

Gains, Pains and Divides Attitudes on Globalization on the Eve of the Corona Crisis

2020 GED Globalization Survey

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July 2020

Cover picture: © NicoElNino - stock.adobe.com

Editing: David Gow

Graphic design: Nadine Südbrock, Sandhya Shah | Präsentation Düsseldorf

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Executive Summary

This paper presents the key findings of our 2020 globalization survey, which covers a set of 15 emerging markets and developed economies. It was conducted from late February to mid-March 2020. As the results pre-date any changes in attitudes arising from the coronavirus crisis, many people may consider them dated. We believe, however, that they show some clear underlying tendencies that will almost certainly remain with us well beyond the pandemic. In addition, they might provide a useful point of reference when comparing them with other polling data during or after the crisis.

Our main findings are:

- Compared to the results of our 2018 survey, we find more negative attitudes toward globalization and international trade. In other words: The **gains** of globalization have become less obvious.
- There is a widely shared sense that possible or actual negative effects of globalization, such as rising inequality or environmental problems, need to be addressed. In other words: The **pains** of globalization have come to the fore.
- While support for globalization, international trade and foreign investment is still at very high levels in emerging markets, it rests on shakier ground in developed economies, particularly in France. In other words: There are significant **divides** in the attitudes toward globalization between countries.

We conclude that we should not try to return globalization to the status quo ante of the pre-corona era but use this crisis as a window of opportunity to address some of the major underlying concerns about global economic integration and its effects.

1 Introduction

Since our previous Trade and Globalization Survey in 2018¹, a series of events has fundamentally changed the world economy: a trade war between the United States (US) and China, Fridays for Future, Brexit and, most recently, the COVID19 pandemic – now more than ever global economic dynamics play out in a rapidly changing environment.

Against this complex background, the 2020 GED Globalization Survey by the Bertelsmann Stiftung measures the attitudes towards globalization, trade and investment within a variety of developed countries and emerging markets. The study aims thereby at providing a **snapshot of people's perception of different dimensions of globalization**, its future development as well as its past and current impact on socio-economic factors.

The main results reveal that, although globalization is perceived on average as a positive phenomenon, support for it is gradually dwindling in emerging and even more so in developed countries (see chapter 3: Gains). There are, in fact, several sources of discontent within and across countries that are specifically related to the effect of globalization on (1) the distribution of resources across different groups, (2) the environment, and (3) the lack of safety nets for negative outcomes of global integration (see chapter 4: Pains). Critically, the results show that there is a divide between different social groups in their perception of globalization: between residents of developed countries and emerging markets, among developed economies, and between people within countries (see chapter 5: Divides).

But before we explore the findings in more detail, let's take a closer look at the methodology and timing of the survey – which are both crucial to the interpretation of our results.

¹ Bertelsmann Stiftung (2018a).

2 Survey design – facing the corona crisis

On behalf of the Bertelsmann Stiftung, YouGov Deutschland GmbH carried out a representative online survey in fifteen countries, conducting in total 15,636 interviews worldwide. The online survey took place between **February 19th and March 17th, 2020**, with different starting points for each country.² The sample includes both developed countries and emerging markets on all continents except for Oceania. The questionnaire was identical for each country with the sole exception of a few country-specific questions. Each participant received the questionnaire in the official national language of his or her country of residency. The sample was made up of 50.33 percent women and 49.67 percent men. Moreover, all age groups above 18 years are represented in the sample.

As a point of comparison, this survey report refers to a previous version of the survey conducted in 2018 also by YouGov with the same methodology but including only twelve of the current sample. In comparison to 2018, Turkey was not included, while Brazil, South Korea, Nigeria and Sweden were added to the list. Although the questionnaires of both surveys included similar questions, the current survey extends the research fields of the 2018 survey. In the event of comparable results, these are denoted accordingly in each section of the study. Furthermore, it is important to mention that the data were weighted for each country by age, gender and region to compensate for deviations in the quotas. When merging the data, the weights carried over to the overall data set.

T 1 – General sample overview

Country	No. of observations	No. of men	No. of women
Brazil	1,071	522	549
Canada	1,007	495	512
China	1,031	577	454
France	1,028	490	538
Germany	1,022	497	525
India	1,131	577	554
Indonesia	1,062	584	478
Japan	1,094	524	570
Mexico	1,048	503	545
Nigeria	1,014	517	497
Russia	1,021	459	562
Sweden	1,005	503	502
South Korea	1,021	508	513
United Kingdom	1,017	493	524
United States	1,064	518	546
Total	15,636	7,767	7,869
Percentage	100%	49.67%	50.33%

As a point of comparison, this survey report refers to a previous version of the survey conducted in 2018³ also by YouGov with the same methodology but including only twelve of the current sample. In comparison to 2018, Turkey was not included, while Brazil, South Korea, Nigeria and Sweden were added to the list. Although the questionnaires of both surveys included similar questions, the current survey extends the research fields of the 2018 survey. In the event of comparable results, these are denoted accordingly in each section of the study. Furthermore, it is important to mention that the data were weighted for each country by age, gender and region to compensate for deviations in the quotas. When merging the data, the weights carried over to the overall data set.⁴

² Detailed information about the conduction of the survey, questionnaire and access to the data can be found in the end of the report.

³ Bertelsmann Stiftung (2018a).

⁴ Additional information on the merging procedure can be found in the online appendix.

The survey and the corona pandemic

The timing of our survey is both a blessing and a curse. On the one hand, we realize that polling data from before or the start of the corona crisis are yesterday's news. They seem to come from another era of globalization, and we must ask whether we can take them at face-value in drawing any conclusions for our current situation. On the other hand, this could - in the long run - be their most important added-value. They capture public attitudes toward globalization on the eve of the corona pandemic. So, comparing them with data in the future, they might offer a good reference to infer the impact of the corona crisis on public attitudes toward globalization. Therefore, we will make the data available to anyone who is interested in conducting his or her own research.

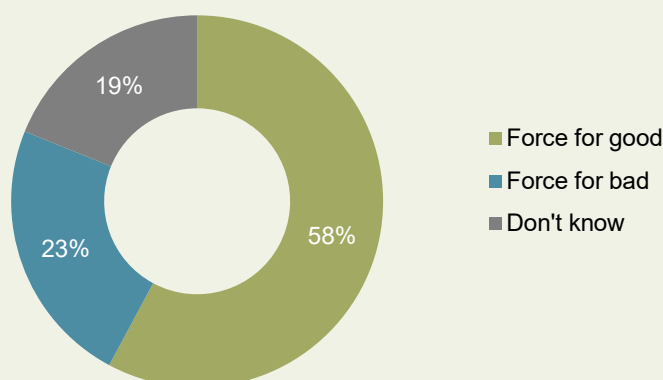
3 Gains – shrinking positive attitudes towards globalization

There is a bright and a dark side to globalization. On the one hand, it creates new opportunities in every realm of life: society, economy, politics or culture. On the other hand, it comes with challenges and problems, such as increasing uncertainty, competition or redistribution of wealth and power. Therefore, it is not surprising that attitudes toward globalization reflect this ambiguity. In this section, we take a closer look at the bright side: What are the positive aspects or prospects our respondents see in globalization? First, we look at globalization in general. Second, we turn to international trade. Third, we take on foreign direct investment (FDI). Our results show that the overall attitude on all three issues is positive. However, comparing different results with those of 2018 shows a declining proportion of people who are optimistic about these trends.

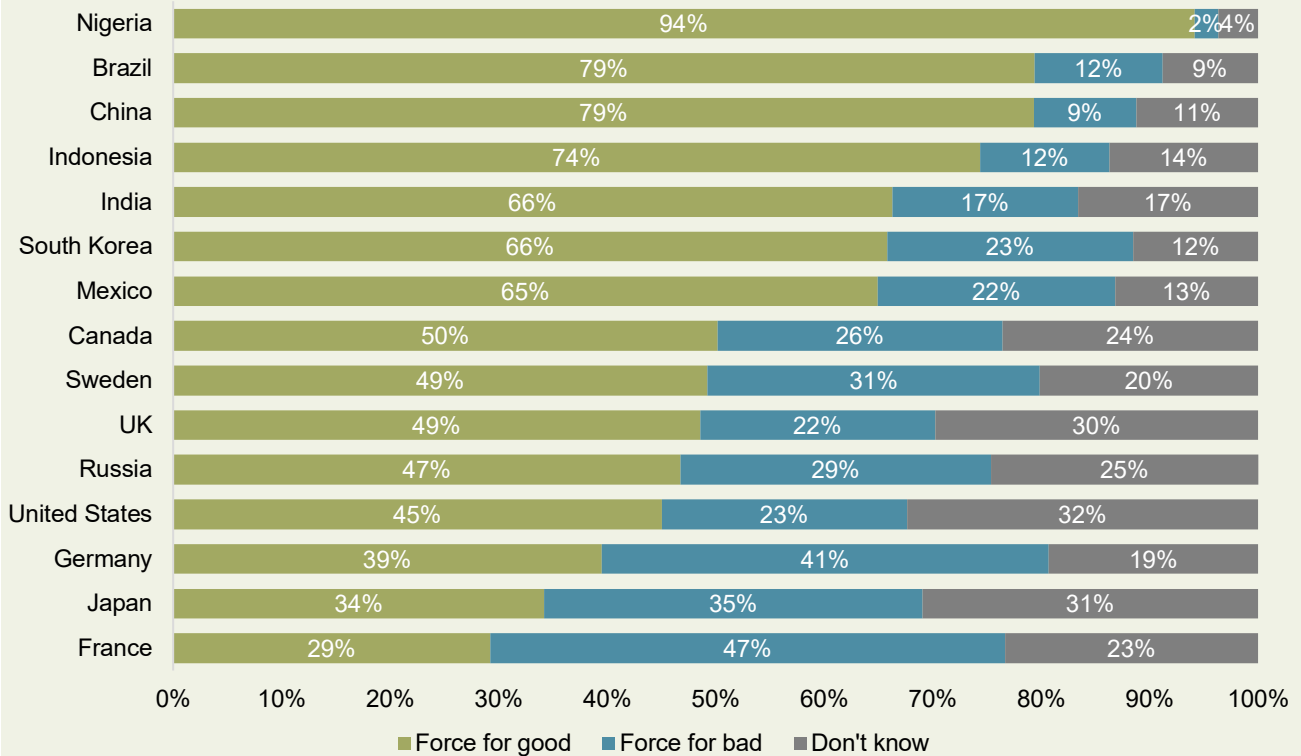
3.1 A majority still sees more upsides than downsides to globalization

Attitudes to globalization are in general positive. Taken together, 58 percent of the respondents from the 15 countries consider globalization to be beneficial, 23 percent have a negative assessment and 19 percent are not sure (Figure 1). In 12 of the 15 countries we surveyed, the percentage of people who view globalization as a force for good was higher than that regarding it as a force for bad (Figure 2). On the positive side, Nigeria stands out: 94 percent of the respondents say globalization is a good thing, while only 2 percent think it is a bad thing. The generally favorable view holds even after taking into account participants' economic situation: Even among people who rate this as bad, a majority views globalization favorably. So, despite rising nationalist sentiments which have been emerging in different regions of the world in the last two years, there is still a good deal of support or goodwill for close economic, political or social ties around the globe in most major countries.

F1. QUESTION: **Globalization is the word used to describe the increasing movement of products, ideas, money, jobs, data, culture and people around the world. Overall, do you think globalization is a force for good or bad for the world?**



F2. QUESTION: Globalization is the word used to describe the increasing movement of products, ideas, money, jobs, data, culture and people around the world. Overall, do you think globalization is a force for good or bad for the world?



F3. QUESTION: Attitude towards globalization according to own perception of economic situation. How do you consider your current economic situation?



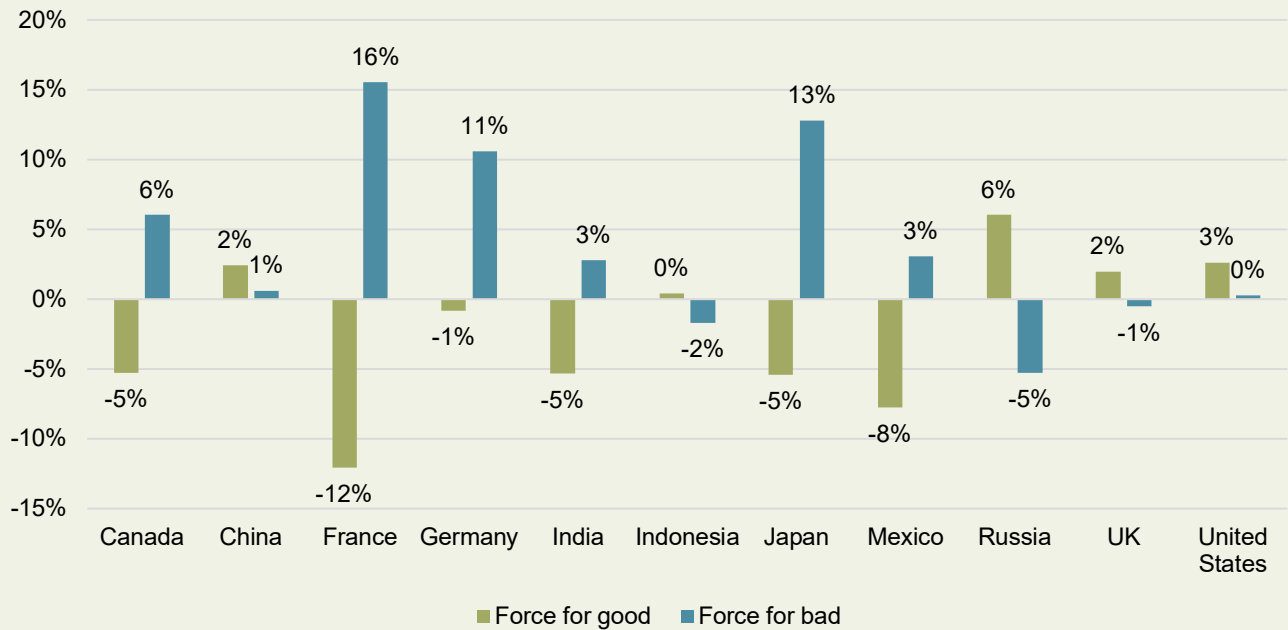
A comparison of these results with those of our 2018 Globalization Report⁵ shows that the economic dimension of globalization is probably the underlying determinant of this positive attitude. The acceleration of globalization since the 1990s has had a positive effect on the GDP of both developed and emerging economies (Bertelsmann Stiftung 2018). Thus, there is an economic case for viewing globalization as a force for good over as long a period as the last three decades.

⁵ Bertelsmann Stiftung (2018b)

Pro-globalization stance, while generally positive, is declining, most prominently in developed countries

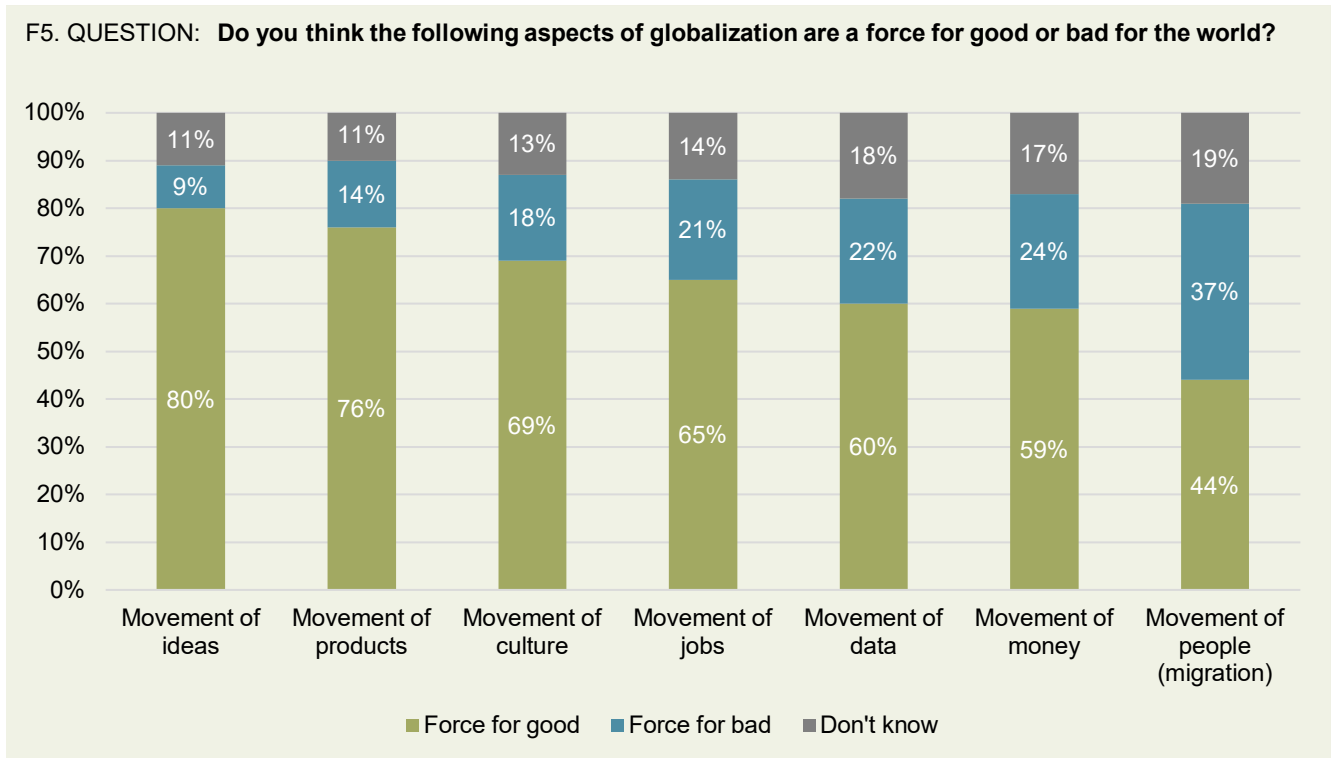
Comparing the current results with data from 2018 (Figure 4) shows a more positive attitude in Russia (force for good up 6 pp) but more negative in Mexico (good down 8 pp), India (good down 6 pp), Canada (good down 5 pp), and particularly France (good down 12 pp, bad up 16 pp), Japan (good down 6 pp, bad up 13 pp) and Germany (bad up 10 pp).

F4. QUESTION: **Change in the general attitude towards globalization between 2018 and 2020**



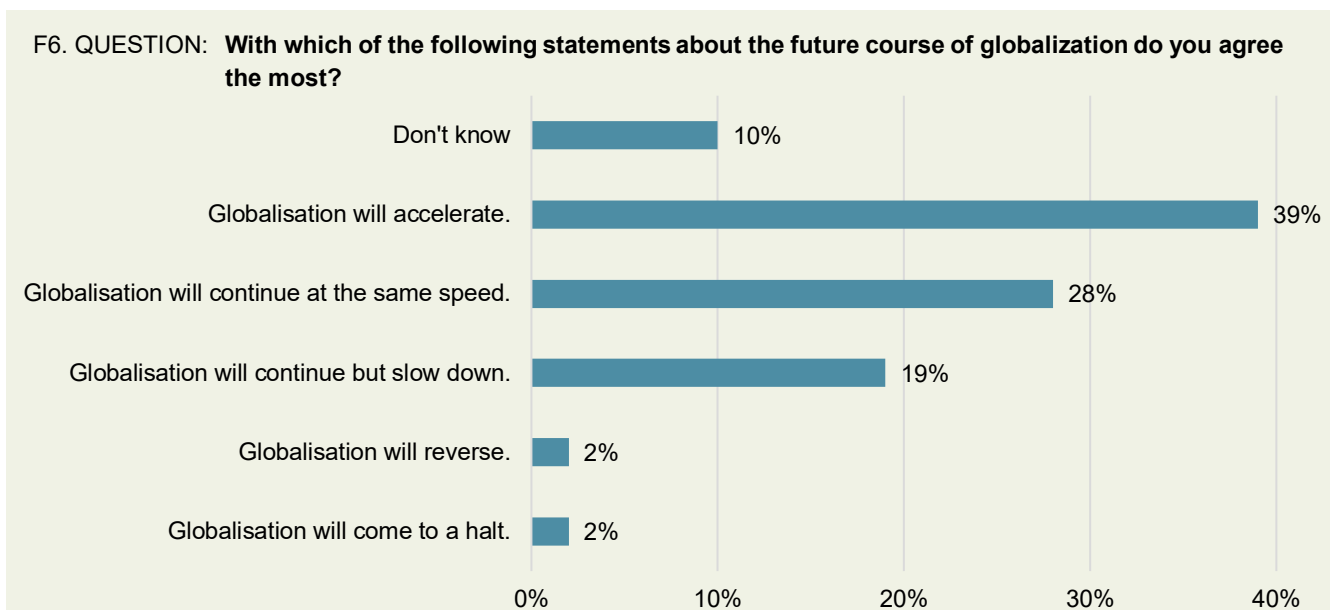
The exchange of ideas is the most popular aspect of globalization. Across our sample of 15 countries, 80 percent of people consider the cross-border movement of ideas a good thing, while less than ten percent consider it a bad thing. This is the highest rating of any aspect of globalization in our survey with movement of products and movement of culture coming in second and third. The movement of people (migration) receives the lowest rating. Still, even for this least popular dimension of globalization, the proportion considering it a good thing is higher than that holding a negative attitude toward it.

The generally positive perception of the movement of ideas is particularly good news in the age of the knowledge-based economy. As economic and social progress depends more and more on collating information or creating new knowledge, importing ideas or transplanting concepts from other countries has become a key ingredient for success. It is also good news for a world plagued by huge transnational problems, such as Covid19 or climate change, as it indicates that there is a positive attitude toward sharing solutions. It also goes to show that globalization's appeal goes beyond mere calculations of economic utility.



A large majority expects globalization to continue or even accelerate. When it comes to the future course of globalization, people clearly assume that it is here to stay. By a sizeable margin – 67 percent vs. 23 percent – respondents expect globalization to continue at least at the same pace rather than slow down or even stop. The view that globalization will come to a halt or reverse might even be called a fringe position, given it gets just 2 percent backing on both occasions. Again, respondents in Nigeria are the most optimistic about its future dynamic: 70 percent think it will accelerate and 16 percent believe it will continue at the same speed.

