

Credit Suisse Progress Barometer

Country Cockpit





Australia

Progress Map Australia

As a vast country with only a marginally developed rail network, Australia is highly dependent on road transport and mobility – the future of which lies in electric mobility. The progress map for Australia now shows that the country is ready and willing to embrace this future. People clearly want things to move faster when it comes to maintaining or even expanding mobility, whilst at the same time reducing the emission of greenhouse gases that are harming the climate. On the other hand, tackling the issue of climate change via a newly introduced fuel tax is not something Australia greets with enthusiasm; in this respect, the country would rather turn the dial back.

Australians also clearly wish their nation to be even more progressive when it comes to values touching on a person's freedom for self-realization. Equality (gender equality and gay rights) as well as issues concerning the individual working environment (expansion of public child-care, finding purpose and meaning in one's work and the idea of lifelong learning) are things on which Australians would like to see things move faster.

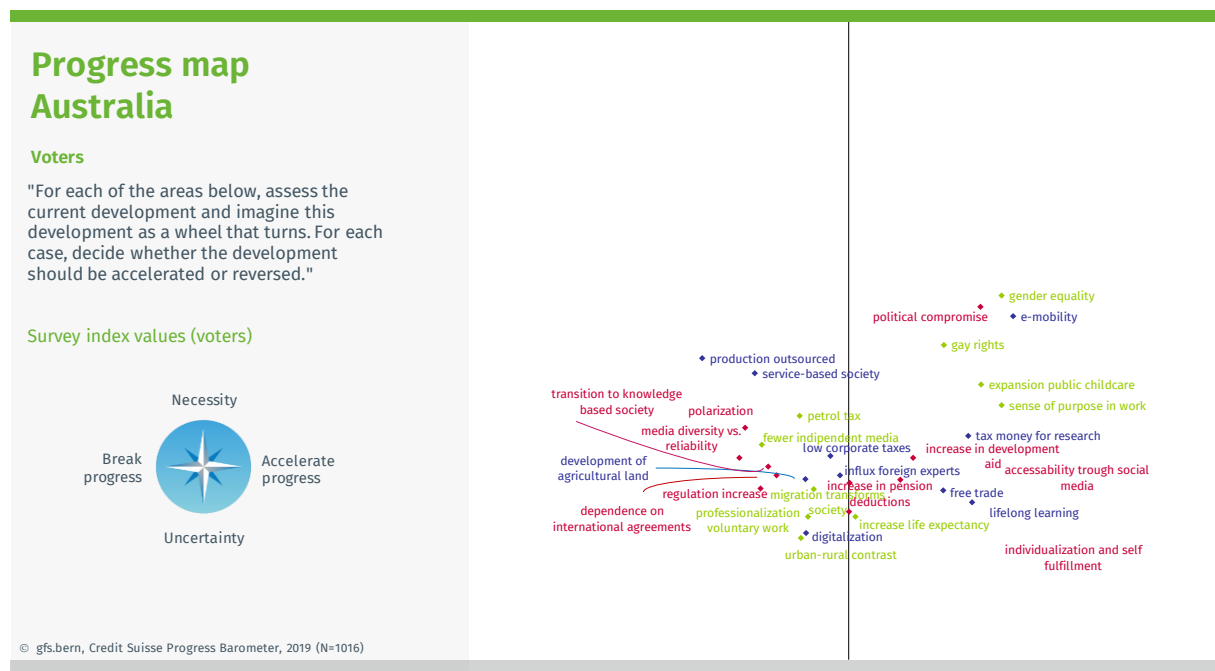
While Australians want to see more taxpayers' money spent on research, they would also prefer to turn the dial wheel when it comes to the influx of foreign experts into the country, the prospect of traditional professions being made redundant by digitalization and the country's move away from manufacturing to a services-based economy. Accordingly, Australians are particularly averse to outsourcing certain aspects of production abroad, this being the development where the nation would like to turn the dial back most of all.

Aspects of globalization in general seem to be met with certain reservations: while Australia wants less dependence on international agreements and prefers not have migration transform their society, there is also a clear desire for progress in terms of allowing more free trade. People are also willing to spend more money on development aid.



In the realm of politics and public opinion, Australia faces the same challenges as many other nations: Political polarization is on the increase¹ and, despite a high degree of trust in the media compared with other countries, the fake news issue is leaving its mark.² On both political polarization and the disappearance of independent media, Australia would like to turn the dial back. There is a clear desire for greater compromise in politics.

According to the census of 2016³, two-thirds of Australia's population live in its cities, leaving the vast heartland of the country mostly – and increasingly – unpopulated. The increase in this urban-rural divide is something on which Australia would like to turn the dial back. Accordingly, the fact that this growth of cities and infrastructure implies the redevelopment of more and more agricultural land is something that makes Australians quite averse to progress.



Desire for Progress in Australia

Compared to the other 16 countries surveyed in this year's Progress Barometer, the desire for progress in Australia on certain aspects of society, the economy and politics is offset by the aversion to further development in other areas. On average, this conflict leads to an overall desire for the status quo to be maintained – particularly in the area of politics and the economy. When it comes to societal issues, however, Australians have a slight desire for progress.

Australias self- assessment of progress

When asked, how Australians themselves would rate progress in their country, 51% are of the opinion that their country is currently very progressive or somewhat progressive when it comes to social issues, while 47% think the same of economic progress and 32% think political progress has been made. In terms of the nation's self-assessment of progress, the ranking of the three areas correspond to the index calculated from the 30 progress items.

¹ <https://www.theguardian.com/news/datablog/2014/aug/07/australian-politics-becoming-more-polarised>

² <https://www.ipsos.com/en-au/australians-trust-media-less-ipsos-trust-media-study>

³ <https://www.abs.gov.au/ausstats/abs@.nsf/lookup/Media%20Release10>

Further information



Future prospects: 19% of Australians see their personal future as quite bleak – as opposed to 78% who view it with some optimism or mixed feelings. Regarding the prospects of the next generation, Australians are more pessimistic. A majority (59%) tends to agree that there is a risk their children will not be as well off as the respondents themselves. And while they would consider themselves being part of Australia's middle class, they are afraid that their social and economic status is increasingly under pressure. Only 25% of Australians are very or quite confident that they will have enough money to live comfortably throughout their retirement years



Life satisfaction: Roughly half of all Australians (47%) are fully satisfied with their life, while a quarter of the population is completely dissatisfied (22%)



Power of innovation: 54% agree with the notion that new technologies will help solve major problems. While this is a slight majority, Australians are still more sceptical when it comes to the power of innovation than most other countries (Germany, Japan and Switzerland being even more sceptical than Australia)



Battle against climate change: While Australia is not enthusiastic about the introduction of a petrol tax, there are still clear signs of the wish for more action in dealing with climate change: 70% agree that the state needs to do more to stop companies from polluting the environment; 72% also think that the economy has been too one-sided in its focus on growth while sustainability has been ignored.



Social cohesion: According to Australians, only a small minority is getting richer while everyone else is missing out on the benefits of growth (77%). Consequently, the state should do more to reduce income inequality between rich and poor (61% tend to agree).



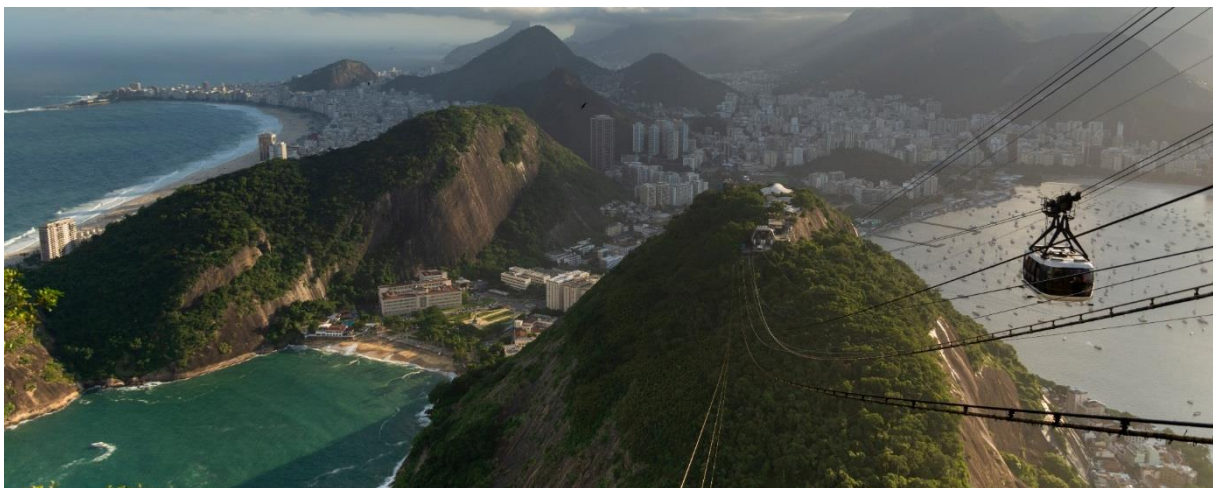
Brazil

Progress Map Brazil

Brazil is ready for more progress. As in most other countries, electric mobility perfectly suits the zeitgeist of combining (technological) innovation with the desire for greater ecological sustainability. The government is ready to assist in this desire to get things moving faster. National and regional projects are underway to integrate plug-in hybrids and electric cars into society nationwide and, in June 2019, it was announced that electric vehicles will be exempt from certain taxes applied to industrial products.¹

Despite this push for innovation, Brazil's economic structure is still relatively one-sided and its exports hugely dependent on products such as soybeans, iron ore and crude petroleum. It is no surprise that there is less enthusiasm in Brazil for the introduction of a fuel tax than there is in most other countries. For the future, however, the Brazilian population wants to be less dependent on commodities.² Associated with this wish is also the desire to stop exploitation of the Amazon rainforest and at least to halt, if not reverse, the reduction of the territory occupied by indigenous people. Thirteen percent of Brazil's land area has been recognized as indigenous territory; 98.5% of this territory is located in the Amazon region.

While protectionist measures are gaining momentum again on a global level, Brazil's government is advocating the opening of its markets. According to the findings of the Progress Barometer, Brazilian voters show that they have an affinity for progress when it comes to freer and more liberal trade, are not averse to outsourcing certain aspects of production and welcome international companies and experts into the country. There is also little fear of greater dependence on international agreements.

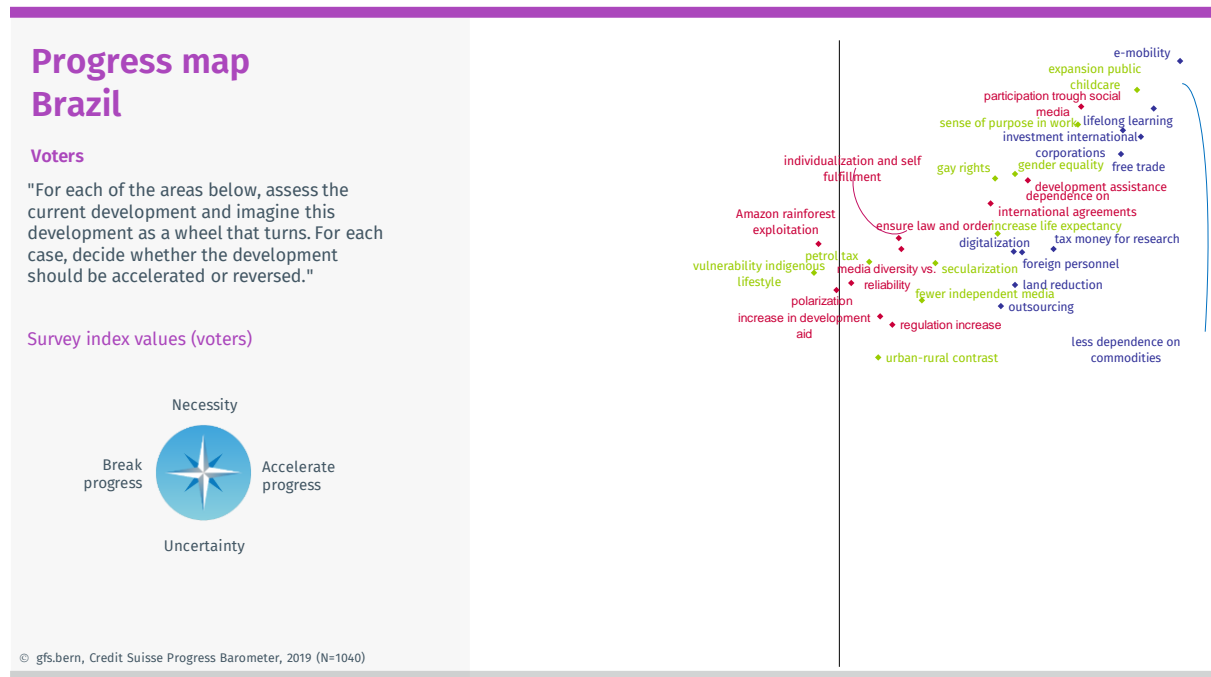


¹ <https://ihsmarkit.com/research-analysis/brazil-launches-local-roadmap-for-evs-with-german-government.html>

² <https://oec.world/en/profile/country/bra/>

The expansion of public childcare is the only non-economic issue in the top 5 of the aspects where Brazilians would like to see things moving faster. Brazilians also want progress in terms of gender equality, gay rights and secularization – compared to other countries, however, these issues are not prioritized.

Opinion on political polarization is comparatively critical, as are views on the decrease in independent media and the trade-off between diversity of information and accuracy of news. One of the main platforms for the election of Brazil’s new President, Jair Bolsonaro, was his promise to fight corruption and crime in the country. Accordingly, Brazilians want to see more progress in maintaining law and order, as this shown in year’s Progress Barometer.



Desire for Progress in Brazil

Brazil wants to progress most quickly on economic issues, followed by progress in the realm of society and lastly in politics. This ranking is similar to the priority assigned to the three areas on the average of all 16 countries surveyed. Of all 16 countries, however, Brazil is the nation with the greatest desire for progress.

Brazil's self- assessment of progress

When asked how Brazilians themselves would rate the current development in their country, they think that most progress has been achieved in the area of the economy, 41% saying that Brazil is very or at least somewhat progressive on this issue. The proportion of Brazilians who think progress has been achieved on issues concerning society is slightly smaller (39%), while progress in the area of politics comes last (30%).

