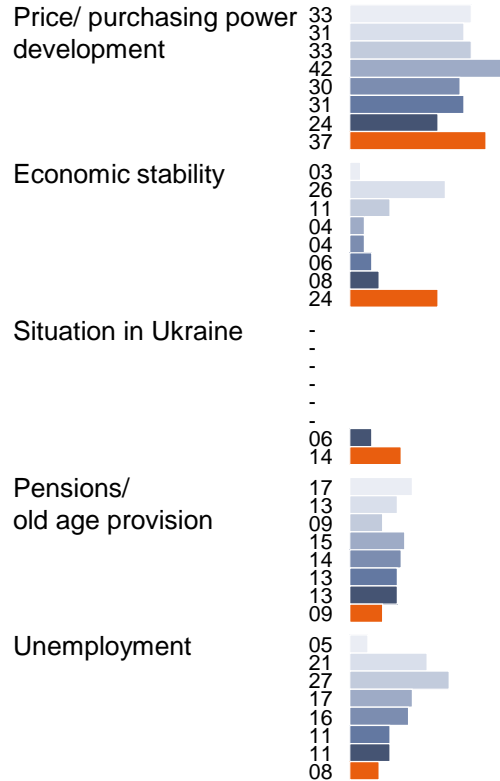


# Russia /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in Russia: (unaided replies; in %; rounded; multiple responses possible)



Base 2015: 2,106 resp.



For information only:  
 International/ European policy: 4% (2014: - )  
 Education policy: 4% (2014: 7%)  
 Traffic policy: 4% (2014: 4%)



The concern about **price and purchasing power development** dominates the Russian problem ranking in 2015, with an increase of 24% to 37%. Just last year, the fear of inflation decreased significantly. The reason for the increase is mainly an explicit concern about the stability of the national currency (14%). According to the OECD, the inflation rate was 8% in 2014, and even increased to 16% in the first quarter of 2015. One reason for the depreciation of the Russian Rouble is the low price of oil. Approximately half of the Russian state budget is dependent on oil and gas exports. Furthermore, the Russian economy has been placed under massive pressure due the sanctions imposed against the country by the West in consequence of the Ukraine conflict. These sanctions are aimed at persons, companies and banks and include for instance export and import bans as well as freezing of accounts and travel bans. For these reasons, the exchange rate of the Russian Rouble crashed dramatically in 2014, dropping to its lowest point in December. In order to avoid significant depreciation, the Russian Central Bank increased the key interest rate from 10.5% to 17%. The Russian central bank, as well as experts,

expect a further deterioration of the situation, so the population must brace for continued rising prices in 2015.

The rating agency Fitch therefore lowered the creditworthiness of Russia at the beginning of 2015, setting its forecast to negative. Russia's creditworthiness is therefore on a level comparable with India or Turkey. It is not surprising therefore, that the concern about **economic stability** tripled to 24% in 2015. Growth forecasts for the coming years are also everything but rosy: It is expected that GDP will drop by just under 4% in 2015. In addition, the price of oil on the world market will only recover marginally in the coming years. This means that the country must adjust to a prolonged economic crisis. Because of the tense situation in the Ukraine and the drop in the oil price, investors are also increasingly taking money out of Russia, which is further deteriorating the economic situation. For the time being, there is no improvement to the situation in sight, as the fronts between the West and Russia currently appear hardened.



This is also why the **situation in the Ukraine** remains among the explicitly mentioned top issues on the Russian agenda. Concern has more than doubled, with an increase from 6% to 14%. The initial conflict developed during the course of 2014 to a conflict between Ukrainian government troops and pro-Russian separatists, explained in a brief outline in the following:

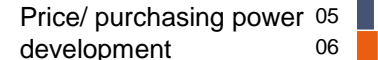
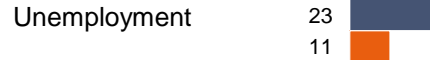
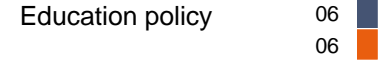
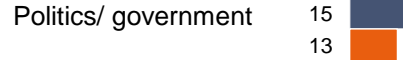
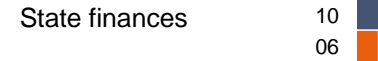
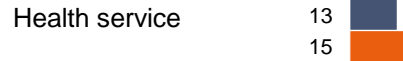
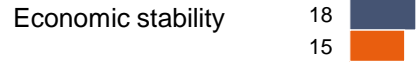
After the annexation of the Crimean peninsula, which was not recognized by the West, the EU and the United States imposed their first set of sanctions against Russia. These measures were repeatedly increased during the course of the crisis. The transitional government in Kiev then commenced a military operation against pro-Russian separatists. France and Germany tried to move the conflicting parties to engage in dialogue, but these efforts were fruitless. The pro-Russian separatists in Donetsk and Lugansk declared independence from Kiev and founded a “People’s republic”. Poroshenko is elected the new Ukrainian president. A passenger plane is probably hit by a missile above eastern Ukraine. Kiev and the separatists accuse each other of downing the plane. After an unstable cease-fire, pro-European

parties win decisive victories at the Ukrainian parliamentary elections. The election is boycotted by the separatists; they organize their own elections in eastern Ukraine, but these are not recognized by Kiev. The conflict escalates in January 2015 after many people die in the port city of Mariupol after residential buildings are hit by rockets. There is another cease-fire in February 2015, but it is broken again and again by both sides. Heads of State Merkel and Hollande then try once more to resolve the crisis by diplomatic initiatives, with no success so far. Russia is accused of supplying the separatists with weapons, although the country continues to deny this. These events are probably also the reason why **European policy** and **international policy** features for the first time on the list of noteworthy concerns, at 4%.

Probably, issues such as **unemployment** or **old age provision** are currently of secondary concern due to the dominance of external affairs. Both of these topics are still at positions 4 and 5, but the concern has been reduced in each case, to 9% and 8% respectively.

# USA /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in the USA: (unaided replies; in %; rounded; multiple responses possible)



■ 2014  
■ 2015

Base 2015: 1,000 resp.



Together with the Netherlands and Japan, the United States had the lowest level of concern about the Top-2 challenges in 2015. The main concern this year for instance, **economic stability**, dropped by 3 percentage points to 15%. The world's strongest economic power, which generates around one-fifth of the world's annual income, continues its positive trend for the fifth year in a row after the economic crisis in 2009. According to the OECD, a real growth in GDP by 2.4% was measured in 2014, similar to previous years. Although, the growth rate is therefore only moderate, the job market was still able to significantly improve. In combination with the low energy prices, private consumption, traditionally the most important pillar of the American economy, is increasing again. However, experts expect that from mid-2015 the US Federal Reserve Bank will step-by-step end the era of low interest rates introduced in the wake of the financial crisis.

But for now, Americans are acknowledging the better job market situation. The issue of **unemployment** has once again lost in urgency compared to the previous year: While the concern of US-citizens during the initial survey of 2014 was at 23%, this

concern has dropped sharply this year to just 11%; therefore this issue has slipped to fourth position. At 5.6% in the first quarter of 2015, the unemployment rate is approaching its level before the financial crisis in 2008, and has fallen significantly since 7.4% in 2013 and 6.2% in 2014.

**Health service** is now in position 2 of the list of concerns at 15%, an increase of two places since last year when it was in position 4. In turn, however, the US-specific issue of "ObamaCare" was mentioned by only 2%, after 4% last year. This reform launched at the end of 2013 allows each US-citizens to get a state-funded, basic health care insurance. However, the majority are still insured by the employer, which is seen as a problem not only due to limited flexibility. By paying insurance instead of a salary, state tax revenues are also lost. Around 8 million persons have already been insured now by "ObamaCare", although currently over 30 million Americans are still without health insurance. Nevertheless, the reform remains controversial, because not all Americans support such state regulation.



As in the previous year, the topic of **politics** and **government** remains in third position, at 13% (2014: 15%). This still relatively great dissatisfaction is probably also due to the disagreements between Democrats and Republicans. Their displeasure with the Democrat government and with President Obama in particular was vented by the electorate during the mid-term elections on 4th November 2014, although it is a tradition in the US to “punish” the party of the incumbent president. But the Republicans, in addition to having a majority in the House of Representatives, also gained the majority in the Senate, meaning that the Democrats can no longer pass reforms and laws without the consent of the Republicans.

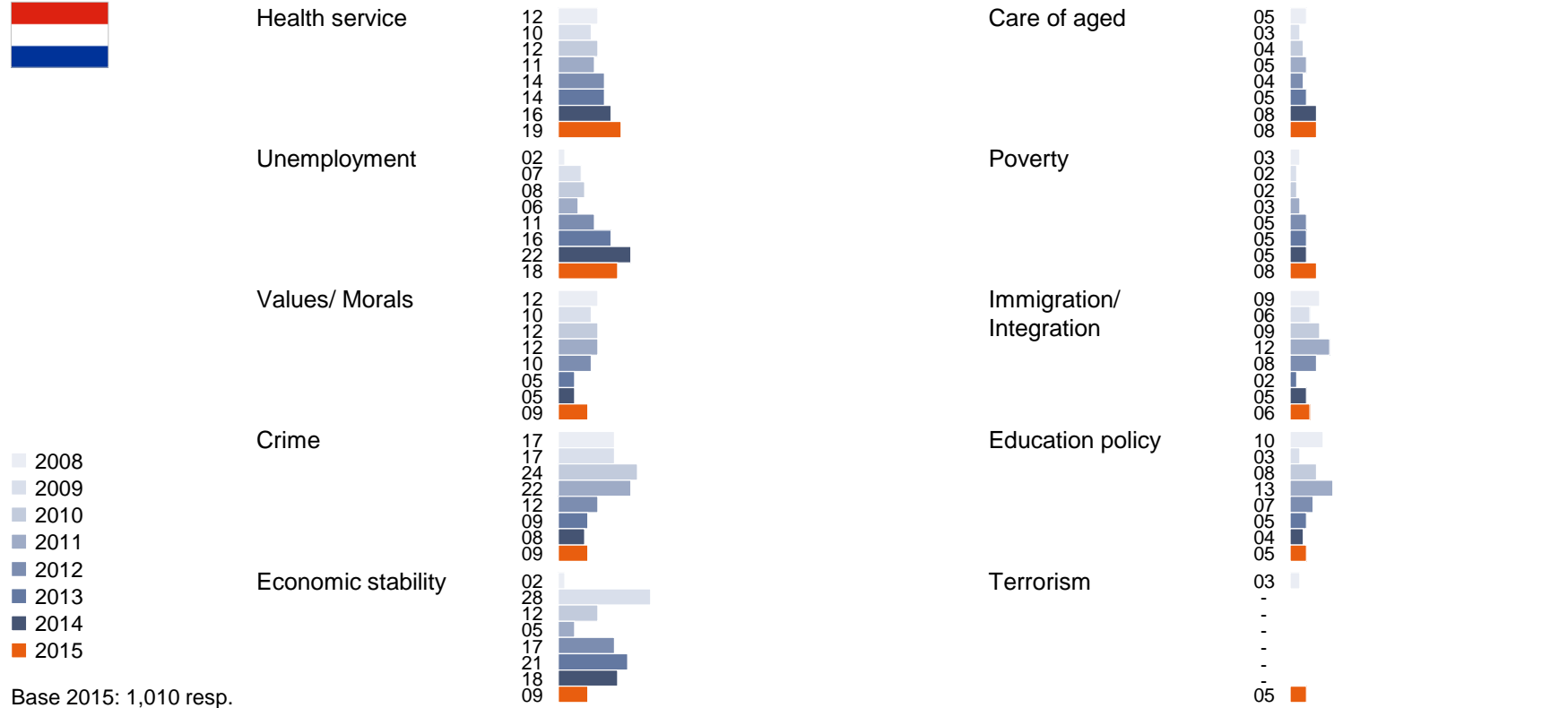
US-citizens see an increasing need for action in the fight against **terrorism**. This concern shot straight into position 6, at 8%. This is likely due to different events: Cyber attacks against the film studio Sony Pictures at the end of 2014 caused consternation, because large quantities of data were stolen and partially posted on the Internet for download. The Americans accuse North Korea of being responsible for the attacks. But also, the rise of the terror-

militia ISIS in Syria and Iraq is perceived as a threat, even though first successes in the fight against the terrorists were reported at the beginning of February 2015 by Secretary of State Kerry. And in addition to this, the trial against the surviving perpetrator of the Boston Marathon attack in 2013 was held during the survey period. In the worst terrorist attack in the United States since 2001, three persons were killed and 260 were injured, some severely. A guilty verdict was handed down in April 2015, and the death penalty was finally imposed at the beginning of May.