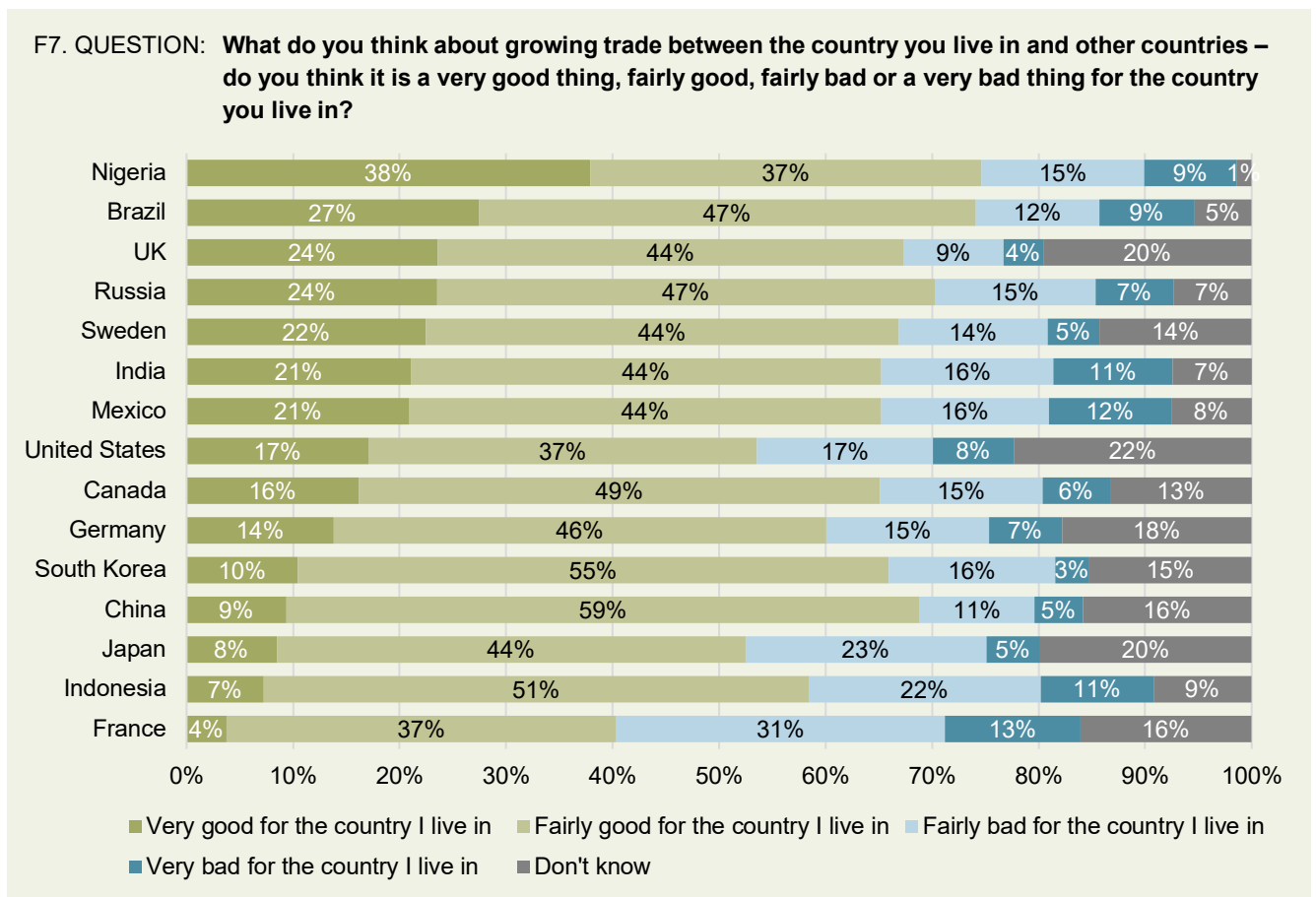
While this is not a normative but a positive assumption about globalization, we link it to among the gains since more people associate positive aspects with globalization than negative ones. This nexus is clearly challenged by the current COVID19 crisis, which has exposed the contagion effects of global supply chains and dependence on foreign goods in many nations. As a result, calls for less globalization or at least a more diversified approach to it and for second-guessing its positive effects have increased.



3.2 Trade is also generally seen as beneficial

Attitudes to international trade in general are positive. Globalization and trade are not the same thing. So, we decided to ask respondents about their attitude towards both separately. If we compare results (for globalization see section 3.1), we find that trade is slightly more popular. This is also in line with our finding that movement of products – which is the essence of international trade – is regarded as one of the most popular aspects of globalization.

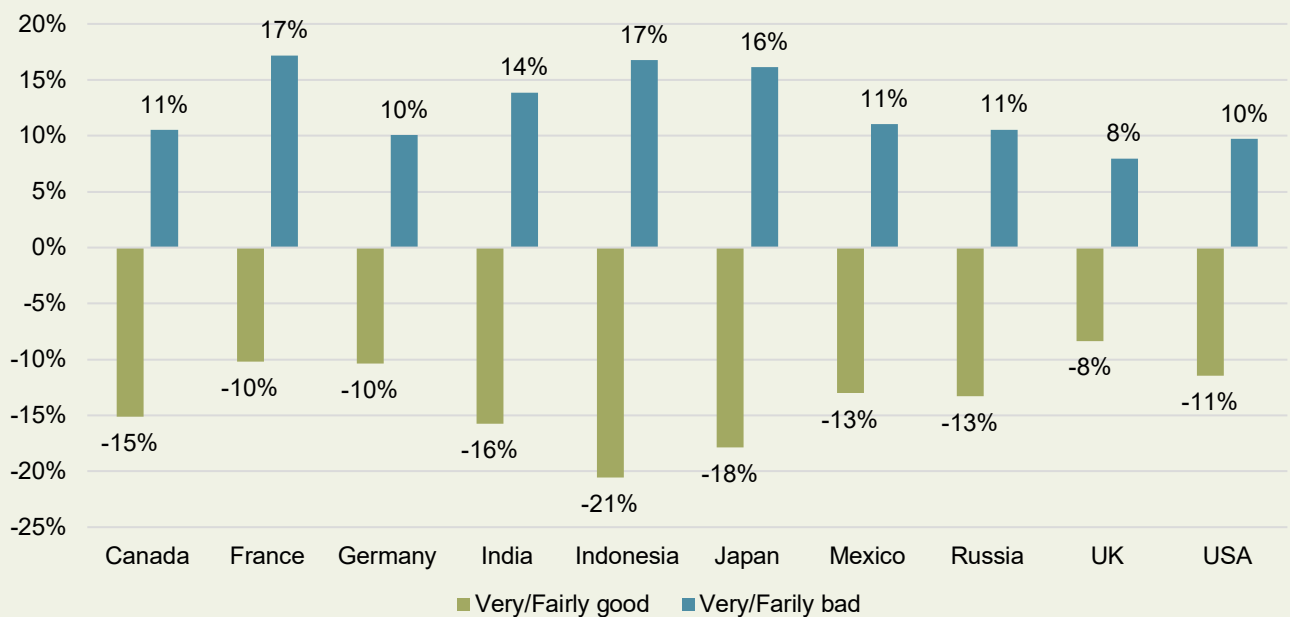
When it comes to growing trade between their own and other countries, opinions are also rather positive. 63 per cent of respondents across the 15 countries rate it a good or fairly good thing, while only 24 percent rate it a bad or fairly bad development. In 14 of the 15 countries, more than half of respondents have a positive view on increasing trade in goods or services – with France being the odd one out. Germany, Canada and France stand out as the most popular trading partners. Each of the trio gets an approval rating of more than 70 percent for increased trade.



Pain disguised as gain

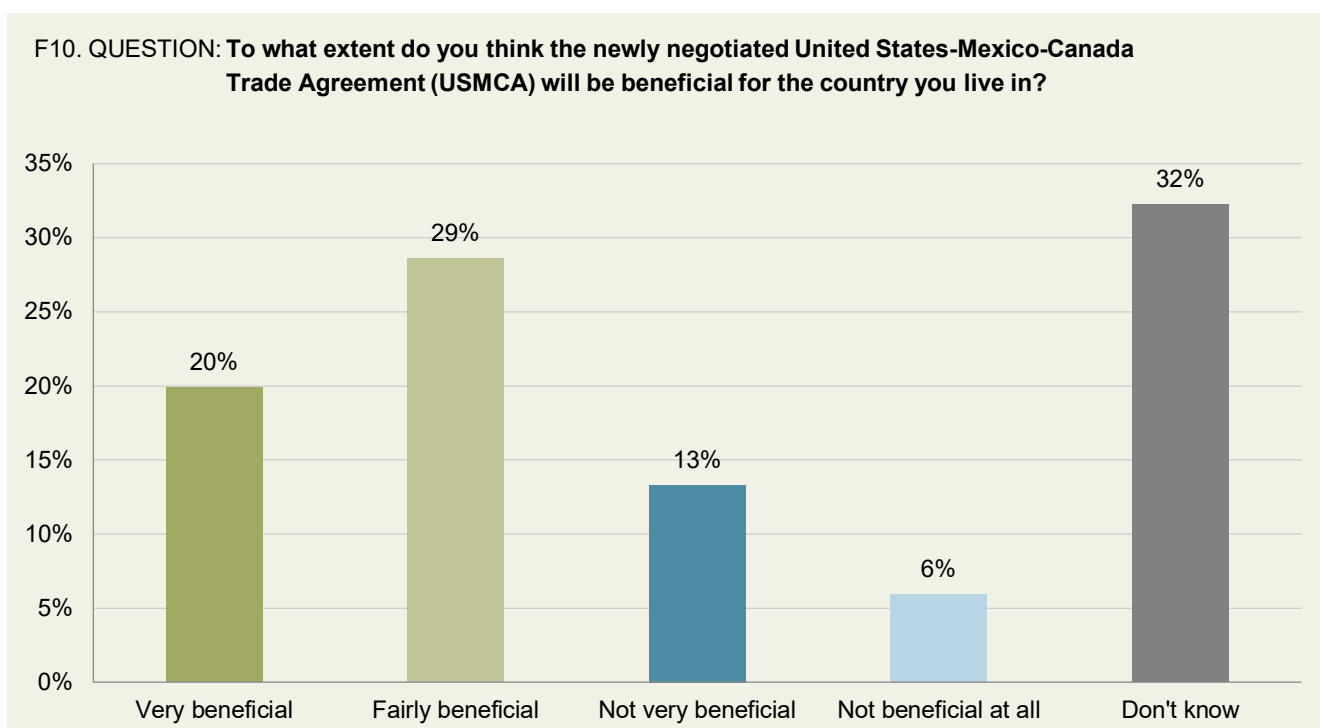
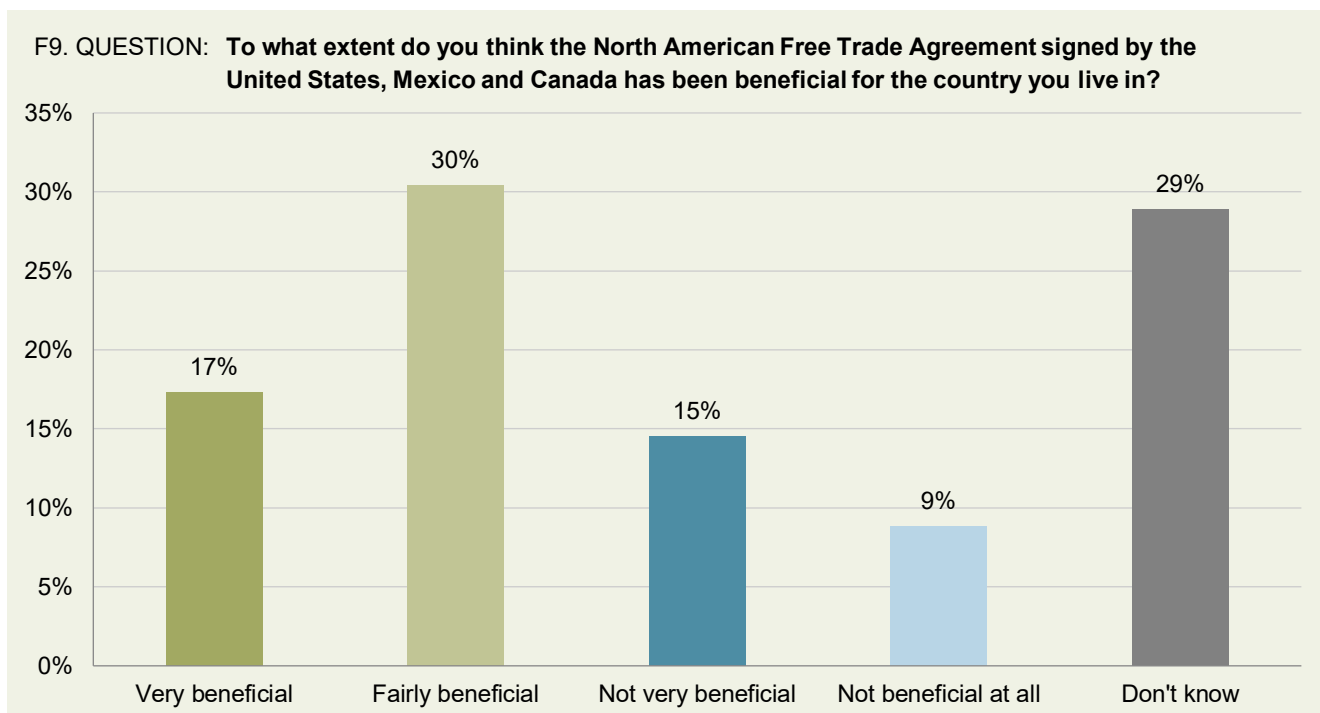
As stated before, the results reveal a generally positive attitude towards international trade in most of the countries of the sample. However, comparing these results with those of 2018 indicates several changes in the perception of all comparable countries. Indeed, the proportion of population that believes increasing trade is positive for the country they re-side in has decreased between 8 to 21 percentage points. Meanwhile, the group of people more hostile to international trade has increasing between 8 and 17 percentage points. These results reveal a significantly negative shift in the attitudes towards trade.

F8. QUESTION: **Change in the general attitude towards growing trade between 2018 and 2020**



Attitudes to trade agreements are positive. In addition to asking about trade in general, we also asked about specific bilateral or regional trade agreements. Here again, the overall picture was positive in that the proportion of people viewing these agreements as beneficial outweighs those with a negative attitude. This finding also holds for developed countries which are usually more skeptical about opening up their markets (see section 5).

A case in point is NAFTA: While the North American Free Trade Agreement has many outspoken critics, a majority in all three constituent states continue to view both its original and its new version (USMCA) as positive by a margin of roughly 2:1. While there is almost no difference in the attitudes toward both agreements in the US and in Mexico, Canadians liked the old agreement much better: USMCA backing has dropped by eleven percentage points compared to the original NAFTA.



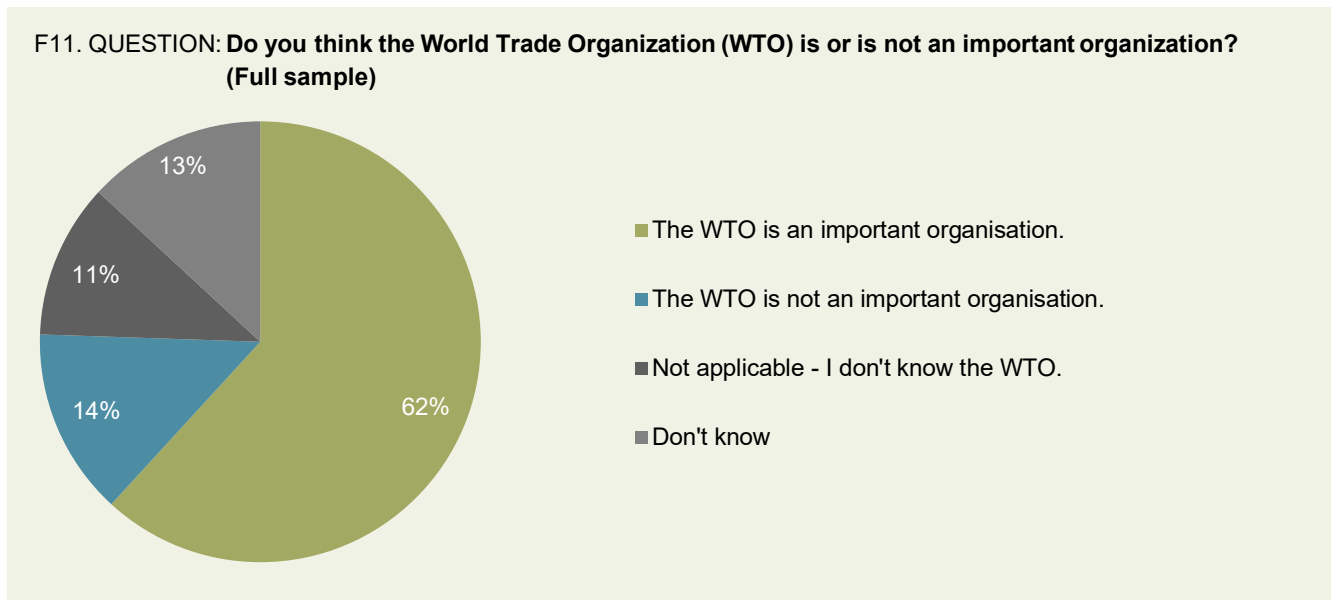
Attitudes to the World Trade Organization are positive

The World Trade Organization (WTO) is currently in a tight spot: Negotiations about the latest major round of trade liberalization have gone nowhere for more than a decade; reform efforts have stalled; and its arguably most important member state – the US – has been taking a very negative stance toward the organization under the current Administration. While our recent research finds evidence for the organization's positive effect on member state GDP⁶, we also see declining public interest in the organization and multilateral trade policies⁷.

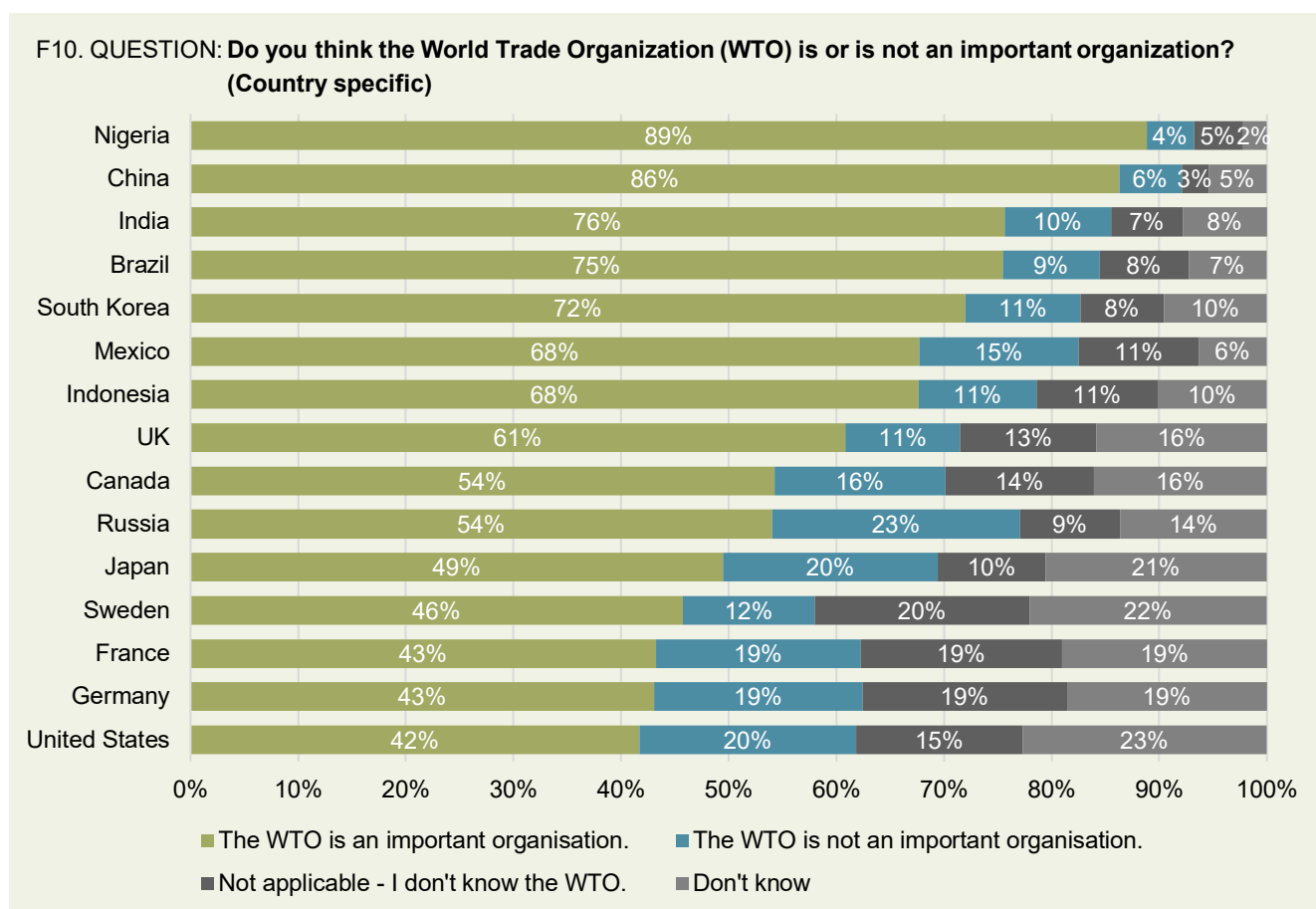
⁶ Bertelsmann Stiftung (2019)

⁷ Bertelsmann Stiftung (2020a)

Our survey paints a rather positive picture for the WTO. It finds that 62 percent of respondents in our 15-country-sample consider it to be an important institution, with only 14 percent considering it irrelevant. Only 11 percent of respondents have never heard of the WTO. Furthermore, country-specific results reveal that in ten of the 15 countries, more than 50 percent rated the WTO as an important organization. It is important to mention that in comparison to 2018, the overall positive perception about the WTO has increased by 6 percentage points – up from 56 to 62 percent within two years. What's more, the results for the “don't know” category reveal that in contrast to 2018, proportion uncertain about the importance of the WTO has decreased by 5 percentage points – falling from 16 to 11 percent in this year's survey.



Looking at the country-specific results shows that, although in every country most of the people believe the WTO as an important organization, there are clear differences in the value of positive ratings across countries. Nigeria, China, India and Brazil seem to be the most positive about the organization with over 75 percent of their respondents believing that the WTO is an important international organization. At the other end of the spectrum, we find the US, Germany and France with positive shares below 43 percent. These results are particularly interesting against the background of the trade conflict between the US and China which was fueled, among other factors, by the concerns of the White House about the lack of Chinese compliance with WTO rules. Furthermore, it is curious how large the gap between the Chinese perception and that of some founding WTO members is.