Further information



Future prospects: When it comes to their personal future, the proportion of Brazilians who are optimistic stands at 49% - this being the second highest of all 16 countries surveyed (only Indonesia is higher). On the other hand, respondents are less sure about the future of their children: 65% think their children will not be as well off as themselves. In fact, a comparatively high proportion (55%) of Brazilians agrees with the statement "things could only go downhill for society".



Assessment of past years: Looking back on the past 10 years, a majority of Brazilians feel that things have deteriorated when it comes to both social security (53%) and national security (52%). The stability of economic relations has been under strain (49%) and both the protection of privacy (49%) and national unity (43%) have become worse. On the other hand, people generally think the population's participation in decision-making has tended to improve in the past few years (47%), and they also think Brazil has become more inventive and made progress when it comes to sustainable technologies (64%). While people think that rural infrastructure has rather improved (46%), they are less clear when it comes to rating the development of urban infrastructure (43% improved vs. 44% deteriorated).



Prospects in politics: 73% of Brazilian voters are convinced the country's problems can be solved better without political parties. They also feel that rapid change can only be achieved by strong leaders from the private sector rather than stakeholders from politics and society (57% agree completely or tend to agree) and that, in the complex world we live in today, a strong government which decides on the basis of facts rather than political considerations is needed (82%).



Battle against climate change: The Progress Barometer shows that Brazilians are great advocates of e-Mobility. They generally think that new technologies help solve major global problems (74%) – particularly also climate change (52%) – and generally make life easier (83%). While the imposition of a new fuel tax is not something Brazilians are too enthusiastic about, they still feel that the state should do more to prevent corporations from polluting the environment (83% agree).



Social cohesion: The proportion of Brazilians who currently feel that a small minority is getting richer while most of the population is not is particularly high (81%) compared with the other countries. Brazil is also the country where most agree that the opposition of small groups prevents swift progress for the nation as a whole (62%). However, progress cannot be forced. Seventy percent of Brazilians agree with the statement that social development means resolving conflicts without weapons this notion.



Canada

Progress Map Canada

Improvement in the area of gender equality is a leading progress issue in most of the 16 countries surveyed in this year's Progress Barometer, and Canada is no exception. Arguably one of the most important factors in facilitating equality between women and men is the better compatibility of work and family life. The Canadian population clearly wants to see things moving faster when it comes to expanding public childcare. At the same time, they are happy with the status quo when it comes to the professionalization of work that was largely voluntary work before (e.g. childcare or care for the elderly). Canadians also welcome the transition of a working environment away from the idea that a job primarily guarantees economic survival towards one that gives life meaning and purpose.

In Canada, gay couples are able to marry and adopt children. The country is altogether very progressive when it comes to same-sex rights¹ and the acceptance of homosexuals in society. According to the Canadian population, however, the wheels of progress should turn even faster here in the future.

The legalization of marijuana has been an important political issue for Canada in recent years. While a majority support the legalization that was enacted in 2018, some caution remains.² The Progress Barometer therefore also identifies the issue as one where no further progress is desired, but the status quo should be upheld.



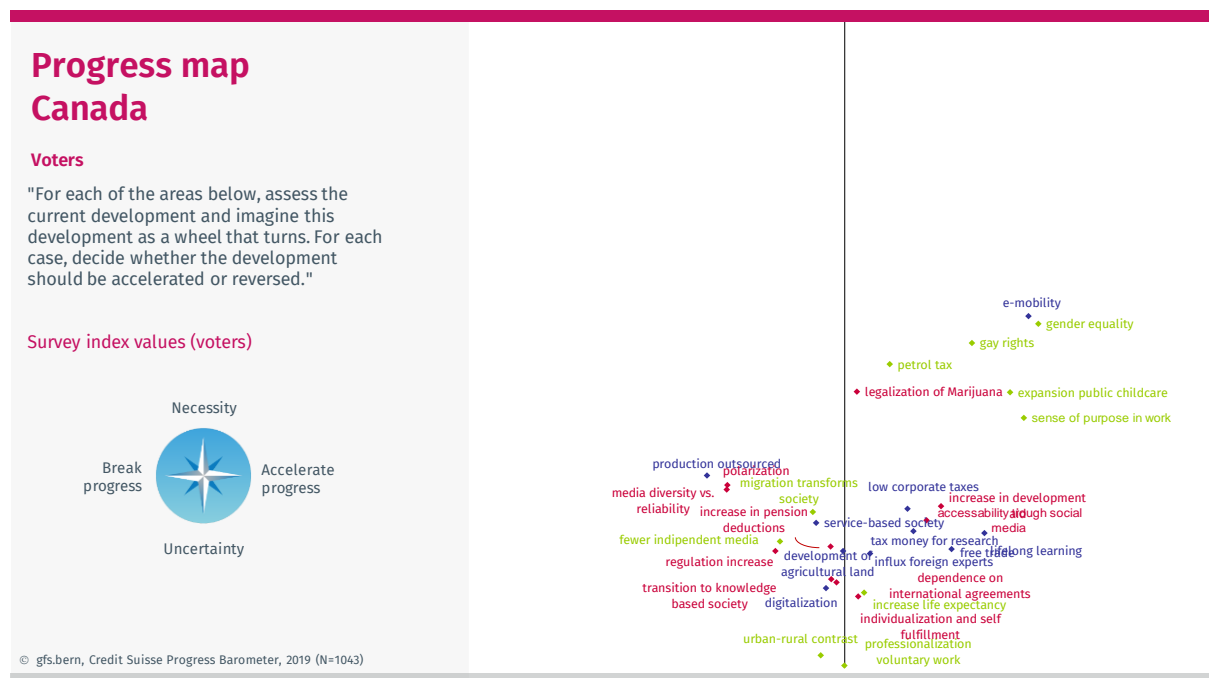
Innovation, promotion and dissemination of e-mobility are among the most important progress issues in Canada as well as on globally. Conversely, the desire to see faster progress on the introduction of a fuel tax is considerably lower. While both issues address the challenge of climate change, e-mobility carries the implicit message that it makes the status quo more sustainable, while the fuel tax would come at the price of certain constraints in current living conditions.

¹ <https://www.cbc.ca/news/canada/timeline-same-sex-rights-in-canada-1.1147516>

² <https://www.nytimes.com/2018/10/17/world/canada/marijuana-pot-cannabis-legalization.html>

The issue where Canadians most desire a reversal of current developments is in the relocation of aspects of production abroad. In Canada, 1.6% of the economy is based on the agricultural sector, 28.2% on the industrial sector and 70.2% on the services sector.³ While Canadians are not opposed to this, they also are not keen on seeing things moving any faster in terms of the (further) transition away from manufacturing towards an even more services-based society. Canadians also want less regulation and continued progress on free trade, but at the same time would not like to increase their dependence on international agreements.

The volume of information available has exploded with the advancement of the internet, digitalization and the spread of social media. This increase in news sources comes at the price of an increased vulnerability to fake news at the same time. As in many other countries, people in Canada too are critical when it comes to this trade-off and would rather see a reversal of this development. The same holds true for the decreasing number of independent media. Associated with this debate is the polarization of the nation's political culture, which is something that is also viewed as an issue where people would like to see a reversal of developments.



Desire for Progress in Canada

Canada shows the greatest willingness for progress in the area of society, has a slight desire to see things move faster when it comes to economic issues while looking to preserve the status quo in the political arena. Overall this results in a slight desire for progress with respect to all areas surveyed.

The desire to see things progressing faster is most decisive when it comes to issues concerning (a more liberal) society and also the economy. In terms of developments in the political arena, Canada wants to preserve the status quo.

³ <https://www.cia.gov/library/publications/the-world-factbook/geos/ca.html>

Canada's self- assessment of progress

When asked how Canadians themselves would rate progress in their country, 63% feel their country is very progressive or somewhat progressive when it comes to matters of society, 54% are of the opinion that Canada is progressive in economic matters, whereas only 43% rate Canada progressive in terms of the current development of its politics.

Further information



Future prospects: Canadians are optimistic or at least partly optimistic about their own future (81%). When it comes to the future of society, they are more sceptical, but not pessimistic: 77.5% look to the future with mixed feelings or some optimism. Only 19% see the future as quite bleak.



Assessment of past 10 years: A majority (51%) of Canadians feel that the situation regarding sustainable technologies has improved over the last 10 years, whereas the protection of privacy has deteriorated (55%). A deterioration is also perceived in terms of national unity (44%), the people's influence on decision making (39%), social security (45%) and the stability of economic relations (41%).



Social cohesion: A majority of of Canadians (67%) consider themselves part of the country's middle class, but feel an ever-increasing pressure about their own status. While 84% are fully or quite satisfied with their life at present, they worry about the situation their children will find themselves in (66%). Finally, 69% of Canadian voters feel that only a small minority is getting richer, while no one else is benefiting from developments. Meanwhile, 59% agree with the statement that government should do more to mitigate this situation.



Battle against climate change: 73% of the Canadian population wants more government intervention to prevent companies from polluting the environment, 70% want people to return to living in greater harmony with nature and 72% think the economy has been too one-sided in focusing on growth and should now focus more on sustainability.



Chile

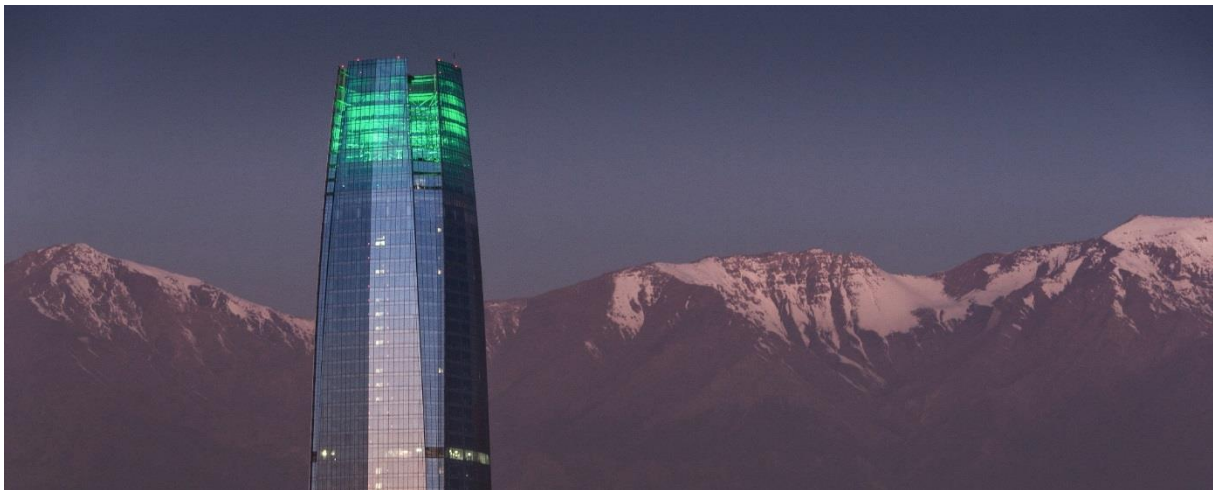
Progress Map Chile

In Chile, as in other countries, the desire for more progress in the area of electrically powered vehicles is considerable. Innovation, promotion and dissemination of e-mobility are among the most important goals at the international level, as it allows for better mobility without putting extra strain on the environment. On top of that, Chileans are open to the introduction of a fuel tax to further lessen the human impact on nature.

Chile have fought floods, mudslides and fires in recent years. While 2017 represented a peak in terms of these incidents, natural catastrophes are increasingly recurring in Chile. Consequently, Chilean society is looking for progress in the risk management of natural disasters and wants more projects dealing with the fallout of climate change.

Compared to other Latin American countries, Chile's per capita domestic product is relatively high and, for the past three decades, poverty rates have been falling significantly.¹ Since the turn of the century, large-scale government programs such as "Chile Solidario" have been implemented, targeting the extremely poor – with apparent success.² It is also against this backdrop that the Chileans express a clear desire for a strong(er) government role in the fight against poverty.

The centralist unitary state is being called into question by civil society in Chile. Measures to decentralize the Chilean state are met with a high degree of approval among the population.



In Catholic Chile, abortion is strictly regulated. A relaxation was approved by the constitutional court in 2017. Since then, women have been able to have legal abortions in certain extreme situations. But according to the findings of the Progress Barometer, this is not enough: there is a desire to see the wheels of progress turning faster when it comes to a woman's right

¹ <https://www.macrotrends.net/countries/CHL/chile/poverty-rate>

² <https://blogs.worldbank.org/developmenttalk/reflections-social-protection-and-poverty-alleviation-long-term-impact-chile-solidario>

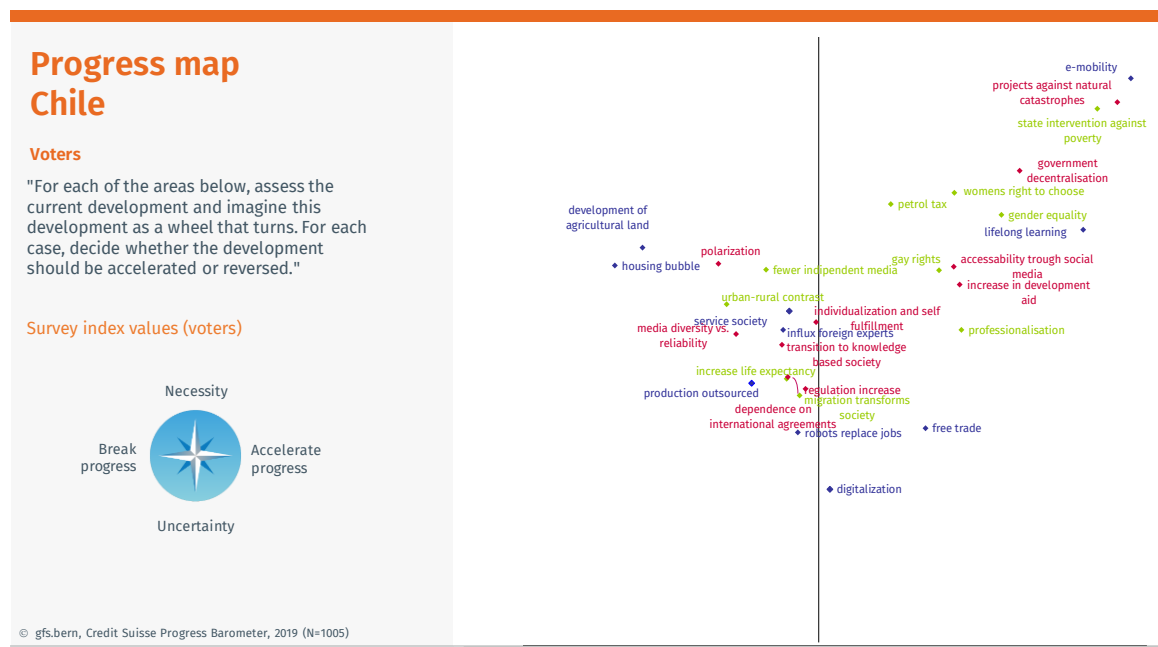
to choose. In accordance with this desire for a more liberal society, Chileans also wish to see greater equality for men and women as well as more rights for homosexuals.