The issue of **immigration and integration** has also gained in importance in comparison with the previous year, and increases by four percentage points to 10%. In November last year, US President Obama made a highly controversial decree on immigration policy. This decree was supposed to provide more than four million illegal immigrants with a limited right to residence under certain conditions. The Decree was only stopped by an injunction after this survey - and after a broad discussion in the media. But the problem remains, since immigration from Mexico to the United States is one of the world's largest migration flows.

# The Netherlands /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in the Netherlands: (unaided replies; in %; rounded; multiple responses possible)



Base 2015: 1,010 resp.



In the Netherlands, the concern about the **health service** is now at the top of the list of challenges in 2015. This concern has been growing for years, now reaching 19% after a further increase of 3 percentage points this year. However, the Euro Health Consumer Index (EHCI), published in January 2015, puts the country once more in first place in a comparison of 36 European countries. Vulnerabilities exposed in the study were the occasional long waiting periods for an appointment with a specialist, as well as insufficient efforts to combat smoking. But obviously, the Dutch do not assess their own health system as positively. This could be connected to the on-going reform process, which is constantly criticised. Shortly before Christmas 2014, for instance, there was a risk of a cabinet crisis, because a law introduced by Health Minister Schippers almost failed. The law is intended to further restrict the free choice of a doctor, in order to save money. Critics complain that the health insurance companies, who in future will choose the doctor according to the reform, have now been given even more influence. Four insurance companies already dominate 90% of the Dutch market. The bill must now be adapted within half a year. This

has most probably contributed to increased uncertainty in the same way as those laws that came into effect on 1st January 2015: These also include, in addition to further budget cuts, a shift of responsibilities for some tasks from the national level to local offices. The media reports almost every day on problems with these adjustments, for instance, that transport services are cancelled, or money is not paid or only paid with delays. The impact of budget cuts in the care sector is also discussed: For instance, the Dutch “Health Care Performance Report” 2014 - a report on quality, access and costs of health-care - criticized that the number of citizens without access to the health system due to financial barriers has been increasing since 2010, with as yet unforeseeable consequences. It remains to be seen how the outstanding reforms will be perceived and assessed by the citizens.





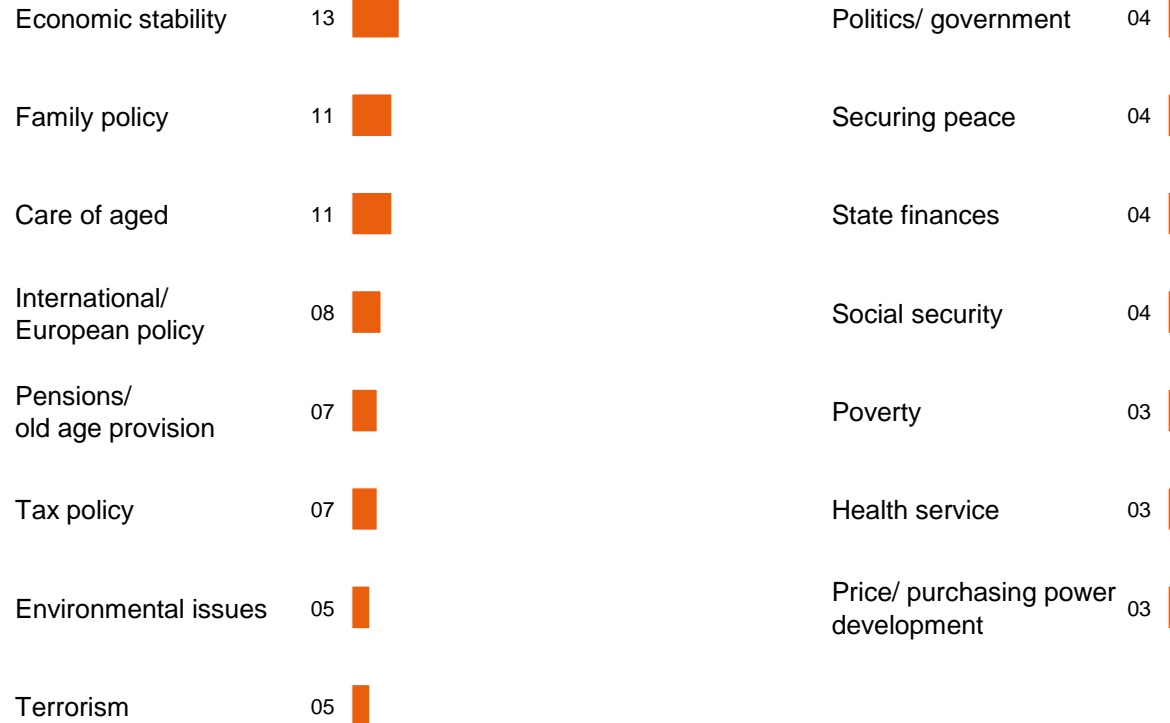
The concern about **unemployment** may be reaching a turning point: This concern has increased steadily since the economic crisis, and reached its highest value last year since the start of the study, at 22%. In 2015, however, the concern reduced slightly for the first time, to 18%, and currently occupies position 2 in the ranking. If you look at the actual development on the labour market, then overall, there is another small increase in the unemployment rate visible in 2014, with 7.4%. But in the course of the year the quota fell steadily, and was at 7.2% in December 2014. Even although this level is still high by Dutch standards, the slightly lower concern about unemployment may be connected to the most recent positive economic development: According to Eurostat, the GDP shrank in 2012 (-1.6%) and 2013 (-0.7% ), but growth was again achieved for the first time in 2014. Experts attribute this in particular to exports, increasing sales figures in retail as well as the recovery of the real estate market. The relief of citizens regarding the economic development can be seen in the results of the study: The concern for economic stability halved from 18% to 9%, and after reaching 2nd place in the list of concerns in the previous year it is currently just in fifth place.

However, little has changed in the call for a fight against **crime**: The topic once more occupies position 4, at 9% (+1 percentage point), and is therefore just behind the issues of **values and morals** in the ranking of challenges. Here, there has once more been a relatively strong increase in this concern from 5% to 9%, since the issue was less of a concern to citizens in the previous two years. This development may also be associated with an increased concern about **terrorism**: This concern, at 5% of responses, enters the top 10 for the first time since the introduction of the study. As in other countries, it seems that the insecurity of people here, after terrorist attacks in Paris, Copenhagen and the attempted attack at the nearby Belgian Verviers, plays a role.

# Japan /// Challenges 2015

## Top 15

... % of respondents mentioned as the most urgent problem to be solved in Japan: (unaided replies; in %; rounded; multiple responses possible)



Base: 1,200 resp.



A glance at the Japanese results reveals one thing above all else: There are hardly any - expressed - problems. But how is this to be interpreted? In accordance with social conventions in Japan, it is not usual to express criticism, anger or concern openly and directly. This is evident in many surveys by the high proportion of "not specified" responses. In the context of the completely open nature of the questions in this study it is even 39% - by far the highest proportion of all surveyed countries. It is therefore worth taking a closer look at this group: For instance, Japanese in rural regions, and even women, were a little more circumspect. But most people withholding responses were teenagers and the less-educated. However, although 2% of respondents were not able to spontaneously come up with any problems, 59% of respondents in Japan did.

**Economic stability** is in position 1 of the list of concerns in Japan, with 13% of citizens worried. After the US and China, Japan remains the third largest economy in the world, and its per capita GDP is therefore one of the highest globally. According to the OECD, the GDP grew by 1.6% in 2013 compared to the previous year; however, the economy declined slightly in 2014, by -0.1%. After previous record growth rates, the economy has already been

more restrained since the beginning of the 1990s, and has not yet recovered from the setbacks of the last few years. The aftermath of the global economic crisis and the 2011 Tsunami, as well as the nuclear catastrophe caused by the meltdown of the nuclear power plant in Fukushima are still noticeable. However, according to experts, the economic slump in 2014 is also due to the increase of value added tax from 5% to 8%, effective from 1st April 2014, as domestic demand has fallen because of this. Probably that is why 7% of Japanese also express displeasure about **tax policy** (position 6).

To combat continuing deflation and improve the economic situation, "Abenomics" was introduced in 2013. This is a mixture of multi-billion dollar economic stimulus package, a relaxed monetary policy, and structural reforms. These measures are controversial, but did not stop the re-election of Prime Minister Abe in early elections in December 2014. The reason for this confirmation of current policy may, however, also have to do with a weak opposition. Criticism of **politics** and the **government** was expressed by 4% of the citizens in Japan, putting the topic in ninth position.



Challenges related to demographic changes occupy a total of three of the foremost five places in Japan. With 11% of mentions each, **family policy** - and here especially the issue of childlessness is mentioned - and **care of the aged** land in positions 2 and 3. In fact, ageing of the population is further advanced than in any other country. Since the drop in the birth rate in the 1970s, the number of newborns has been cut in half, and the population is shrinking. Although Japan currently still has 127 million inhabitants, according to the latest figures there will only be 87 million in 2060. Policies to promote and support 3-child families have been enacted to try and counteract the low birth rate. Primarily, there are not enough workers in the different sectors and, as a result of ageing, this will also soon apply to the care sector. There are estimates that in 2020 approximately 400,000 additional nurses will be required. It is therefore hardly surprising that in Japan, the leader in the field of robotics, robotic care equipment is already being developed to animate those in need of care to participate in ball games - especially as other possible solutions for the lack of human resources, such as migration from other Asian countries, tend to be negatively discussed in public.

A further consequence of the ageing process is the increasing expenditure for care and pensions. The topic of **pensions** and **old age provision** concerns about 7% of Japanese, putting it in position 5. The retirement age was extended in April 2013 from 60 to 61, and it is to be increased step-by-step to 65 by 2025. Unlike in many other industrial countries however, the majority of Japanese workers are interested in working beyond the set retirement age. Pensions are already being taken up well above the official retirement age. This is also due to the fact that for many the regular pension is insufficient to cover the high cost of living. Thus, according to the OECD, one in five Japanese over 65 years lives in income poverty.



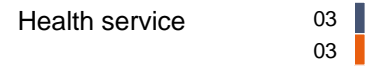
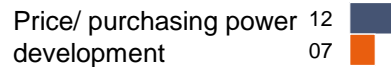
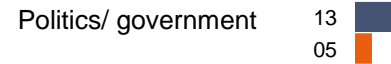
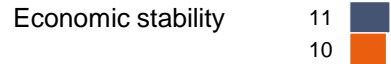
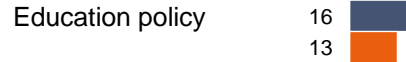
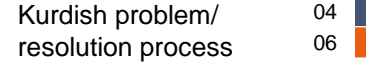
Another issue mentioned relates to foreign policy. Japan participates in the framework of UN peace-keeping operations and disaster relief. In mid-January 2015, the government committed itself to support the fight against the ISIS terror militia financially. Shortly afterwards, two Japanese hostages were killed by the terrorists. The country is therefore engaging at the centre of global conflicts, something it has tried to avoid for decades. Therefore, citizens are also concerned about **foreign affairs and international policy**, which occupies fourth position at 8%, and also explicitly demand a fight against **terrorism** (5%, position 8).