3.3 Inflow of foreign direct investment is seen as beneficial

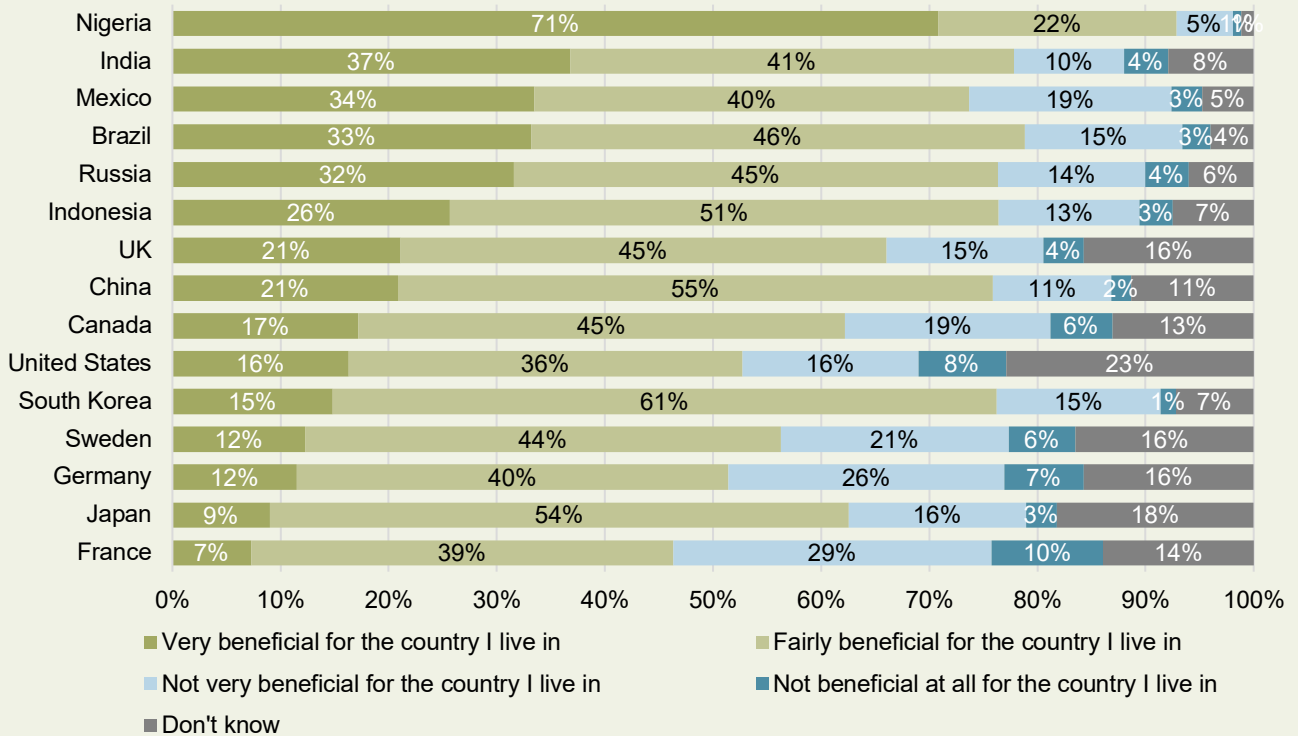
Investment from foreign companies in the domestic economy is seen as beneficial.

A total of 68 percent of respondents thinks that foreign companies that invest in the country they live in are a good or at least fairly good thing, while only 20 percent rate their involvement as negative. In 14 out of the 15 states, more than 50 percent view it positively – with France being again the odd one out. Compared to our 2018 survey, these numbers are fairly stable. We only have significant variations for France, where attitudes have become more negative (26 percent with an unfavorable opinion on FDI in 2018 versus 39 percent in 2020), and for Japan, where FDI has become more popular (63 percent rating it as positive in 2020 versus 50 percent in 2018).

Our recent discussion paper on the macroeconomic effects of FDI gives us a clue as to why attitudes might in general accentuate the positive when it comes to FDI⁸. In Germany, it supports 3.4 million jobs directly. Taking indirect, induced and spillover effects into account, this number even rises to 14.6 million. So FDI leaves a considerable mark on the German job market – possibly also the case for other countries.

⁸ Bertelsmann Stiftung (2020b)

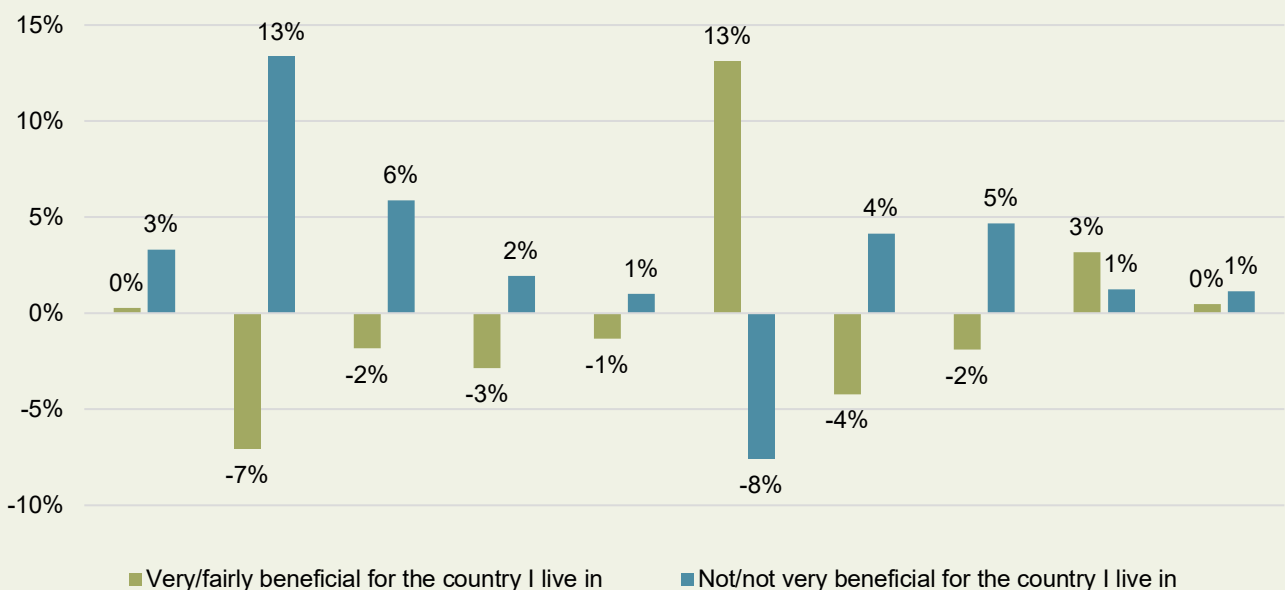
F10. QUESTION: **What do you think about foreign companies investing in the country you live in?**
Foreign companies investing are ...



Changes in the perception of foreign investment are in general less pronounced

The comparative 2018 results show that negative perceptions of foreign investment in the domestic economy has particularly increased in France, Germany, Mexico and Russia. On the contrary, a larger proportion of participants resident in Japan believe that foreign investment is good for their economy; a slight increase can also be seen in the UK.

F11. QUESTION: **Change in the general attitude towards foreign investment in the domestic economy between 2018 and 2020**



4 Pains – people urge for a more environmentally friendly globalization

So far, we have focused on positive attitudes towards globalization, international trade and investment. In general, results have revealed an overall positive perception of all three. However, the survey also sheds light on **sources of discontent with the development of globalization and related underlying trends**. These strongly relate to distributional issues with the perceived gains of globalization seen as unequally shared among the population. The results reveal that negative attitudes towards globalization relate to its socio-economic impact as well as to international policy making, and particularly to the effect of globalization on the environment. In the following, we present these results from different perspectives.

4.1 Unequal distribution of the gains of globalization at international and national level.

High-skilled, rich and urban dweller – the archetypical winner of globalization

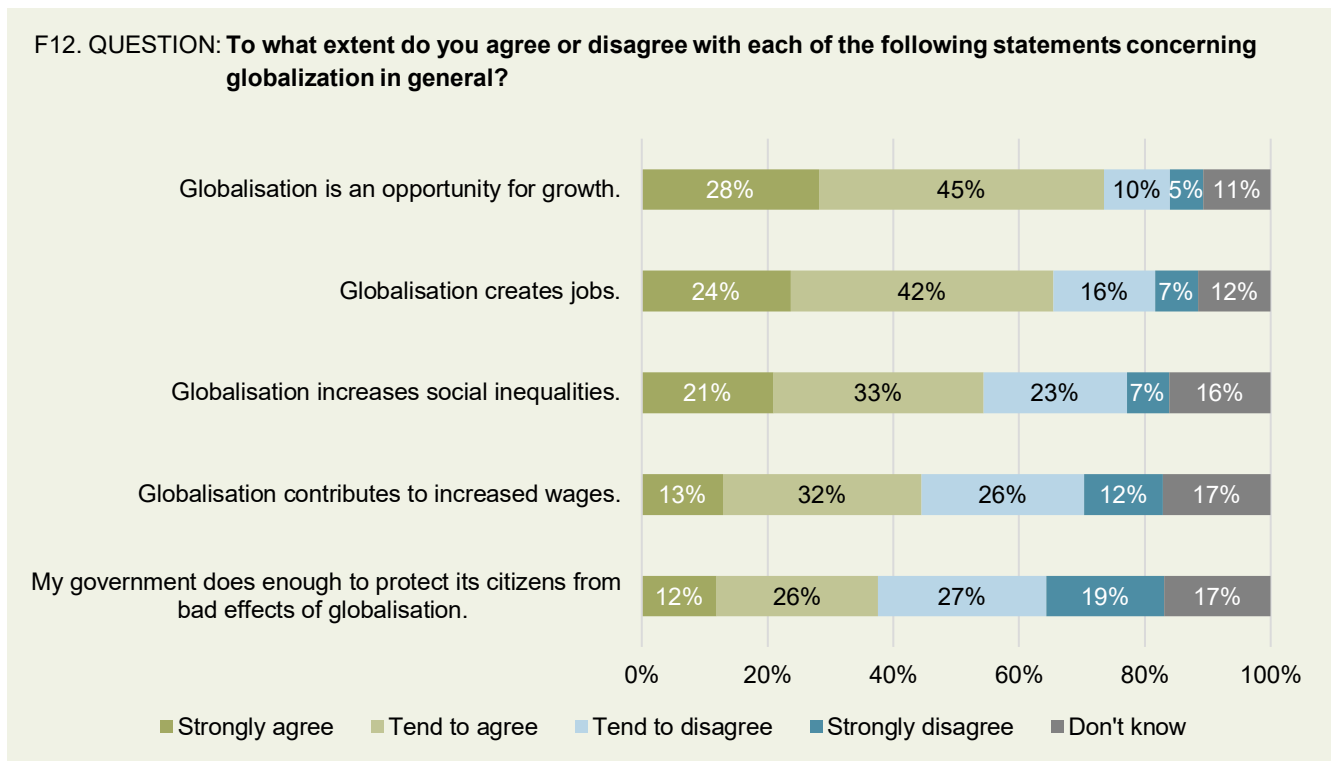
According to the results people believe that certain groups of society benefit more than others. Responses shows that the rich, young and highly skilled have benefitted more from globalization than others. So, too, do people living in cities and in developed countries. Furthermore, when asked whether larger or smaller companies gain from globalization, people believe that larger companies have profited more.

T2. QUESTION: Which of the following groups do you think have benefitted more from globalization?

Group A	A	Both A and B	B	Group B	Neither A nor B	Don't know
Rich people	59%	22%	5%	Poor people	4%	10%
Developed countries	38%	27%	21%	Developing countries	4%	10%
Women	6%	49%	20%	Men	10%	16%
Older citizens	7%	28%	38%	Younger citizens	11%	15%
High skilled	47%	26%	8%	Low skilled	6%	13%
People living in cities	51%	24%	6%	People living in rural areas	7%	12%
Large companies	58%	25%	5%	Small companies	3%	9%
The country I live in	11%	38%	27%	Other country	6%	18%

Unlike previous aspects, where respondents pointed to a specific winner group, the results show women and men are believed to have profited equally from globalization. Additionally, people think that the country they live in and other countries have equally gained. Hence, the results point to the gains of globalization appearing to be concentrated among specific social groups.

A safety net for the negative aspects of globalization remains relevant



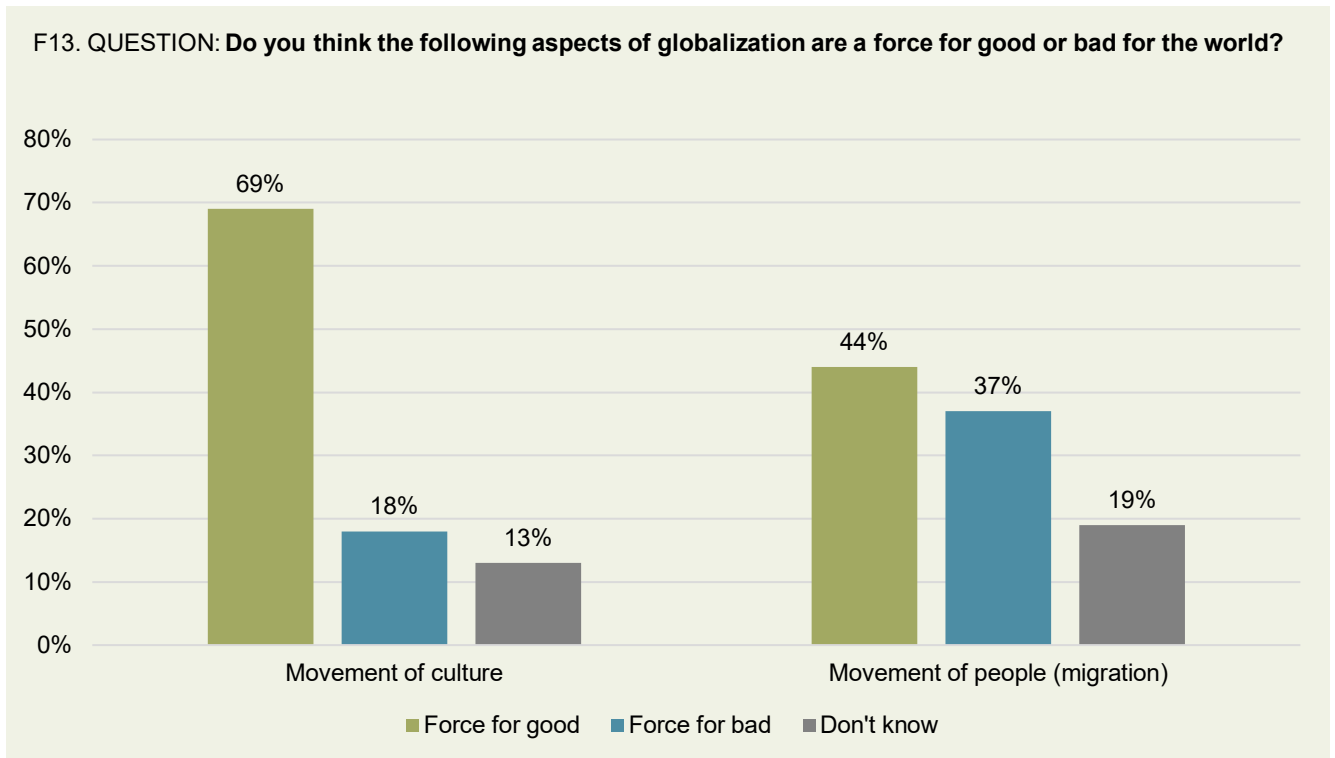
One of the main results of the 2018 GED Globalization Survey was discontent with regard to the protection people receive against the downsides of globalization from their governments. These results remain relevant today. In particular, there is a belief among almost all countries within the sample that the national government of the resident country does not provide enough protection against globalization downsides.

4.2 Migration, international trade and competition as further sources of discontent

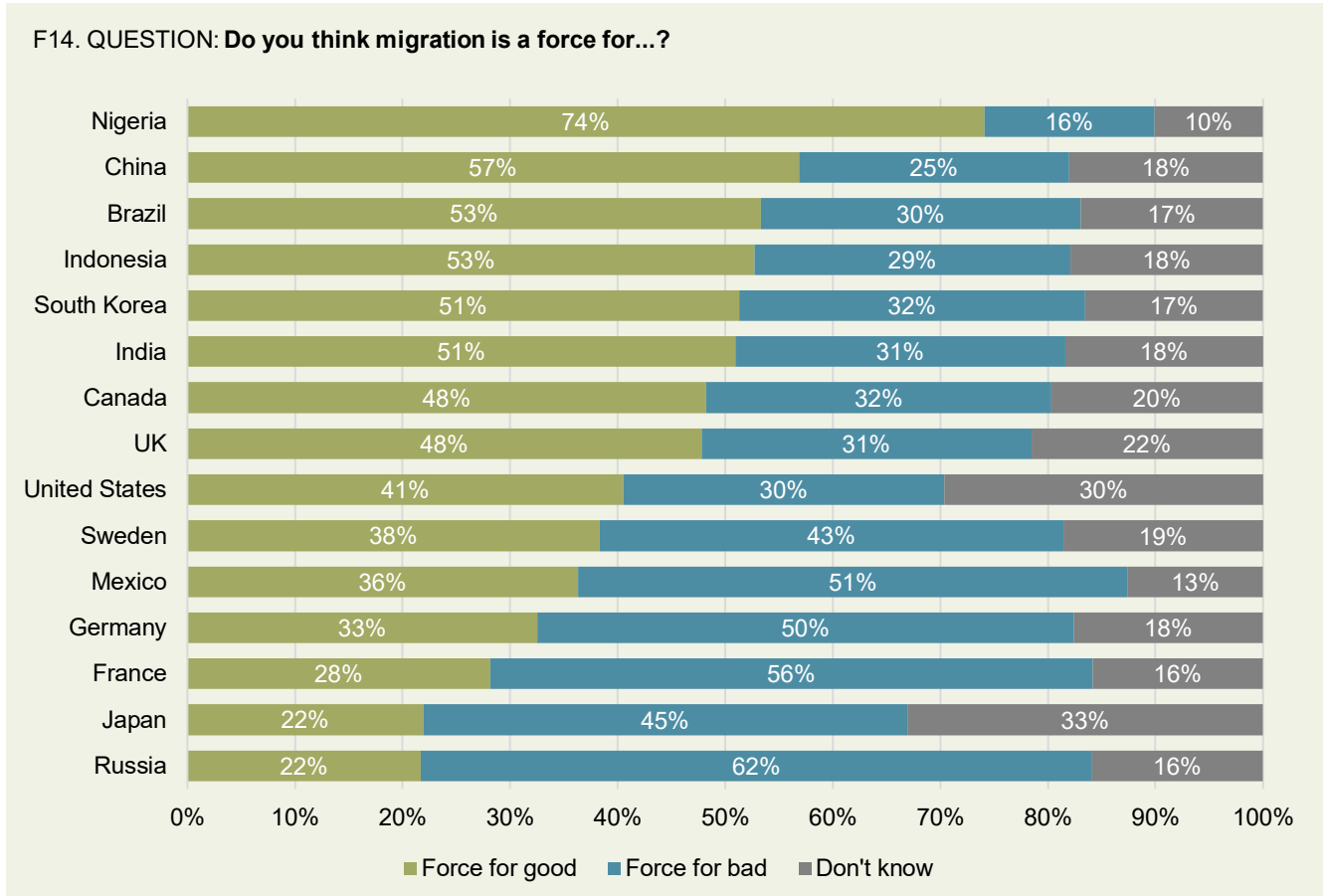
Culture without people?

The megatrend known as globalization represents a variety of economic and social phenomena that involve the international movement of factors like ideas, products and data, among others. A fundamental aspect of globalization is increasing cross-border movement of people.

The results show that of the seven aspects that make up the definition of globalization in our survey, migration is that winning the least approval. Paradoxically, the exchange of culture across borders is perceived as one of globalization's benefits.

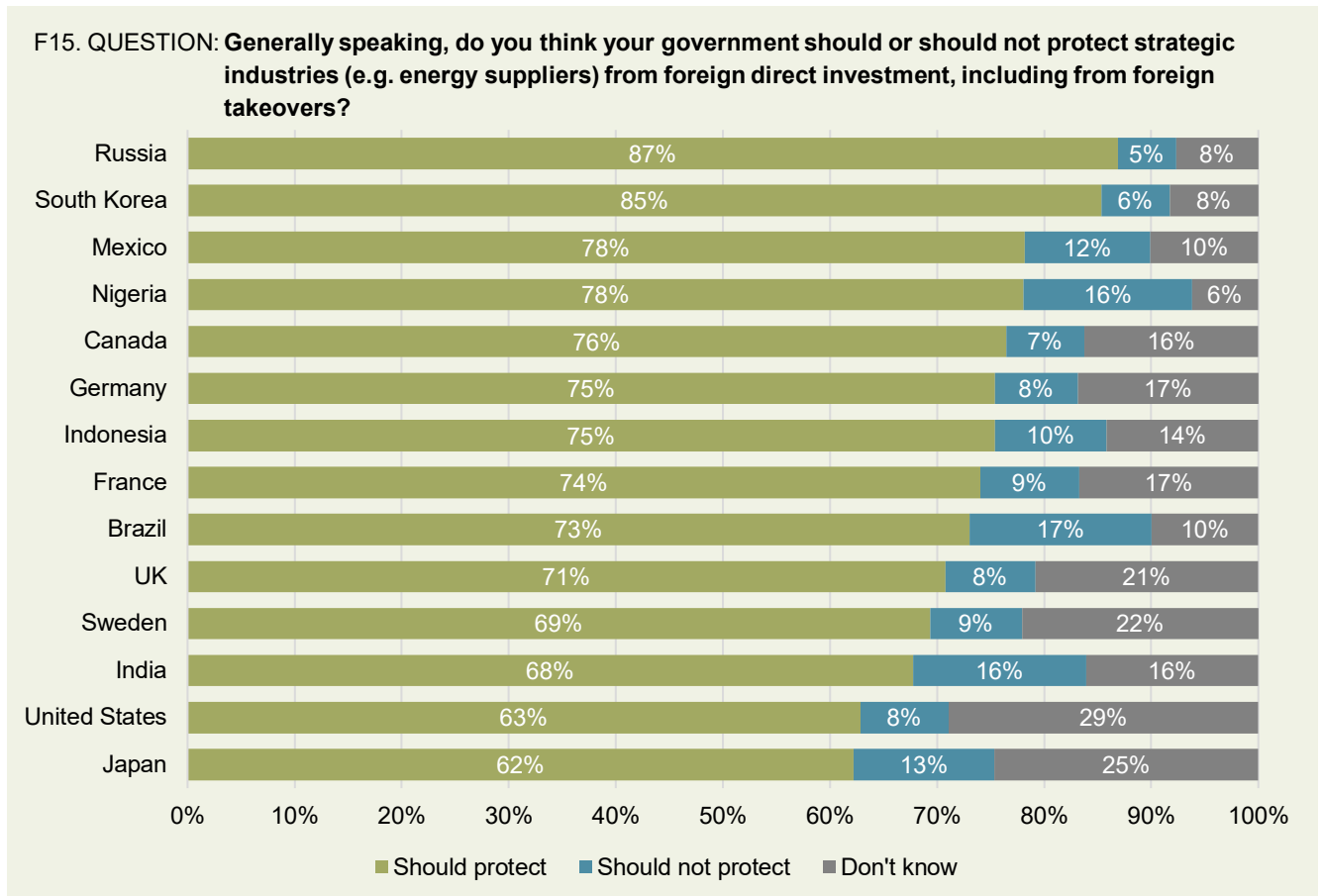


When we look at disaggregated data corresponding to each country, the results show that Russia, France, Germany, Mexico and Japan have the largest proportions of discontent with migration. In contrast, Nigeria, China and Brazil are the countries where migration wins the highest approval in our survey.



