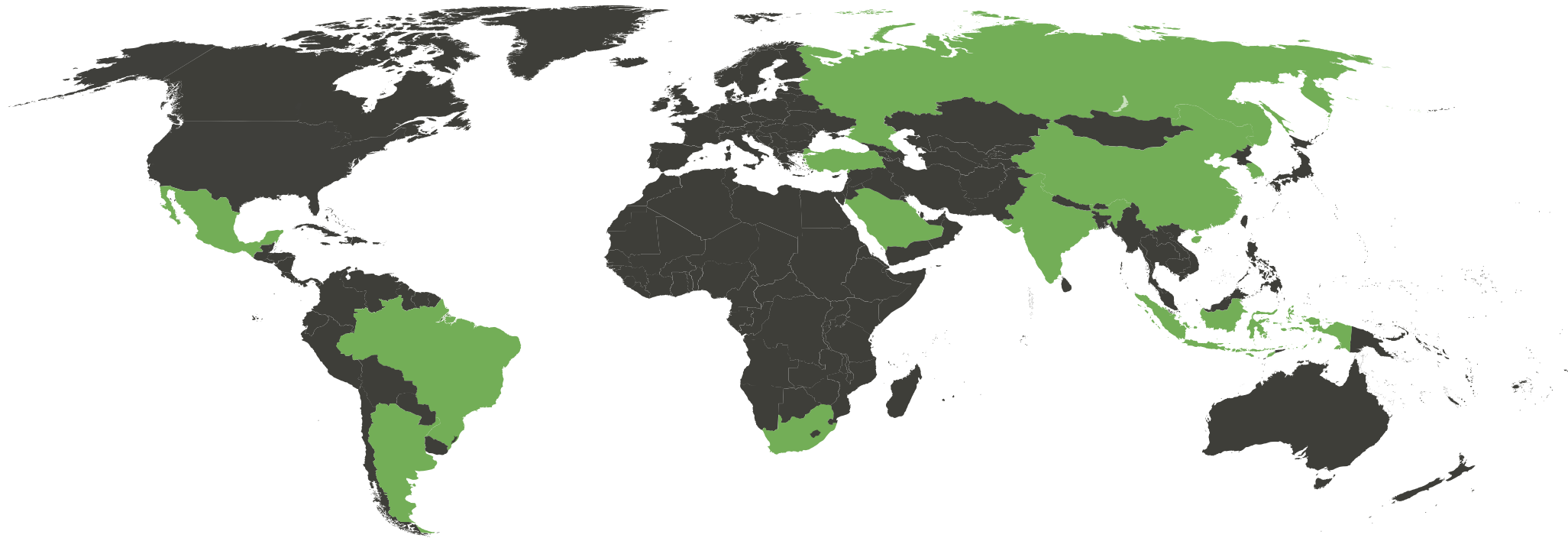


Emerging Markets and the Changing Global Order: Is There a New Model of Development?