**Securing peace** is explicitly mentioned by 4% of Japanese, although this is probably due to different reasons: In July 2014, the “principle of pacifism” was amended in the constitution to permit the “right to collective self-defence” in future. This loosened the restrictions for the deployment of the self-defence forces, and the defence budget increased again in January 2015. This led to protests from both sides, i.e. opponents and supporters of such an increased military commitment.

Japan is a resource-poor country and highly dependent on imports for its energy supply. With the phasing-out of nuclear power, a measure, incidentally, that is now to be reversed, fossil fuels have had to be increasingly imported since 2011, resulting among other things in record deficits in Japan’s trade balance sheet. Despite the economic benefits, a return to nuclear energy is controversial; according to surveys, up to 80% of the population is opposed. In this present study, 5% mention **environmental issues** as an urgent task to be solved (position 7), whereby 3% explicitly reject the use of nuclear energy.

# Turkey /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in Turkey: (unaided replies; in %; rounded; multiple responses possible)



■ 2014  
■ 2015

Base 2015: 1,235 resp.



With only 1.1 explicitly mentioned problems, Turkey is on the second last position of the international ranking in terms of concerns. The first position, just as in 2014, is the concern about **unemployment**, constant at 30%. The unemployment rate also remains high; according to the OECD, it rose from 8.7% in 2013 to 10.0% in 2014. Youth unemployment, at 17.8% in 2014, was at its highest level since 2010. The situation is particularly difficult in the countryside, so many migrate in the cities to find work. The government is planning a number of measures to counteract this, such as a greater flexibility of the labour market, a further education and training program for skilled professionals, as well as an improvement of vocational training. It is hoped that these measures will create 1.5 million new jobs in the next few years.

In Turkey, it is worth taking a look at a topic that was in position 2 last year, at 17%, but that currently seems almost irrelevant to citizens. Just 1% of Turks are concerned about **corruption**. But according to Transparency International, corruption is increasingly being perceived: The CPI has sunk from 50 points in 2013 to 45 points in 2014, which means an increase in

the level of corruption. Responsible for this is the political situation in Turkey, in particular the restriction of the freedom of expression by the Erdogan government after the protests in Gezi Park.

The expressed criticism of **politics** or the **government** has also decreased by eight percentage points, to 5%. However, the political climate had already changed by the time of the survey: The governing AKP gained the absolute majority at the last three general elections, but even before the parliamentary elections in June 2015, opinion polls show that the pro-Kurdish party HDP is gaining in popular support within the population. The HDP was therefore able to enter parliament with 12% of the vote, and are now the fourth largest force. The AKP only reached 41%, thus losing their absolute majority. Although Erdogan - the head of the government, confirmed in office as recently as in 2014 - had the goal of achieving a two-thirds majority with his AKP party. This would have been enough to pursue the goal to reform the constitution in Turkey and to introduce a presidential system in future. But possibly, the Erdogan government paid the price for the deteriorating economic development.



Concerns about **education policy** have declined slightly, but at 13% is still in position 2 of the list of concerns. The Turkish population is very young - about a quarter is within the compulsory school age - the education sector is therefore central for the further development of the country. Due of the absence of an occupational training system, there is a heavy rush on the universities, but only about 40% of the applicants receive a place. In addition, the opposition and the teachers' trade unions criticized some of the reforms of the education system in recent years, which they assessed as Islamisation: For one thing, the preacher or Imam-Hatip schools could now already be visited at intermediate level, and not as previously at upper school level. And also, the ban on headscarves in schools, dating back to Ataturk, the founder of the Turkish state, was abolished in 2014.

Concern about **economic development** is currently in position 3, at 10%. The Turkish government had to correct the original growth forecast of 4% downwards in the course of 2014; according to the OECD, the economy only grew by 2.9% in 2014. Also in 2015, indications are that growth will be less than expected.

Given previous growth rates of around 9% in 2010 and 2011, this can be a cause of concern. There are a variety of reasons for the cooling of the economy, such as weak exports or decreased foreign investment. Political pressure is also being exerted on the central bank, nourishing doubts about its independence. Because originally the central bank wanted to increase key interest rates already in 2014, to counter the high inflation rate of 8.9%. However, only 7% are concerned about the development of **prices** and **purchasing power**, after 12% in the previous year. The lower oil prices in 2014 and 2015, which benefit Turkey as an importer, may play a role here.

Concerns about **terrorism** also remain steady in comparison to 2014, at 10%. Here, the geographical proximity to the advance of the ISIS terror militia in adjacent Syria certainly plays an important role. Furthermore, the terror has now reached Turkey itself: In early 2015, a self-assassination attempt attributed to ISIS was carried out in Istanbul.



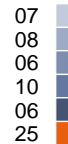
# Sweden /// Challenges 2015

... % of respondents mentioned as the most urgent problem to be solved in Sweden: (unaided replies; in %; rounded; multiple responses possible)



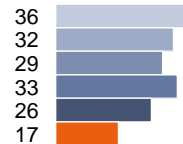
Immigration/  
Integration

07  
08  
06  
10  
06  
25



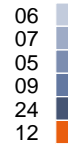
Unemployment

36  
32  
29  
33  
26  
17



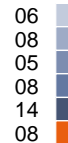
Education policy

06  
07  
05  
09  
24  
12



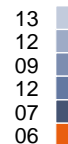
Health service

06  
08  
05  
08  
14  
08



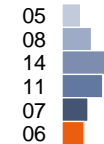
Environmental issues

13  
12  
09  
12  
07  
06



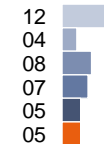
Youth unemployment

05  
08  
14  
11  
07  
06



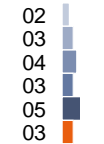
Economic stability

12  
04  
08  
07  
05  
05



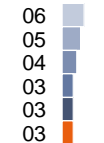
Care of aged

02  
03  
04  
03  
05  
03



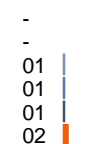
Social security

06  
05  
04  
03  
03  
03



International/  
European policy

-  
01  
01  
01  
02



2010  
2011  
2012  
2013  
2014  
2015

Base 2015: 1,000 resp.

For information only:  
Poverty: 2%  
(2014: 0%)  
Politics/ government: 2%  
(2014: 2%)



Again in 2015, Sweden, with just one challenge mentioned on average, has the lowest problem pressure in comparison with the 22 countries. The issue of **immigration and integration** is now at the top of the Swedish list of concerns: At currently 25%, this concern has increased fourfold compared to 2014, replacing the concern about unemployment at the top of the list. The reasons for this growing concern are manifold. Measured by population across Europe, this Scandinavian country has for several years been taking in the largest number of refugees. In 2014 there were about 9 asylum seekers per 1,000 inhabitants; in Germany, this figure was significantly lower at 2.5. However, this fact had not yet led to such high concern in the last few years. But the numbers of refugees are now increasing even further, and the mood in the country seems to be changing. A sign of this is also the result of the election in autumn 2014, in which the right-wing populist Swedish Democrats gained 13% of the vote. The Swedish Democrats have set themselves the goal of reversing the previously very liberal immigration policy of the country, and thus limiting immigration. However, in view of the increase in the number of refugees, even

the Christian Democrats are calling for a reorientation of asylum policy. In a proposed three-point plan, the previously unlimited residency status (among other things) is to be converted into a limited three-year stay. It is hoped that this will weaken the so-called “pull effect”, i.e. that asylum seekers choose a specific country for the simple reason that different rules apply there. In most other European countries, asylum seekers receive no permanent residence permit. The leader of the Christian democrats, Hägglund, hopes to achieve in the process a more even distribution of refugees within the EU.

The concern about European and international policy may also be seen in this context: 2% of Swedes are concerned about this, placing this issue for the first time in the top 10. The Social Democrats have also fuelled the debate on the issue of immigration, suggesting that ISIS extremists should be provided with more integration assistance after their return to Sweden. This caused an outcry in Swedish media.



It remains to be seen how politics will counter this obviously pressing concern and the anticipated further increase in refugees in 2015.

The downward trend of the last few years with regard to the concern about **unemployment** is continuing: This concern decreases by 9 percentage points, and now stands at 17%. This is the lowest value since introduction of the study in 2010, when more than twice as many citizens were concerned about the job market (36%). According to the OECD, the official unemployment rate at that time was 8.6%, a record level for the former model country Sweden. Since then, unemployment has been relatively constant around 8%, and in 2014 at 7.9%. However, experts assume that the quota will only fall very slowly, because the number of those able to work continues to increase due to current immigration policy.

**Education Policy** is less contentious in 2015. Although just last year education policy was a problem area for every fourth Swede, this year only 12% of the population are concerned with

this, currently placing it in position 3. In the run-up to last year's survey, the publication of the PISA results triggered a broad public debate in Sweden, but at present it appears that the top issue of immigration and integration is forcing other issues to the background.

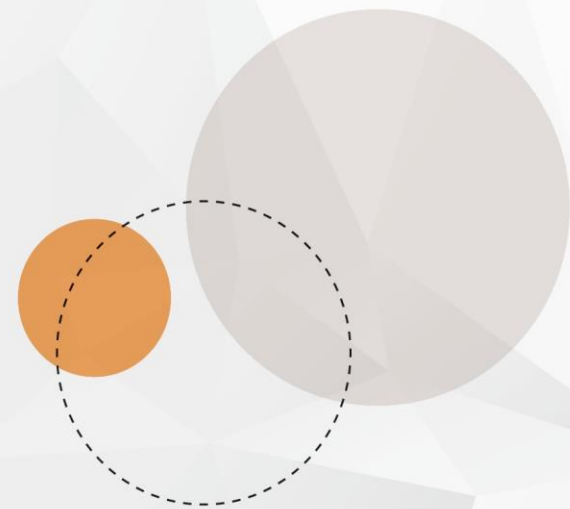
This can also be seen in the next position on the list of concerns, the **health service**. It drops by 6 percentage points to 8%, once more reflecting the level it held in 2013. The Euro Health Consumer Index Report 2014, published in January 2015, indicated no improvement in comparison to 2013. The report criticizes the continued long waiting times for a doctor's appointment - in spite of the efforts of the government. They seem difficult to understand, especially in combination with the high level of expenditure for the health care system; the budget is therefore somewhat polemically referred to as "queue billions".

The problem area **Environmental issues** comes in at position 5, at 6%. This is the lowest value for this issue since the introduction of the study in 2010.

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# Network Analysis on Immigration and Integration in D/A/CH

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The study by Twitter on the topic of integration and immigration in the period 4th May to 7th June 2015 shows that a little more than one third of the texts on Twitter (so-called tweets) were formulated in a way that can be classified as **pro immigration and integration**. A little less than one third is formulated in a way that points in the **contra** direction with regard to immigration and integration. It cannot be excluded that texts deemed “contra” may just be formulated to quote in a simplified manner, or are ironic or sarcastic.

Among the pre-defined nine topics, most tweets within the period of the study were on the **topics of civil society and institutional policy**. The former includes a multitude of tweets with the **hashtags** (= keywords used to locate tweets) “**Pegida**”, “**Nogida**”, “**No Pegida**”, etc. and were marked by the authors themselves. The topic of institutional policy includes a large number of **news bulletins/items**. Evidence of this is provided by the high proportion of neutral messages in this category.

The core of the study is a segmentation of the network from Twitter user accounts. The cluster analysis shows eight major

segments: “Twitteria”, “Mass Media”, “Left”, “Nonconformists”, “Austria”, “Netizens”, “Teenies” and “Switzerland”. Unsurprisingly, the segment with the most Twitter accounts is composed of quite normal users who rarely express themselves politically and who place their own private interests in the foreground (“Twitteria”). Nevertheless, all associated accounts during the study period commented at least once on the issue of immigration & integration. The four most interesting segments from the perspective of the study-panel will be further investigated, namely “**mass media**”, “**left**”, “**nonconformists**” and “**Austria**”. When searching for a group with a predominantly “contra attitude”, the “nonconformists” segment emerged. This is characterized not only by a predominantly negative attitude to the acceptance of refugees, acceptance of persons with a migration background and other religions and cultures. Much more, this segment is characterized by the claim of its users to the “truth” and their perception that “the lie” is in the journalistic, political and economic mainstream.