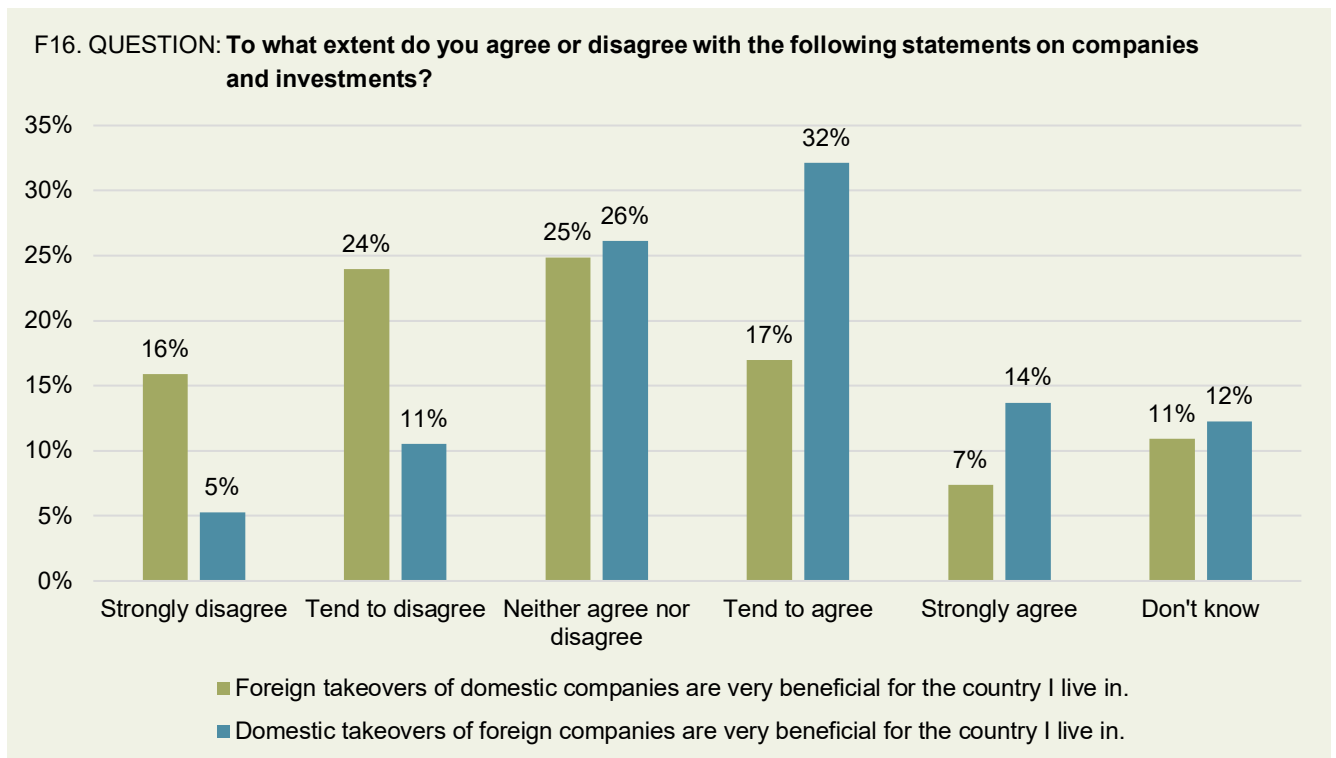
Strategic industries should remain in national hands

Over recent years, protectionism has been the key word determining the international debate about trade and investment policy. These protectionist tendencies are reflected to some extent in the survey answers. Although in the last section we pointed out that FDI is perceived as relatively positive for the national economy, foreign takeovers are disapproved of for most survey interviewees irrespective of their country of residence. For instance, when asked about strategic industries, more than 60 percent of the respondents in all countries believe that these should be protected by the national government from foreign takeovers.



Different definitions of reciprocity

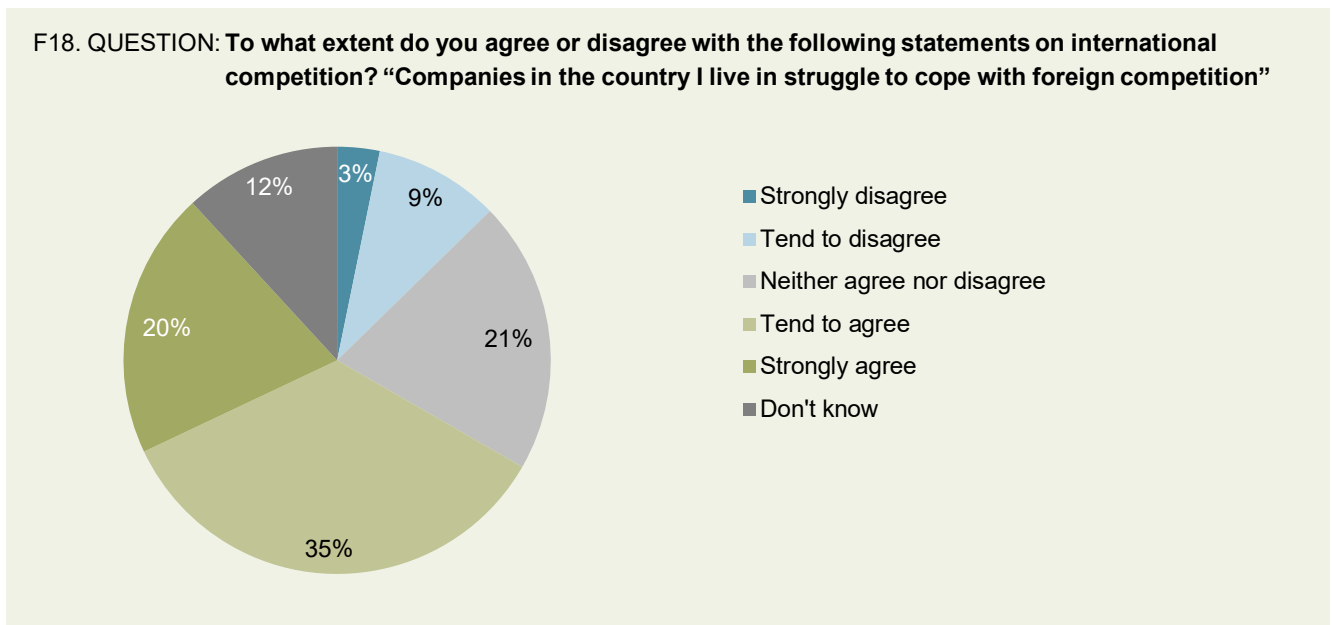
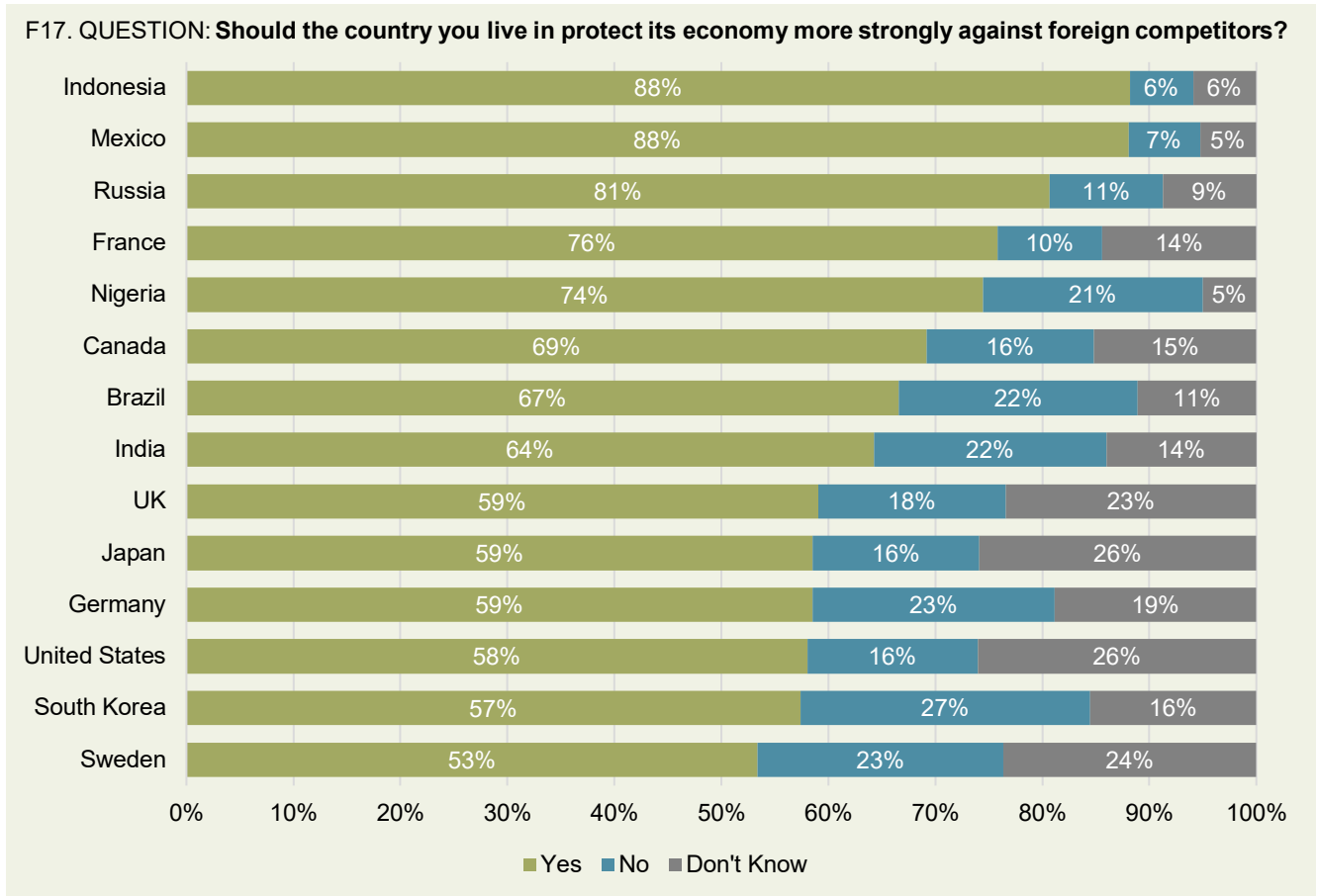
The results also deliver some contradictory views about the general principle of reciprocity. In direct relation to the previous question, we asked people whether they see foreign takeovers of nationally-based/-owned companies as beneficial for the country they live in and domestic takeovers of foreign firms as good for their countries of residence or the direct flipside.



The results indicate that, while people tend to favor domestic takeovers overseas as positive for their countries of residence, they are particularly skeptical of the benefits of foreign takeovers of domestic firms. Furthermore, when asked their opinion on other countries preventing domestic investment abroad, most believed that their resident country should react in the same way. Hence, it seems that reciprocity is to be praised in the context of retaliatory actions but not of competition and economic interactions.

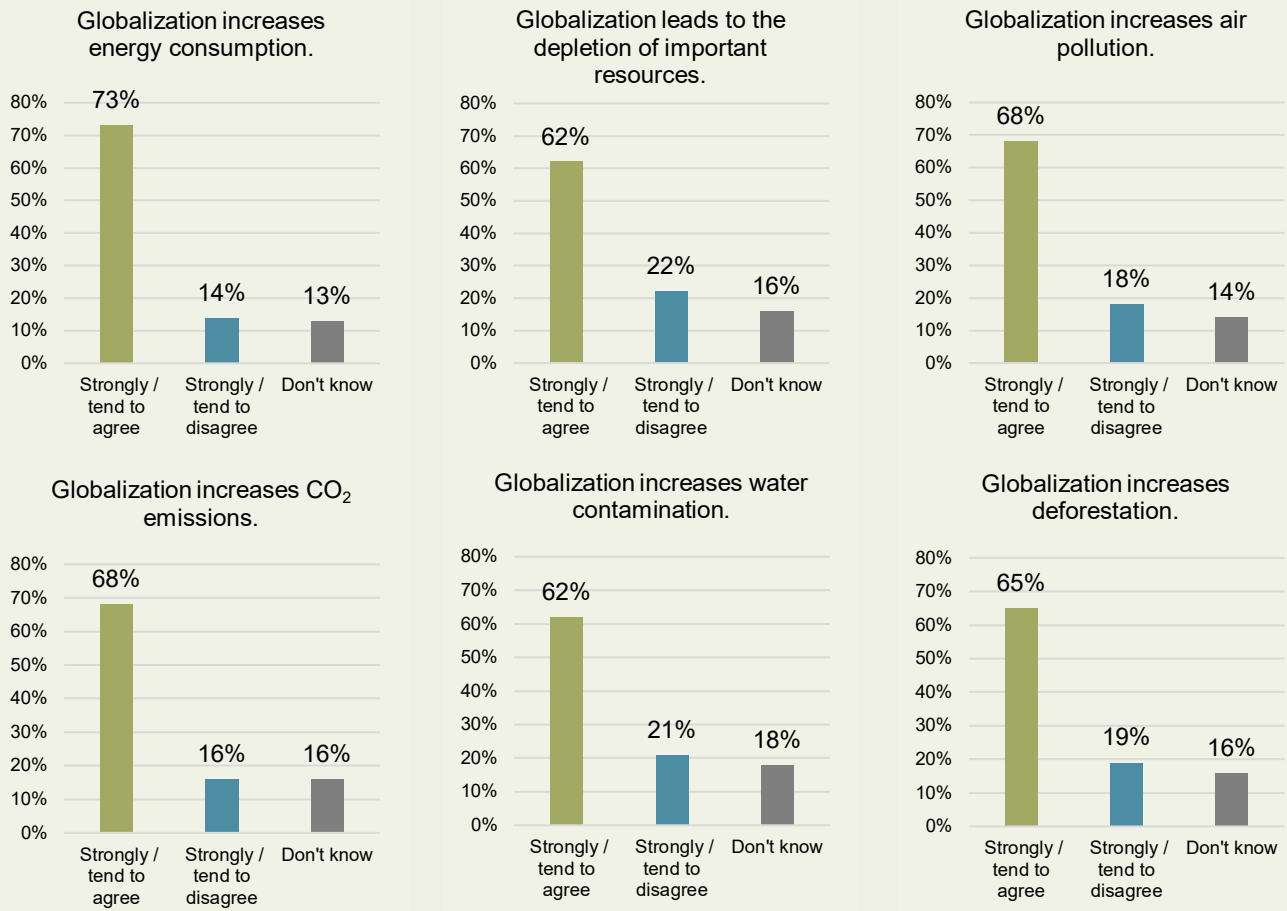
National companies are largely threatened by foreign competition

A fundamental aspect of economic globalization is increased competition for national companies when they are part of the global market. According to the results, most respondents in all surveyed countries believe that national companies should be better protected from foreign competitors (Figure 17). Indonesian, Mexican and Russian respondents feel particularly strongly about this, while the United States, South Korea and Sweden are less concerned. Interestingly, when asked about the extent to which national companies struggle to cope with foreign competition, 55 percent of all respondents believe that companies in their country of residence reside are unable to cope with foreign competition. Which is, at least to some extent, the reason behind the call for more protection by national governments.

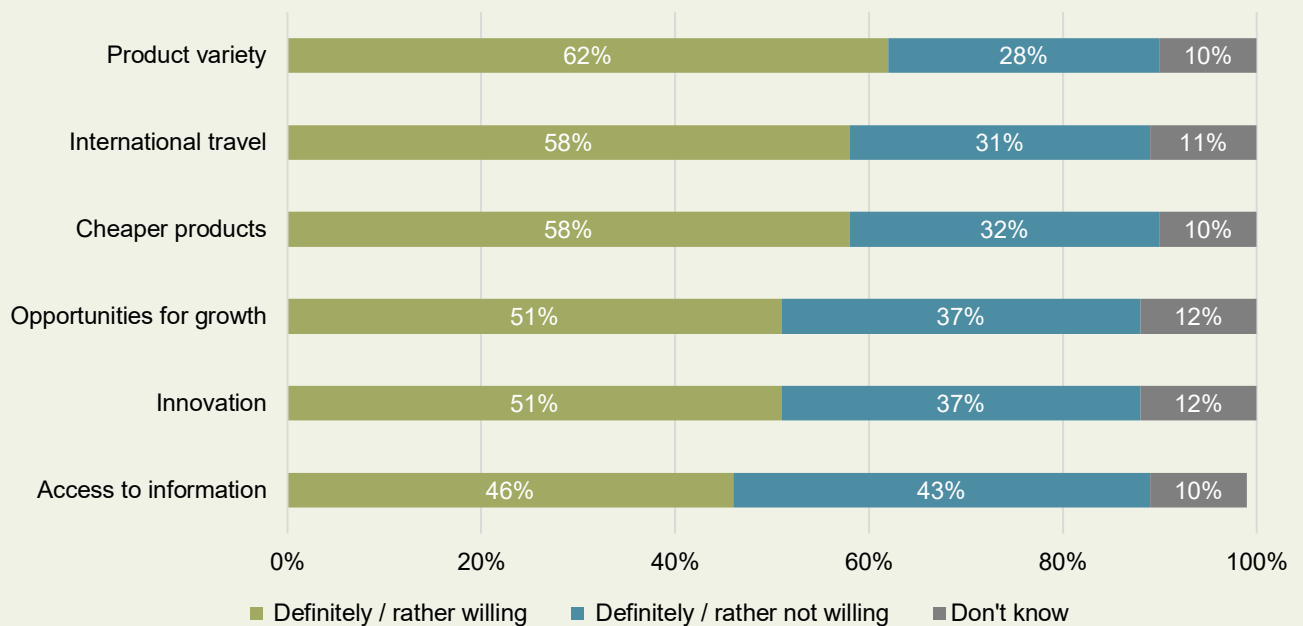


The environment is an issue – so much so that people are willing to forego benefits of globalization for its benefit. The need for solutions and strategies to face the environmental crisis has become more and more relevant in the last couple of years. According to our survey results, people see globalization as damaging for the environment through different mechanisms such as energy consumption, depletion of important resources, air pollution, deforestation and water contamination. However, when asked whether they would accept foregoing some of the benefits of globalization for the sake of the environment, more than half of interviewees stated that they are rather willing or willing to give up benefits such as product variety, cheaper goods and international travel in order to contribute to the fight against climate change.

F19. Globalization and the Environment



F20. QUESTION: The following aspects are assumed to be some of the benefits of globalization. To what extent are you willing to forego these benefits for the advantage of the environment?