King's International Development Institute and Ipsos MORI

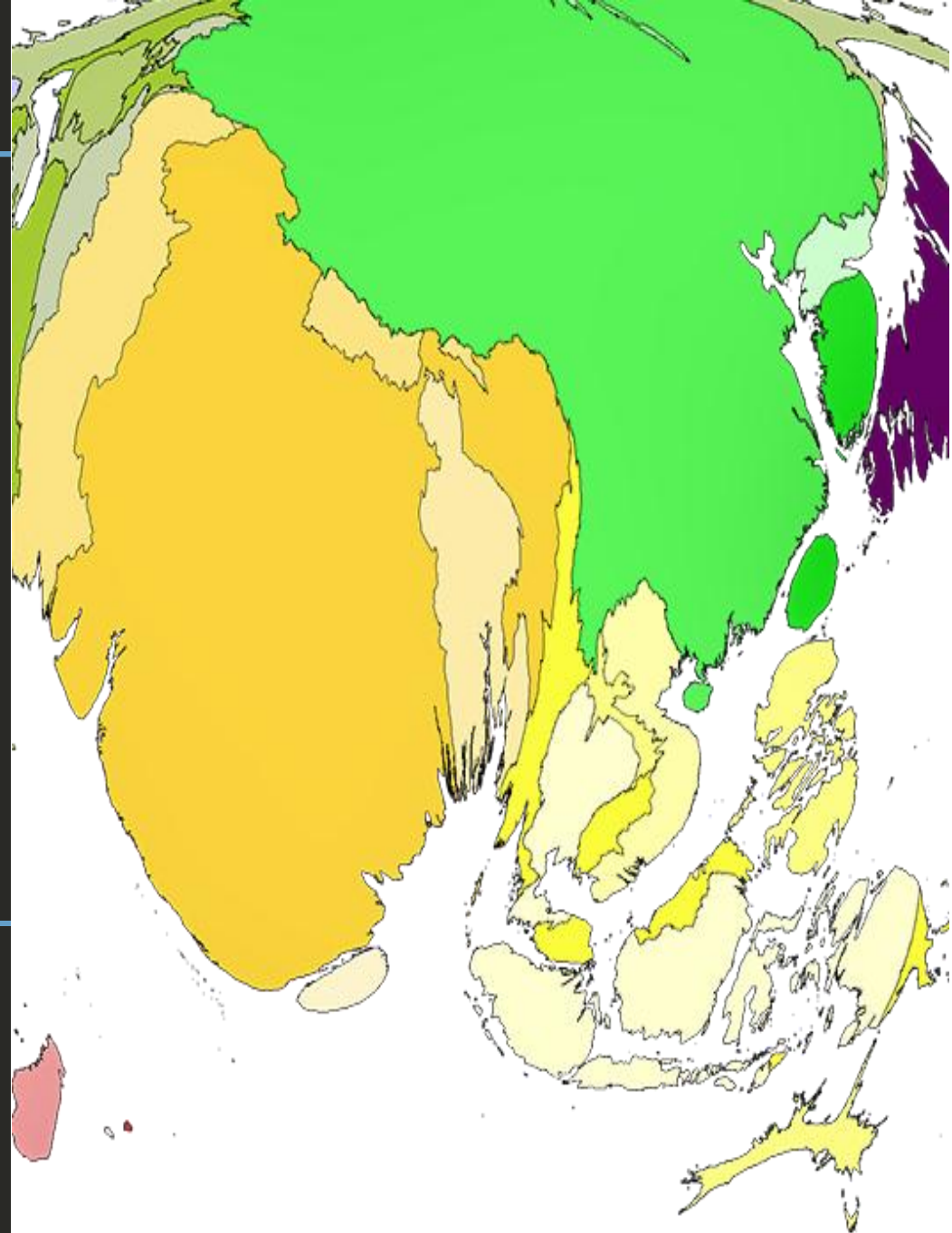




- **11 'emerging markets' covered: Argentina, Brazil, Mexico, South Africa, Turkey, Saudi Arabia, Russia, India, China*, South Korea, Indonesia**
- **Using Ipsos' Global @dvisor monthly survey - *online* panel: representative of more affluent, connected population in these countries**
- **Only includes those aged 16-64, 6,000 interviews in total, fieldwork 1-15th Oct 2013**

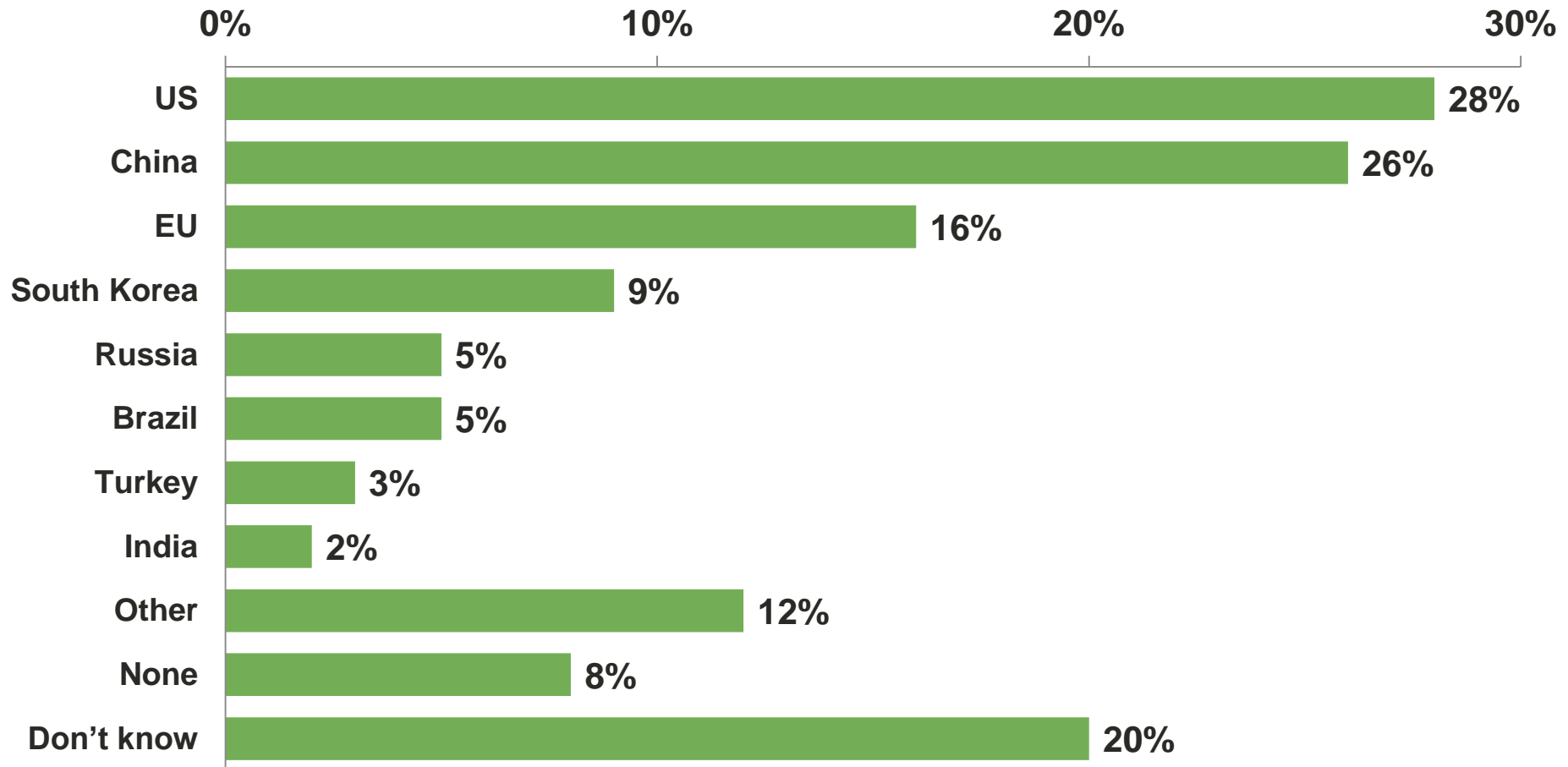
Three key questions:

1. Which countries do people look to as an economic model?



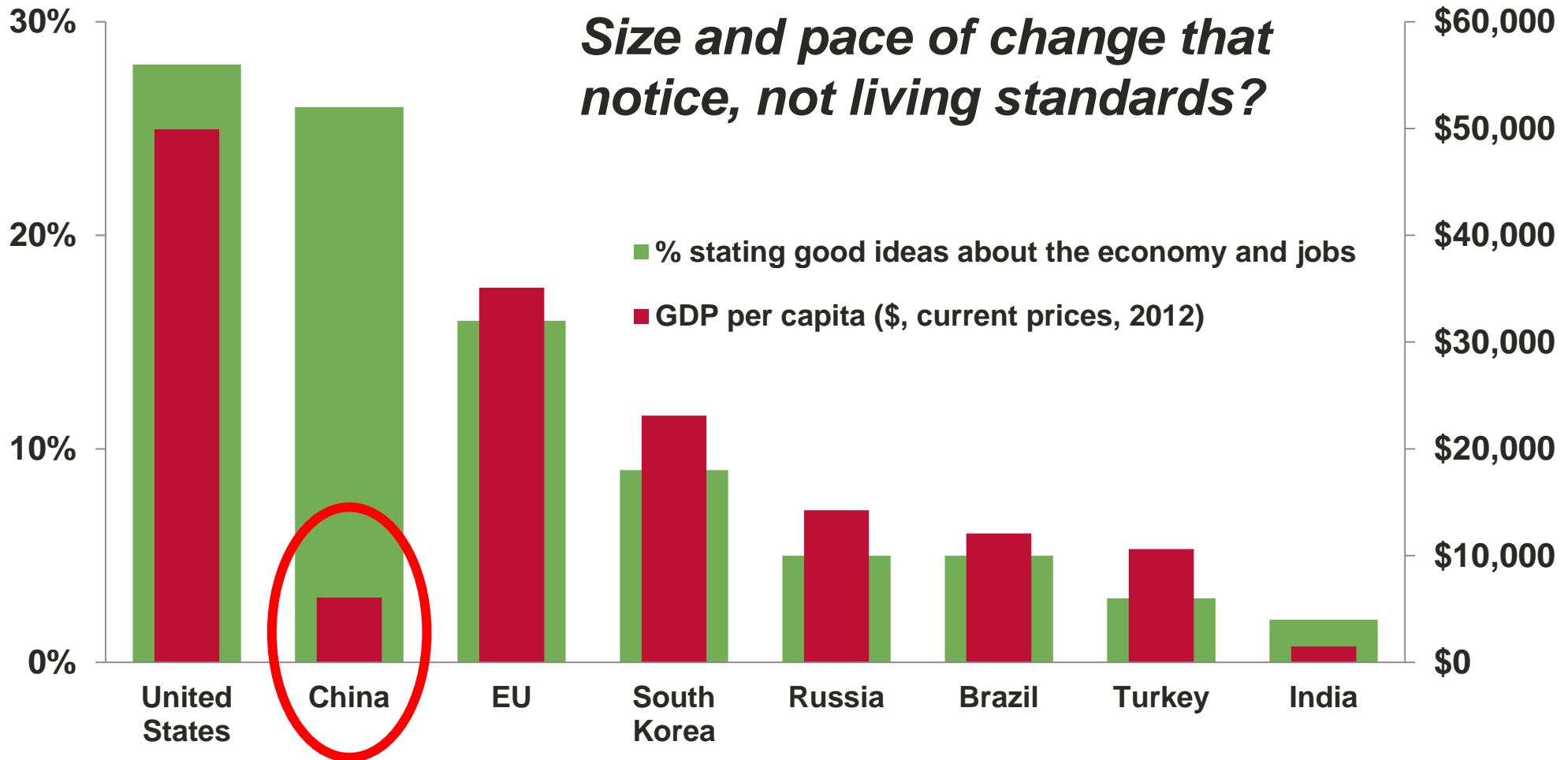
Who do citizens of these countries look to?

Which country or countries, if any, do you think have the right ideas about the economy and jobs that your country's leaders should copy?



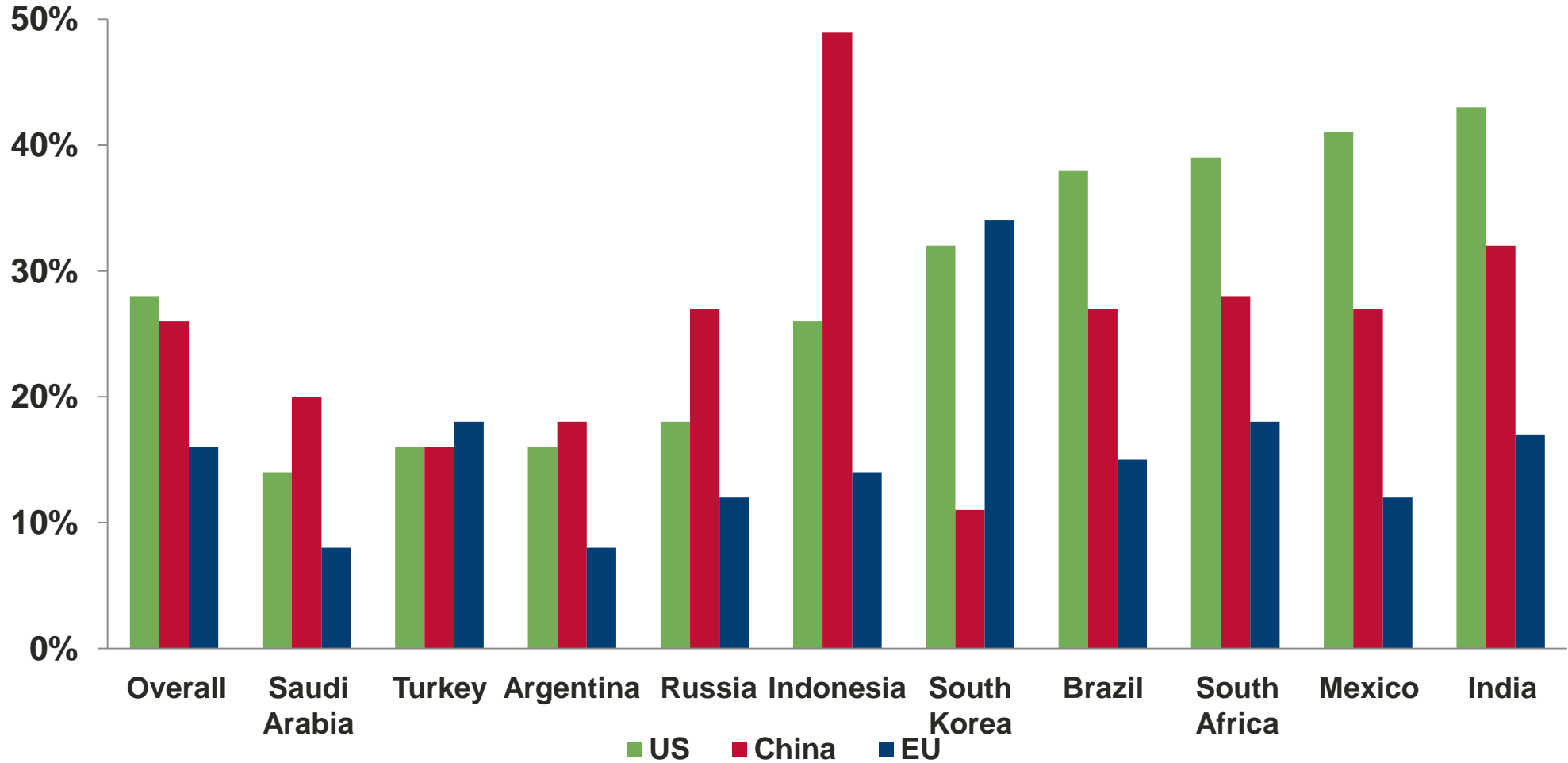
The countries people look to fairly closely related to per capita income – with one big exception...