Method	<ul style="list-style-type: none"><li>▪ Network analysis of Twitter in the German-speaking world</li><li>▪ Cluster analysis for the identification of groups of players</li></ul>
Survey period	4th May to 7th June 2015
Categories:	Predefined categories: Security & crime, economy & work, welfare state & social system, culture & religion, living conditions, ethics & morality, civil society & non-institutional policy, institutional policy, ideology
Coded tweets	1,500 from a total statistical population of 49,985 tweets
Coded articles or documents	500 from a total statistical population of 10,567 articles or documents

This year, the *Challenges of Nations* report shows a **greater importance of the topic of immigration and integration** in some countries in comparison with the previous year. In particular in Germany, Austria, Switzerland, Italy and Sweden, the concern of the population about this issue has increased greatly. In Germany, Switzerland and Sweden, this concern is even in the pole position.

This development offers the opportunity to take a closer look at the topic of immigration and integration in a supplemental study. While the *Challenges of Nations* report reflects the views of the people, this special analysis sheds a light on the "**published**" **opinion on the Internet**. How do the media, political parties, institutions, clubs and other groups and, of course, private individuals, speak out in the public forum of the Internet? Due to the strong significance of the topic in Germany, Austria and Switzerland, this lends itself to an analysis of the German-speaking world in the Internet.

The Internet opens up the possibility of looking "behind the scenes" and of understanding the connections between media, groups, etc. Twitter is a suitable platform for this. The study therefore aims to **make network structures visible**.

Thus, this supplemental study focuses on questions such as how the German public is structured on Twitter around the topic of immigration and integration, and in particular, which **groups of players** can be identified. How can these groups be differentiated politically and ideologically? What is the size of these groups and their audiences on Twitter? In addition, the opinion leaders or the most important players on this topic will be identified. What media are relevant, and to which groups of players, for communication on the issue of immigration and integration? Last but not least, the analysis looks at the content of the debate: What topics can be identified in the public debate on immigration and integration?

In recent years, Twitter has also established itself in the German-speaking countries as a **relevant communication system for political and social discourse**. In addition to politically interested citizens, politicians, political parties, journalists, media, experts, institutions, political activists and civil society initiatives actively use Twitter as part of their daily information and communication repertoire. Like other social media, Twitter allows every user to publish his or her personal opinions on day-to-day political events, to share links to interesting online content, to network and exchange with like-minded people, or to argue with political opponents.

Due to the high number of **active multipliers on Twitter** from politics, journalism and civil society, as well as the function of the service itself as a **distribution system for media content** from the most varied origins, the debates held there are also of significant importance for the public debate as a whole. The scientific study of political communication on Twitter can therefore provide information about current topics and public structures from a specific perspective.

This is precisely the approach followed in the present study within the context of social debate on migration, integration and asylum. The selected research approach thereby links the conceptual level of topics with the networking structures of the users. The former aims to the question of what is being spoken about, while the latter asks who is talking to whom and which socio-political segments can be identified. By combining these two approaches, this study provides rich insights into what issues/topics are being picked up by the various social groups and whether, and in what form, the topics of immigration and integration are pitted against each other positively or negatively.



# D/A/CH /// Network Analysis

## Method: Predefined topic categories

▶ Each tweet and each article linked in a tweet of the drawn sample was assigned to at least one of the topic areas listed here.

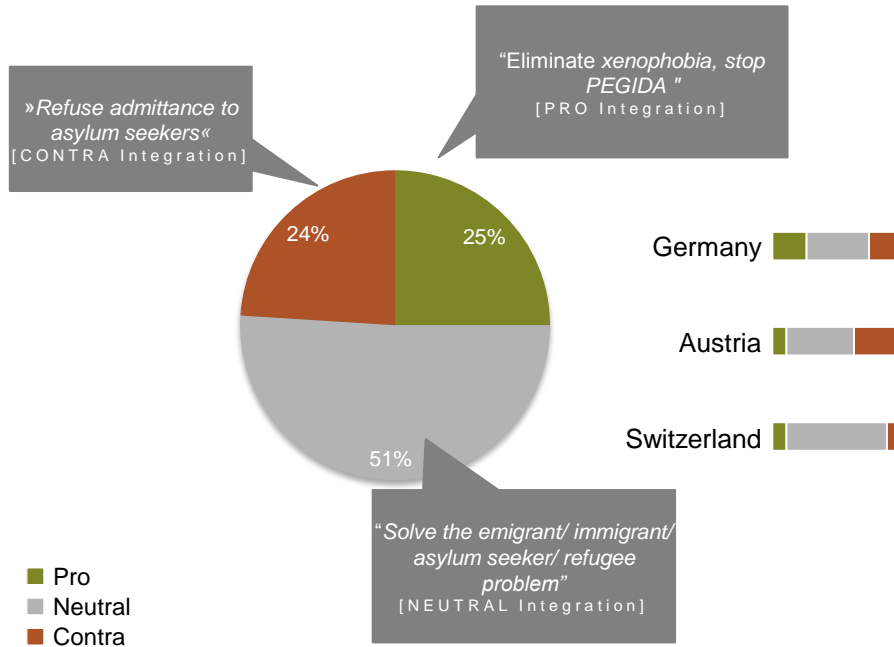
Topics were classified in cooperation with the GfK Verein with the intention of covering and classifying as far as possible all content on the topic of Immigration and Integration. The first template used for such a category classification was the results of the study of the *Challenges of Nations 2015*.

Security & crime	Economy & work	Welfare state & social system	Culture & religion	Living conditions
Crime and contraventions, fear for physical safety and property	Labour market, labour policy, economic policy, examples of integration in the economic context, foreigners as entrepreneurs, work-safety, foreigners in specific occupations, immigrants in their role as workers	Institutional support, solidarity via state measures;  not: private aid and support	Cultural and religious aspects of coexistence, positive and negative aspects of cultural diversity, cultural initiatives, cultural exchange	Living conditions of foreigners and locals within a migration context, living environment improved/deteriorated by migration

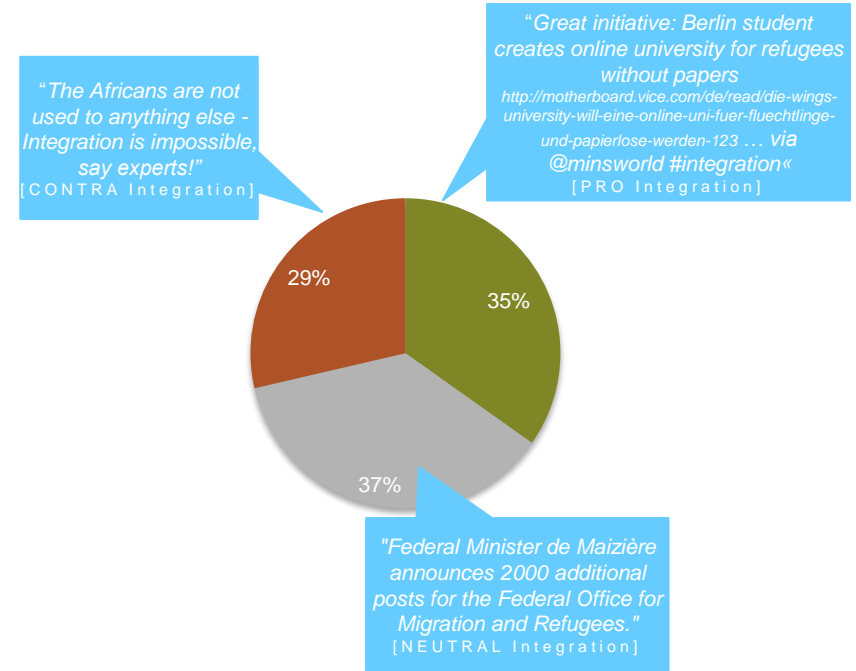
Ethics & morality	Civil society & non-institutional policy	Institutional policy	Ideology
Moral aspects of dealing with refugees, foreigners; reference to human rights and humanity, renunciation of human rights, moral blame	Civic participation, involvement of citizens, protests and demonstrations, PEGIDA & NOGIDA	Party politics, politics in institutions (Europe, Germany, Austria, Switzerland, Federal States, municipalities etc.); political action in relation to integration; legislation	Slogans, prejudices, resentments, without consideration of the above aspects

# Challenges of Nations & Network Analysis in Comparison How do respondents express their attitude to integration as compared to Twitter users?

Coded, open responses from *Challenges of Nations 2015*

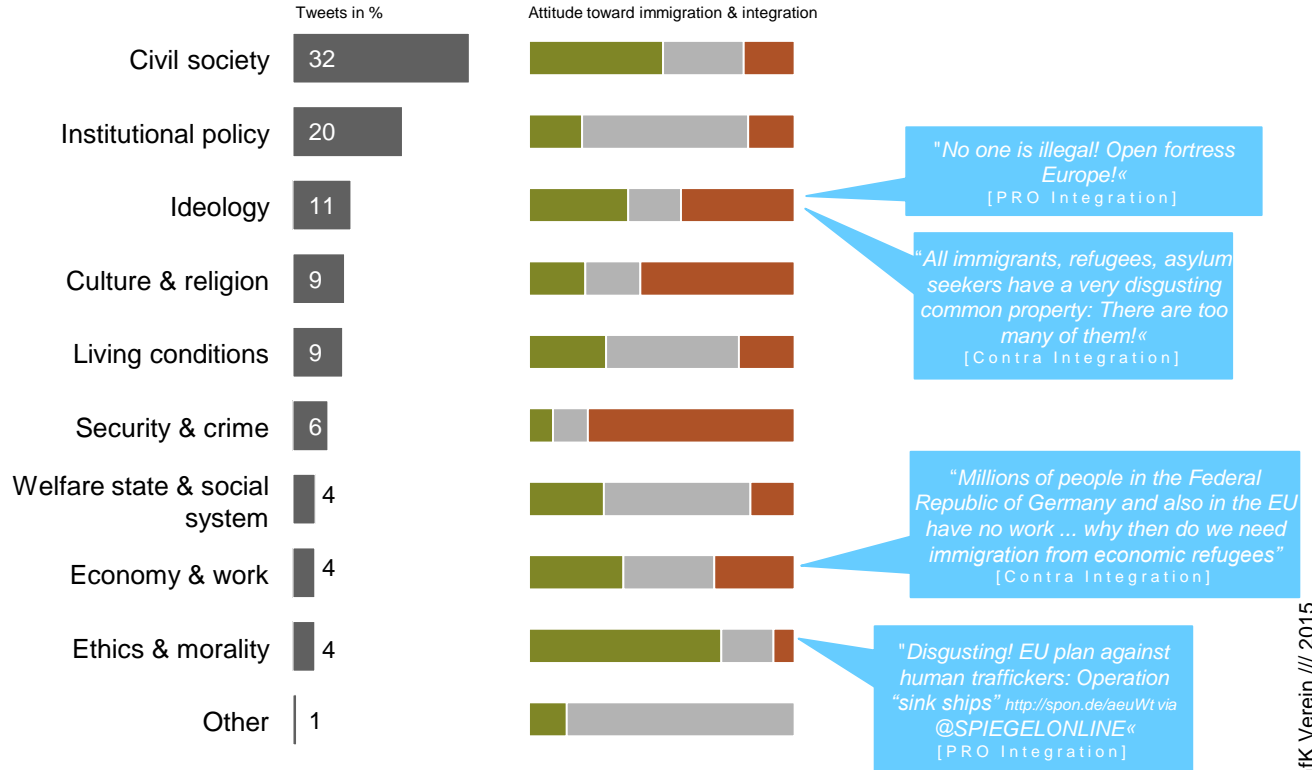


Tweets from special analysis of integration & immigration



- Almost a third of all examined tweets could be assigned to the topics of civil society and non-institutional policy. There were a large number of tweets in this category marked with the hash tags “Pegida”, “Nogida”, “No Pegida” (or suchlike), and that were therefore consciously placed on Twitter in the context of the debate.
- Many of these Tweets simultaneously dealt with topics such as institutional policy or the welfare state and social system.