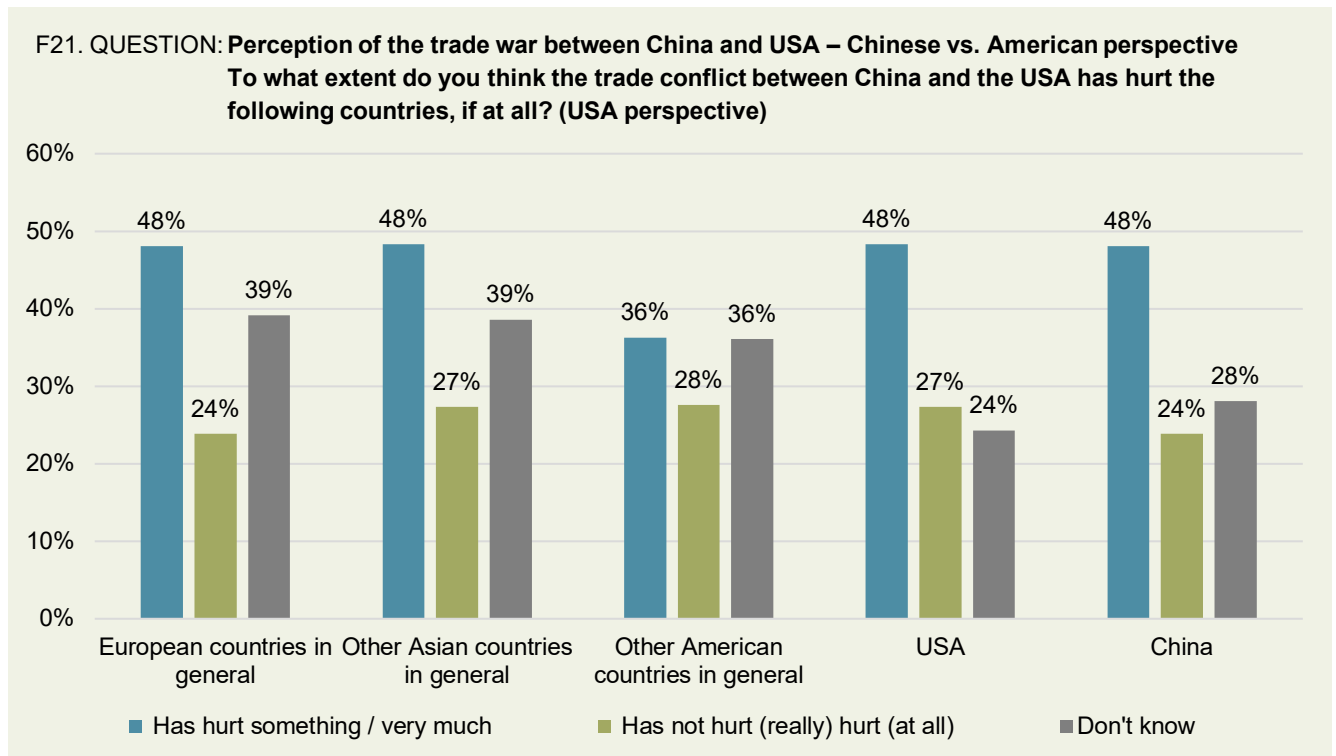


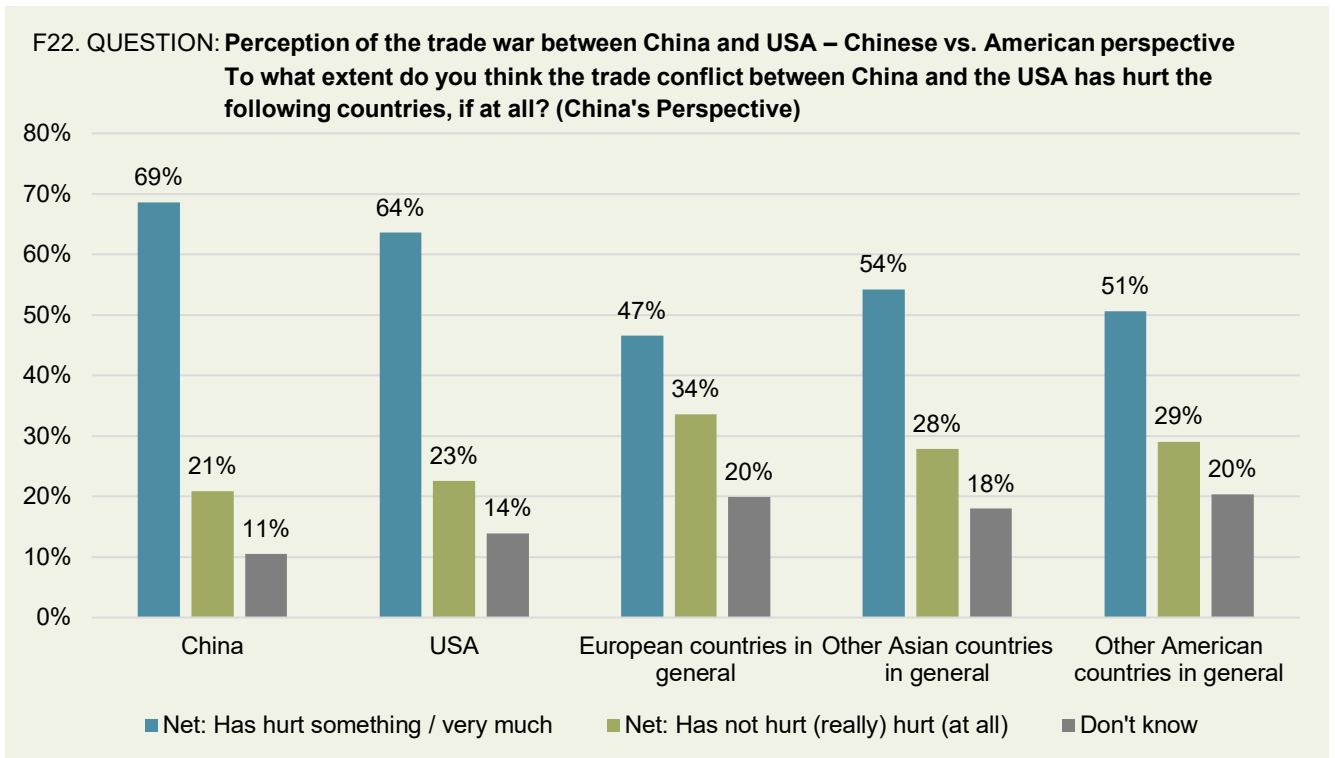
4.3 More sources of discontent emerge from national economic policymaking

Chinese and Americans both see a negative fallout of the trade war

One of the most controversial events of the last two years in trade policy was the conflict between the US and China. Triggered by the dissatisfaction of the White House with Chinese policymaking, China and the US have progressively imposed tariffs and other trade barriers on a set of goods from the other country. This had led to consequences on both economies that go from more expensive consumer goods via job losses to exchange rate appreciation.

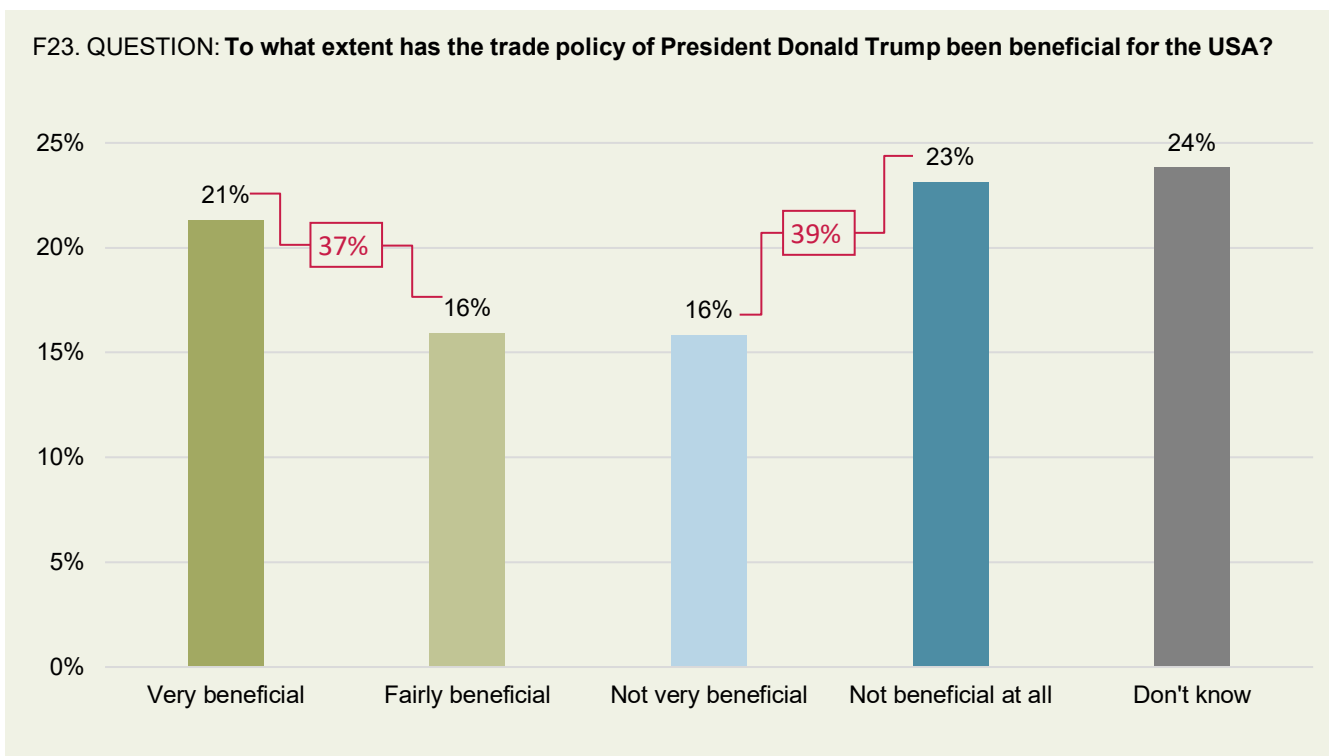
Looking at each country's perspective on the trade war's impact, we see that people from both countries believe that the conflict has been detrimental not only for the economies directly involved but also for European, Asian and American countries. Taking the responses from American participants, the results reveal that the same proportion of people in the sample believe that China, the US, European and other Asian countries have suffered from the conflict. Compared with the answers emanating from China, a larger proportion of US participants is unsure about the outcome of the trade war, hence the smaller numbers both for positive and negative answers. In contrast, Chinese interviewees believe more strongly that China and the US are the biggest losers from the conflict.





US polarization translates to President Trump’s trade policy

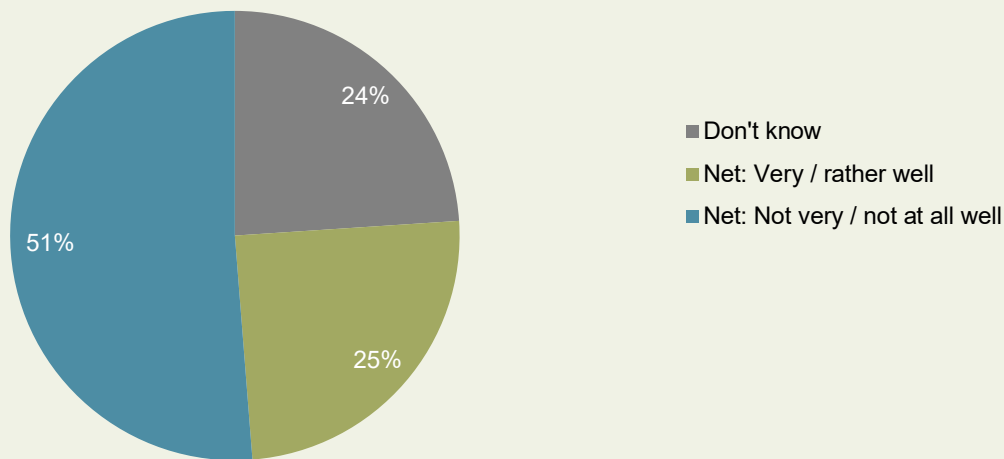
US politics is by and large divided on every topic and Trump’s trade policy is no different. Looking at the data about opinions on the benefits of the President’s trade policy, the results reveal that the American respondents are also pretty polarized about this topic. Specifically, the group that thinks that current US trade policy is beneficial or fairly beneficial accounts for 37 percent of respondents while the group of opponents comprises 39 percent. It is important to point out that there is also a significant group of people that admits to being unsure about the benefits of Trump’s trade policy.



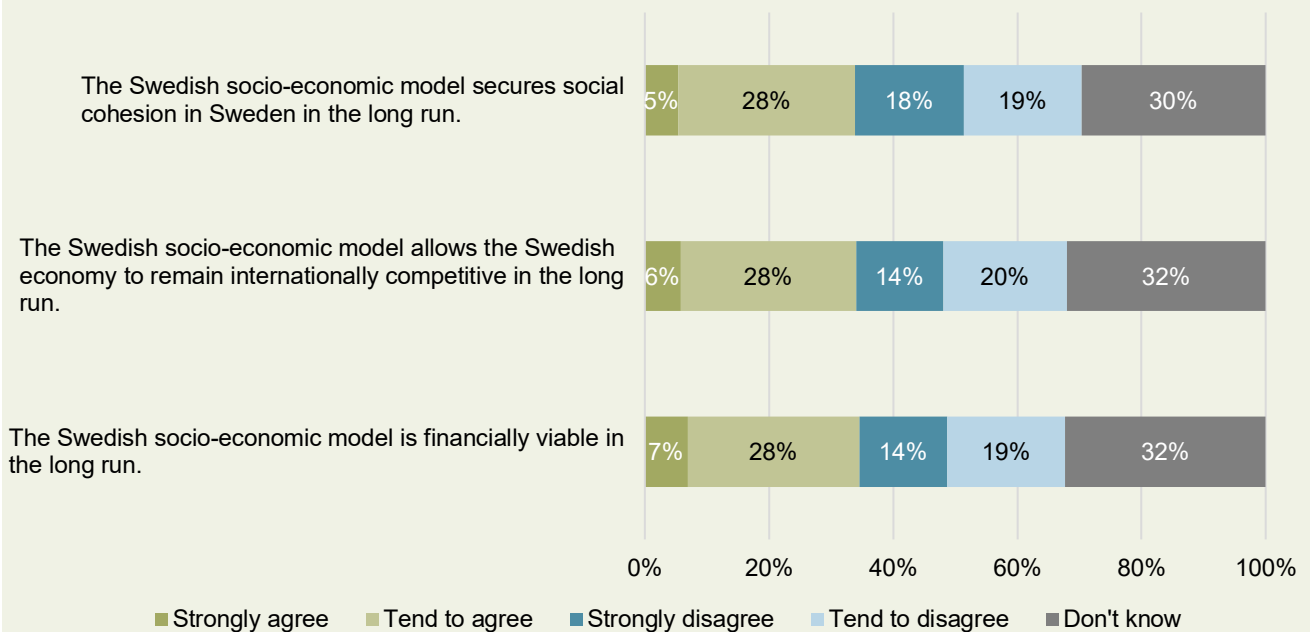
Even the Swedes do not trust their welfare state

The Swedish socio-economic model is praised internationally for its progressive policies and ascribed ability to combine generous welfare with high economic performance. To understand how this model is perceived by Swedish residents in the context of globalization, we asked whether they believe this model has managed to combine both aspects – welfare and globalization. To our surprise, half consider that the Swedish socio-economic model has not managed to achieve this. The rest are divided almost equally with a quarter positive about this question and a similar number uncertain whether it is the case.

F24. QUESTION: **In your opinion, to what extent has the Swedish socio-economic model managed to combine welfare and globalization?**



F25. QUESTION: **To what extent do you agree or disagree with the following statements about the Swedish socio-economic model?**

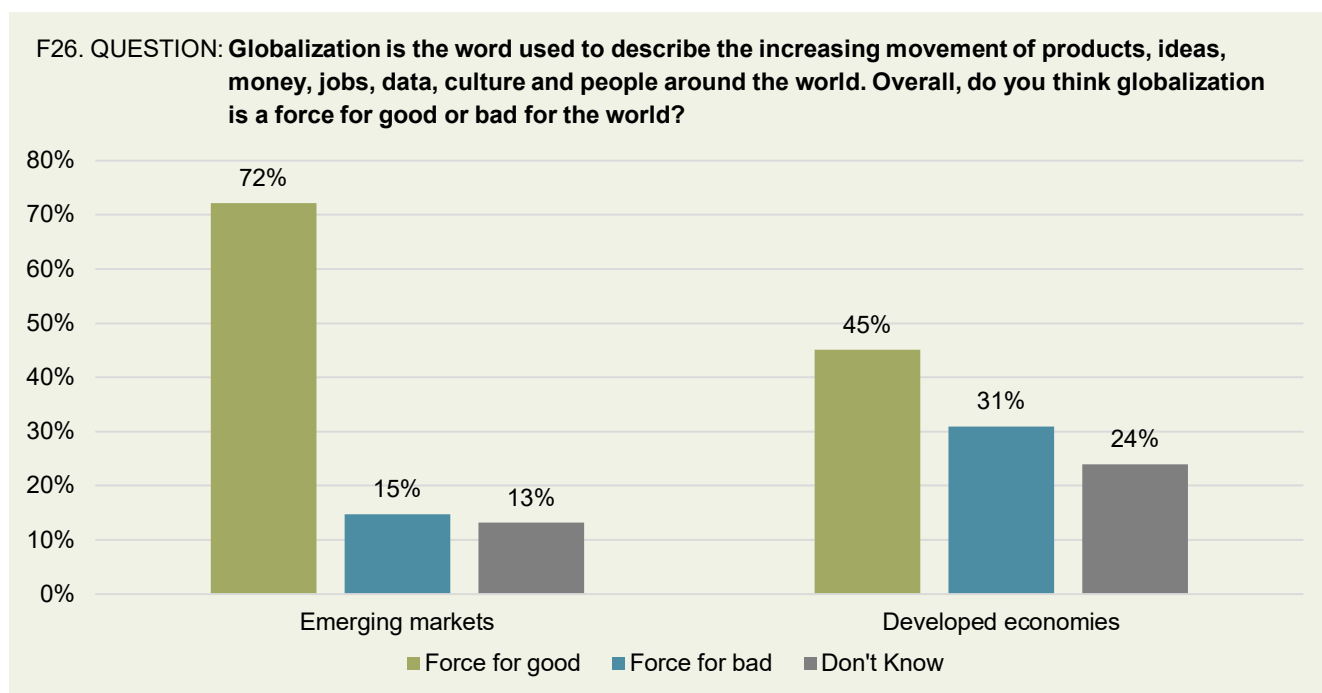


5 Divides – the Mathew Paradox

So far, we have focused on general tendencies revealed by the results. In this section, we discuss **country- or group-specific differences**. First and foremost, we find a gap between perceptions in developed countries and emerging markets about the benefits of globalization and trade. Second, the results show that there are also significant variations among developed countries. Lastly, we briefly turn to differences between social groups. In particular, we look at possible divergences between men and women and young and old.

5.1 Differences between emerging markets and developed economies

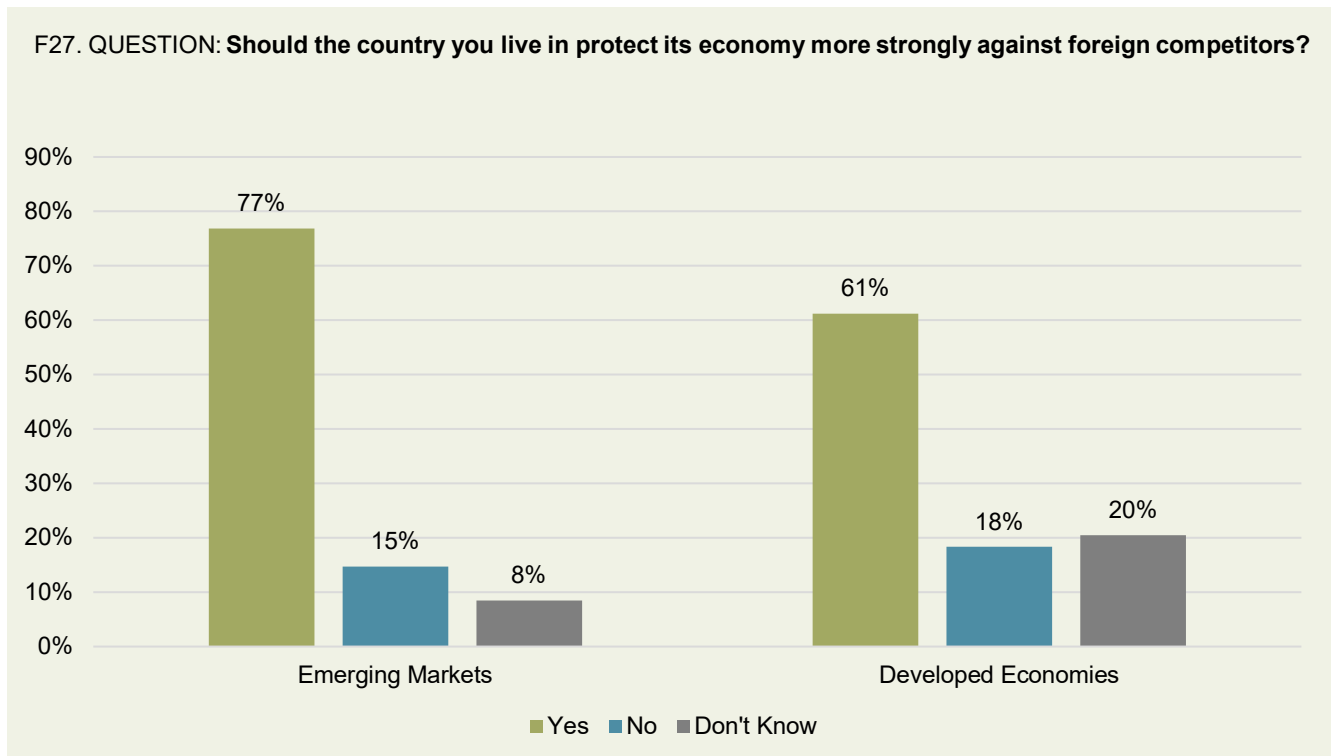
People in emerging economies are more positive about globalization. While we find a general appreciation of the benefits of globalization, trade and foreign direct investment across our sample (see section 3.1), we observe strong differences between developed and emerging economies on a closer look at the data. From the eight emerging economies surveyed, seven take the top spots in our ranking of countries with the most positive view on globalization. As can be seen below, the difference in positive answers between emerging markets and developed economies is 27 percent. Not only do people in emerging economies single out globalization as an overall positive phenomenon for economic growth, but they also consider it to be a very important driver of innovation or peace.



At first sight, this finding is striking given that our findings also show that across all survey countries, whether developed or emerging, respondents agree that globalization has above all benefited developed countries. So, in other words, people agree that it follows the Matthew principle or Matthew effect: Rich countries benefit more than poor countries. We call this puzzle in our findings “the Matthew Paradox” as you would expect it to be the opposite: Developed countries, which see themselves as the biggest beneficiaries of globalization, should be more enthusiastic than emerging economies who rate their benefits lower.

However, people in emerging economies are rather wary of foreign competition. If there is one aspect of globalization where people from emerging economies have more second thoughts than people in developed countries, it is foreign competition. In all the countries we surveyed, a majority of respondents hold the opinion that their governments should take a more protectionist approach toward foreign competitors of domestic firms. But this view is more pronounced in emerging economies: In Indonesia, Mexico and Russia more than 80 percent feel this way.

The most obvious reason for this could be the belief that local firms have no chance of competing with firms from the more advanced economies. However, as we have seen in section 1, there also seems to be a realization that these firms bring innovation and new ideas.



People in developed countries are more ambivalent about globalization. The "don't knows" consistently score higher percentage points in developed countries throughout the survey. This is a strong indicator that they are more ambivalent about the impact of globalization. They do not see it in black and white terms but rather in shades of grey. This may be because developed economies have a longer and greater exposure toward globalization. As their economies have become ever more integrated with the global economy, it has become harder to distinguish between effects that can be attributed to globalization and those related to other trends or factors. As the developed economies we surveyed are all democracies, this shows that there is a substantial number of people who could be swayed one way or the other. So, there is scope for both "nationalists" and "globalists" to make their case.