The agricultural sector is of great importance in Chile. The country is one of the top 10 exporters of agricultural products worldwide.³ Accordingly, one of the two issues where people are most averse to progress is the development of agricultural land for infrastructure projects. While Chileans are slightly uncomfortable about the dependence on international agreements, free trade is something where the country would like to see the wheels of progress turning faster in the future.

Chileans would like to turn the dial back on the booming construction industry out of fear of higher real estate and rental prices. The population of Chile has almost tripled over the past 50 years from around 6 million in 1970 to 19 million today. Since Chile's geography is dominated by the Andes mountain range, much of the nation's population is clustered around the Santiago metropolitan area, leaving the rest of the country sparsely populated.⁴ The increasing urban-rural divide is one of the issues in this year's Progress Barometer where people would like to turn the dial back most.

People in Chile would also like to reverse the process of political polarization and are worried that the increase in media diversity due to digitalization is leading to less reliable information. In terms of digitalization itself, maintenance of the status quo is preferred at the moment. The transition of the labor market – not least due to new technologies, is viewed with some scepticism (transition to a knowledge-based, service-based society and outsourcing of production).

<https://www.reuters.com/article/us-chile-protests-explainer/explainer-chiles-inequality-challenge-what-went-wrong-and-can-it-be-fixed-idUSKBN1X22RK>



³ <https://www.export.gov/article?id=Chile-Agricultural-Sector>

⁴ <http://worldpopulationreview.com/countries/chile-population/>

Desire for Progress in Chile

Overall, Chileans want to see the wheels of progress in their country turning slightly faster than in the past. In the ranking of all 16 countries surveyed, Chile is number seven in terms of readiness for progress.

The desire to see the wheels of progress turning faster is most marked in relation to issues concerning a (more) liberal society and also political issues. As regards the development of the economy, Chile wants to maintain the status quo.

Chile's self- assessment of progress

When asked how Chileans themselves would rate progress in their country, 50% are of the opinion that Chile is currently very progressive or somewhat progressive when it comes to economic issues, 47% think the same of social progress, whereas only 25% rate Chile progressive as regards the current development of its politics.

Further information



Future prospects: Exactly half the population is completely satisfied with their current life today (50%). Only 14% are completely dissatisfied. In terms of their personal future prospects, 38% are optimistic, whereas a majority have mixed feelings (41%) or expect it to be quite bleak (19%). The proportion of Chileans who consider themselves part of the country's middle class but fear for their future status is the second-highest of all 16 countries (79%). Only 12% of respondents are confident at present that they will have enough resources to live comfortably throughout their retirement years.



Assessment of last 10 years: Assessing the past 10 years, Chileans think that the country's situation has deteriorated in terms of social security (63%) and national security (60%), the protection of privacy (63%) and rural infrastructure (50%). In all three areas, the proportion of people who give a critical assessment of the situation in Chile is way above the average of the rest of the 16 countries surveyed. Infrastructure in the cities, on the other hand, is perceived to have improved (61%) as is the dissemination of sustainable technologies (62%). People are also not pleased about the development of the population's participation in decision-making (49%) or in the stability of economic relations (46%).



Political situation: The political situation in Chile is tense. The country's military past still seems to reverberate in the population's views on politics. The proportion of Chileans who think social development means having to resolve conflicts without weapons stands at 82%, well above the average of the other countries surveyed. At the same time, the legitimization of democratic institutions is also under strain: today, 67% think the country could solve its problems better without political parties than with them.



Social cohesion: Chile remains one of the most unequal countries amongst the world's 30 wealthiest nations, which currently also leads to intense protests triggered by an increase in transport fares.⁵ It is not surprising therefore that the proportion of people who agree with the statement that a small minority is getting richer today while everyone else is missing out on the benefits of development is higher than average among the 16 countries surveyed (78% in Chile vs 69% on average)



Battle against climate change: According to respondents, people should return to living in harmony with nature (85%). Respondents living in urban and those in rural regions have a similar answer to this question. At the same time, a majority of the same proportion of people (85%) wants the state to become more active in preventing companies from polluting the environment. This number is above the average of the other countries.

⁵ <https://www.bbc.com/news/world-latin-america-50123494>



China

Progress Map China

In China, the willingness to make progress is considerable in all areas, but it is particularly pronounced when it comes to economic issues, as illustrated by the cluster of blue dots in the upper right corner of the map below. In China, education is seen as an important factor in progress – thus lifelong learning ranks on top when it comes to progress issues. Another area where clear desire for progress is seen is investment into research and development.

China is the world's largest export country.¹ It is therefore only fitting that the Chinese want to see progress when it comes to a free and open market, as it clearly benefits from international trade. People are less enthusiastic that global interconnectedness also leads to increased dependence on international agreements. China is also a pioneer in the dissemination of electric mobility and one of the key drivers of current developments in this area worldwide.² The population clearly wishes to progress further in this respect.

The rapid growth of the Chinese economy and society in the last decades has left its mark with a substantial amount of agricultural land being used for construction each year.³

This and the widening urban-rural divide are the areas where the desire for further progress is least pronounced.



Demographic challenges due to ageing are particularly pronounced in China with the combined effect of China's one-child policy and a significant increase in life expectancy.⁴ The growing cost of retirement (increase in deductions for old-age pensions) and the rise in the putative age of retirement prompt only a slight desire for more progress.

China is less progressive when it comes to further promoting the rights of homosexuals, but is quite willing to make progress on gender equality. The promotion of private and public

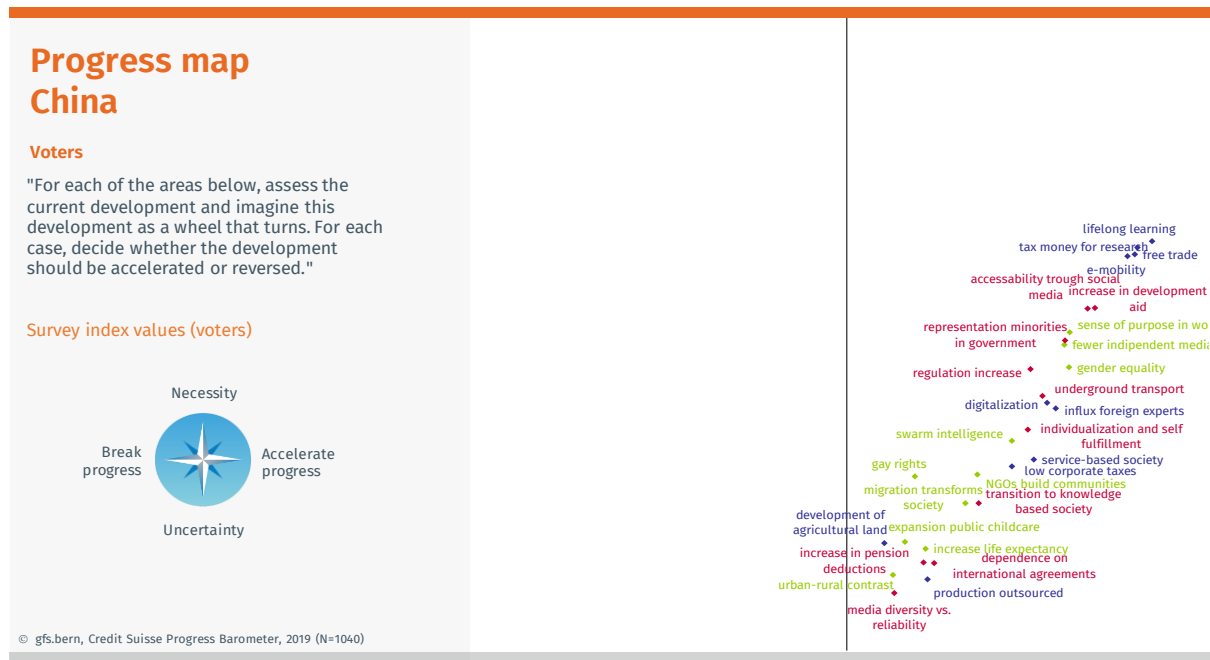
¹ <https://www.worldatlas.com/articles/exports-by-country-20-largest-exporting-countries.html>

² <https://www.rolandberger.com/fr/Publications/E-Mobility-Index-2019-China-pulls-further-ahead.html>

³ <https://china.diplo.de/cn-de/themen/wirtschaft/landwirtschaft-basisinformationen>

⁴ <https://chinapower.csis.org/aging-problem/>

childcare on the other hand is not a priority issue when it comes to the desire for greater progress.



Desire for Progress in China

China shows the greatest willingness for progress in the area of the economy, where it comes second behind Brazil in the ranking of all 16 countries surveyed.

While China’s readiness for progress when it comes to the economy is not quite as marked as that of Brazil, the country is still one of the most willing to embrace progress in this area and also in the area of societal issues.

China's self- assessment of progress

When asked how the Chinese themselves would rate progress in their country, 86% are of the opinion that China is currently very progressive or somewhat progressive in terms of economic issues, 83% think the same of social progress, whereas 76% rate China progressive in terms of the current development of its politics.

Further information



Future prospects: Almost 9 out of 10 Chinese are generally optimistic about their own future (89%). The growing middle class in China and the resulting improvements in living conditions certainly have an impact here. A growing middle class is linked to strong social mobility. Compared to other countries the proportion of Chinese respondents who think their position as members of the country's middle class is under pressure, is relatively low (52%). Unlike most other countries surveyed, the Chinese are also clearly not worried for the future status of their children. Only 28% are afraid that their children might not be as well off as the respondents themselves. And 74% of respondents are very or rather confident that they have enough money to live comfortably during their retirement.



Assessment of past 10 years: Over the past 10 years, a majority of Chinese feel an improvement in all areas surveyed – most markedly in urban (78%) and rural (70%) infrastructure, sustainable technologies (73%), national unity (74%) and social security (74%), but also in the possibility of political participation (57%) and the stability of economic relations (62%). The proportion of people who feel the protection of privacy has improved is smallest (52%).



Social cohesion: In China, as in all other countries surveyed, a majority of respondents agree that only a small minority of citizens is getting richer, while no one else is benefiting from growth (63%). Compared to the other 16 countries surveyed, the number of Chinese people who want their government to intervene and correct this issue is quite high (81%).



Battle against climate change: 66% of the Chinese population wants more government intervention to prevent companies from polluting the environment. This figure is relatively low compared to other countries, even if a majority is in favor. A comparatively high proportion of 54% thinks instead that the solution to save the climate lies in new technologies.



Germany

Progress Map Germany

Germany is one of those countries in this year's Progress Barometer where there is a clear distinction between issues on which there is a desire to turn the dial back and issues where there is considerable desire for progress. Contrary to most other countries, where e-mobility is the top issue for progress, Germans want to see things to move fastest on the expansion of public childcare. The desire for greater more gender equality and gay rights also point to the desire for a (more) liberal society.

The transition from energy production based on nuclear and coal-fired power to more sustainable energy sources is of high priority to the German population. While around 40% of electricity in Germany is already generated from renewable energy (wind, sun, water or biomass), Germans want to see further progress in this direction.¹ German voters are aware that infrastructure must be built to allow the production of more renewable energy and would like to see the provision of sufficient land for this purpose. Germany as a whole also appears to be ready to spend more taxpayers' money on research aimed at strengthening the country in terms of innovation and as a location for investment.

Germans look for a job situation that gives them a sense of purpose in their work and - to a slightly lesser extent - look for individualization and self-fulfilment not only in their private life but also professionally. Within this context, they also embrace the idea of lifelong learning as something in which they would like to see more progress. The fact that people are living longer (and therefore have to deal with increased deductions for old-age pensions) is not something they shy away from when it comes to moving the dial forward.



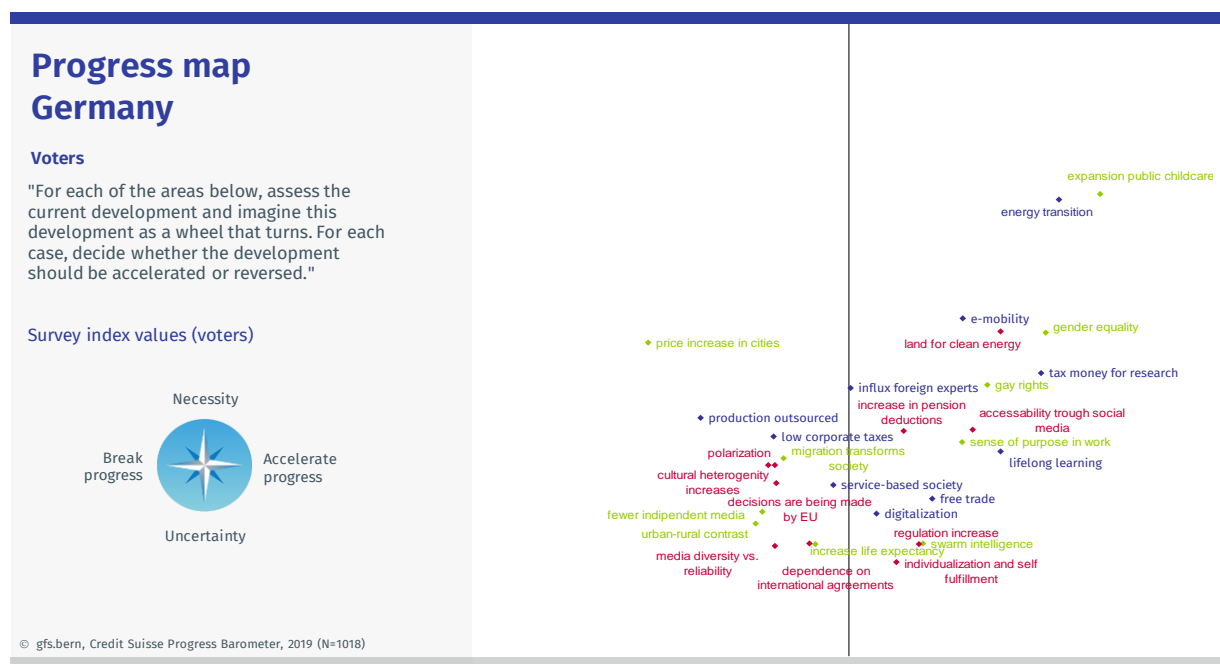
According to the German Federal Institute for Building, Urban Affairs and Spatial Research (BBRS), rents for apartments rose by 4.4% in the first half of 2019 alone. This phenomenon is particularly noticeable in large cities. This year's Progress Barometer shines a light on this problem, as it is the issue on which the desire to turn the dial back is greatest. In a similar

¹ <https://www.bmwi.de/Redaktion/DE/Dossier/energiewende.html>

context, the increasing urban-rural divide is also something where there is no desire for further progress.