■ Pro  
■ Neutral  
■ Contra



# D/A/CH /// Network Analysis

## Top accounts on Twitter on this topic



Number of followers  
Centrality in the entire network in %

281,787	27	taz <small>Tazgezwitscher</small>
786,316	25	SPIEGEL ONLINE <small>SPIEGELONLINE</small>
201,712	24	netzpolitik.org <small>netzpolitik</small> <small>Blog about politics on the Internet, copyright issues and monitoring by Markus Beckedahl</small>
695,024	24	Tagesschau <small>tagesschau</small>
470,567	23	Süddeutsche Zeitung <small>sz</small>
366,200	23	Steffen Seibert <small>RegSprecher</small> <small>Spokesman for the federal government and head of the Federal Press Office</small>
116,828	21	Der Postillon <small>Der Postillon</small> <small>Satirical contributions in the style of newspaper articles and agency reports by Stefan Postillon</small>
501,135	19	DIE WELT <small>welt</small>
71,925	17	Der Freitag <small>derfreitag</small> <small>Left-liberal national weekly</small>
61,448	16	Gregor Gysi <small>GregorGysi</small>

Reading example: 27% of users throughout the network follow "tazgezwitscher"



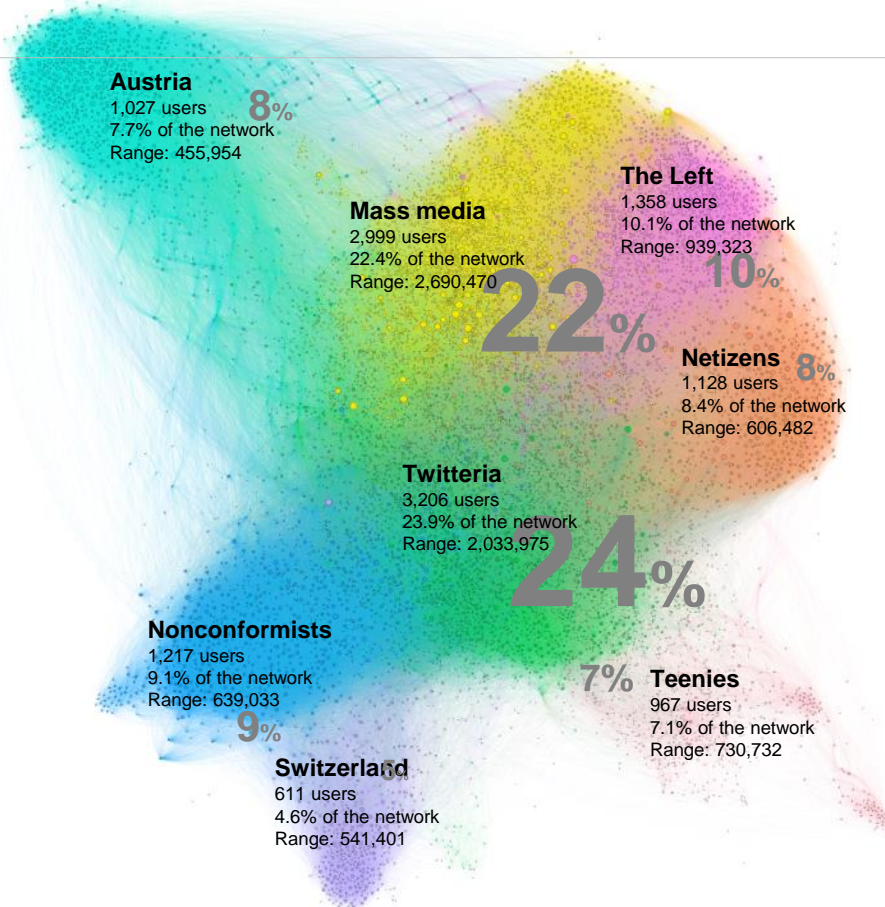
Not surprisingly, six established (German) news media are among the most relevant Twitter accounts on this topic: taz, Spiegel, Tagesschau, Süddeutsche Zeitung, Welt and Der Freitag. Interesting is that the taz is the most important media on this issue in the entire network, although other news media have far more followers on Twitter all together. The taz therefore has a stronger voice on the issue of immigration & integration.

The Twitter account of *Netzpolitik* is - a bit of a surprise - the third most important account on the topic, although the focus of the blog is actually on political aspects of the digital transformation.

Not to forget: This is a closer look at how the accounts are networked to each other and what role certain accounts in this network have for the other accounts. This analysis shows that *Netzpolitik* is a blog linked with many other journalistic accounts. The same applies to the account of Steffen Seibert, the government spokesman of the German Federal Government, as well as to the *Postillon* account - the latter less for journalistic than for entertainment reasons.

# D/A/CH /// Network Analysis

## Overview of groups of players:



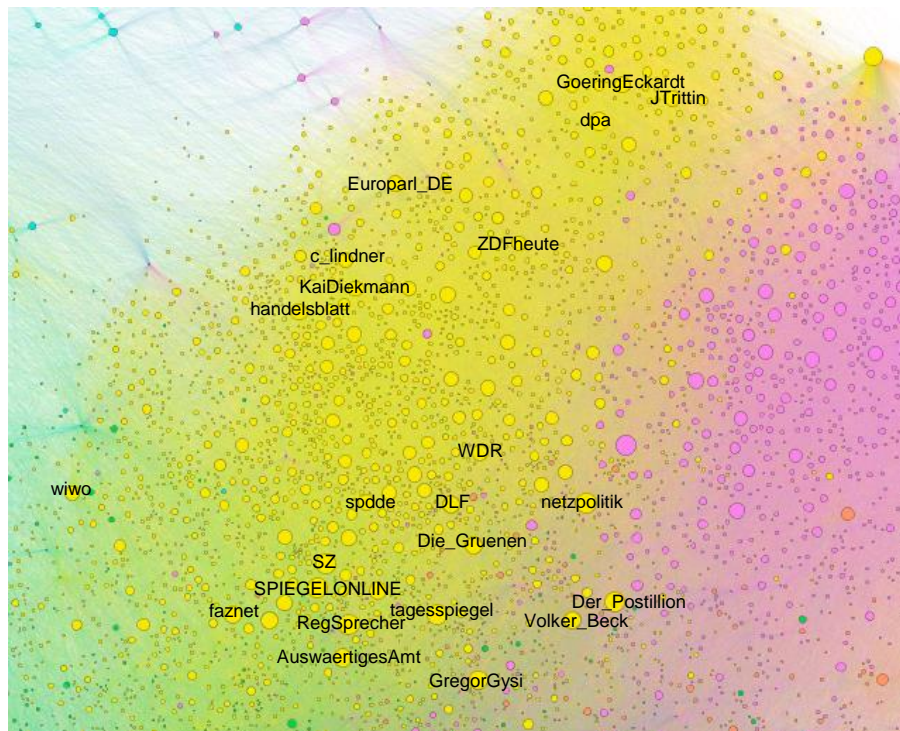
The information network of users participating in the discourse on immigration and integration on Twitter has eight larger segments, differentiated from each other to some extent by **political-cultural aspects** and to some extent **geographically**:

In the centre is a 'mass media' cluster, containing the most important German media and politics accounts. The left-wing "Pro-integration" and "Netizens" clusters on the one hand and the right-wing "Nonconformists" cluster on the other, are opposite poles within the network.

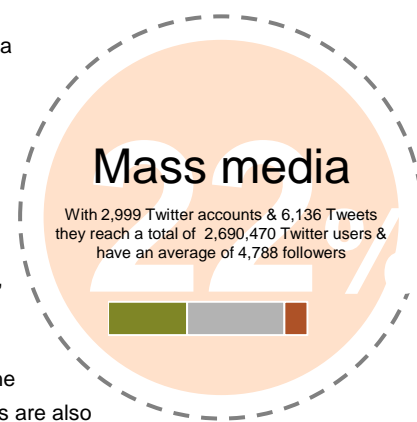
In between are the "Teenies" and "Twitteria" segments, which express a very wide range of opinions, whereby the "Teenie" cluster sets itself apart from the rest of the network. There are only a few connections between the world of adults and of youth. On the edge of the network are segments that can be allocated to Austria and Switzerland.

# D/A/CH /// Network Analysis

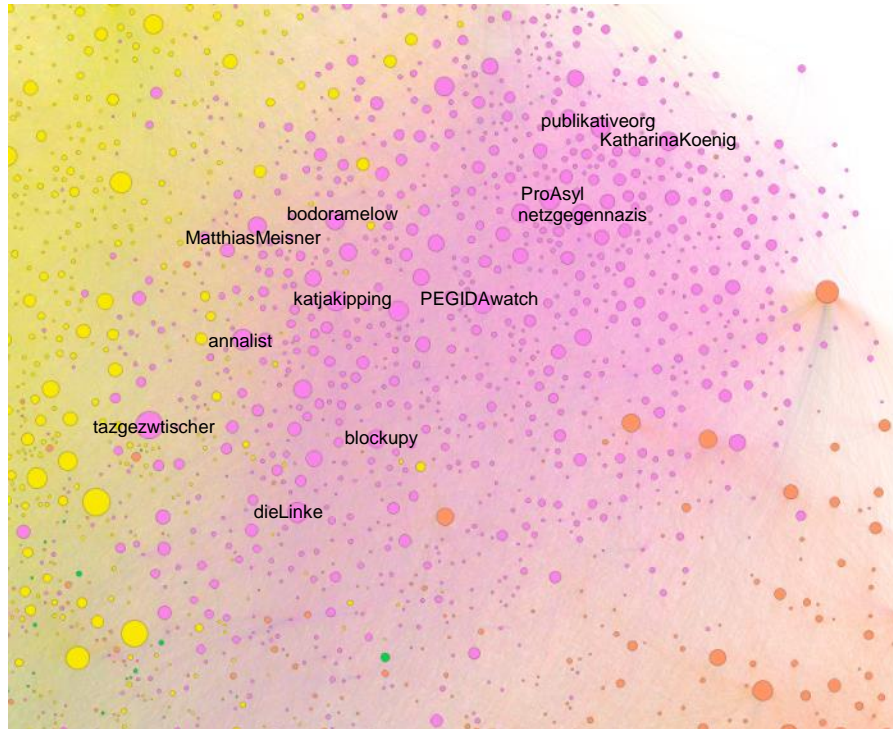
## “Mass media” segment: Overview



This very large segment includes the accounts of the most important German media (e.g. Tagesschau, Süddeutsche Zeitung, Spiegel Online), journalists (e.g. , Kai Diekmann) and politicians from moderate parties - whereby accounts from The Greens (e.g. , Volker Beck, Juergen Trittin) are significantly more prominent than those of the SPD (e.g. SPD party leadership), CDU/CSU (e.g. CDU parliamentary group) and FDP (e.g. Christian Lindner). Agencies and authorities (e.g. Federal Foreign Office, the European Parliament) and political foundations are also represented in this segment; the central account in this context is from the German government spokesman Steffen Seibert. Even away from the more prominent accounts, users working in the media dominate, and/or users who present themselves as officials or supporters of the SPD, the CDU/CSU, The Greens or the FDP.



Users in the mass media cluster communicate mainly in a neutral manner on the topic of integration. However, when opinions are expressed, these are predominantly positive toward migration. Thematically, institutional policy is most represented, which is unsurprising given the composition of the cluster. In addition, living conditions of migrants is a hotly discussed issue.