5.2 Differences between developed economies

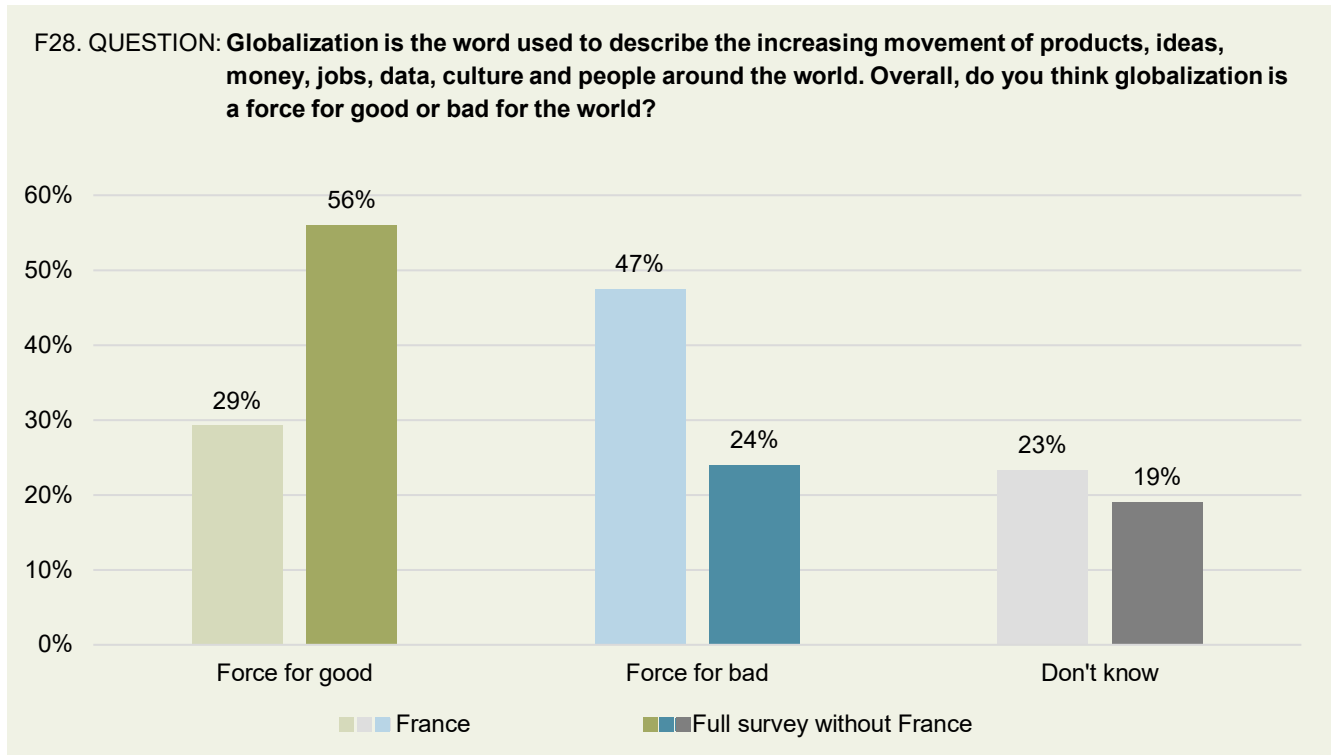
People in the UK are most positive about trade

Attitudes have turned more negative in developed countries in the past two years. That is also true for the United Kingdom, albeit to a much lesser extent than for other developed economies. While trade has seen a decrease in favorability of 18 points in Japan and 15 in Canada, in the UK positive opinion about trade has only dropped from 75 percent to 68 percent. This number makes it the most trade-friendly developed economy on our list.

In particular, UK respondents are very supportive of increasing trade relations with Canada and EU member states as these are ranked as the most popular trading partners. Conversely, the UK is also ranked as a very appealing trading partner by other EU member states. So, these results indicate room for public support for a post-Brexit free trade agreement between the UK and the EU. Attitudes toward the US as a trading partner were also positive but less pronounced.

France is very negative about globalization

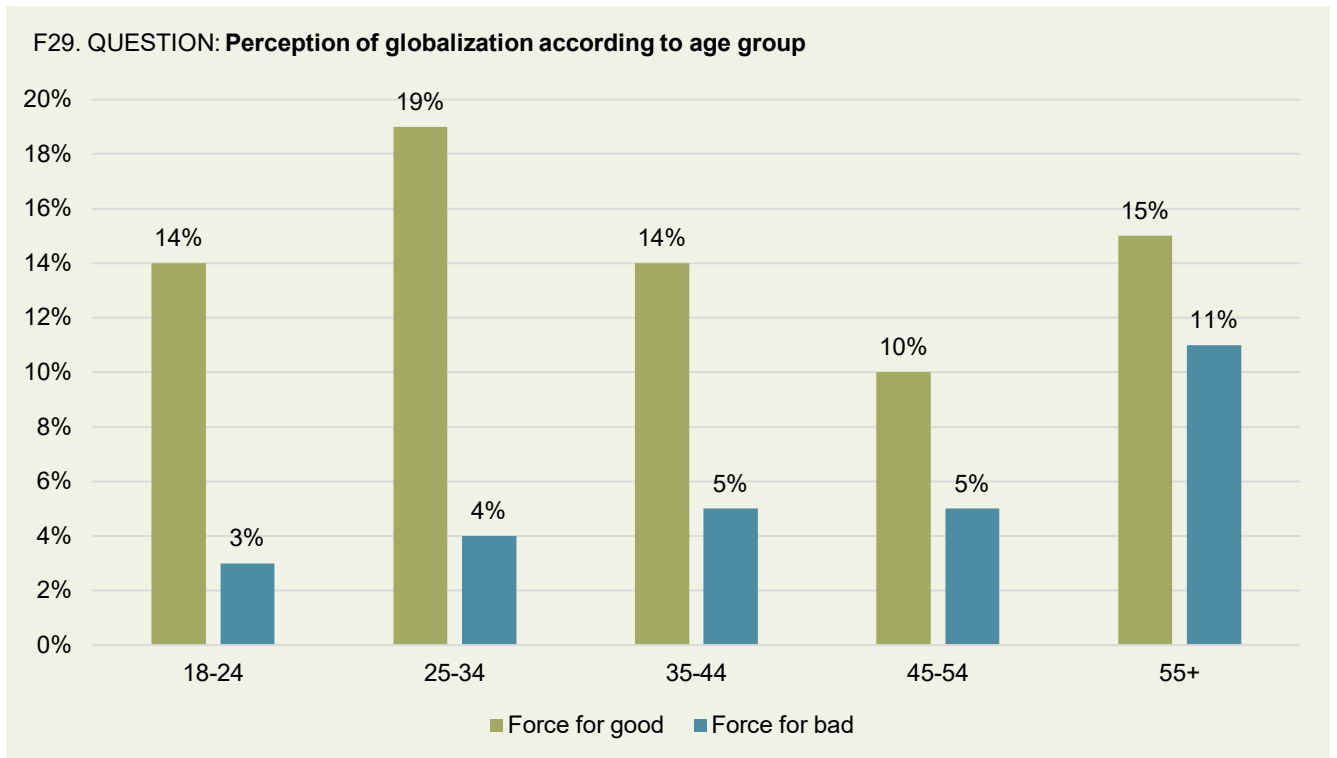
The story about France and international economic integration is not a happy one. Whether it is globalization, trade or foreign investment, France consistently comes bottom of the favorability chart – sometimes by a considerable margin. We can also see that, compared with our 2018 survey, the trend is negative: In 2018, 41 percent in France considered globalization a force for good; in 2020, the number is down to 29 percent. In trade it fell from 51 to 41 percent, in direct investment from 53 to 46 percent – but here, the number considering FDI a force for bad has jumped from 26 to 39 percent.



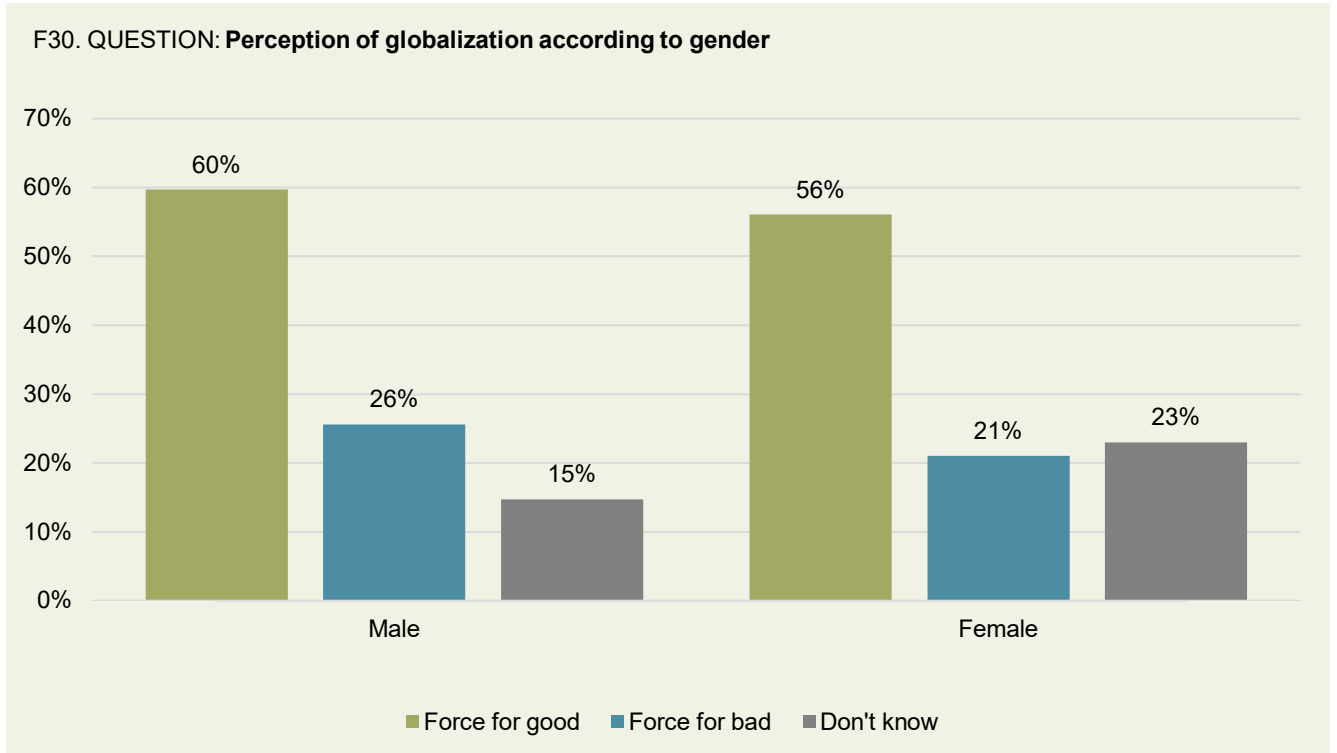
These findings clearly confirm that significant numbers of people in France are at odds with the more liberal approach of President Emmanuel Macron. These numbers should also alert Germany. France is not only a major trading partner but Germany's most important political ally. If there is to be a liberal future to European trade policy, it depends on French public support – and, once the more trade-friendly UK leaves the EU, more than ever.

5.3 Differences between different demographic groups

Finally, it is important to mention that, irrespective of age or gender, most respondents believe that globalization is a force for good. Analyzed according to different age groups, the results indicate that younger people (18-34 years) are particularly optimistic about globalization, while older population groups – though still more positive – are more divided about the benefits of this global trend (Figure 25).



From a gender perspective, the results confirm that positive tendency. Both men and women in the sample believe that globalization is a force for good. Interestingly, the results show that unlike men the proportion of women who are undecided whether globalization is good or bad is almost ten percentage points larger.



6 Conclusion

To sum up, we find a lot of results on what was the eve of the 2020 corona crisis that raise **concerns about the future course of globalization, trade and investment**.

Our "Gains" section shows that growing skepticism about globalization pre-dates the corona crisis. While other surveys have found declining support for it since the beginning of the crisis (e.g. Bidder 2020), the second-guessing of its benefits began earlier. A majority of respondents may still see more light than dark in global economic integration, but attitudes have been darkening over the past two years. Given that globalization is not a law of nature but a social phenomenon, it is dependent on continued majority support in pivotal countries. The fact that this majority in many developed countries barely exists – or, in the case of France, not at all – and that the corona crisis is likely to further undermine support for it, should be a **wake-up call for anybody who takes globalization for granted** and assumes it will continue.

Our "Pains" section makes clear that explaining the benefits of globalization in a better way or to a wider group of people probably will not be enough to turn the tide. It shows that concerns about the downsides of globalization – such as rising insecurity about jobs, fear of global competition and detrimental environmental effects – are broadly shared. This is particularly true for people in developed nations – probably because of their greater integration in the world economy. There is a **wide-spread demand for a less volatile, more inclusive and more sustainable globalization** - a demand that can easily turn into a call for more national sovereignty, if it is not addressed properly. The opponents of globalization have tapped into these feelings for quite a while and have gone a long way to giving globalization a bad name. Its future reputation and course will hinge on its proponents' ability to come up with innovative and effective proposals, not just for more globalization but for better globalization.

Our "Divides" section indicates that this will be far from an easy task. We find a huge divide between the attitudes of emerging countries on the one hand and developed countries on the other. Whereas the former seem to expect that the best of globalization is yet to come for them, the latter apparently feel that they have already seen the peak of its benefits. That **does not bode well for a global consensus** on how to reform existing international trade and investment governance. The challenges are barely smaller at the regional and national levels. Given France's really negative take on globalization, for instance, it is hard to imagine a united and constructive European approach. Higher support for globalization among younger people compared to older ones may at least provide a small ray of hope there might be room for future economic openness and interconnectedness.

So, the corona crisis hits globalization at a bad time. It is likely to exacerbate many of the negative underlying tendencies that we have examined. It is therefore all the more important that we try to **use the crisis as a window of opportunity to rethink the governance of globalization** at the national, regional and international levels. Going back to the status quo ante will not be an option and should not be an option. Instead, we need to re-shape the paradigms of globalization and trade in a way that they better rhyme with both environmental and social goals.

7 Topic and country sheets

In order to highlight some of the most important topic-specific and country-specific findings, we have compiled several info sheets.

The following section takes a more detailed look into the findings for the environment, innovation, peace, and some group-specific findings. In addition, it presents more information of the attitudes of residents from China, France, Germany, the United Kingdom, and the United States.

China

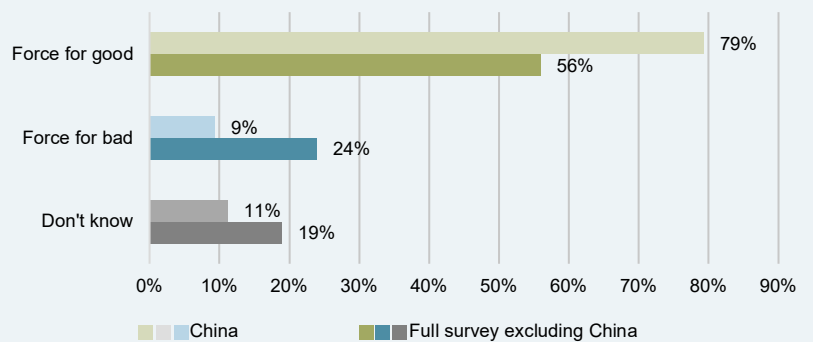
What do Chinese residents think about globalization?

Between March 5th and 12th, 2020 we asked 1,031 Chinese residents about their views on globalization, foreign trade and multilateralism. Here, some of the most important findings.

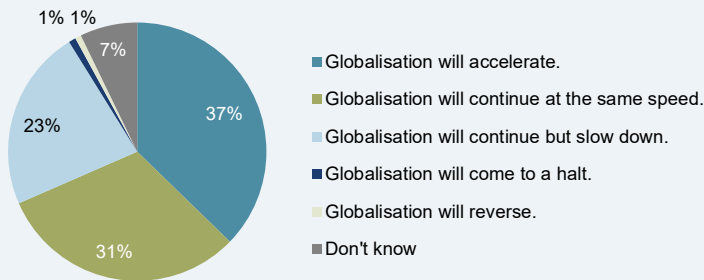


Globalization is the word used to describe the increasing movement of products, ideas, money, jobs, data, culture and people around the world. Taking this definition under consideration, a full **79% of Chinese respondents believe that globalization is a force for good**. In comparison to the other 15 surveyed countries **China stands out with its proglobalization stance**. This positive attitude is linked to the idea that globalization is an opportunity for growth, creates jobs, makes products cheaper and enhances China's capacity to innovate. This view is also reflected in Chinese opinions on trade and investment.

Q: Overall, do you think globalization is a force for good or bad for the world?



Q: With which of the following statements about the future course of globalization do you agree the most?

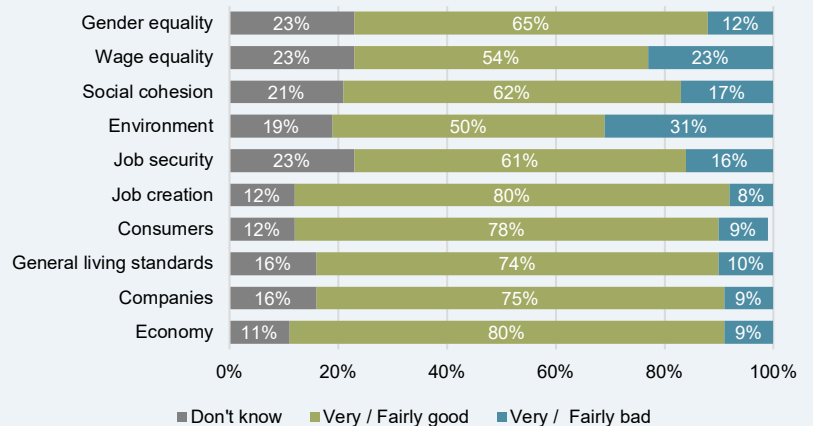


Over 60% of respondents believe that in **future globalization will continue at the same speed or even accelerate its course**. This would be a positive outcome for the Chinese economy which has suffered gravely from the economic slowdown wrought by the COVID-19 crisis. This finding highlights, furthermore, the optimism of Chinese residents about a positive return to 'business as usual' post- pandemic.



When asked about the socio-economic benefits of international trade, Chinese participants think that **it has overall a positive impact both socially and economically**. Over 60% of respondents consider that international trade has a positive impact on companies, consumers, and the economy. Albeit with fewer positive answers, most of the Chinese surveyed believe that even the environment has profited from international trade.

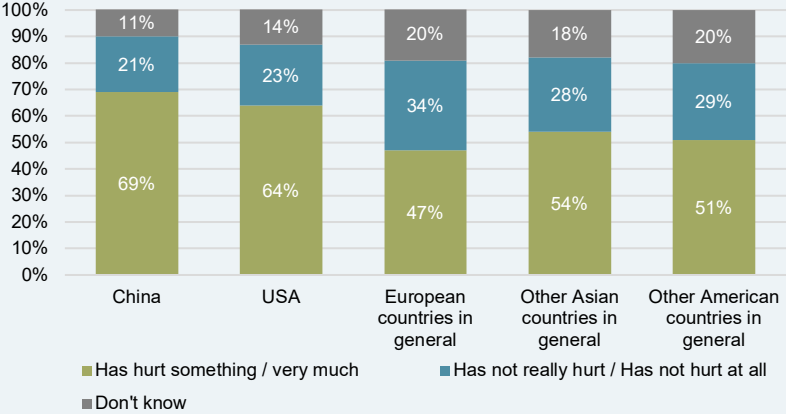
Q: Overall, do you think international trade is good or bad for each of the following in the country you live in?



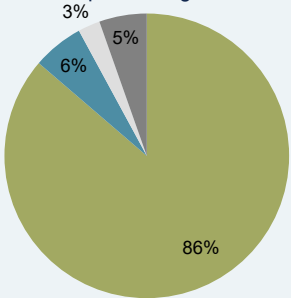


Over the last two years, China and the USA have been involved in constant disputes over trade policy which has resulted in a trade war between them. **Chinese citizens believe on an equal scale that China and the US have suffered from the conflict.** This finding by and large mirrors the perception of American citizens who share the view that both China and the US have suffered from the conflict. The results also show that, albeit on a smaller scale, most respondents also consider that the conflict has had a detrimental effect on other countries from Asia, the Americas and Europe.

Q: To what extent do you think the trade conflict between China and the USA has hurt the following countries, if at all?



Q: Do you think the World Trade Organization (WTO) is or is not an important organization?



- The WTO is an important organisation.
- The WTO is not an important organisation.
- Not applicable - I don't know the WTO.
- Don't know



The relationship between the World Trade Organization as guardian of the multilateral trading system and China has come in for much international criticism over recent years. Furthermore, the ongoing institutional crisis of the WTO has shown up several deficiencies and problems within that body. Nonetheless, when asked about its relevance, **most Chinese citizens believe the WTO to be an important international institution.**

France

What do French residents think about globalization?

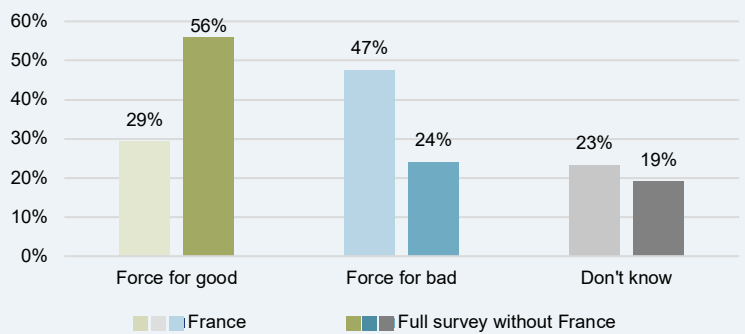
Between March 4th and 12th, 2020 we asked 1028 French residents about their views on globalization, foreign trade and multilateralism. Here are some of the most important findings.



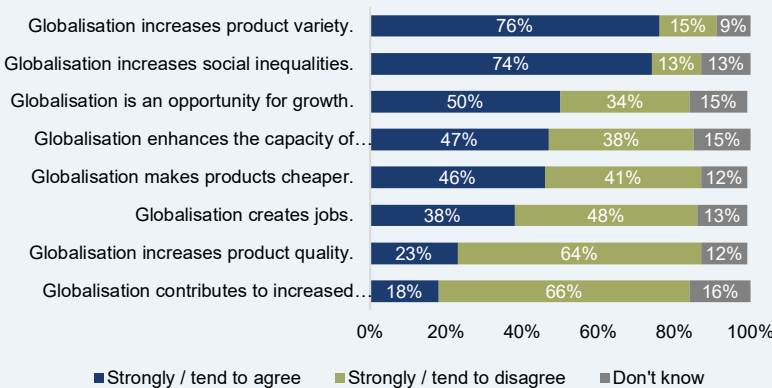
France is the country most reluctant to endorse globalization among the 15 countries surveyed.

In general, French residents adopt a negative attitude towards globalization and international trade, one which is related to the socio-economic impact of these global trends. Considering globalization as the increasing movement of products, ideas, money, jobs, data, culture and people around the world, only 29% of participants believe globalization is a force for good. In contrast, **47% of the respondents believe globalization is a force for bad.**

Q: Overall, do you think globalization is a force for good or bad for the world?



Q: To what extent do you agree or disagree with each of the following statements concerning globalization in general?