Which country or countries, if any, do you think have the right ideas about the economy and jobs that your country's leaders should copy?



Wide variation between countries...

Which country or countries, if any, do you think have the right ideas about the economy and jobs that your country's leaders should copy?



*N.B.: The authorities in China refused to allow this question to be asked

BRI publics don't look to other BRIs for economic ideas...

Which country or countries, if any, do you think have the right ideas about the economy and jobs that your country's leaders should copy?

	Brazil	Russia	India
Brazil	-	<1%	5%
Russia	6%	-	11%
India	3%	1%	-
China	27%	27%	32%

Neighbourhood effects – people looking in their own back yards

Which country or countries, if any, do you think have the right ideas about the economy and jobs that your country's leaders should copy?



Indonesia

China – 49%

South Korea – 30%

US – 26%



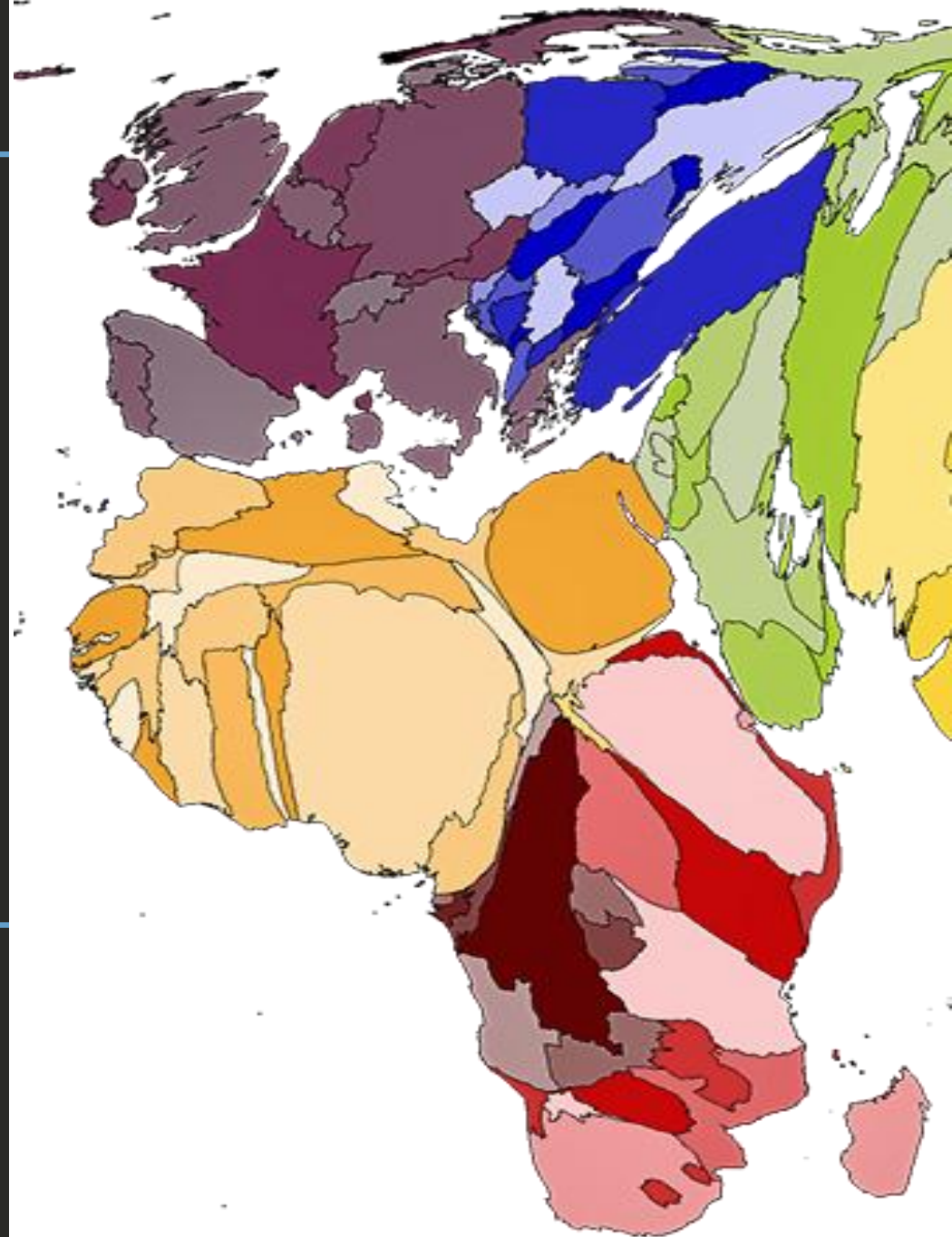
Saudi Arabia

Turkey – 22%

China – 20%

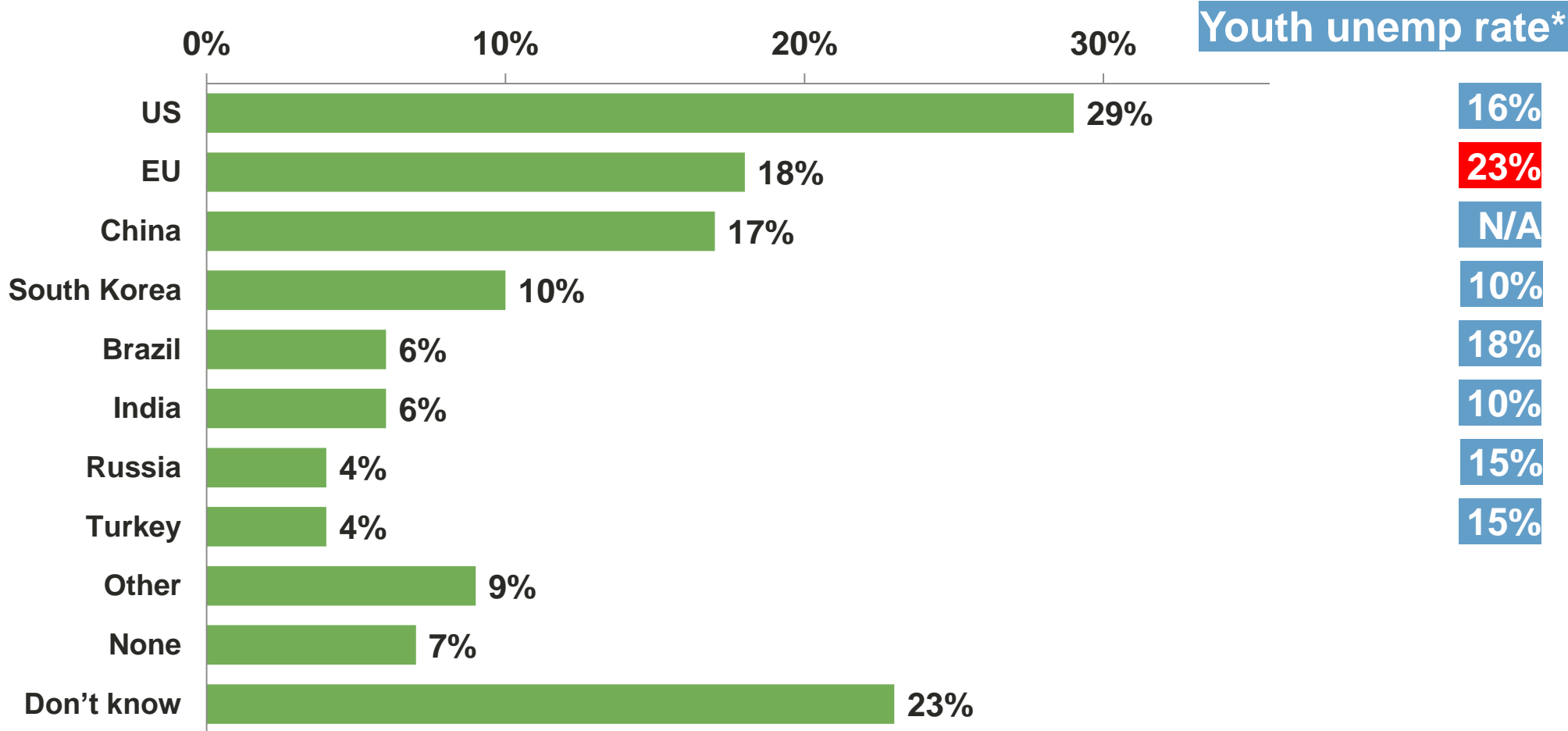
Others – 16%

2. Best job opportunities for young people?



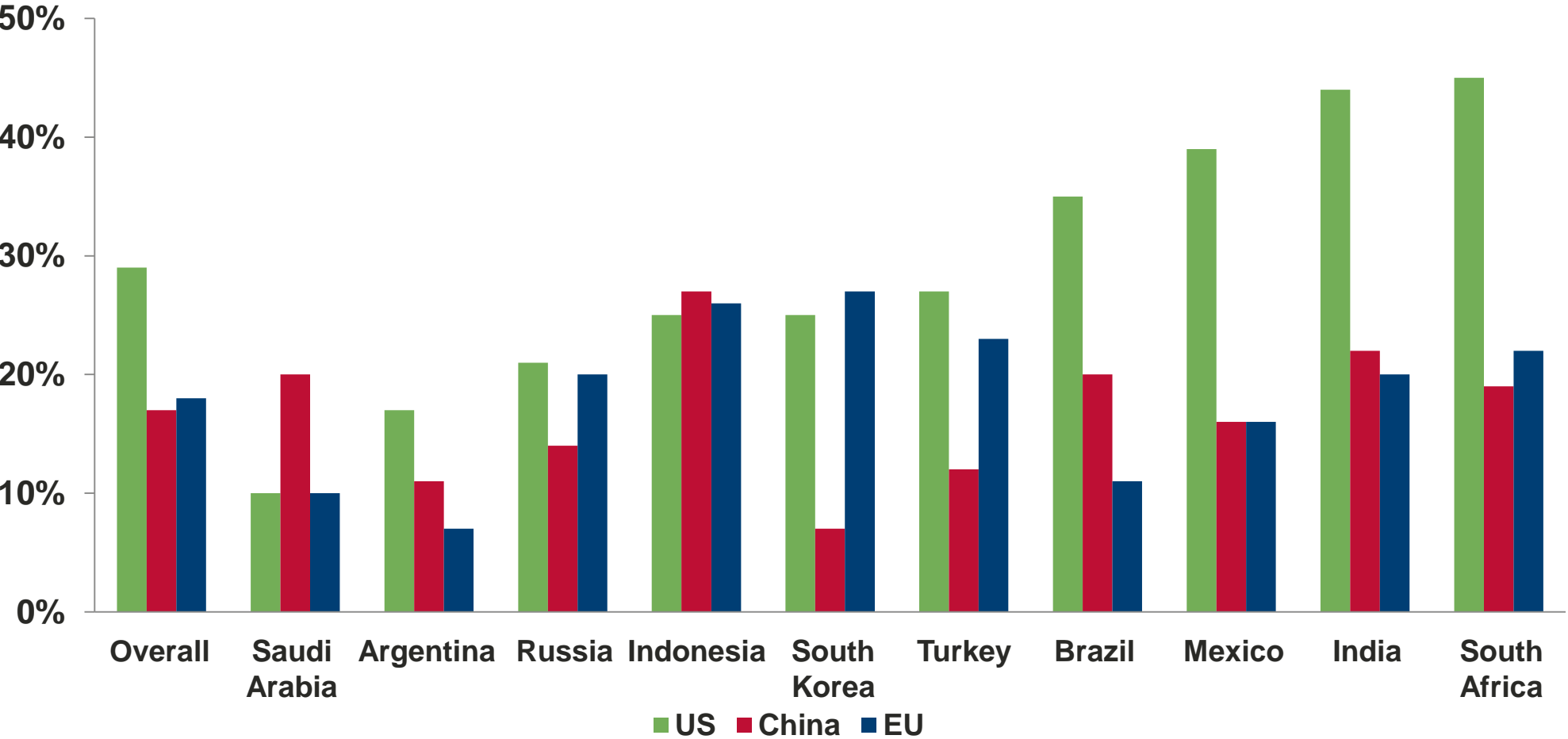
Clear US lead on job opportunities for young people; EU and China in a close second and third