This cluster is dominated by accounts of political activists and civil society initiatives classified within the political spectrum as on the left. These include initiatives to combat the exclusion of migrants, anti-Pegida activists and anti-fascist documentation archives, dedicated feminist accounts, users from the homosexual and queer community and users dedicated to the defence of minority rights. Dedicated leftist media such as *Neues Deutschland* and *Junge Welt*, as well as left-wing media such as *taz* and *Le Monde Diplomatique* round off the picture. In case of the established political parties, only accounts from “Die Linke” (the left party) are to be found.



Not surprisingly, the attitude of the users of this segment on migration and integration is largely positive. Thematically, the topic of “Civil Society” is very strongly represented, and often the organization of anti-Pegida protests or support initiatives for refugees are discussed.

### What are the most important topics?



Civil society	56
Institutional policy	16
Living conditions	9
Ideology	6
Ethics & morality	5
Culture & religion	3
Security & crime	2
Economy & work	2
Welfare state & social system	1
Other	0

»Kill borders! Build bridges for immigrants! Thursday was a wonderful day, just one deportation: <https://t.co/4LVpzwia1T>«  
[PRO Integration]

»Are refugees also discussed at the #Europaforum?! Here, we do: please sign! <http://t.co/gnwTA1thhu> Thanks:) #PetitionRefugees«  
[PRO Integration]

»About #Pegida: #Dresden should become bilingual and a pilot town for refugee integration: <http://t.co/oeDDhAq80n> «  
[PRO Integration]

»Juliane Nagel (Linke): Deportation of a man from Tunisia: Heavily pregnant girlfriend remains traumatised behind <http://t.co/rAwLDOKYm8>  
"[PRO Integration]


»RT @w2wtal: #Deportation after 30 years in Germany! Uproar in the council meeting: <http://t.co/koxbd8YKTZ> #Berlin #Krefeld "  
[NEUTRAL Integration]

### Tweets on the topic of civil society

### Tweets on the topic of living conditions

## The Left

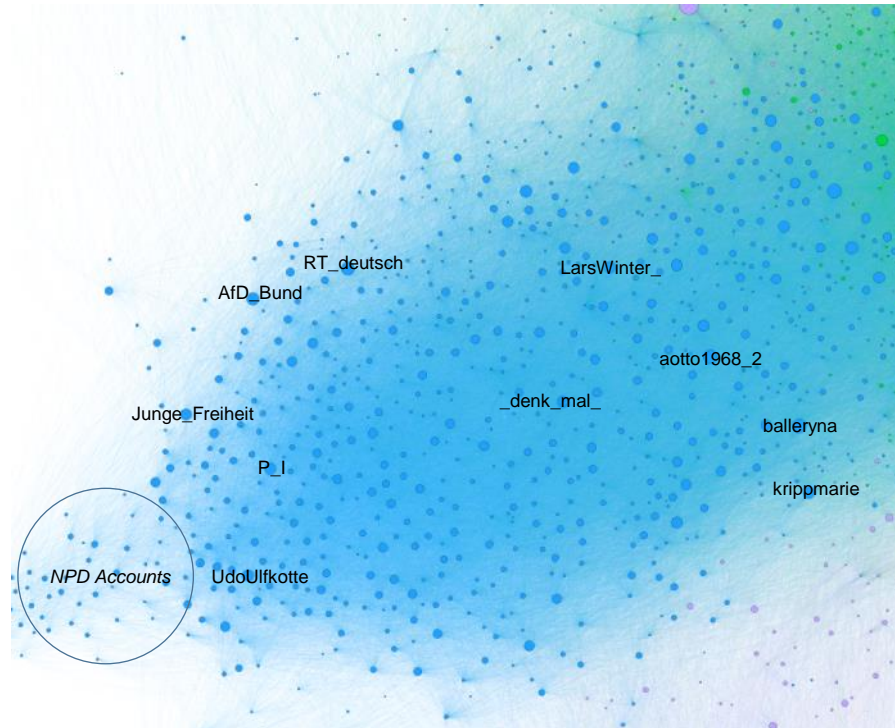
With 1,358 Twitter accounts & 6,618 Tweets they reach a total of 939,323 Twitter users & have an average of 1,434 followers





# D/A/CH /// Network Analysis

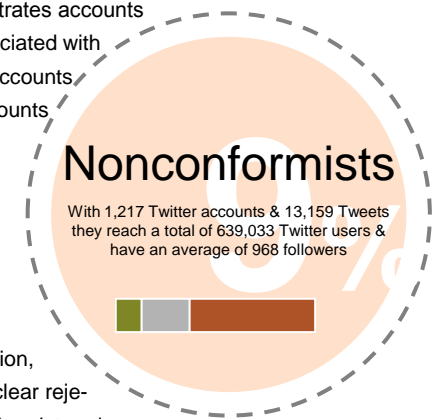
## “Nonconformists” segment: Overview



The “nonconformists” segment concentrates accounts which are often - but not in every case - associated with the political right. For example, several AfD accounts are in a central position, as well as NPD accounts in the periphery of the segment.

However, more than mere political orientation, many users of this cluster emphasize their societal non-conformism: Political incorrectness and the search for the ‘truth’ to counter the ‘lies’ within society’s elites are often provided as a motive. In addition, there is a strong Reference to Russia and a clear rejection of the European Union in the profiles. The picture is rounded off by initiatives for men’s rights and against paedophilia. The latter are conspicuously often suspected within the mainstream elites.

Commensurate to the political bias of the accounts towards the right, integration and migration is assessed largely negatively. Thematically, security and crime (in the context of criminal foreigners and asylum seekers) dominate as well as culture and religion (keyword Islamization of the West). The topic of civil society is also strongly represented, often with regard to the organization of demonstrations (keyword: Pegida) and other civil-society initiatives against Islamization and foreign infiltration.



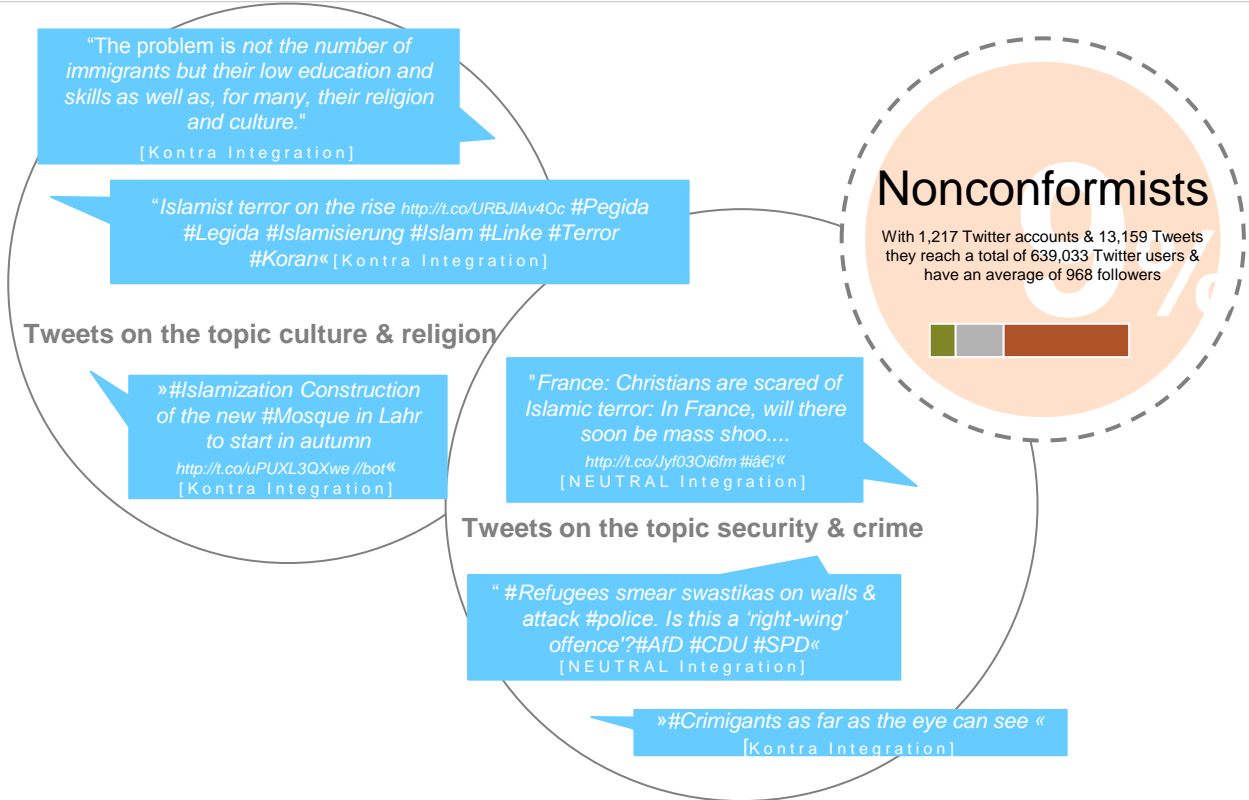
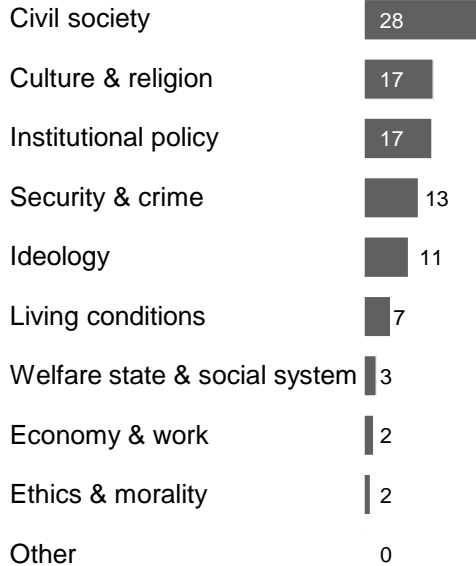
# D/A/CH /// Network Analysis