While free trade is something that Germans embrace and where further progress is desired, they show a clear aversion to the relocation of production abroad. Consequently, people vote to uphold the status quo when it comes to the transition away from the manufacturing to a services-based society. Furthermore, the issue of reducing corporate taxes in order to make Germany more attractive for the relocation of companies is not something where there is any desire for further progress.

The current development of Germany's political culture towards greater polarization is viewed critically. There is a desire for this process to be reversed – as there is also the continuing fragmentation of the media.



Desire for Progress in Germany

The greatest willingness for progress is found in the economic sphere in Germany (index value of 10.2). Second comes the desire for progress on societal issues (index value of 5.5). When it comes to the political arena, Germans are comfortable with sticking to the status quo on this point (index value of 2.1). In terms of its overall readiness for progress, Germany ranks tenth among the other 16 countries.

Germany's self- assessment of progress

When asked how Germans themselves would rate progress in their country, 56% are of the opinion that their country is currently very progressive or somewhat progressive when it comes to economic issues, 41% think the same of progress in society, whereas only 29% think political progress has been made – this is one of the lowest values of all 16 countries with only the UK, Chile and Japan showing a lower proportion.

Further information



Assessment of past 10 years: Germans have quite a negative view of developments in their country over the past 10 years. They see a negative development in social security (61%) and national unity (57%), feel that the population has less say on political matters (53%) and perceive a deterioration in national security (51%). Economic relations are not as stable as they once were (44%) and rural infrastructure has been neglected (49%). A deterioration is also noted when it comes to the protection of privacy (63%). On the other hand – and in accordance with most other countries – Germans feel that improvement has been made in the area of sustainable technologies (55%).



Battle against climate change: Environmental issues are a hot topic in Germany: 80% of German voters very much or rather agree with the statement that people should live more in harmony with nature. A more environmentally friendly economy that focuses more on sustainability enjoys a high level of support in Germany (76%).



Social change: Germany has been shocked by an increase in ideologically motivated violence and hate crime in the last years and months. A clear majority of 81% of Germans, however, make it perfectly clear that they feel conflicts have to be resolved without weapons, and 70% agree that good social change means greater tolerance of minorities. There is, however, a section of the population that thinks weapons are a feasible option (12%) and does not feel that tolerance of minorities is to be desirable (21%).



Future prospects: Although – or maybe precisely because – Germans are amongst the people most satisfied with their current life (65% completely satisfied), the proportion of respondents who are pessimistic for the future is above average (22%). A majority (65%) are convinced that their children will not be as well off as they are now.



India

Progress Map India

The map below describes India as a very progress-oriented country – especially in the areas of the economy and society, but less so on political issues.

The issue where India wishes for progress the most is the empowerment of women. In addition, gender equality in general – and related to this the improvement of (external) child care – are also strong progress issues. This is no coincidence: India is lagging behind in terms of gender equality (ranked 131st of 188 on the UN Gender Equality Index), the educational level of women is significantly lower, and violence against women is a recurring issue.¹ India also wants to improve the political representation of its lower castes – compared to the empowerment of women, however, this is not as clearly prioritized.

The second range of topics where India wants to see faster progress is the transition of the labour market. The idea of finding a purpose in one's work is traditionally a post-materialistic value associated with the generation of millennials in the countries of the west. This year's Progress Barometer indicates that this is also of high priority for Indians, as is lifelong learning. There is a clear willingness to spend more (taxpayers') money on research. On the other hand, digitalization and the transition from an economy focused on manufacturing to one that is based on services is viewed with slightly more circumspection. People are not necessarily opposed to the development of agricultural land for better infrastructure and the expansion of cities, but they are not enthusiastic either. The same holds true for the deepening of the urban-rural divide.

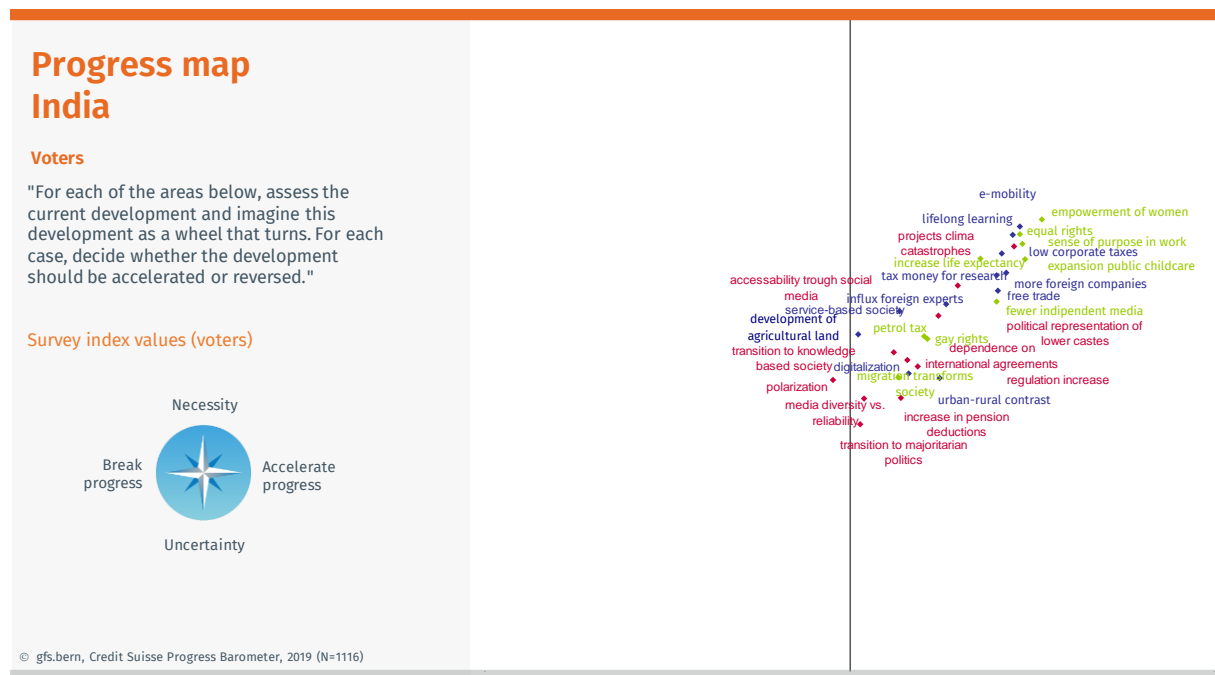
Opening India up to more free trade, the influx of foreign experts and providing attractive conditions for (international) companies in order for them to relocate is something India is willing to embrace.



¹ <https://www.washingtonpost.com/news/worldviews/wp/2018/03/12/why-indias-modern-women-say-its-a-burden-to-be-female/>

Twenty-two of the world's 30 most polluted cities are in India.² The idea of preserving (or even expanding) individual mobility without putting even greater pressure on the environment therefore falls on fertile ground in India. As in all other countries surveyed, e-mobility is one of the issues where there is the greatest desire for progress. The introduction of a new petrol tax, on the other hand, is met with less enthusiasm in the country which used to be the world's fastest-growing economy but is now increasingly heading towards a slump.³

As regards the process of transition away from a political system that is pluralistic to one that is more majoritarian, people want to maintain the status quo. Media diversity often comes at the price of less accuracy in information. This is also a development where Indians want to see the wheels of progress stop turning.



Desire for Progress in India

India shows the greatest willingness for progress in the area of society, where it is number 3 after Brazil and China in the ranking of all 16 countries surveyed.

Slightly less strong, but still amongst the highest is India's readiness for progress when it comes to the economy and finally also politics.

India's self- assessment of progress

When asked how Indians themselves would rate progress in their country, 66% are of the opinion that their country is currently very progressive or somewhat progressive when it comes to social issues, 65% think the same of economic progress and 61% think political progress has been made. Indians thus have a much higher opinion of the progress their country has made over the last ten years than people do of their own country's progress in the other 16 nations surveyed.

² <https://www.theguardian.com/cities/2019/mar/05/india-home-to-22-of-worlds-30-most-polluted-cities-greenpeace-says>

³ <https://www.ft.com/content/6efe817a-12a7-11ea-a7e6-62bf4f9e548a>

Further information



Future prospects: 12% of Indians feel their personal future is quite bleak – in contrast to 44% who view the future with some optimism or mixed feelings. When it comes to the prospects of the next generation, Indians are somewhat less pessimistic than people in the other countries: 44% take the view that there is a risk their children will not be as well off as the respondents themselves. And although they see themselves as part of India's middle class, they fear that their social and economic status is increasingly under pressure (73%); 43% of all Indians are very or quite confident that they will have enough money to live comfortably in their retirement.



Battle against climate change: Although India's voters are not altogether enthusiastic about the introduction of a fuel tax (35%), there are still clear signs of a desire to see more measures to combat climate change: 74% agree that the state must do more to prevent companies from polluting the environment; 69% are also of the view that the economy is too one-sided in focusing on growth and that sustainability is being ignored.



Assessment of the past 10 years: In various areas, the situation in India has improved over the last 10 years, according to Indian society. Most Indians feel there has been an improvement in political participation (54%), social security (53%), national unity (65%), the stability of economic relations, innovation (70%), sustainable technologies (58%) and both urban (57%) and rural (56%) infrastructure.



Social cohesion: According to Indian voters, only a small minority is getting richer, while no one else is benefiting from developments (68%). The idea of resolving conflicts without weapons and violence is historically embedded in the democratic process of India; 66% of Indian voters still share this opinion today. Greater social cohesion is also called for when it comes to the position of the lower castes in Indian society.



Indonesia

Progress Map Indonesia

Jakarta opened the first **MRT (Mass Rapid Transit)** metro line in early 2019.¹ The aim was to offer an alternative to the chronically congested roads in the nation's capital city. This development finds high support within the population and represents the area where Indonesians are most united in wanting things to move faster.

Indonesia is currently graduating out of bilateral EU **development assistance**.² At the same time the country launched its own development agency in 2019 to aid neighbouring countries. This is in accordance with the desire of Indonesia's citizens to increase the country's contribution in this regard.

In order to optimize costs, many companies relocate aspects of their production processes abroad. The Indonesian population wants to make progress in welcoming foreign companies to the country and to see things move when it comes to lowering bureaucratic hurdles and reducing regulation. The possible influx of foreign experts on the other hand is viewed more critically.

According to a study by the Australian-based Lowy Institute, the biggest challenge facing Indonesia these days is not in improving access to education, but in improving the quality of education.³ The population prioritizes education and research very highly and wants to see progress in both lifelong learning and greater spending on R&D.



Compared to the priorities in most of the other 16 countries surveyed, gender equality is not a top issue in Indonesia, but progress is desired all the same. Other aspects of a liberal society have been more under strain in Indonesia recently: lawmakers planned to update the country's penal code restricting gay rights – among other things. President Joko Widodo has now vetoed this bill, which is in line with the findings of this year's Progress Barometer showing

¹ <https://www.spektrum.de/news/jakarta-findet-absurde-loesungen-fuer-das-verkehrsproblem/1669650>

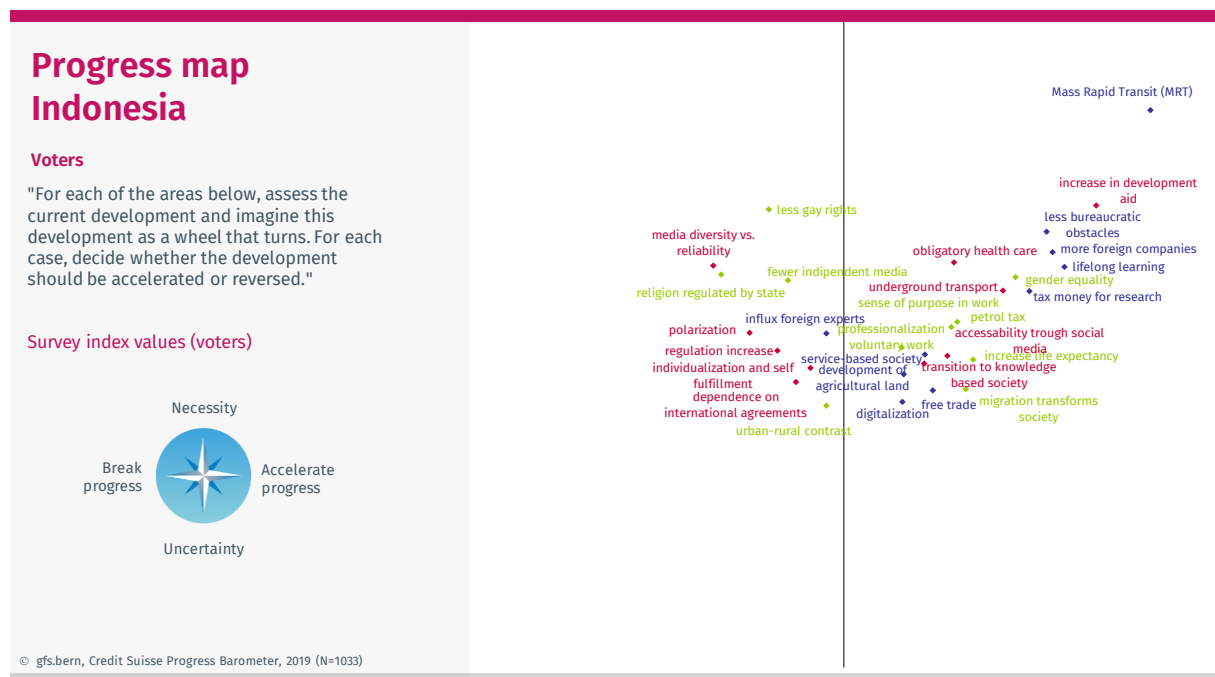
² https://ec.europa.eu/europeaid/countries/indonesia_en

³ https://www.lowyinstitute.org/sites/default/files/Rosser_Beyond%20access%20-%20Making%20Indonesia%27s%20education%20system%20work_WEB_2.pdf

that Indonesians would rather turn back the dial on the further restriction of the rights of homosexuals.⁴ They also disapprove of the government's increased influence in regulating religion.