Which country or countries, if any, do you think provide the best job opportunities for young people today?



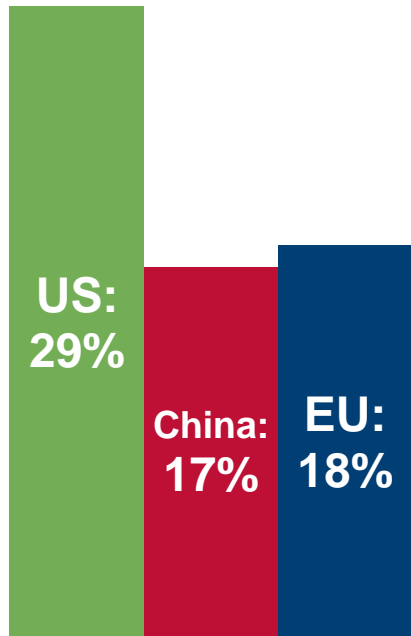
US lead strongest in India, Brazil, Mexico and South Africa...

Which country or countries, if any, do you think provide the best job opportunities for young people today?

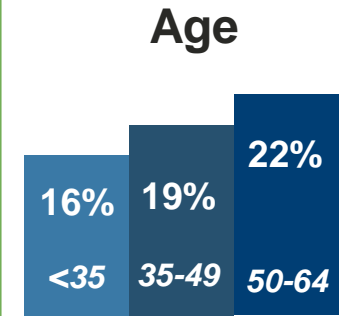
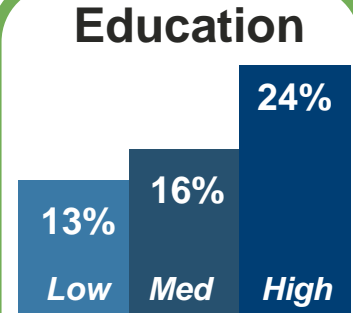
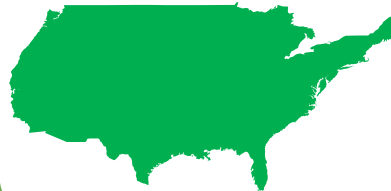
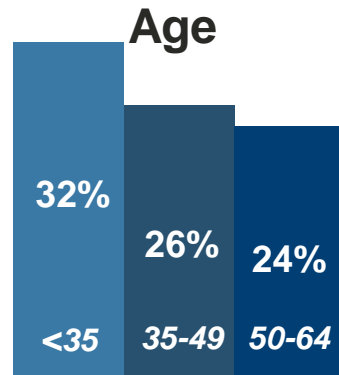


Two significant differences when look across demographic groups...

Which country or countries, if any, do you think provide the best job opportunities for young people today?



Overall



Brazil and India look to themselves – Russia not so much...

Which country or countries, if any, do you think provide the best job opportunities for young people today?