## “Nonconformists” segment: Topics

### What are the most important topics?

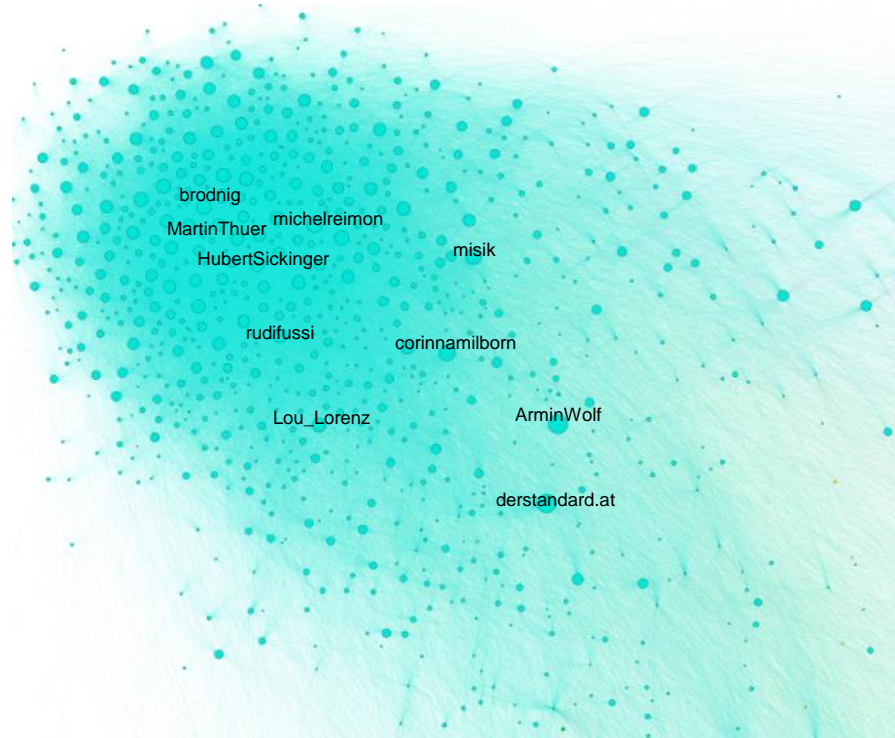


Tweets in %

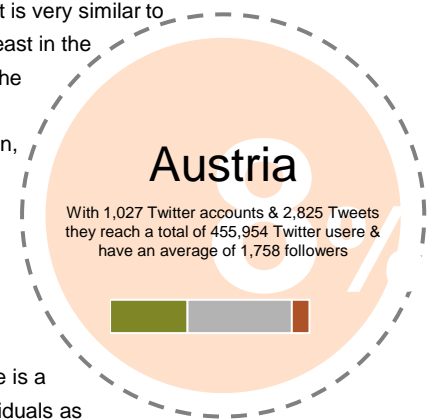


# D/A/CH /// Network Analysis

## “Austria” segment: Overview



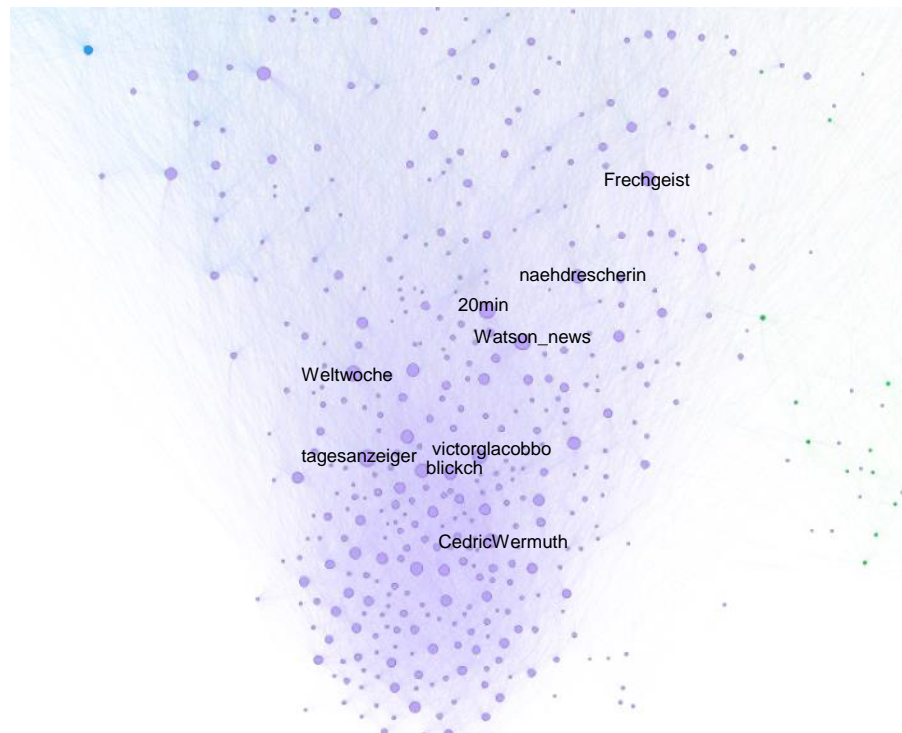
The composition of the Austria segment is very similar to that of the German mainstream segment, at least in the top accounts: There are mainly media (e.g. the Standard, Profil) and individual journalists (e.g. , Armin Wolf, Corinna Milborn). In addition, there are political consultants and experts (e.g. Rudi Fussi, Hubert Sickinger) and politicians from the opposition parties, i.e. Green Party (e.g. Michel Reimon) and Neos (e.g. Matthias Strolz). Parties such SPÖ, ÖVP and FPÖ are clearly less well represented. In addition, it is striking that there is a very strong dominance of accounts from individuals as opposed to institutions, and the extraordinary density of the network: In Austria, the central users follow each other in many cases. The link between Austria and the German clusters is particularly noticeable via the mass media and the Left cluster.



The distribution of opinions about migration is also very similar to that of the German mass media cluster, whereby half of the Tweets were assessed neutral, and around 39 per cent positive. Thematically, institutional policy and living conditions of migrants are heavily represented. The debate on civil-society initiatives is significantly weaker than in Germany, certainly also because the Pegida and the NoPegida movement have limited relevance in Austria.

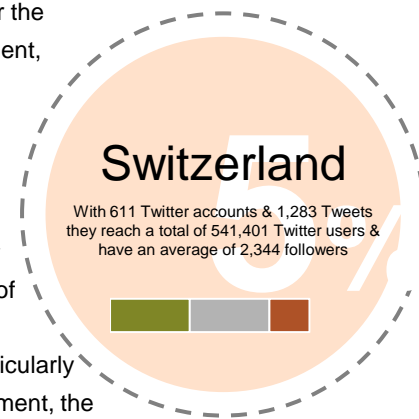
# D/A/CH /// Network Analysis

## “Switzerland” segment: Overview



The *Neue Zürcher Zeitung* is by far the most relevant account in the Swiss segment, which also contains numerous other institutional media accounts (e.g. *Tagesanzeiger*, *20 Minuten*).

In addition to journalists and some politicians (the Green party is particularly strong here), the prominence of a range of politically interested citizens without a function within the political system is particularly noticeable. In contrast to the Austria segment, the Swiss users are linked with more right-wing than left-wing accounts in Germany.



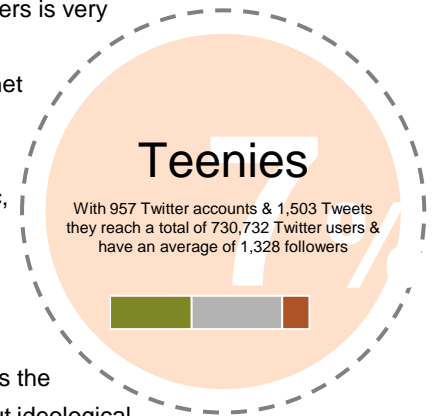
This is also reflected in the opinions, where migrants are seen much more negatively than in Austria and the German mainstream, even though, overall, the positive opinions outweigh. Thematically, there is a proportionately greater discourse around ethics and morals.

# D/A/CH /// Network Analysis

## “Teenies” segment: Overview



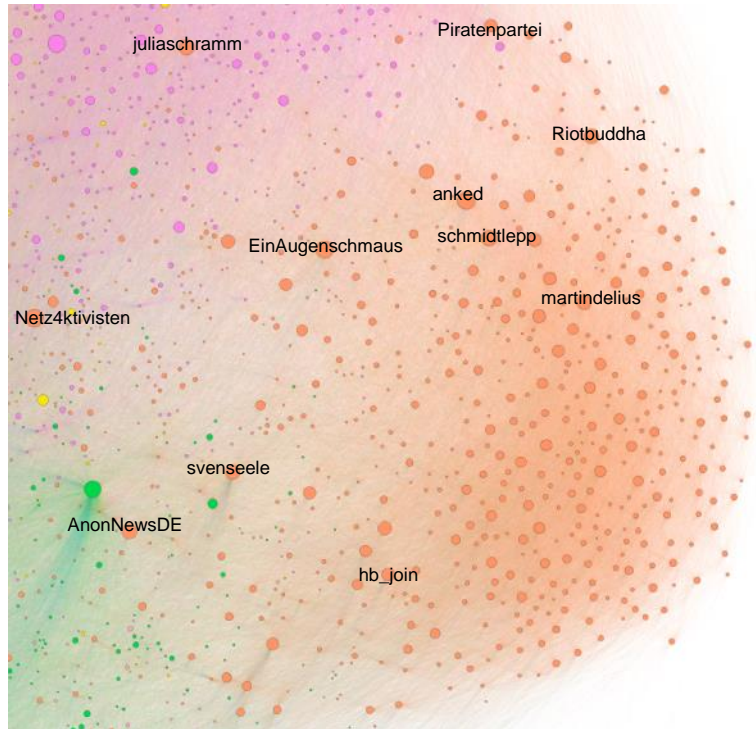
This segment of primarily young users is very much shaped by video bloggers (e.g. Bullshit TV, Y-Titty) and other Internet celebrities who discuss the topic of integration in their communities. The self-descriptions of many users are ironic, sarcastic and they use strong language, and often refer to their own age.



Thematically, the Teenie segment is the only one that contains frequent simply-put ideological statements, and positive statements on migration are three times more frequent than negative ones. Furthermore, in comparison to other segments, issues of culture and religion are over-represented, and institutional policy is under-represented.

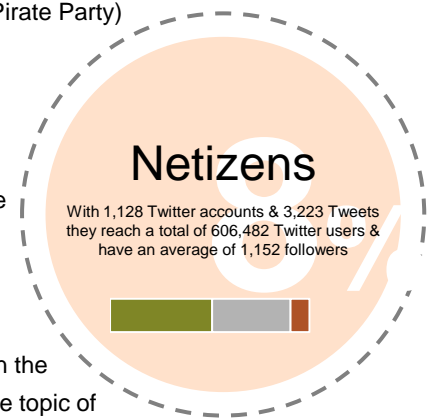
# D/A/CH /// Network Analysis

## “Netizens” segment: Overview



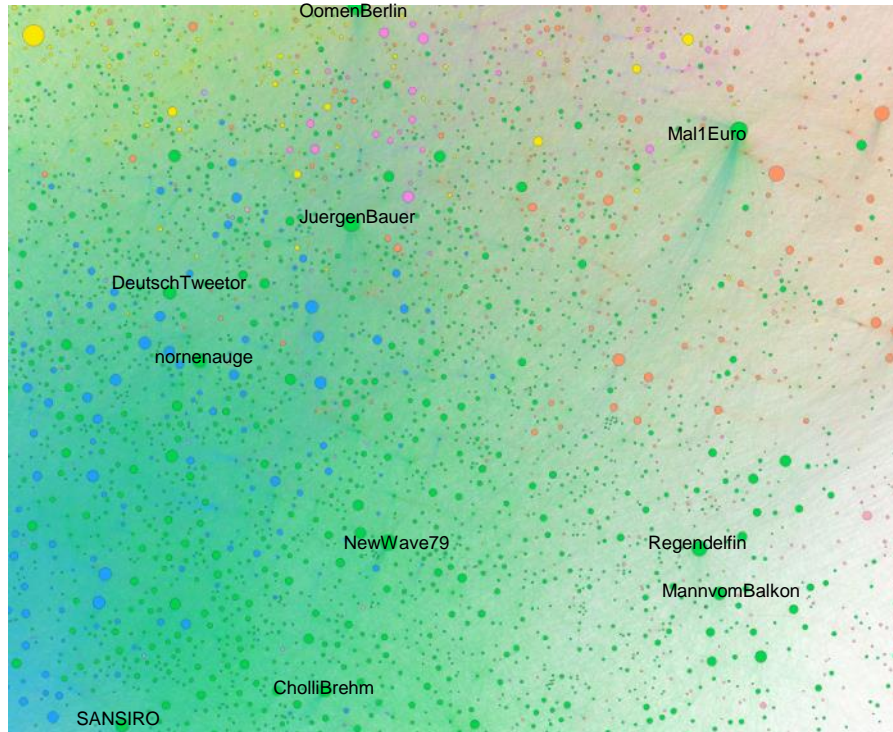
Accounts of the Piratenpartei (the Pirate Party) and current or former officials (e.g. Anke Domscheit-Berg, Christopher Lauer) are strongly represented in this segment. In addition, there are numerous accounts with references to digital culture and the economy, Internet policy, open data, open government and related issues.

The Netizens are largely positive on the issue of migration and integration, and the topic of civil society is well represented.



# D/A/CH /// Network Analysis

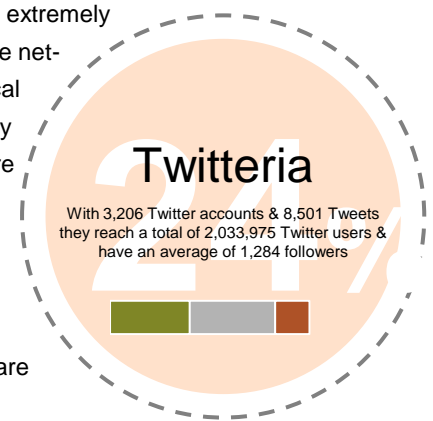
## “Twitteria” segment: Overview



The largest segment of the study is extremely varied. In contrast to the other parts of the network, there are very few dedicated political accounts or institutions here. And in many cases, the users place their private leisure and cultural interests in the foreground.