The trade-off between the increase in media diversity through the internet at the cost of the accuracy of this information is viewed critically. People would also like to turn back the dial on the decrease in independent media outlets in Indonesia.

Indonesians are reluctant to take a clear stand when it comes to the transition and modernization of its economy and society: In the area of digitalization, the redevelopment of agricultural land for better infrastructure and the growing cities, as well as the professionalization of previously voluntary work such as care of the elderly, there is a desire for some progress - but not too much too fast.



Desire for Progress in Indonesia

Overall, Indonesians want to see the wheels of progress in their country move slightly faster than in the past. In the ranking of all 16 countries surveyed, Indonesia is number six in terms of readiness for progress. The desire to move the dial faster is most decisive when it comes to issues concerning the economy and society. In the area of politics, Indonesians are somewhat less willing to see progress.

Indonesia's self- assessment of progress

When asked how Indonesians themselves would rate progress in their country, 71% are of the opinion that Indonesia is currently very progressive or somewhat progressive when it comes to economic issues, 62% think the same of social progress, whereas only 59% would rate Indonesia progressive when it comes to the current development of its politics.

⁴ https://www.lowyinstitute.org/sites/default/files/Rosser_Beyond%20access%20-%20Making%20Indonesia%27s%20education%20system%20work_WEB_2.pdf

Further information



Future prospects: A large majority of Indonesians (91%) are confident or fairly confident about their own future - in contrast to a small minority (6%) who view their future with pessimism. Even when it comes to the future of Indonesian society as a whole, a generally positive feeling prevails in the country (86%). Only a low 40% see a risk that their children will be worse off than the respondents themselves. Other nations are much more pessimistic than Indonesia on this topic. Indonesia is also the country where the proportion of citizens who are very or quite confident they will have enough funds for a comfortable retirement is highest (62%). The average of all 16 countries surveyed lies at 29% on this issue. This goes to show that, compared with the other countries, Indonesia is definitely optimistic about its future.



Assessment of past 10 years: The majority of Indonesians feel a definite improvement in almost all aspects of life surveyed in this year's Progress Barometer, most notably in the country's inventiveness (70%), in its use of sustainable technologies (76%), in its infrastructure both in rural (71%) and in urban areas (78%) and or in the stability of economic relations (56%). Where Indonesians are undecided is in their assessment of progress in the protection of privacy and national unity, the proportion who see a deterioration being roughly the same as the proportion who see an improvement (around 40%).



Social cohesion: Indonesia has the second-highest proportion of citizens who claim to be fully satisfied with life (59%) of all 16 countries (only China is higher). While Indonesians are quite content and optimistic overall, Indonesia is also one of the countries surveyed where the proportion of citizens who feel that government should do more to reduce income inequality between rich and poor is highest.



Battle against climate change: A clear majority of Indonesians believe that new technologies will help solve global problems (79%) such as climate change rather than having to forego things such as air travel or eating meat (59%). However, they are also of the opinion that people should return to living in harmony with nature (69%), focus more on sustainability than purely on growth when it comes to their economic development (87%) and – despite their aversion to regulation – have the state intervene to stop companies polluting the environment (67%).



Political past and future: Indonesia's past under a military junta reverberates in public sentiment to this day: it is among the nations which most wholeheartedly agree that social development means resolving conflicts without weapons (86%) and that good social change means greater tolerance in dealing with minorities (85%). At the same time, they are quite sceptical of those institutions that effectively concentrate political opinion in the democratic process: namely, political parties; 71% feel that the nation's problems would be better solved without parties than with them.

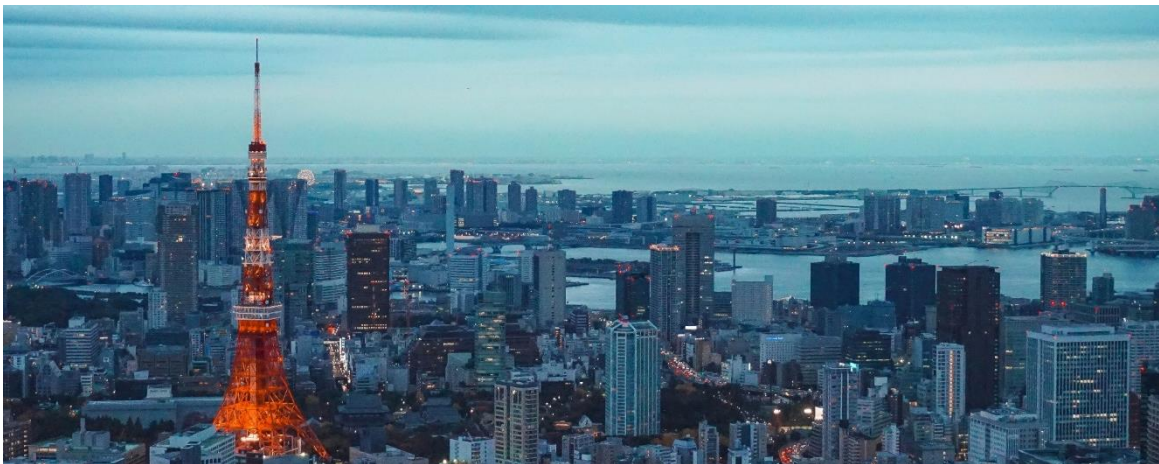


Japan

Progress Map Japan

The different cultural background in Japan, which plays a role in the surveys, is especially evident. In no other country do respondents differ less between the various progress items than in Japan, which is why the progress map is difficult to read there.

In Japan, the focus of progress is on the economy and on societal issues. By contrast, people tend to be more interested in dialling back on politics. What is striking in Japan is that most items lie around the bottom of the y-axis, which means the level of indecision about the actual direction of progress is relatively high. Nevertheless, it appears that the willingness to see things moving faster is greatest in the areas of e-mobility and gender equality. In addition, there is a desire to encourage free trade as there is to support the access of foreign experts to the domestic labour market.



Over and above this, people are primarily interested in maintaining the status quo. This applies not least also to the transition of the labour market towards a society that is (even) more knowledge-based and to the idea that work should be meaningful in and of itself. Japan is also one of the few countries in which political polarization is not firmly identified as a development that needs to be reversed. By contrast, regulation in the country is viewed more critically.

Progress map Japan

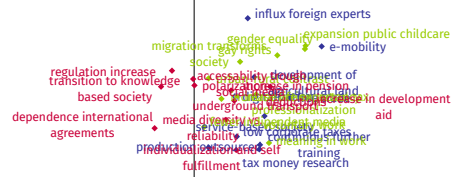
Voters

"For each of the areas below, assess the current development and imagine this development as a wheel that turns. For each case, decide whether the development should be accelerated or reversed."

Survey index values (voters)



© gfs.bern, Credit Suisse Progress Barometer, 2019 (N=1016)



Desire for Progress in Japan

Of all 16 countries surveyed, Japan lies about mid-table in the ranking for willingness to embrace progress (9th of 16), the desire for progress being especially low when it comes to politics.

Japan's self- assessment of progress

44% of people in Japan see their country as progressive in terms of its society, while 34% consider the country's economy to be progressive whereas only 28% take the same view of the country's politics.

Further information



Future prospects: The Japanese are unequivocally the most pessimistic of all 16 populations surveyed when it comes to their personal future (33%). A further 19% view the future with mixed feelings, while likewise 33% at least harbour a certain optimism.



Assessment of the past 10 years: The Japanese also have their reservations when it comes to assessing developments in the country of the last 10 years. In none of the regions surveyed does a majority of 50% or more of the population see an improvement in the situation. As also in the other countries, any sense of improvement tends to be reserved mostly for the spread of sustainable technologies. It fits strikingly well with the progress map that the proportion of respondents who do not have a concrete opinion (proportion of “Don’t knows”) is very high. With regard to opinion-forming processes, this usually indicates that people have not made up their minds. But the cultural context is also likely to play an important role here.



Social cohesion: Compared with the other countries surveyed, it is striking that the proportion of Japanese who take the view that sustainable societal development always includes minorities as well is relatively low: 47% are very much or fairly in agreement with this statement compared with an average of 70% across all countries. This probably has to do with the considerable cultural homogeneity of Japan. Likewise much smaller is the proportion of respondents who take the view that only a small minority is getting ever richer, while the majority of people are not benefiting from the growth of prosperity to the same extent. The perceived need for the state to do more to counter this development is also correspondingly less.



Battle against climate change: A majority of Japanese want to see people living more in harmony with nature again (53%). Half the population (50%) wants economic development to be more focused on sustainability instead of growth and 43% want to see more state intervention to combat environmental pollution by companies. These percentages are also relatively low compared with other countries.



Russia

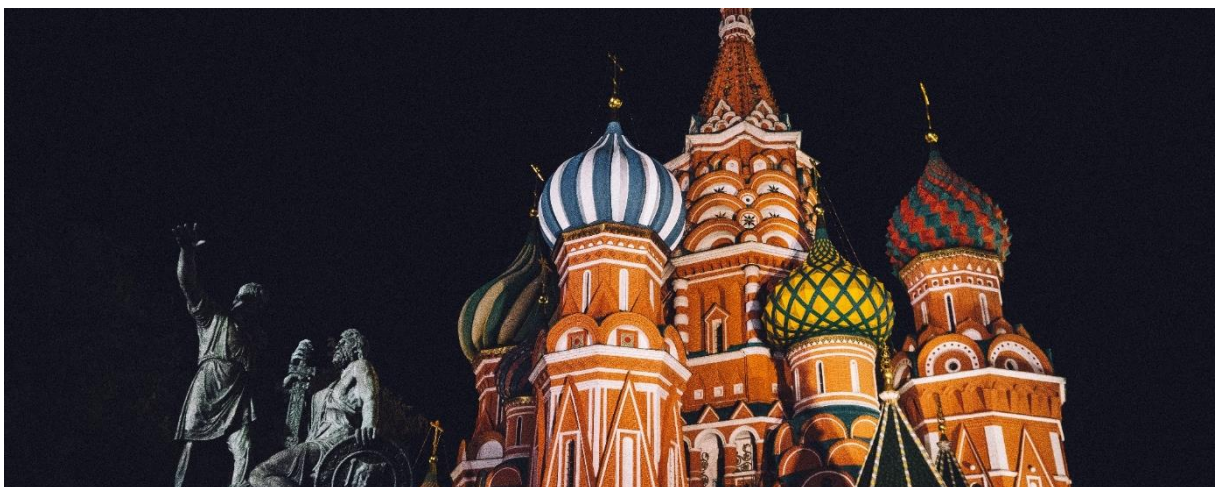
Progress Map Russia

Russian voters seem to see progress as a function of learning and stress the importance of lifelong learning more than any other country. Keeping up with the latest developments and becoming more innovative requires further professional training. Russian society is therefore eager to make progress in the field of continuing vocational education and training and would like to see more commitment in this direction.

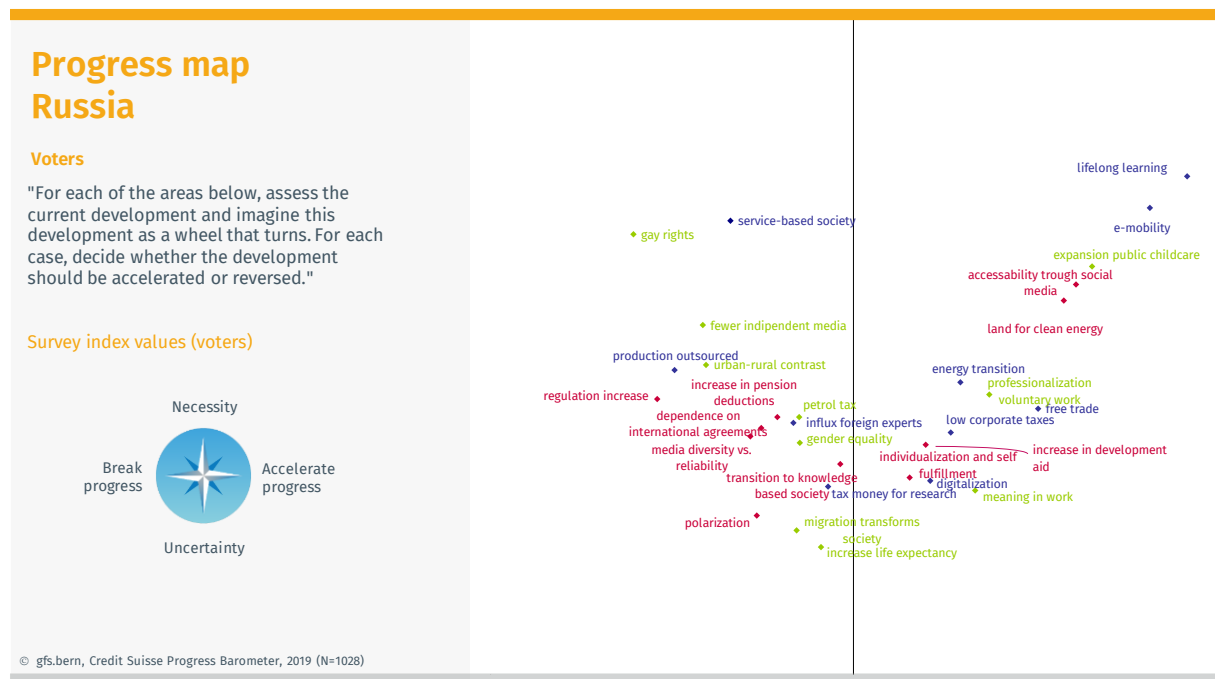
The leading topic of this year's progress barometer on an international scale, e-mobility, also attracts many fans in Russia. In a country as large as Russia, mobility is naturally a central concern. The challenge will be to provide the enormous area with an infrastructure for e-mobility. Russia is also willing to embrace progress in terms of the transition of its energy system away from coal and nuclear power towards more sustainable power sources. While this is not the most urgent progress item, citizens are certainly willing to provide the land necessary to build new infrastructure for cleaner energy production.