Globalization and its underlying international trends are associated with a series of socio-economic outputs. French residents were asked about their opinion on these aspects and whether they agree with the expected impact of globalization on the economy and society. Considering positive aspects of globalization, more than 70% of the respondents believe that globalization increases product variety and more than 40% consider that it leads to more innovation as well as lowering the price of goods. Nonetheless, **over 70% think that globalization increases social inequality. Furthermore, more than 60% disagree with the idea that it increases wages or that it raises the quality of products.**

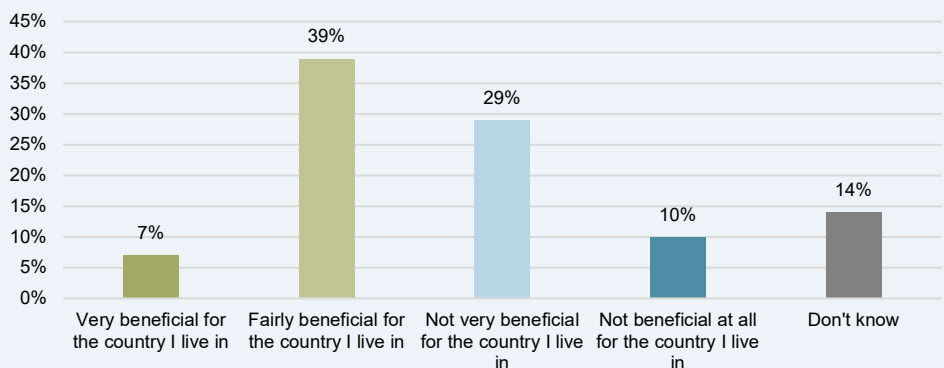


46% of the respondents think that foreign investment is good for the French economy.

Hence, in contrast to the general perception of globalization and international trade, the results indicate that foreign investment is perceived more positively by French respondents. Nonetheless, a relatively large group of people still think that foreign investment is bad for France.

Q: What do you think about foreign companies investing in the country you live in?

Foreign companies investing are ...



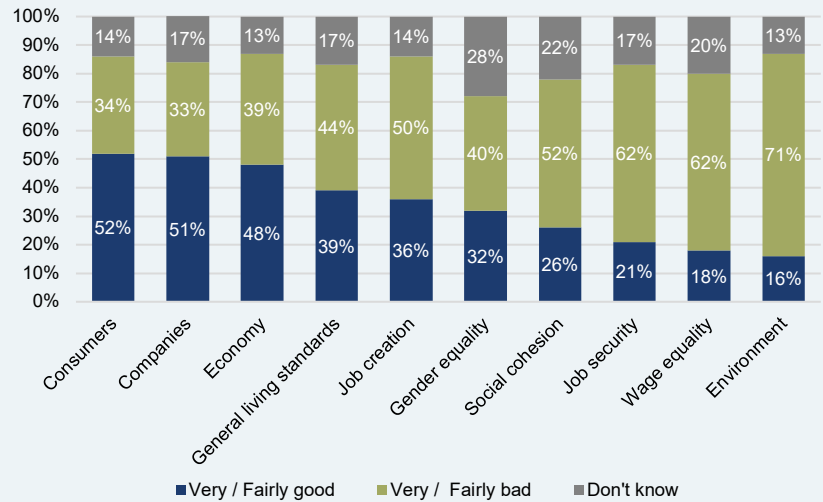


More than 60% of French residents consider international trade to be detrimental to job security, the environment and wage equality.

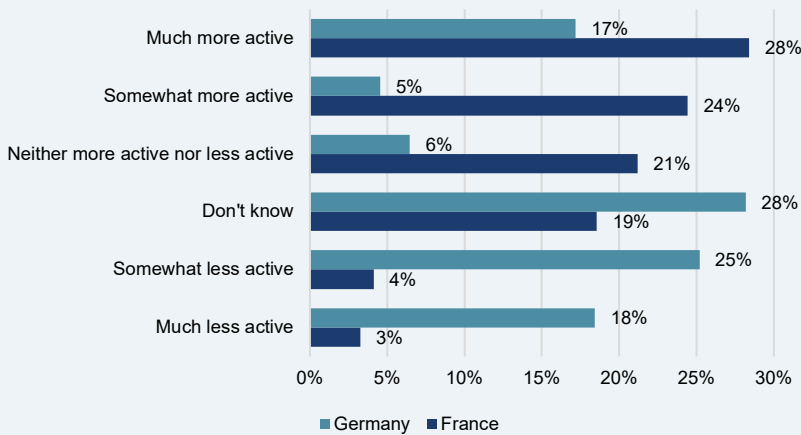
Additionally, a significant proportion of respondents think that trade is negative for job creation, social cohesion, gender equality and living standards in general. On the opposite side, a relatively large share of respondents believe that international trade is good for the economy, consumers and companies. These results confirm the negative attitudes towards the underlying trends of globalization held by French participants.

Additionally, a significant proportion of respondents think that trade is negative for job creation, social cohesion, gender equality and living standards in general. On the opposite side, a relatively large share of respondents believe that international trade is good for the economy, consumers and companies. These results confirm the negative attitudes towards the underlying trends of globalization held by French participants.

Q: International trade refers to the importing and exporting of goods and services across national borders. Overall, do you think international trade is good or bad for each of the following in the country you live in?



Q: In the light of trade conflicts between the US and China, should the EU become a more active or less active economic player?



Over the last two years, there has been an intensive debate about the role of the EU in the global economy and, critically, in the context of international policymaking. **According to 52% of French participants, the EU should become a more active economic player.** In contrast, 21% think that the role of the EU should stay the same, while only 7% believe that the EU should take a less active role. **This positive attitude towards a stronger EU at international level contradicts the views of German respondents, who tend to favor a less active Europe.**

Germany

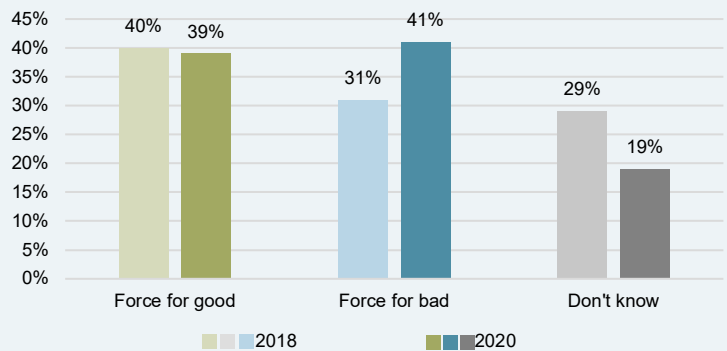
What do German residents think about globalization?

Between March 5th and 12th, 2020 we asked 1,022 German residents about their views on globalization, foreign trade and multilateralism. Here, some of the most important results.

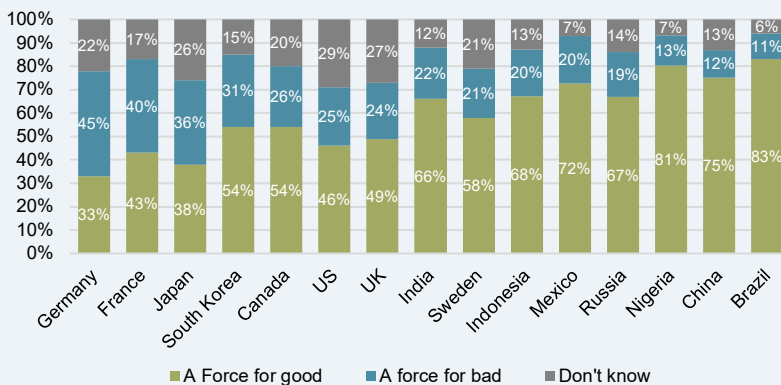


Considering globalization as the increasing movement of products, ideas, money, jobs, data, culture and people around the world, **41% of German respondents believe that globalization is a force for bad**. This proportion is up from 31% in our 2018 survey – a rather steep decrease since then. In contrast, the proportion of respondents who consider it a force for good has barely changed (39% in 2020 compared to 40% in 2018). **Germans feel most positive about the international movement of ideas and culture**, with 75% and 64% respectively rating these two elements as a force for good. Movement of products comes only third (58%) in one of the world's biggest trading powerhouses.

Q: Overall, do you think globalization is a force for good or bad for the world?



Q: Do you think the following aspects of globalization are a force for good or bad for the world? Answers for movement of money.



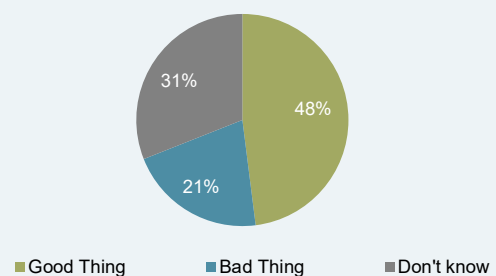
Germans are most skeptical about financial globalization.

Of all the 15 countries we surveyed, Germany has the most negative attitude towards financial globalization. When asked about the movement of money across borders, only 33% of Germans consider it a force for good, while **45% consider it a force for bad**.



Still liking their export surplus: The German export surplus is internationally a point of contention. The US government has been most outspoken in its criticism, with President Trump accusing Germany of unfair trade practices and threatening retaliation through tariffs on cars. In the German public debate, the surplus is often seen as proof of German's international competitiveness, even evoking a relatively rare display of national pride. Our survey shows that about **half the German public sees the export surplus as a good thing** but also that a sizeable minority feels negatively about it.

Q: In general, what do you think about Germany's export surplus?

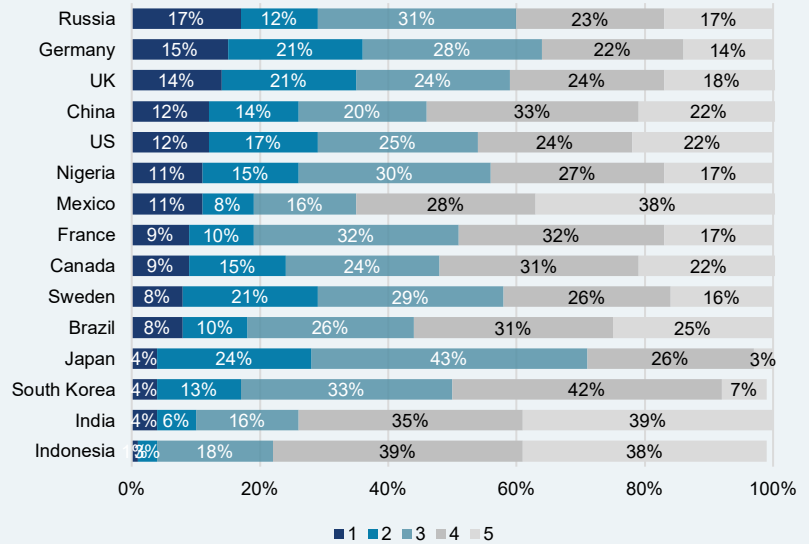




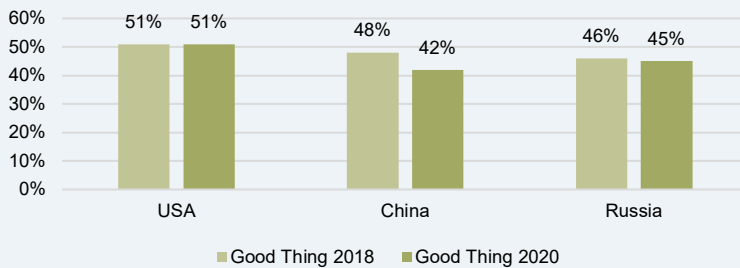
No poster child for multi-lateralism: Germany's constitution and political culture put a high premium

on international cooperation. The rhetoric of German policymakers stresses the **need for and value of multilateralism**. This view does not necessarily translate to the wider populace. While the German public is positive about a binding set of international trade rules, its viewpoint **does not stand out in our sample**. People in nations that are usually assumed to follow a rather nationalist approach, such as China or the US, are only a shade less inclined to opt for binding rules or marginally more inclined to favor independent action. Still, 43 percent of Germans favor a more active role for the EU in trade policy in light of the US-China trade conflict.

Q: On the one hand, global trade rules can limit a country's ability to implement an independent trade policy. On the other hand, they can help to set an international framework of rules that is binding for all countries. On the scale below, which do you think is more important, a binding set of international rules (1) or the ability to set trade policy independently (5)?



Q: Please imagine the country you live in increased trade with the following countries. Generally speaking, do you think this would have a good or bad impact on the country you live in?



No trade pivot to China or Russia:

The foreign policy of the Trump administration has triggered a debate in Germany about a **re-orientation of its international partnerships** toward a more European approach or even a pivot toward China or Russia. In 2018, our survey found that the US was only regarded as a slightly more favorable trading partner for Germany than those two nations. Two years later, the **picture has remained virtually stable**.

United Kingdom

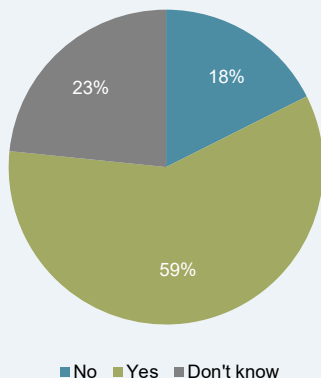
What do British residents think about globalization?

Between March 4th and 12th, 2020 we asked 1017 British residents about their views on globalization, foreign trade and multilateralism. Here, some of the most important results.

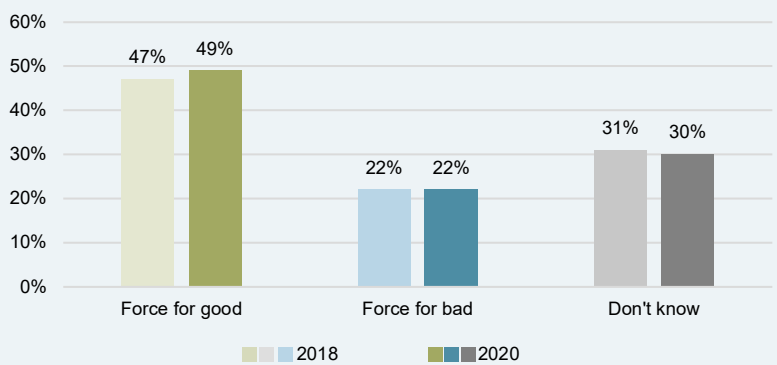
✓ Considering globalization as the increasing movement of products, ideas, money, jobs, data, culture and people around the world, **49% of the British respondents believe that globalization is a force for good.** According to further results about the perception of the different dimensions of globalization, British citizens believe that **the movement of products, culture and ideas are the most positive aspects of this global trend. In comparison to the 2018 GED Survey, the British perception of globalization has remained almost the same.**

↑ Globalization is considered to have several socio-economic effects. When asked whether they agree with different expected outcomes, **more than 50% of the respondents stated that they agree with globalization creating opportunities for growth, increasing product variety, making these products cheaper, creating jobs and enhancing the capacity of the UK to innovate.** Nonetheless, it seems that a large share of the respondents does not consider that globalization leads to better product quality and that it increases wages.

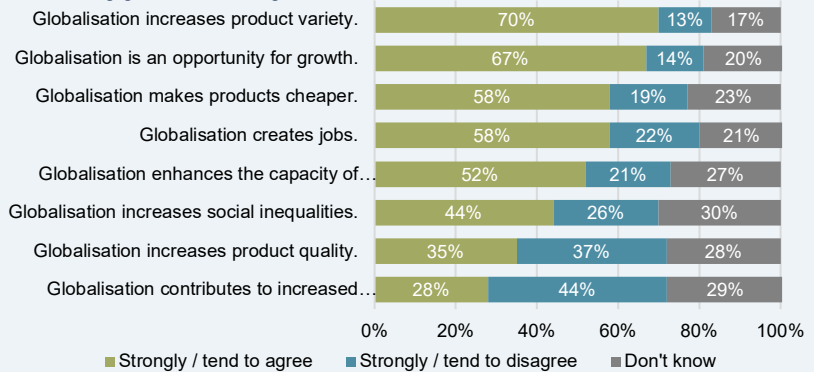
Q: Should the country you live in protect its economy more strongly against foreign competitors?



Q: Overall, do you think globalization is a force for good or bad for the world?



Q: To what extent do you agree or disagree with each of the following statements concerning globalization in general?

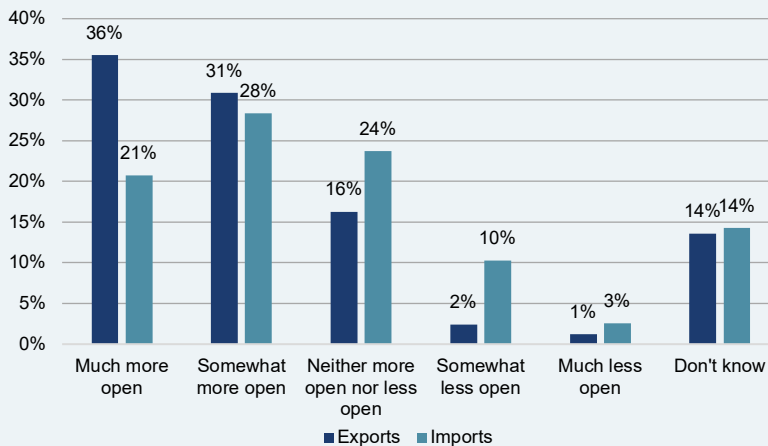


Competition law was one relevant topic for the negotiation rounds previous the Brexit since the official exit of the UK from the EU implied several changes for the enforcement and jurisdiction of British competition law. We have asked British participants whether they believe that the UK should protect the national economy stronger against foreign competitors which was confirmed by a large share of participants. **Specifically, 59% of the respondents think that the British economy should be stronger protected against foreign competitors.** It is important to point out that we found a general tendency in the results towards the believe that national economies should be better positioned against foreign competition irrespective of the country.

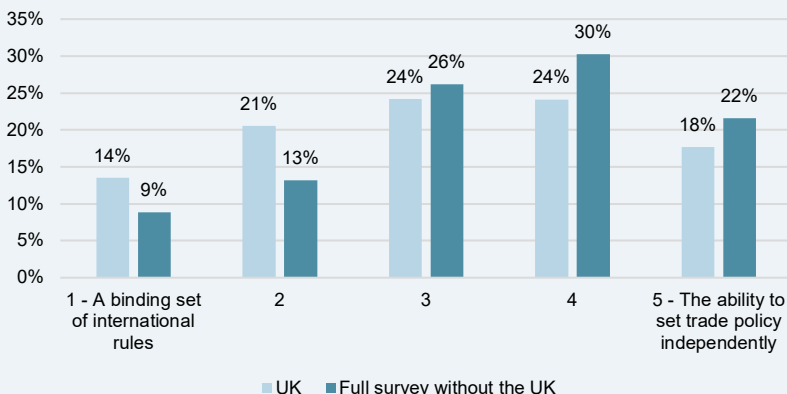


International trade is fundamental for the British economy. After the Brexit the country will have to find mechanisms to maintain a good international position in the global market independently from the EU. According to the survey, 67% of the British respondents believe that the UK should be rather open to export while 49% consider that the focus should lay in imports. **These results imply that most of the respondents think that future economic policy should be shaped to foster British exports.** In comparison to other industrialized countries, the UK seems to be one of the most optimistic about international trade.

Q: Do you think that after Brexit, the UK should be more or less open to imports and exports from and to other countries?



Q: On the one hand, global trade rules can limit a country's ability to implement an independent trade policy. On the other, hand, they can help to set an international framework of rules that is binding for all countries. On the scale below, which do you think is more important, the ability to set trade policy independently or a binding set of international rules?



One of the main triggers of Brexit was the wish of many British policymakers to decide independently and sovereignly about economic policies. Asking British participants whether in a scale of 1 to 5 they prefer a binding set of international rules or the ability to set trade policy independently for the UK, **the results indicate a clear preference of independent policy-making.** The entire country set of the survey which reveal that there is a general tendency towards preferring independent trade policy-making over a set of binding international rules.

United States

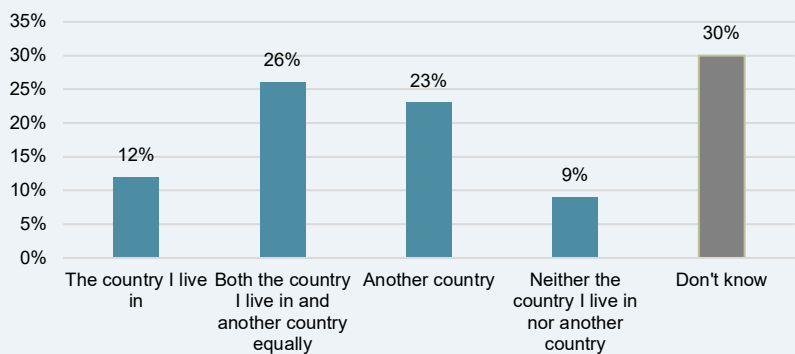
What do USA residents think about globalization?

Between February 18th and 28th, 2020 we asked 1,064 USA residents about their views on globalization, foreign trade and multilateralism. Here, some of the most important results.



Relative losses from globalization...: A key talking point of the Trump administration is that other countries **take advantage of the United States**. The USA is constantly portrayed as the losers of globalization. The administration seems to tap into a certain feeling of victimhood here, as **only 12 percent of Americans think that their country profits more from globalization than other countries**.

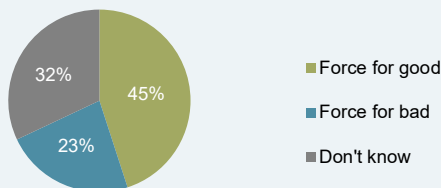
Q: Which of the following groups do you think have benefitted more from globalization?



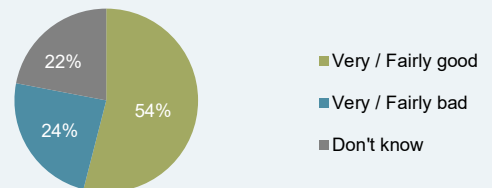
... but absolute gains from both globalization and trade: When the distributional aspect is left aside and people simply consider whether they themselves gain or lose more from globalization and trade, Americans believe that closer international economic ties are beneficial for their country. 45% view globalization as a force for good, while only 32% consider it a force for bad. When it comes to trade, they are even more positive.



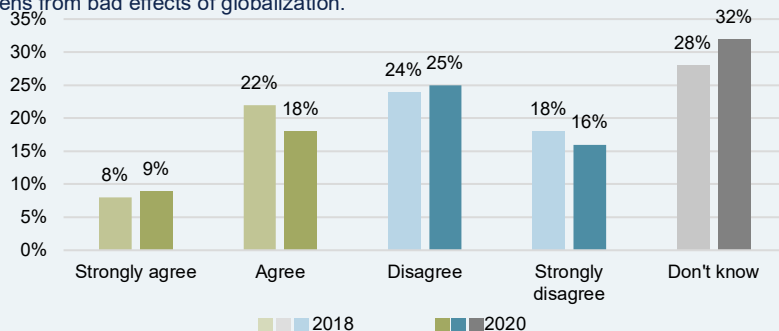
Q: Globalization is the word used to describe the increasing movement of products, ideas, money, jobs, data, culture and people around the world. Overall, do you think globalization is a force for good or bad for the world?



Q: What do you think about growing trade between the country you live in and other countries – do you think it is a very good thing, fairly good, fairly bad or a very bad thing for the country you live in?