Furthermore, tweeting as a cultural form is stressed in many of the central accounts, and wit and irony in particular are highly relevant.

The range of topics on integration are as varied as the diversity of the user structure.



# Economic indicators at a glance 2015

(Selected economic indicators of each country)

	Nigeria	Iran	Germany	India	South Korea	Brazil	Italy	Austria	France	Indonesia	UK
Growth rate GDP (real) in % - 2014 c.f. Eurostat	7.3*	-5.8*	1.6	5.0*	3.0*	2.5*	-0.4	0.3	0.4	5.8*	2.8
Unemployment rate in %-2014 c.f. OECD	-	-	5.0	-	3.5	-	12.6	5.6	10.3	-	6.2
Unemployment rate in %-2013 c.f. OECD	7.5**	13.2**	5.2	3.6**	3.1**	5.9**	12.1	5.4	10.3	6.3**	7.6
Inflation rate in %-2014 c.f. OECD	8.1***	17.2***	0.8	6.4	1.3	6.3	0.2	1.5	0.6	6.4	1.5
	Belgium	Spain	Poland	South Africa	Switzerland	Russia	USA	Netherlands	Japan	Turkey	Sweden
Growth rate GDP (real) in % - 2014 c.f. Eurostat	1.1	1.4	3.4	1.9*	2.0*	1.3*	2.4	0.9	1.5*	4.0*	2.1
Unemployment rate in %-2014 c.f. OECD	8.5	24.5	9.0	-	4.5	-	6.2	7.4	3.6	10.0	7.9
Unemployment rate in %-2013 c.f. OECD	8.5	26.1	10.3	24.9**	4.4	5.6**	7.4	7.2	4.0	8.7	8.0
Inflation rate in %-2014 c.f. OECD	0.5	-0.2	0.1	6.1	0.0	7.8	1.3	0.3	2.7	8.9	0.2


Eurostat/OECD: as of May 2015

\*c.f. World Bank (2013); \*\*c.fl. International Labour Organisation (ILO) (2013/2014, as of May 2015); \*\*\*c.f. World Bank (2014)



# Germany /// Challenges 1991-2015

... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)


 <b>unaided replies</b>	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Immigration/integration	38	68	31	24	20	18	15	12	11	11	13	13	7	6	7	13	7	9	7	8	16	7	8	13	35
Unemployment	39	39	62	66	61	81	79	86	71	66	59	74	75	77	81	80	67	53	57	66	55	34	32	33	22
Pensions/old age provision	4	3	10	9	10	17	15	14	10	17	15	12	18	20	12	18	18	23	9	19	17	13	14	24	16
Price/purchasing power development	13	8	9	7	7	4	5	4	2	5	15	14	10	9	11	11	18	37	13	24	33	26	29	26	16
Economic stability	10	9	14	13	7	7	7	5	4	4	4	11	16	16	12	8	6	7	36	26	14	24	16	10	15
Poverty*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	2	3	10	6	5	6	12	13	14	15
Education policy	1	1	1	1	1	1	1	3	3	3	4	5	4	6	7	9	10	17	14	14	23	12	16	12	15
Securing peace	2	2	2	4	4	2	1	0	5	1	1	2	6	2	1	1	2	2	2	5	6	3	3	5	11
Crime	2	7	9	18	19	13	9	19	9	10	10	17	10	7	6	6	10	13	8	15	17	7	8	11	10
Social Security	4	4	11	6	8	9	8	9	7	7	7	8	12	13	7	10	8	13	13	17	25	11	12	11	9
Health service	2	4	10	4	2	3	4	6	2	6	5	5	15	14	7	15	13	12	10	21	19	11	7	10	9
International/ European policy*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	1	2	4	3	4	4	7
Environmental issues	23	16	15	15	23	13	6	5	4	6	11	5	4	3	3	5	16	12	7	10	14	12	7	10	6
Terrorism*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	1	1	1	1	6
Politics/government	1	3	3	4	1	2	3	3	2	4	3	6	7	8	8	6	7	9	10	10	12	13	7	7	6
Base:	2898	3031	2992	2141	2455	2427	2521	2486	2492	2451	2452	2022	1959	1979	1955	1974	1971	2010	2072	2063	2076	2087	2042	2018	1960

\* Never among the most important challenges in previous years

# Germany /// Challenges

## West Germany 1991-2015


... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)

 unaided replies	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Immigration/integration	44	73	35	28	23	20	17	14	10	12	13	15	7	7	6	15	8	10	8	9	17	7	8	14	35
Unemployment	30	31	58	63	58	80	77	84	69	64	55	71	73	75	80	79	64	51	55	64	53	32	28	32	21
Pensions/old age provision	3	3	11	10	11	19	17	16	11	19	16	13	19	22	14	20	19	24	9	19	18	13	14	26	16
Poverty*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	2	3	9	5	5	6	11	13	15	16
Economic stability	5	5	12	13	6	6	7	5	4	4	4	11	16	17	12	7	5	6	38	27	14	25	16	9	16
Price/purchasing power development	15	10	11	7	8	4	5	4	2	5	14	12	9	9	11	10	16	37	13	22	31	24	26	23	15
Education policy	1	1	1	1	1	1	1	3	3	3	4	5	5	7	7	9	10	17	14	14	23	12	17	12	14
Securing peace	2	2	2	4	4	2	1	0	5	1	1	2	6	2	1	0	2	2	2	5	6	3	3	5	11
Crime	2	5	8	16	18	11	8	17	9	8	9	17	9	6	6	6	10	13	7	15	16	7	8	11	10
Health service	2	5	12	5	2	3	5	6	2	6	5	5	16	15	8	15	13	12	10	21	17	10	8	10	9
Social Security	2	2	10	5	7	8	6	9	6	6	7	7	11	11	7	9	7	12	12	17	24	10	13	11	8
International/ European policy*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	1	2	4	3	4	4	7
Environmental issues	26	18	17	17	26	15	7	5	5	7	13	6	5	3	3	5	16	14	8	11	14	13	7	11	7
Terrorism*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	1	0	2	1	1	1	2	6
Family politics*	-	-	-	-	-	-	-	-	-	-	4	4	2	2	4	7	10	8	9	7	13	9	10	10	6
Base:	1942	2028	1997	1708	1945	1932	2002	1975	1979	1946	1952	1607	1557	1575	1560	1575	1575	1614	1666	1669	1723	1732	1621	1608	1562














\* Never among the most important challenges in previous years

# Germany /// Challenges East Germany 1991-2015

... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)










 <b>unaided replies</b>	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Immigration/integration	12	49	18	10	7	11	5	5	8	8	12	7	4	3	4	8	2	5	4	6	12	3	5	9	35
Unemployment	75	73	80	78	74	86	85	92	78	76	79	87	82	84	86	85	76	63	63	73	68	45	44	40	27
Price/purchasing power development	6	2	2	6	2	4	4	6	3	5	20	14	14	10	13	13	27	39	15	31	43	39	38	34	17
Education policy	2	1	1	1	1	0	0	2	3	2	3	4	3	6	5	9	8	16	13	13	22	9	14	10	15
Economic stability	29	27	21	11	12	10	8	7	4	3	4	12	14	14	15	10	6	10	29	22	14	18	15	10	14
Social Security	12	11	16	12	13	15	14	11	9	8	9	13	16	20	9	16	12	18	18	17	32	14	11	13	14
Pensions/old age provision	6	3	4	5	6	8	7	7	7	8	11	6	13	12	6	12	11	17	9	17	16	13	11	19	14
Crime	3	16	13	24	25	19	13	26	9	16	13	16	11	8	8	7	10	13	13	15	21	8	8	13	13
Securing peace	1	1	2	6	4	2	1	0	6	1	2	2	5	4	2	1	3	4	3	6	7	4	5	5	12
Poverty*	-	-	-	-	-	-	-	-	-	-	-	-	-	2	1	3	4	13	6	6	7	12	11	11	12
Politics/government	3	4	5	2	0	2	3	4	1	4	2	7	11	6	8	9	10	12	12	12	17	12	8	9	10
Health service	1	1	0	1	1	1	2	5	2	4	5	5	10	11	4	15	12	10	12	21	25	12	6	10	9
Family politics*	-	-	-	-	-	-	-	-	-	-	3	3	1	3	4	7	9	6	9	8	12	9	8	12	7
International/ European policy*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	1	2	3	4	5	4	5
East and Germany politics	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5
Basis:	956	1003	995	433	510	495	519	511	513	505	500	415	402	404	395	399	396	396	406	394	353	355	421	410	398

\* Never among the most important challenges in previous years

Europe	Proportion sample/ total population in %	Proportion sample/ total population in thousands	Sample Size	Methodology	Age	Regional coverage	Fieldwork
 Austria	85.3%	7,228K	1,000	CAPI	15+	Nationwide	Feb 15
 Belgium	83.1%	9,303K	1,051	CATI	15+	Nationwide	Feb / March 2015
 France	81.7%	53,945K	1,003	CAPI	15+	Nationwide	Feb / March 2015
 Germany	87.4%	70,48K	1,960	CAPI	14+	Nationwide	Feb 15
 Italy	85.9%	51,395K	1,026	CAPI	15+	Nationwide	Feb 15
 Netherlands	82.3%	13,830K	1,010	CATI	15+	Nationwide	Feb 15
 Poland	85.2%	32,828K	1,000	CAPI	15+	Nationwide	March 15
 Russia	83.5%	119,76K	2,106	PAPI	16+	Nationwide except for regions in Northern Russia and North Caucasus	Feb 15
 Spain	85.0%	39,350K	1,008	CAPI	15+	Nationwide	Feb 15
 Sweden	83.5%	8,010K	1,000	CATI	15-84	Nationwide	Feb 15
 Switzerland	76.0%	6,144K	1,000	CATI	15-74	Nationwide, except for Italian-speaking Switzerland	Feb 15
 Turkey	73.6%	55,151K	1,235	PAPI	15-65	12 provinces: Istanbul, Ankara, İzmir, Bursa, Kayseri, Malatya, Adana, Samsun, Trabzon, Tekirdağ Diyarbakir und Erzurum	March 15
 UK	81.3%	51,104K	1,062	CAPI	16+	Nationwide	Feb 15

Field work carried out with GfK GLOBO BUS®.

# Methodology North and South America, Africa, Asia

North and South America		Proportion sample/ total population in %	Proportion sample/ total population in thousands	Sample Size	Methodology	Age	Regional coverage	Fieldwork
 USA		75.7%	239,310K	1,000	CAWI	18+	Nationwide	Feb 15
 Brazil		69.3%	138,93K	1,000	CATI	18+	Nationwide	March 15
<b>Africa</b>								
 Nigeria		14.4%	25,085K	1,000	PAPI ad hoc	18+	Lagos, Abuja, Port Harcourt	Jan / Feb 15
 South Africa		22.0%	11,646K	1,200	CAPI	16+	Metropolitan area Pretoria, Johannesburg, Durban, Cape Town	Feb 15
<b>Asia</b>								
 India		3.8%	46,955K	1,038	PAPI	15-64	Mumbai, New Delhi, Kolkata, Chennai	Feb / March 15
 Indonesia		4.7%	11,789K	1,041	PAPI	15-64	Jakarta, Surabaya, Medan, Bandung	Feb / March 15
 South Korea		79.6%	39,950K	1,514	PAPI	19+	Nationwide	Jan 15
 Japan		80.3%	102,253K	1,200	PAPI	15-79	Nationwide	Feb 15
 Iran		14.5%	10,909K	1,000	PAPI ad hoc	18+	Teheran, Maschhad, Isfahan, Täbris, Schiras	Feb 15

Field work carried out with GfK GLOBO BUS®.