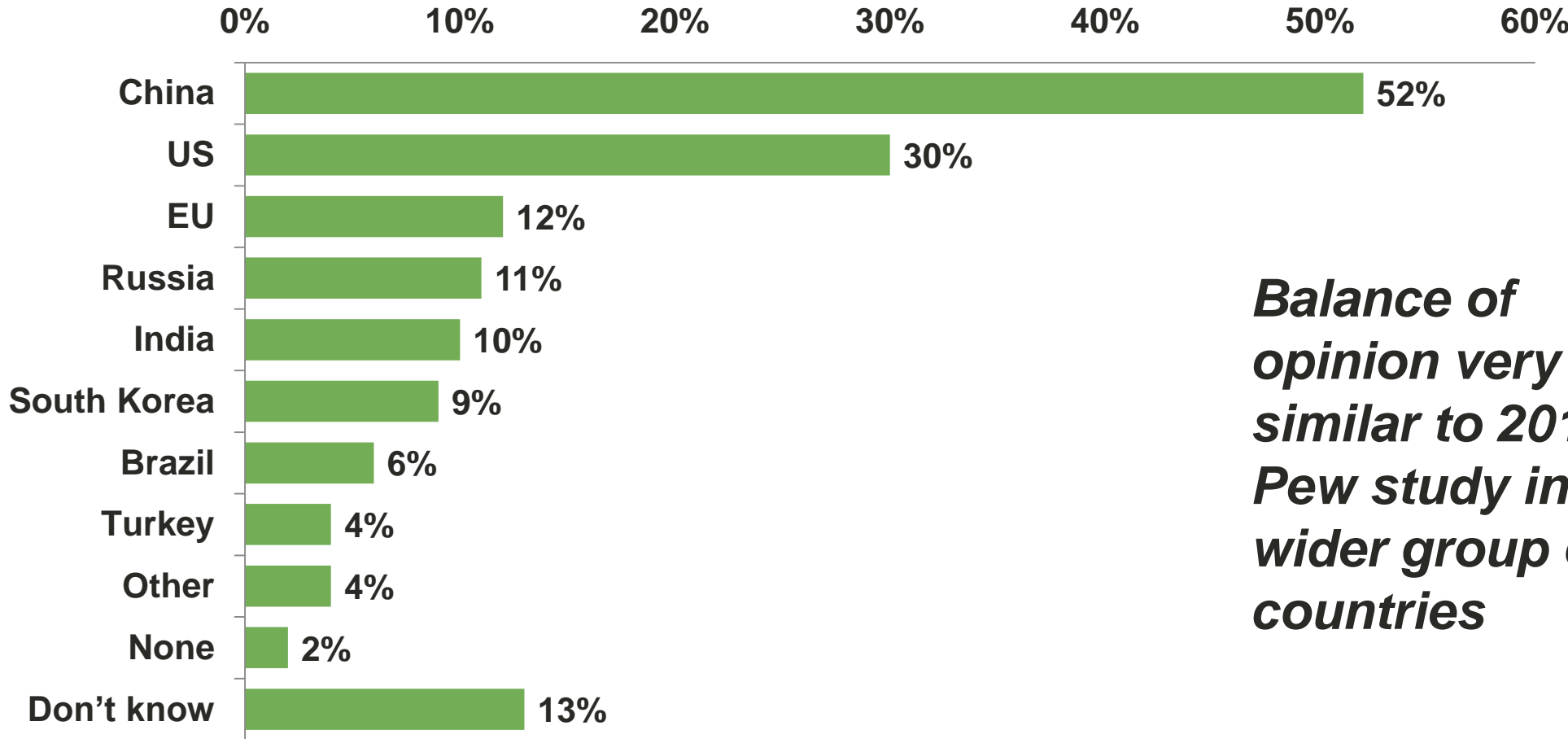
	Brazil	Russia	India
Brazil	22%	*	5%
Russia	4%	11%	7%
India	2%	2%	27%
China	20%	14%	22%

3. Which countries will be the leading economic powers over the next 20 years?



China seen as the leading global power over the next 20 years – US widely mentioned, EU not

Which country or countries, if any, do you think will be the leading economic powers of the world over the next 20 years?



*Balance of opinion very similar to 2013
Pew study in wider group of countries*

People are not far off from projections...

Which country or countries, if any, do you think will be the leading economic powers of the world over the next 20 years?

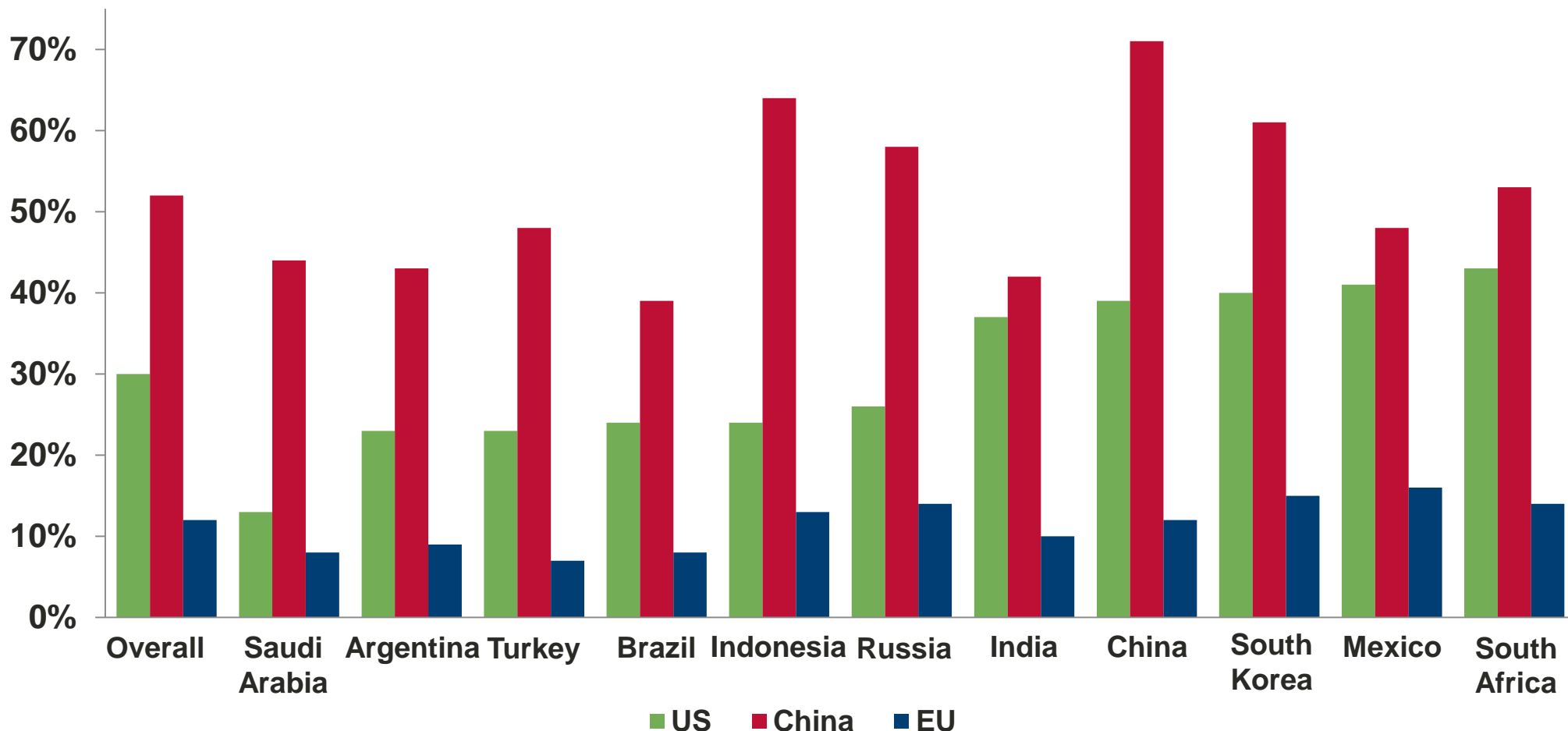
	% Leading economic power	Real GDP (\$trn)	
		2013	2033
China	52%	\$11.6	\$35.3
US	30%	\$13.9	\$21.6
EU	12%	\$13.6	\$20.8
Russia	11%	\$2.2	\$4.0
India	10%	\$4.3	\$16.0
South Korea	9%	\$1.4	\$2.9
Brazil	6%	\$2.1	\$4.3
Turkey	4%	\$1.0	\$2.5