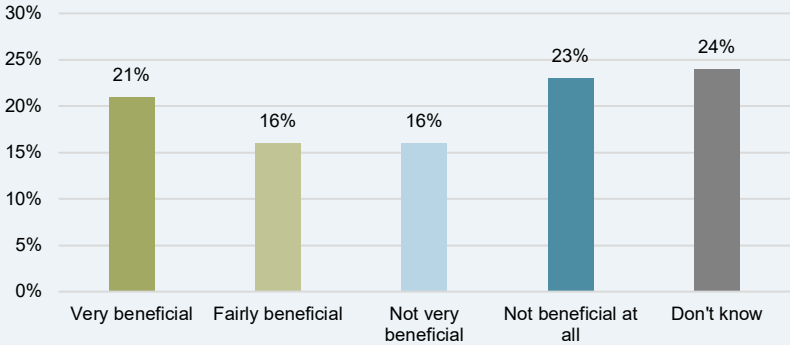


Q: To what extent do you agree or disagree with each of the following statements concerning globalization in general? My government does enough to protect its citizens from bad effects of globalization.



No feeling of being any more protected: Protecting American jobs and prosperity against the perils of globalization is one of the overarching themes of the Trump administration. So far, its measures – such as subsidies for blue-collar industries – do not seem to resonate with the public. Compared to our 2018 survey, Americans are **not more convinced that their government is now better capable of protecting them**.

Q: To what extent has the trade policy of President Donald Trump been beneficial for the USA?



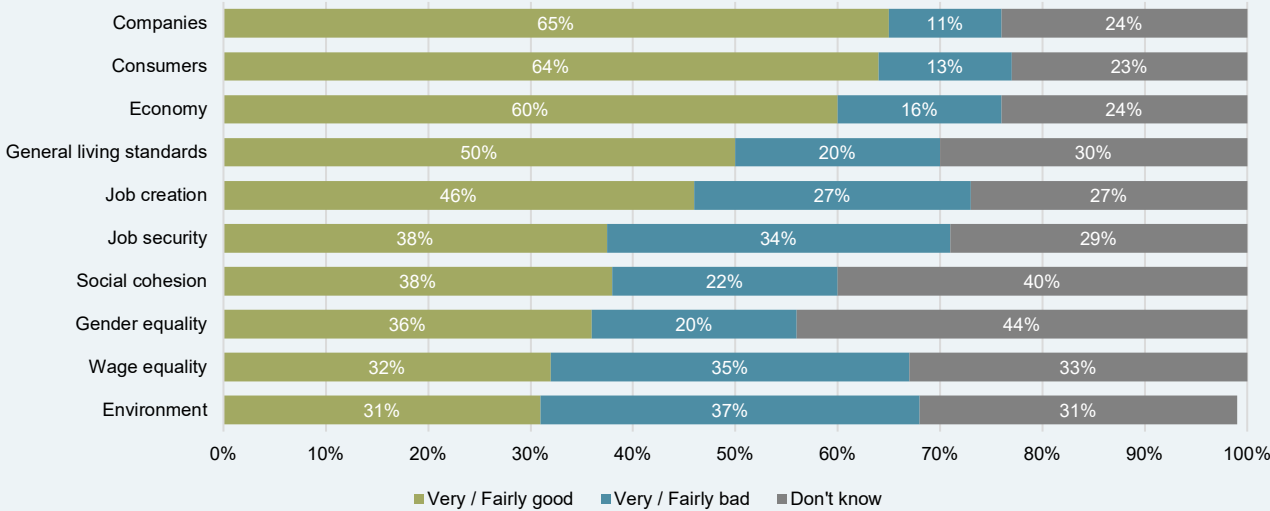
Split and undecided on Trump's Trade Policy:

The USA has often been referred to as a **divided and polarized nation**. When it comes to the current administration's trade policy, there are about as many people who consider it as generally positive as there are people who hold a negative view. However, we also find that it is **not all black and white** and a rather large group is unsure about its effects. When it comes to the trade war between China and the USA, Americans attribute the fallout about evenly to both parties: 48 percent think that each of China and the USA has been somewhat or really hurt by it.



It's the environment (too), stupid: The United States is not traditionally associated with a high concern for environmental affairs while **environmental aspects certainly do not play a big role in national debates** over trade. Our survey shows that they should. When asked about the effects of trade on various aspects of the economy and society, **Americans consider the environment to be among the biggest factors**, even slightly outranking the usual suspects of wage equality and job security.

Q: International trade refers to the importing and exporting of goods and services across national borders. Overall, do you think international trade is good or bad for each of the following in the country you live in?

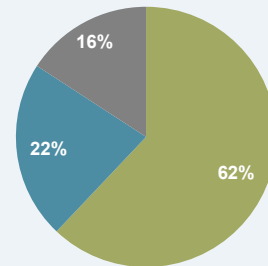


What do people think about the impact of globalization and trade on the environment?

Between February 19th and March 17th, 2020, we asked 15,636 residents of developed countries and emerging markets about their opinion on the impact of globalization and trade on the environment. Here are the most important results.

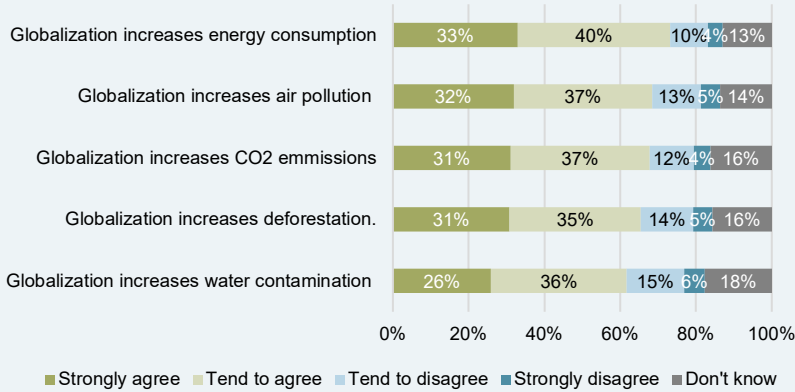
According to the 2020 GED Globalization Survey, **most of the participants believe that globalization has been detrimental to the environment.** This view is probably associated with the impact of different dimensions of globalization like international trade or the movement of people on the exploitation of many different natural resources. Although the share of people who believes that globalization is a force for bad for the environment is relatively larger in all countries. The negative perception of globalization for the entire sample is particularly driven by more developed countries which are rather reluctant to the effect of globalization on the environment.

Q: To what extent do you agree or disagree with each of the following statements concerning globalization?
“Globalization leads to the depletion of important resources.”



■ Strongly / tend to agree ■ Strongly / tend to disagree ■ Don't know

Q: To what extent do you agree or disagree with each of the following statements concerning globalization?

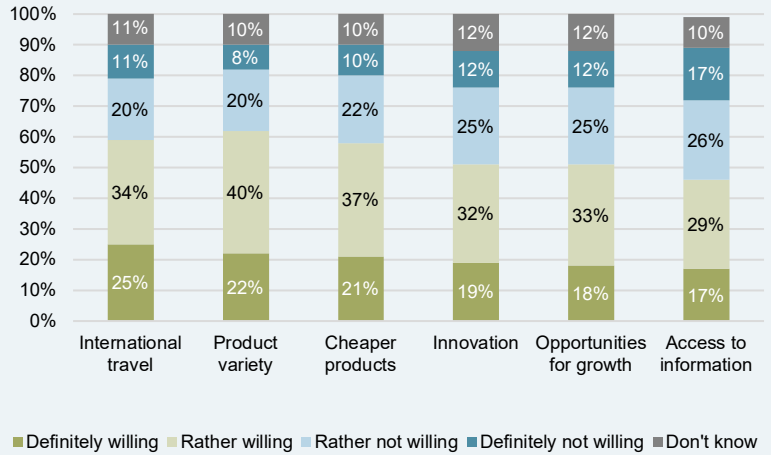


■ Strongly agree ■ Tend to agree ■ Tend to disagree ■ Strongly disagree ■ Don't know

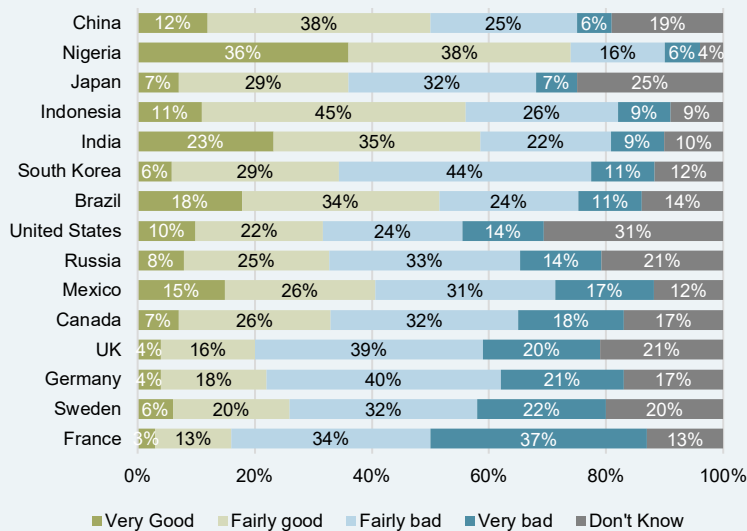
We confirmed this view by asking the opinion of the respondents for the effect of globalization on different natural resources. **Whether water, air or energy, according to the results, globalization has had a negative effect on the environment through several mechanisms.** Specifically, more than 50% of the respondents thinks that globalization leads to more water contamination and more than 60% considers that it increases deforestation, CO2 emissions, air pollution and energy consumption.

There is a series of positive socio-economic effects associated with globalization. These include the access to information, product variety and even international travel. According to the survey results, there is a large group of people that is willing to forego these benefits for the advantage of the environment. The results show that **62% of the respondents is ready to forego product variety**. Additionally, **more than 50% of the participants is ready to pay higher products for traded goods and to travel less in order to protect the environment**. With smaller shares but still representing the predominant view people are willing to forego innovation, opportunities for growth and even access to information for the benefit of the environment.

Q: The following aspects are assumed to be some of the benefits of globalization. To what extent are you willing to forego these benefits for the advantage of the environment?



Q: International trade refers to the importing and exporting of goods and services across national borders. Overall, do you think international trade is good or bad for each of the following in the country you live in? "The Environment"



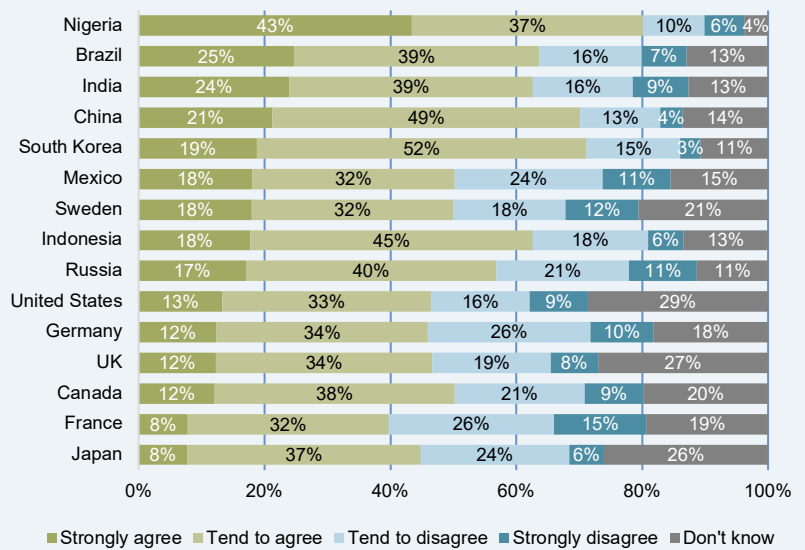
The opinion on whether international trade affects the environment is more polarized across countries than the general view about the environmental impact of globalization. Residents of developed countries seem to have a rather negative opinion about the effect of trade on the environment. For instance, **more than 60% of respondents from Germany and France believe trade is detrimental for the environment**. In contrast, residents of less developed countries are less negative or even believe that trade is positive for the environment.

What do people think about globalization and peace?

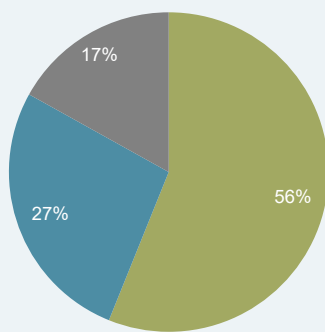
Between February 19th and March 17th, 2020, we asked 15,636 residents of developed countries and emerging markets about their opinion on the impact of globalization on peace. Here are the most important results.

Country-specific results reveal that in particular less developed economies have a positive attitude towards the effect of globalization on peace, with Brazil and Nigeria leading the list. In comparison, developed countries are more reluctant to the benefit of globalization for peace. France and Japan are the least optimistic in this regard.

Q: To what extent do you agree or disagree with each of the following statements concerning globalization? *“Globalization is good for peace.”*



Q: To what extent do you agree or disagree with each of the following statements concerning globalization? *“Globalization is good for peace.”*



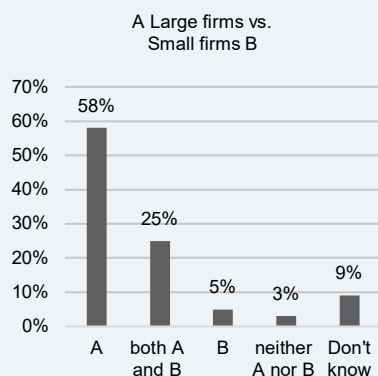
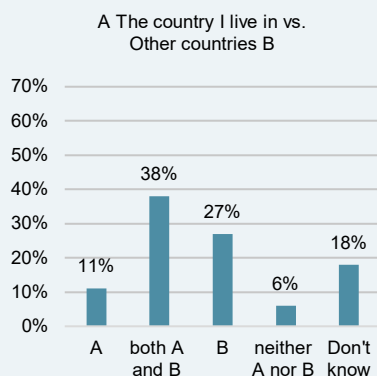
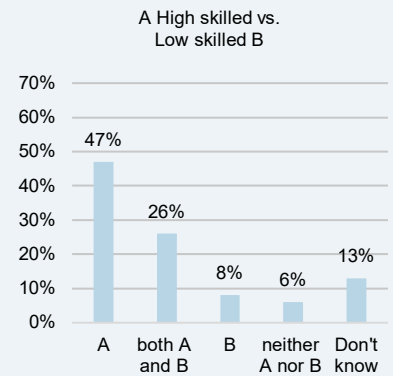
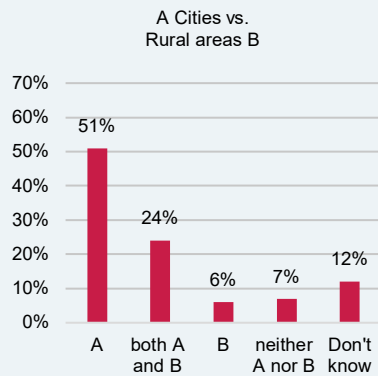
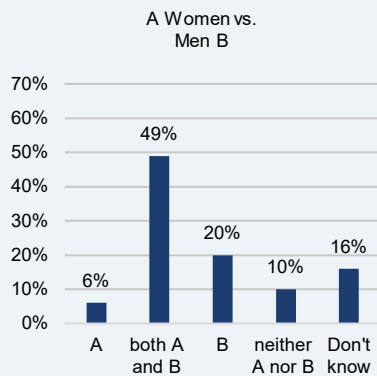
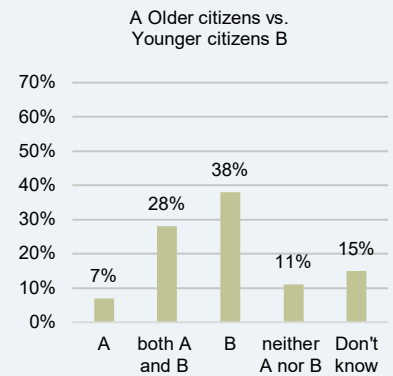
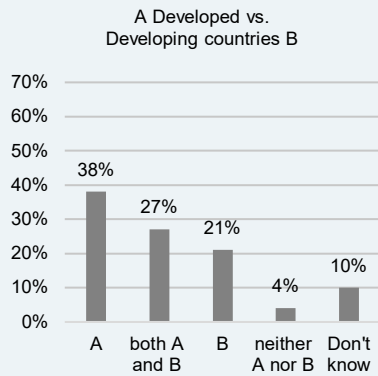
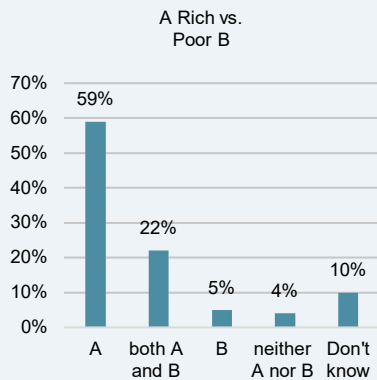
■ Strongly / tend to agree ■ Strongly / tend to disagree ■ Don't know

Most of the respondents of the 2020 GED Globalization survey believe **that globalization is good for global peace**. This is likely related to the interlinkages and interdependencies between countries that the different dimensions of globalization like the movement of goods, ideas, or capital create

What do people think about the impact of globalization on social and economic cohesion?

Between February 19th and March 17th, 2020, we asked 15,636 residents of developed countries and emerging markets about their opinion on the impact of globalization on different economic groups. Here are the most important results.

Q: Which of the following groups do you think have benefitted more from globalization?

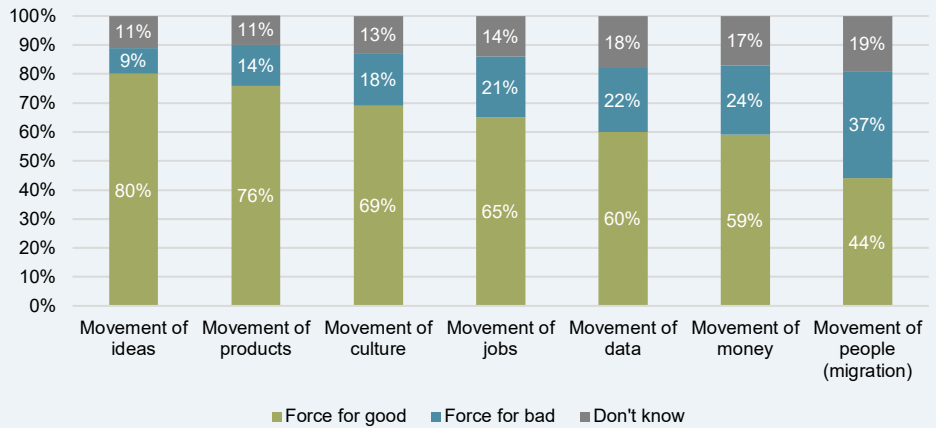


What do people think about globalization and innovation?

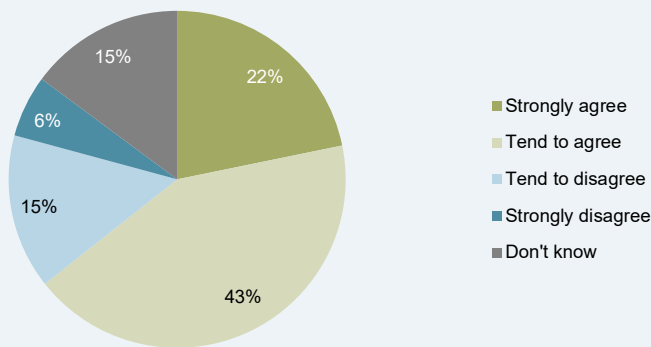
Between February 19th and March 17th, 2020, we asked 15,636 residents of developed countries and emerging markets about their opinion on the impact of globalization on innovation. Here are the most important results.

Innovation is one of the most positive aspects of globalization, according to the different results of the 2020 GED Globalization survey. This view is also reflected on several factors of innovation. When asked about the different dimension of globalization, **the movement of ideas – fundamental for technological change – was largely viewed a force for good for the world.**

Q: Do you think the following aspects of globalization are a force for good or bad for the world?

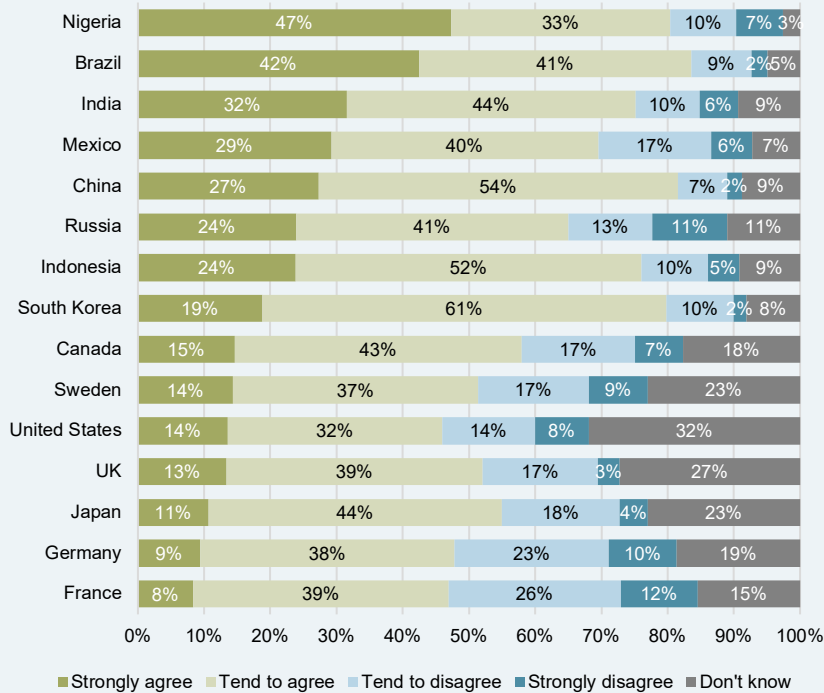


Q: To what extent do you agree or disagree with each of the following statements concerning globalization?
“Globalization enhances the capacity of the country I live in to innovate”.



Asking more specifically about the effect of globalization on innovation, revealed that **64% of the entire population of the survey believes that globalization increases the capacity to innovate** in the country of residence of the respondents.

Q: To what extent do you agree or disagree with each of the following statements concerning globalization? *“Globalization enhances the capacity of the country I live in to innovate”.*



Interestingly the country-specific results show that the positive attitude towards globalization for the entire sample is driven by the opinion of less developed economies. **More of 70% of the residents of Nigeria, Brazil or India believe that globalization has enhanced the capacity of their countries to innovate.** In contrast, significantly less residents of France, Germany and Japan – countries with high technological capacity – think globalization has been a determinant of the innovative capacity of their countries.

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