On the axis of progress in society, Russian voters indicate that certain framework conditions have to be met in order to reconcile family and career. The Russian state should assume more responsibility in childcare in order to facilitate equality between women and men in the labour market. When it comes to other social groups, however, rather conservative tones are struck. Gender equality or migration are not fields where Russian voters feel that much progress is needed.

Political organization, communication and/or participation is made easier and more efficient by the internet (e.g. social media). Enthusiasm about digitalization is perceptible according to this year's Progress Barometer, and in particular the development of new participation opportunities and mechanisms in Russia has many sympathizers who are willing to make progress in this area.



In 2017, 4.7% of Russia's workforce worked in agriculture, 32.4% in industry and 62.3% in services.¹ The Russian population is not interested in the further development of the service society away from the production of goods. On the contrary, they would like to see the dial turned back in this respect. This rejection of deindustrialization is also reflected in the marked willingness to apply the brakes on the relocation of production processes abroad. Ideally, mechanisms should be developed to slow down these processes within companies aimed at increasing flexibility and to retain jobs in the industrial sector within Russia's borders.



Desire for Progress in Russia

Russia shows a slight desire for progress when it comes to economic matters. In terms of society and politics, on the other hand, Russia would prefer to stick to the status quo.

Overall, Russia has a rather low willingness to make progress but would rather preserve the status quo.

Russia's self- assessment of progress

When Russian voters are asked to rate progress in their country, only a third state that Russia is currently very or somewhat progressive when it comes to social matters; 34% think the same of economic progress, whereas 44% think political progress has been made.

It is remarkable that almost the same proportion of voters see change when it comes to social matters as do when it comes to economic issues, but the wish for more progress only exists in the domain of economics.

¹ <https://www.cia.gov/library/publications/the-world-factbook/geos/rs.html>

Further information



Future prospects: A minority of Russians (21%) take a rather gloomy view of their personal future – in contrast to 66% who look to the future with some optimism or mixed feelings. Regarding the future of the next generation, the Russian population is more pessimistic: 54% believe that there is a risk their children will have to cope with less wealth.



Life satisfaction: Only 27% of all Russians are fully satisfied with their life, while 22% are completely dissatisfied. The majority of Russian society ranges somewhere in between.



Power of innovation: The confidence in new technologies appears strong in Russia: 79% agree with the notion that new technologies will help solve global problems. Russians are among the most optimistic people in this regard.



Battle against climate change: 84% of the Russian population wants more state intervention to prevent companies from polluting the environment, while 81% also believe that the economy is too focused on growth and that the focus should be on a more environmentally friendly economy. But the introduction of an oil tax is not popular in Russia (19%), as the country has oil reserves. The Russian economy exports petroleum products and is not interested in taxing the product.



Social cohesion: 86% of Russian voters believe that only a small minority will get richer, while everyone else will not benefit from the development. In this context it comes as no surprise that 82% of Russians think the state should do more to reduce income inequality between rich and poor, even if this results in higher taxes.



Singapore

Progress Map Singapore

While floods or landslides are not uncommon in tropical Singapore, and technically earthquakes can also occur, the country is naturally protected from tsunamis by its surrounding islands. Nonetheless, Singaporeans clearly desire more progress when it comes to implementing projects to reduce the effects of natural catastrophes. One aspect of nature that is currently the subject of heated discussion in Singapore is the rising of sea levels. Only recently, the Singaporean government declared its intention to look into solutions dealing with the issue, thus complying with its citizens wish to see faster progress on this issue.¹

Another aspect that touches on the issue of climate change is the increase in availability of e-mobility. As in most other countries surveyed, this is an area where there is a marked and widespread desire for progress.

Singapore is already considered to be very attractive for business. But its citizens are still interested in seeing further progress in this regard: on free trade and low corporate taxes, for example; on the issue of regulations, however, they would like to see the dial turned back. The influx of foreign experts – a logical consequence of being a global hub – is viewed positively, but with slightly less desire for progress. While Singapore has developed spectacularly over the last decades, the comfort gained comes at a higher cost for living. This is something where the country would rather turn the dial back slightly.

The transition from an economy strongly focused on manufacturing to a modern, knowledge-based economy is an issue on which Singaporeans would rather maintain the status quo.

Learning itself has a high value, however: lifelong learning is an area where there is a desire to see faster progress. On the other hand, the issue of parentocracy – where a child's education must conform to the wealth and wishes of parents rather than the abilities and efforts of the pupil – is viewed with some criticism.

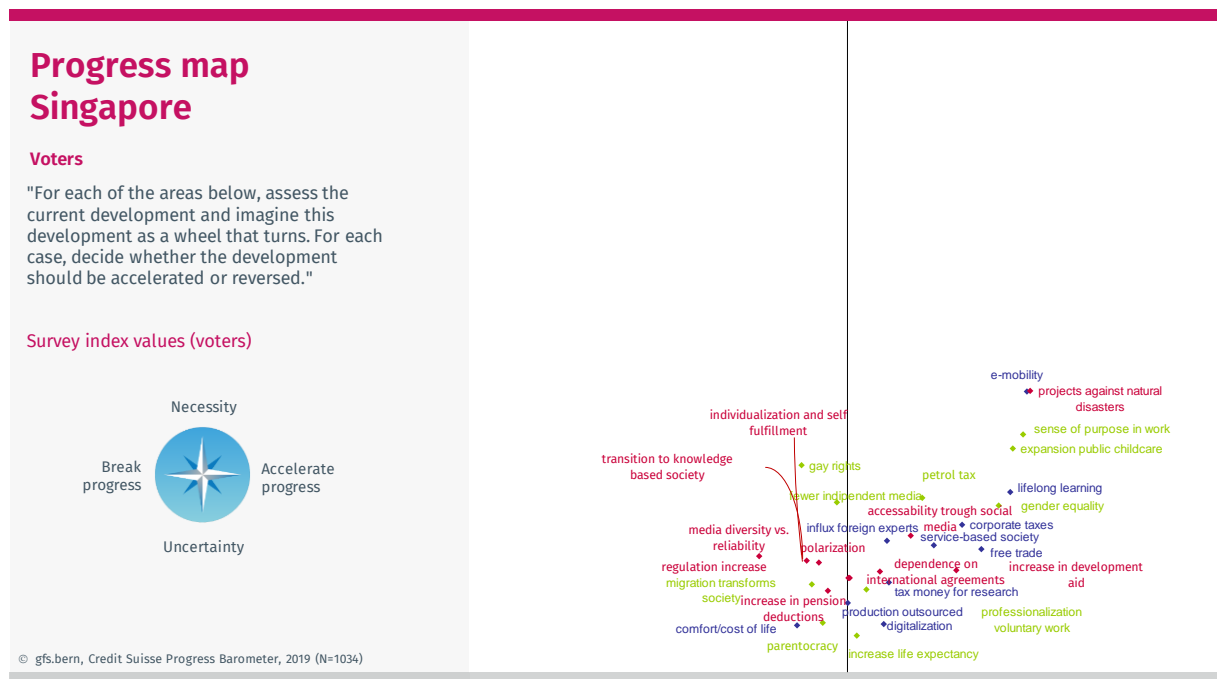


¹ <https://www.preventionweb.net/news/view/68339>

Singaporeans are not averse to being dependent on international agreements and are willing to spend more money on global development aid.

The question of equality for men and women also scores a high index value in Singapore, indicating a desire for more progress. Closely linked with this is a desire among Singapore's citizens for more to be done to expand public childcare. The desire for progress in gender equality and gay rights go hand in hand in most other countries. However, this is not the case in Singapore, where the population prefers to slow down the expansion of homosexual rights.

The possibility of disseminating information on the internet has brought about a media revolution. On the upside, much more diverse information is available. On the downside, however, information is not necessarily scientifically or journalistically verifiable. The trade-off between availability and reliability is viewed with criticism in Singapore. Accordingly, Singapore would like to slow down the loss of independent media.



Desire for Progress in Singapore

Overall, Singaporeans want to see the wheels of progress in their country turning slightly faster than in the past. Of all 16 countries surveyed, Singapore ranks number 8 and thus right in the middle of the table. The desire to see things moving faster is strongest in the area of society, followed by economic issues. In terms of political developments, Singaporeans want to maintain the status quo.

Singapore's self- assessment of progress

When asked how Singaporeans themselves would rate progress in their country, 71% are of the opinion that Singapore is currently very progressive or somewhat progressive when it comes to economic issues, 67% think the same of social progress, whereas only 51% would rate Singapore progressive when it comes to current political developments.

Further information



Future prospects: Singaporeans are comparatively optimistic about their future. The proportion of people fully satisfied with their current life, however, is roughly 10% below the average of all 16 countries surveyed. 74% feel that their status of belonging to the country's middle class is increasingly under pressure and 62% very much or rather agree with the statement that there is a risk their children will not be as well off as the respondents themselves are now; 25% are at least quite confident they will have enough money to live comfortably when retired.



Assessment of past 10 years: When it comes to how much the country has improved over the last 10 years, Singapore ranks among the best (4th out of 16) in this year's Progress Barometer. The changes have been most notable with regard to improvement in infrastructure (72%), national security (66%) and the effort to educate society (63%).



Social cohesion: Singapore is among the countries that agree most with the idea that the end of a progress phase has been reached with the growing risk of a backlash destroying what has been achieved so far (54% agree completely or tend to agree). 64% of Singapore's voters believe that only a small minority is getting richer, while all others miss out on the benefits of developments, and 69% think government should do more to prevent this gap from becoming even wider.



Battle against climate change: While the introduction of a fuel tax is not the top progress issue, Singaporeans also do not show a clear aversion to such a policy. They also think government should do more to prevent companies from polluting the environment (75%). There is also quite a few who believe in the power of innovation: 47% tend to agree that giving up air travel or eating meat is not necessary, but that new technologies will save the climate instead.



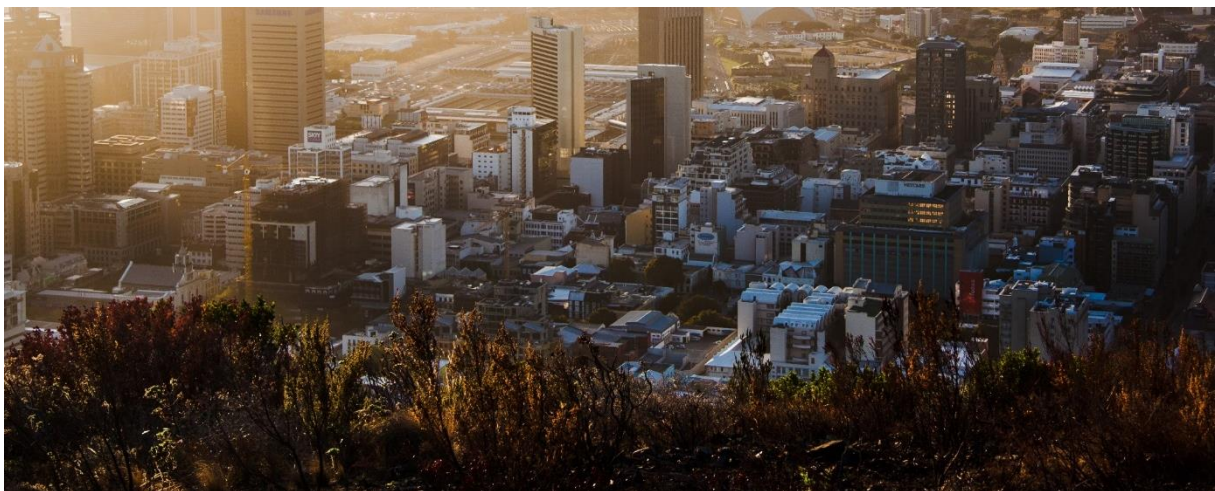
South Africa

Progress Map South Africa

Unemployment is a huge issue in South Africa with the general unemployment rate at roughly 30% and almost twice as high among young people.¹ The one issue where South Africans therefore want most progress is the improvement of **skills for its workforce, and they are very interested in lifelong learning**. Greater reluctance is seen, however, in increased spending of taxpayers' money on research. The professionalization of what has previously been voluntary work promises new job opportunities, which is why South Africa is also willing to embrace progress in this area. Since there is still a long way to go in terms of perfecting the country's educational system, it is also understandable that the readiness for progress in terms of a transition towards a service-based and knowledge-based economy is low. People prefer to maintain the status quo in this respect, as the South African economy has been under strain in the last few years, and a substantial part of the country's production still stems from agriculture. Accordingly, there is a clear aversion to the **relocation of production processes abroad and to deindustrialization**.

South Africans want **less bureaucracy**, which would provide for better conditions to attract businesses; they want to see progress on free trade and embrace the influx of foreign experts into the country.

An important aspect in South Africa is the question of **equal rights** between men and women. Here, South Africans are fundamentally willing to make progress. Associated with this is the **expansion of public and private child care**, which is also desired in this country. They also want to see progress in the expansion of gay rights, but at a slower pace.