Note: GDP data is in 2005 US\$ PPP volume terms

Note: Data for the EU excludes Bulgaria, Croatia, Latvia, Lithuania and Romania

China the most mentioned in every country, variable for US – uniformly low for EU...

Which country or countries, if any, do you think will be the leading economic powers of the world over the next 20 years?

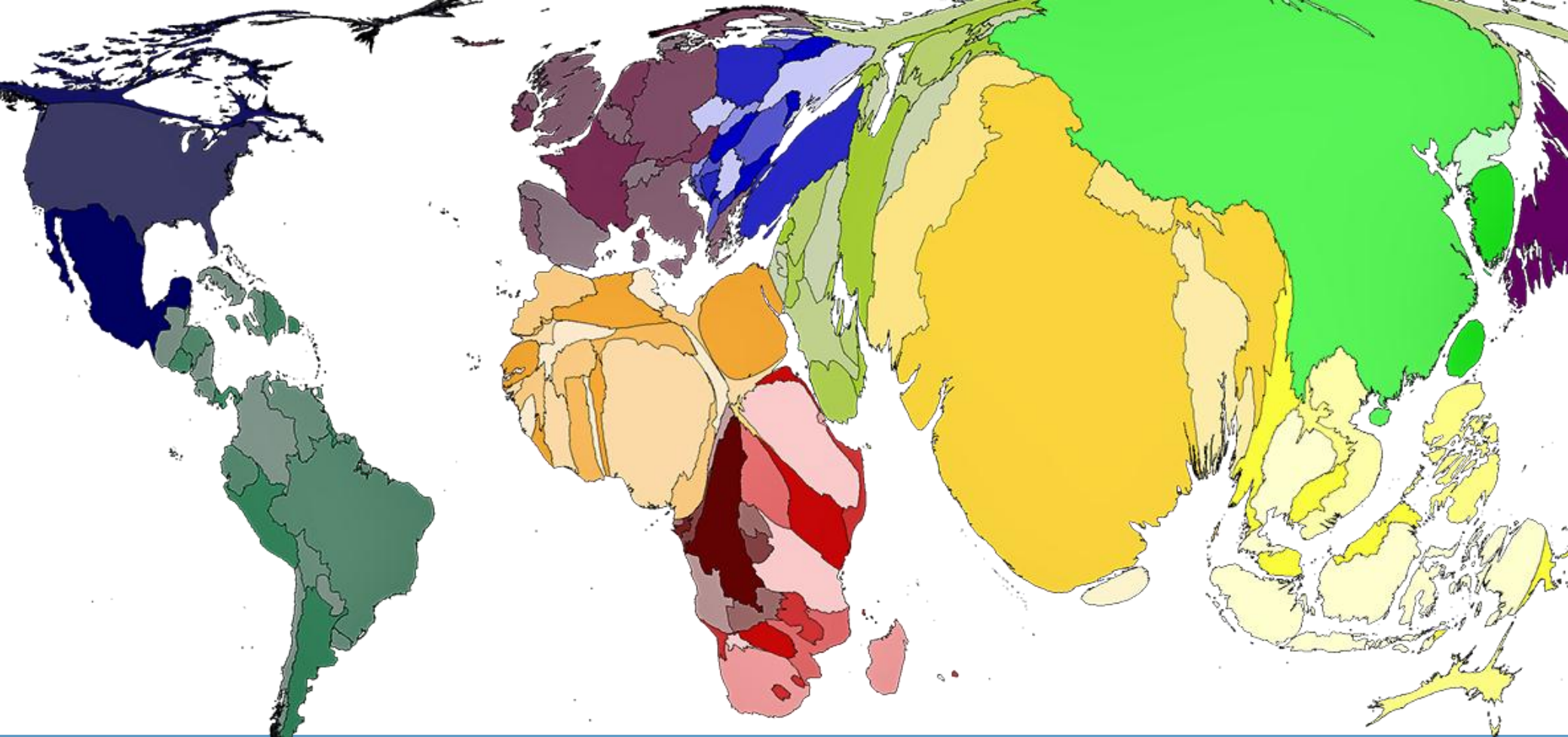


Every BRIC country more likely to select own country than US ...

Which country or countries, if any, do you think will be the leading economic powers of the world over the next 20 years?

	Brazil	Russia	India	China
Brazil	25%	1%	3%	2%
Russia	8%	30%	8%	16%
India	6%	2%	41%	2%
China	39%	58%	42%	71%
US	24%	26%	37%	39%

- Clear messages in emerging/non-western country opinion – although note “don’t knows”
- Not experts/decision-makers – but national moods/impressions useful to understand
- China now nearly on par with US as a model to follow
- Although US still leads on job opportunities for young – and stronger among young themselves
- Clear view of future – reflects likely outcome to an extent: G7 accounted for 50% of world GDP in 1995, will be 34% by 2018; BRIC and TIMP up from 20% to 37%
- China’s prominence despite low GDP per capita: living standards not top of mind?
- Little comfort for EU – more educated more positive (and South Korea...), but not a positive image of future



Thank you

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