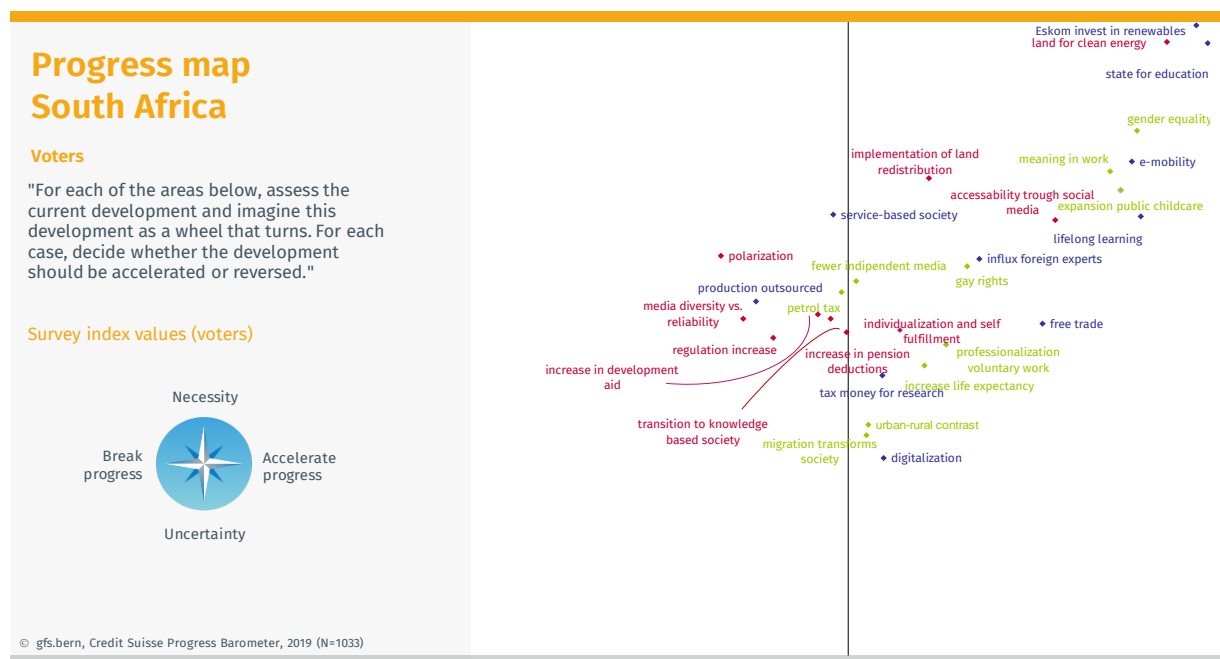
The South African power company Eskom is the seventh biggest energy company in the world². It is also the lynchpin of and symbol for many of South Africa's problems, such as mismanagement, corruption and energy shortages. The idea that Eskom should reposition itself towards **renewable energies therefore also reflects the desire for a fresh start and a**

¹ <http://www.statssa.gov.za/?p=12121>

² https://de.wikipedia.org/wiki/Liste_der_gr%C3%B6%C3%9Ften_Kohlenstoffdioxidemittenten#Nach_Energieunternehmen

better future for the nation's biggest state-owned enterprise. South African voters are aware that infrastructures must be built for the energy transition and that sufficient land should be available for this purpose. They are willing to embrace progress in this respect. While South Africans also want to move the dial forward in electric mobility, this is less of a priority than it is with other nations.

The **polarization** of political culture is an inhibitory factor in a relatively large number of countries. In South Africa, too, there is a desire for change in this respect. This polarization is related to the way in which political information is disseminated. More and more sources of information are available, especially online. People are more likely to consume information that corresponds to and reinforces their own world view. There is uncertainty about information sources and their professionalism ("fake news"). There is a desire for this spread of "fake news" to be reduced.



Desire for Progress in South Africa

Compared to the other 16 countries surveyed in this year's Progress Barometer, South Africa is amongst the countries with the biggest desire for progress (4th out of 16).

The desire for progress is biggest when it comes to economic issues. But there is also considerable willingness to move the dial forward on social and in political issues.

South Africa's self- assessment of progress

When asked how South Africans themselves would rate progress in their country, 51% are of the opinion that their country is currently very progressive or somewhat progressive in terms of social issues, while 35% think the same of economic progress and 34% also think political progress has been made.

Further information



Future prospects: A majority of South Africans are optimistic or at least partially optimistic about their own future (75%). But when it comes to their children, the population are pessimistic: 80% very much or rather agree with the statement that there is a risk their children will have to cope with less prosperity. A majority of respondents fear that their social and economic status is under increasing pressure (78%). 43% consider themselves to be financially insured at retirement age, while 55% of all South Africans are not confident that they will have enough money.



Assessment of past 10 years: The majority of South Africans feel there has been a deterioration in the areas of political co-determination (60%), social security (67%), national security (69%), stability of economic relations (67%), data protection (60%) and both rural (55%) and urban (53%) infrastructure. An improvement in the field of sustainable technologies (50%) is discernible.



Social cohesion: 66% of South African voters believe that only a small minority is getting richer, while all others are not benefiting from development (84%). Furthermore, 82% of respondents agree that more economic freedom brings growth and progress to South Africa. 55% think that important developments are blocked because everyone always puts family before society. A majority of South African society (85%) feels that conflicts should be resolved without armed force.



Battle against climate change: 87% of the South African population wants more government intervention to prevent companies from polluting the environment; 68% want a greener economy, while 11% think the economy should focus solely on growth. There is little desire for the introduction of a mineral oil tax in South Africa (27%).



South Korea

Progress Map South Korea

Apart from the global mega trend of e-mobility, questions of societal progress are important to South Korean voters. Gender equality is particularly stressed, and the issue of equality goes hand in hand with a strong need for action when it comes to the expansion of public childcare. But social progress seems to be limited to the classic nuclear family. When it comes to rights for homosexuals or the role of migrants, South Koreans see no specific need for progress.

When it comes to economic factors, progress is emphasized especially with regard to continuing vocational education and training and free trade. As an export-oriented country¹ with China as the major import and export partner, free trade is of structural importance. The influx of foreign experts is also seen as a measure of progress, another result that can be seen in the context of an export-oriented economy. The automotive industry is a fundamental aspect of this country's exports, and e-mobility also has many supporters in South Korea.

The current development of South Korea's political culture towards polarization is viewed critically by South Korean voters. What is desired here is a turnaround in this dynamic. Compared with other countries, this is a relatively widespread phenomenon.



As one of the tiger states, South Korea enjoys wealth and a comparatively high living standard thanks to its economic growth. The wish for more professionalization of voluntary work and support for an increase in development aid are symptomatic of a nation that has overcome the status of a recipient and become a donor country². An issue that remains problematic is poverty among the elderly population.³ Therefore it is no surprise that after an increase in development aid and a desire for more underground transportation, an increase in deductions for old-age pensions are the third political element where South Koreans would like to see more progress.

¹ <https://oec.world/en/profile/country/kor/>

² <https://journals.openedition.org/poldev/1535>

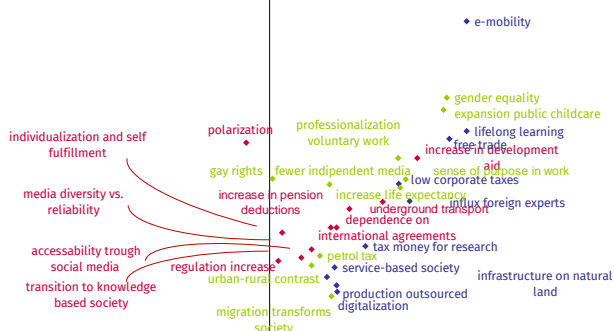
³ <https://asia.nikkei.com/Spotlight/Asia-Insight/No-country-for-old-Koreans-Moon-faces-senior-poverty-crisis>

Progress map South Korea

Voters

"For each of the areas below, assess the current development and imagine this development as a wheel that turns. For each case, decide whether the development should be accelerated or reversed."

Survey index values (voters)



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Desire for Progress in South Korea

In comparison, South Korea stands out with its high degree of willingness to make progress. It can be said that there is an above-average desire to see things moving forward at all levels. Especially when it comes to economic issues, South Koreans are willing to embrace more progress as they have benefited from it in past decades.

But there is also a strong will to advance when it comes to societal issues. In the political sphere there is slightly less enthusiasm for progress, but the overall desire for political progress can still be considered strong.

South Korea's self- assessment of progress

If asked, how South Koreans themselves would rate progress in their country 52% are of the opinion that their country is currently very progressive or somewhat progressive in terms of social matters. 49% think the same of economic progress and 38% think political progress has been made.

Further information



Future prospects: A majority of South Koreans are at least partially optimistic about their own future (79%). But when it comes to their children, South Koreans are rather pessimistic: 53% agree with the statement that there is a risk that their children will have to cope with less wealth. Half of the respondents fear that their social and economic status is under increasing pressure (50%). A majority (50%) do not see themselves financially insured at retirement age.



Assessment of past 10 years: The majority of South Koreans feel an improvement has been made in their country in the areas of political participation (59%), social security (58%), innovation (54%), sustainable technologies (62%) and both rural (52%) and urban (62%) infrastructure within the past 10 years.

On the other hand, a deterioration has been perceived in the stability of economic relations (44%).



Social cohesion: 66% of South Korean voters believe that only a small minority is getting richer, while no one else is benefiting from growth, and 68% think that the state should do more to counter this development.



Battle against climate change: 66% of the South Korean population want more government intervention to prevent companies from polluting the environment. This is relatively low compared to other countries. Meanwhile, 68% would like a more environmentally friendly economy compared to 24% who believe that the economy should focus solely on growth.



Switzerland

Progress Map Switzerland

Switzerland shows particularly marked variance in its desire for progress in society, the economy and politics. The idea of expanding underground transport (also to protect the existing landscape) is met with a particularly marked willingness to see progress.

In addition to this priority issue, gender equality is another key area in which Swiss people want to see progress. Aside from the global #MeToo debate, the issues of gender equality and women's empowerment in Switzerland were also reflected last year in a nationwide women's strike and a national election in which the proportion of women elected to the national parliament reached a record high.

Finally, the Swiss also want progress in innovation and research - and are prepared to invest taxpayers' money. In Switzerland, as in almost all countries, electric mobility is one of the major progress issues and is much more popular as a climate-saving measure than the introduction of a new fuel tax.

The disappearance of independent and local media is something that is viewed particularly critically in federalist Switzerland, where political decisions are taken not only at the national level but also at the level of the cantons and municipalities. The fact that the diversity of information often comes at the price of accuracy is also viewed critically. And people would like to see a reversal of these trends.

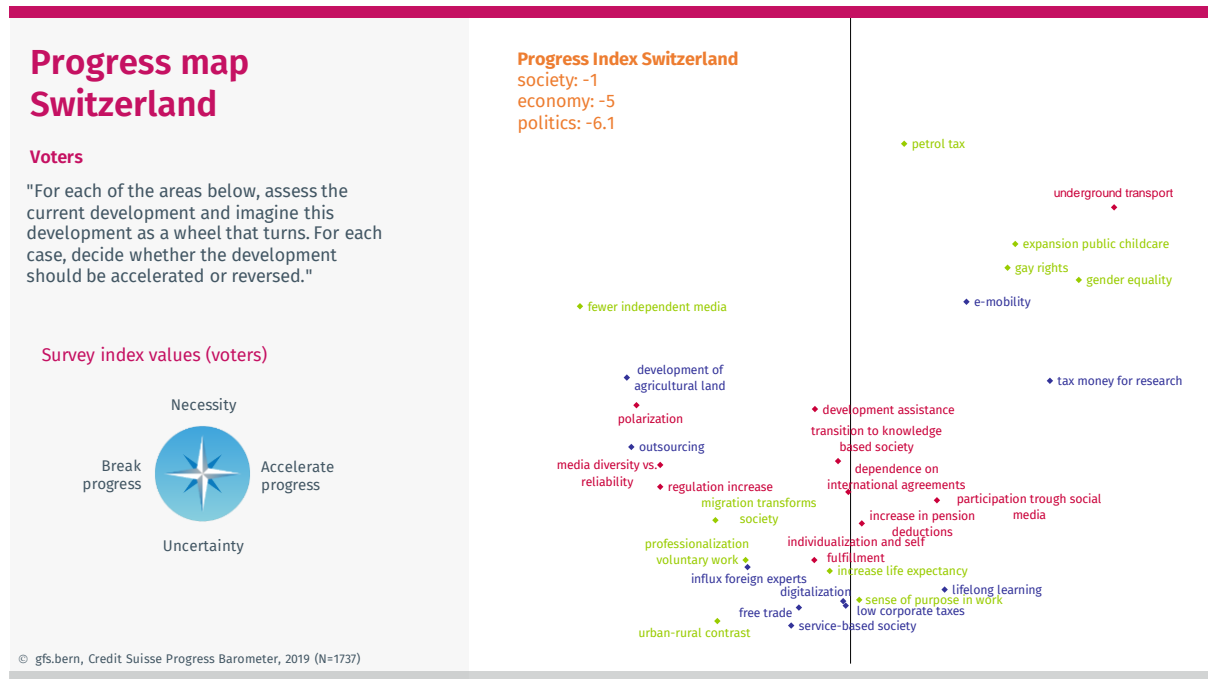
Switzerland has a comparatively dense population, since around a quarter of its territory is considered "unproductive" by virtue of the Alps and lakes. The idea of using more natural land is therefore not met with much enthusiasm. On the contrary, Switzerland would like to dial back on any such developments.



As in many Western countries, politics in Switzerland is increasingly polarized, despite the system of consensus and concordance. Here, too, the population would like to see a return to earlier conditions and gave expression to this in the national elections in the autumn of 2019, when the more extreme parties clearly lost out. One of the issues where fights are carried out

most intensely is migration. In this case, just as on the influx of foreign personnel, Switzerland is reluctant to turn the wheel forward.

Today, Switzerland no longer has a strong industrial sector, but is primarily a services society (based on knowledge and innovation). The aim here is to maintain the status quo.



Desire for Progress in Switzerland

Switzerland is reluctant to make more progress but would rather preserve the status quo, at least when it comes to social and economic issues. This year's Progress Barometer also identifies a slight desire to dial back on current political developments.

Switzerland's self- assessment of progress

When asked how Swiss citizens themselves rate progress in their country, 52% feel Switzerland is very progressive or somewhat progressive when it comes to social issues. This corresponds closely to the average of all 16 countries surveyed. When it comes to politics (52%) and especially economic issues (84%), a much higher proportion of people feel their country is progressive than that of respondents in other countries (average of other countries 42% for politics and 56% for the economy).

Further information



Future prospects: a total of 64% of all Swiss citizens claim to be fully satisfied with life. That is the highest proportion of all 16 countries surveyed. Forty-four percent look to the future with some optimism – a further 37% have mixed feelings about what lies ahead. Optimism falls considerably when it comes to the outlook for the respondents' children: 77% feel there is a risk that their children will not be as well off as the respondents themselves. Opinion is also divided when it comes to old-age provision: around half of those surveyed assume they will have sufficient resources in old age, while the other half are doubtful. Compared to the other 15 countries surveyed, a record 94% feel that Switzerland should continue to be innovative despite prosperity.



Assessment past 10 years: It is in the protection of privacy where the biggest proportion of Swiss citizens sees a deterioration over the last 10 years (77%), followed by the coexistence between the national languages (59%) and social security (61%). Fifty-one percent feel that the people's participation in decision-making has deteriorated. On the other hand, the country is felt to have advanced in the area of sustainable technologies (72%) and in both urban (69%) and rural (56%) infrastructure.



Social cohesion: Compared with the other 15 countries surveyed, the proportion of Swiss who consider themselves part of the country's middle class but feel their status to be under increasing pressure is highest of all (81%). Seventy-seven percent feel that only a minority accumulates wealth while the great majority does not benefit equally from developments and 58% think the government should do more to reduce this increasing inequality – even if it means higher taxes.



Battle against climate change: A substantial proportion of citizens feel that new technologies will help solve major global problems (53%) and that this will also be the key to saving the climate (46%). Switzerland is practically united in the idea that people should return to living in harmony with nature (92%) and that the economy has been too one-sided in its focus on growth and should now focus more on sustainability (91%). While still a large majority, the proportion of people who want more intervention against pollution is slightly smaller (82%).



United Kingdom

Progress Map UK

In contrast to other countries, where the main dynamic is clearly set on progress, the UK makes quite a clear distinction between issues, where some people want to see certain things progress faster, while a majority want to see other developments reversed.

E-Mobility and gender equality are issues that literally transcend nations in terms of citizens' willingness for progress. They are accordingly also at the forefront of where people in the UK want to see things moving faster in the future. These two areas are not only the issues where the desire for progress is biggest (position on the X-axis), they are also ranked highest in terms of consensus amongst respondents (Y-axis). With regard to these two issues, UK citizens also desire more progress when it comes to expanding the existing underground transport and granting equal rights to gay people.

UK citizens seek a greater sense of purpose in their work and are willing to embrace lifelong learning to stay competitive on the job market. Because of a more modern working environment, the UK also shows a desire for a better reconciliation of work and family by expanding public childcare. Depending on the employment status of the parents, the cost of (external) childcare can be amongst the highest of all the OECD countries.¹

The UK is clearly interested in remaining an attractive location for business, international companies and talents: Despite current discussions about a "No Deal Brexit", free trade and the further influx of foreign experts are areas where Britons want to see continued progress. At the same time, they want to avoid dependence on international agreements. The UK should also keep corporate taxes low while dialing back on regulations and spending more (taxpayers' money) on research. Compared to the other 15 countries, the UK enjoys an average ranking when it comes R&D expenditure as a proportion of GDP.²

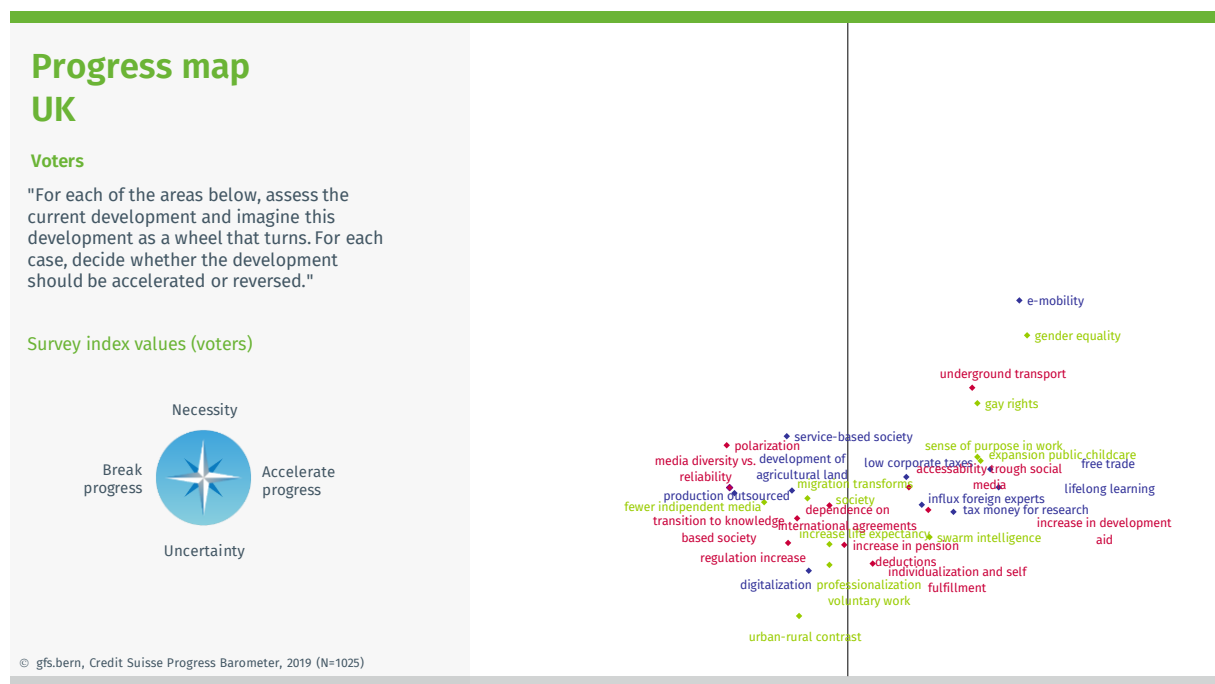


¹ <https://www.bbc.com/news/uk-42966047>

² <http://uis.unesco.org/apps/visualisations/research-and-development-spending/>

Compared to the other 15 countries surveyed, the UK is particularly critical of the trade-off between media diversity and reliability of information. It is said that the Brexit referendum is one of the first events where the possibility of influencing public opinion via the internet, especially social media, has properly been explored.³ The past months and years of political turmoil have put quite a strain on the image of politics in the UK; accordingly, one of the three developments where people in the UK are most averse to progress is the polarization of politics.

The outsourcing of production is viewed very critically, as is the transition away from the production of goods and agriculture to a more service and knowledge-based society. The re-development of agricultural land to extend infrastructure and cities is an area where people would like to see developments reversed.



Desire for Progress in the UK

Like most other western countries in this year's Progress Barometer, the desire to see things moving faster in society, politics and the economy is less pronounced than in other parts of the world. It ranks 12th out of the 16 countries surveyed.

People in the UK display a slight desire for progress both in society and on economic issues. In terms of political developments, on the other hand, they do not want see things either progress of move backwards, but prefer instead to preserve the status quo.

The UK's self- assessment of progress

When asked how they would rate progress in their country, 42% of people in the UK are of the opinion that their country is currently very progressive or somewhat progressive when it comes to economic issues, while 40 % think the same of social progress. Only 25% – together

³ <https://www.theguardian.com/uk-news/2019/jul/30/cambridge-analytica-did-work-for-leave-eu-emails-confirm>

with Chile the lowest share of all countries surveyed – think the UK has been progressive in the area of politics.

Further information



Future prospects: A majority of UK respondents are optimistic (or partially optimistic) about their own future (75%). When it comes to the prospects of their children, however, there is greater pessimism: 62% agree with the statement that there is a risk their children will be less well off than they are now. Half (50%) of respondents also fear that their social and economic status is under increasing pressure and only about one-third of the population (27%) is very confident or quite confident that they will have sufficient resources to live comfortably in retirement.



Battle against climate change: 73% of the UK population would like more government intervention to discourage companies from polluting the environment. Seventy-three percent also want a greener economy versus 18% who think the economy should focus solely on growth. Meanwhile, 67% of UK citizens take the view that people should return to living in harmony with nature. While this is a clear majority, it is still below the average of all 16 countries surveyed (77%).



Assessment past 10 years: An absolute or relative majority of the population in the UK perceived a deterioration in various aspects of life in the UK, including national security (43%), social security (57%), the stability of economic relations (50%), the people's participation in decision-making (48.2%) and, most of all, national unity (66%). On the other hand, clear progress is seen when it comes to sustainable technologies (50%).



Social cohesion: In the UK, 68% of respondents think that only a small minority is getting richer, while the rest of the population is not benefiting from developments. Sixty-four percent also agree that the government should do more to reduce this inequality between rich and poor. While these numbers are high, they are still average compared to the other 15 countries.



Political situation: The UK is effectively unable to move ahead as a nation until a path forward has been agreed on how to deal with Brexit. Despite this, only 50% of all voters think problems could be solved better without political parties than with them. This is below the average of the 16 countries surveyed. On the other hand, the proportion of people who think political sovereignty should be shifted to supranational bodies because of a globalized economy is well below average at 39%.



USA

Progress Map USA

Like in many other countries, gender equality, the expansion of public childcare and electric mobility are the issues where progress is most desired in the US. The need to move ahead in these areas clearly transcends nations, as do two of the most talked-about current political movements: the climate strikes and the #metoo debate, the latter actually originating in the US.¹

Gay rights are a subject of controversial discussion in the US, the debate about “values” being one of the most defining topics² on the political stage. Most respondents clearly prefer to see progress when it comes to granting gay people more rights. However, people also want to dial back on developments in the area of religion, which is becoming less and less important in people’s everyday lives, a view that speaks to the more conservative side of the values-debate.

The possibilities that social media provide for people to force politics and politicians to become more accessible constitutes an area in which people favour progress. At the same time, it is in the US that terms such as “fake news” and “alternative facts” were born. The issue of disinformation, also enabled by digitalization, is therefore one of the most critical of all – rivalled only by the great political polarization in the country, which people would equally like to see reversed.

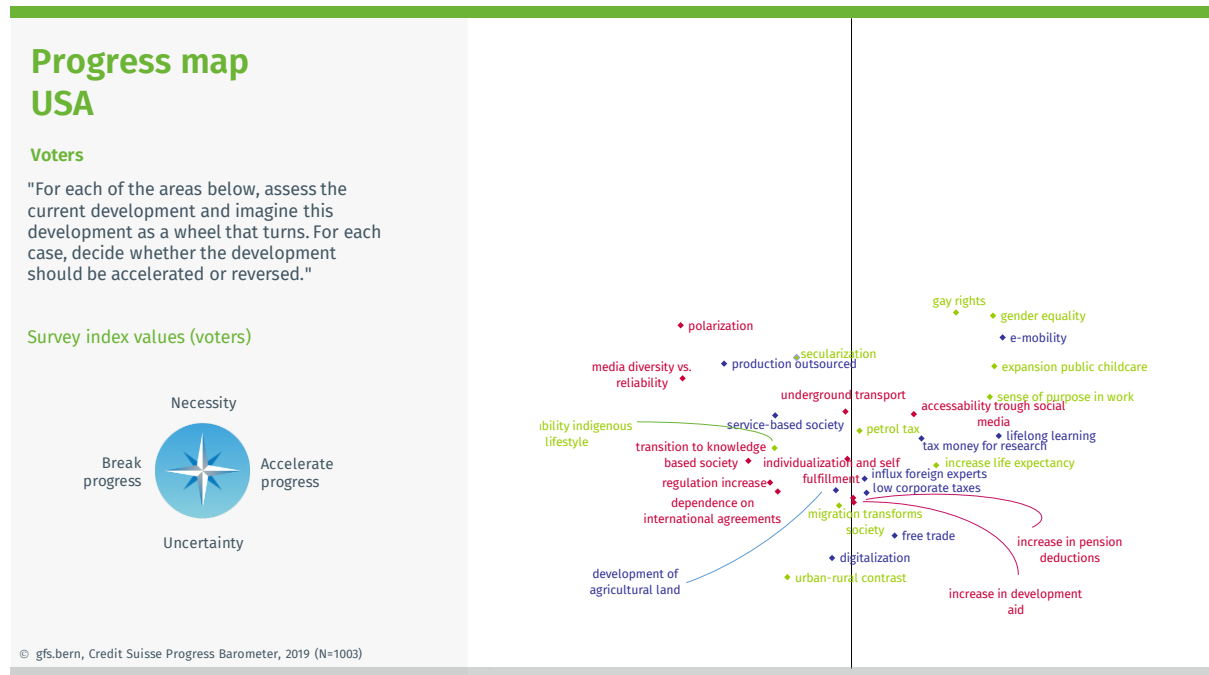
Where there is progress, there is usually also someone fearful of being left behind. While people show a clear desire for progress on the issue of lifelong learning and the spending of taxpayers’ money on research, they are much less inclined to see progress in the transition away from a traditional industrial, production-based society towards a knowledge-based and service-oriented society.



¹ https://www.huffpost.com/entry/the-me-too-campaign-was-created-by-a-black-woman-10-years-ago_n_59e61a7fe4b02a215b336fee

² <https://www.pewresearch.org/fact-tank/2019/02/05/republicans-and-democrats-have-grown-further-apart-on-what-the-nations-top-priorities-should-be/>

Trade policy is a hotly debated policy both in the US and on the global stage. While it is by no means one of the top progress issues, people tend to be in favour of increasing exchanges with other nations rather than dialling back on trade. Similarly, people tend to be in favour of maintaining the status quo when it comes to the influx of foreign experts, development assistance or the transformation of society through immigration or the strategy of lowering corporate taxes to attract multinational corporations to settle in the US.



Desire for Progress in the USA

The US is pulled in two different directions when it comes to the nation's willingness for progress: On the one hand, the country wants to see more progress on societal issues. On the question of economic developments people want to preserve the status quo, but would clearly like to turn back a page or two when it comes to US politics.

Across all the issues surveyed, this pull from two sides results in an average value that suggests an overall preference for preserving the status quo.

The USA's self- assessment of progress

When asked how US citizens themselves would rate progress, 48% think the US is very progressive or somewhat progressive when it comes to societal issues, and 52% are of the opinion that the US is progressive on economic issues, whereas only 36% rate the US progressive when it comes to current political developments.

Further information



Future prospects: A majority of Americans (81%) look to the future with optimism or at least with mixed feelings. Only a small proportion (13%) are downright pessimistic. However, as in all countries surveyed, respondents view the outlook for their children more negatively: 63% think they will be less well off than the respondents themselves. More than half of those who consider themselves to be part of the US middle class fear for their social and economic status (66%). A majority also fear they will not have enough to live comfortably when they are retired (55%).



Assessment past 10 years: Looking back on the past 10 years, an absolute majority of Americans feel that national unity has deteriorated (63%). A deterioration is also perceived when it comes to social security (56%) and urban infrastructure (51%). An improvement, on the other hand, is seen in the area of sustainable technologies (53%).



Social cohesion: 67% believe that good social change always implies tolerance in dealing with minorities and 65% think that conflicts must be resolved without weapons. This leaves 19% and 21% respectively who don't necessarily agree with these statements. While this is a considerable amount, it lies within the average of all 16 countries surveyed. Another issue is the divide between rich and poor: while 61% feel this divide is increasing only 51% think the government should do more to prevent this development – even at the cost of higher taxes. Compared to the other countries, this is a rather low proportion.



Battle against climate change: 66% of the population wants more government intervention to prevent companies from polluting the environment. This figure is relatively low compared to other countries, even if a majority is in favour. A comparatively high proportion of 54% think the solution to save the climate lies in new technologies.