

THE PUBLIC OPINION IN VIEW OF A THIRD WORLD WAR

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There is growing global public opinion concerned about the possibility of a new world conflict, just like the First and Second Wars. The invasion of Ukraine seems to have the world's citizens worried and anxious. According to a new Ipsos survey conducted for the Halifax International Security Forum - the annual gathering of civil servants, academics and the military that takes place in that Canadian city - almost three in four (73%) agree that we could see a world conflict like the major military confrontations of the last century, sometime in the next 25 years. Of the more than 32,000 people surveyed in 33 countries, an average of 73% somewhat agree or strongly agree with the statement: "I expect another world conflict involving superpowers, similar to World Wars I and II in the next 25 years", a 10 pp increase against last year. In relation to the countries and how much their fear of a world conflict increased, Australia rose 8 points and reached 81%, Ireland 80% (it was measured for the first time this year), Mexico added 8 points and reached 80%) and Peru went up 3 more points and reached 80%. These are the countries where people are most concerned about world conflicts. Concern increased significantly, but it is lower in Japan, which grew 16 points and settled at 51%, Sweden, which added 11 points and reached 60%, Germany, which increased its concern by 17 points and reached 63% of their public opinion, and Indonesia, which reached 63% and was included in the study for the first time.

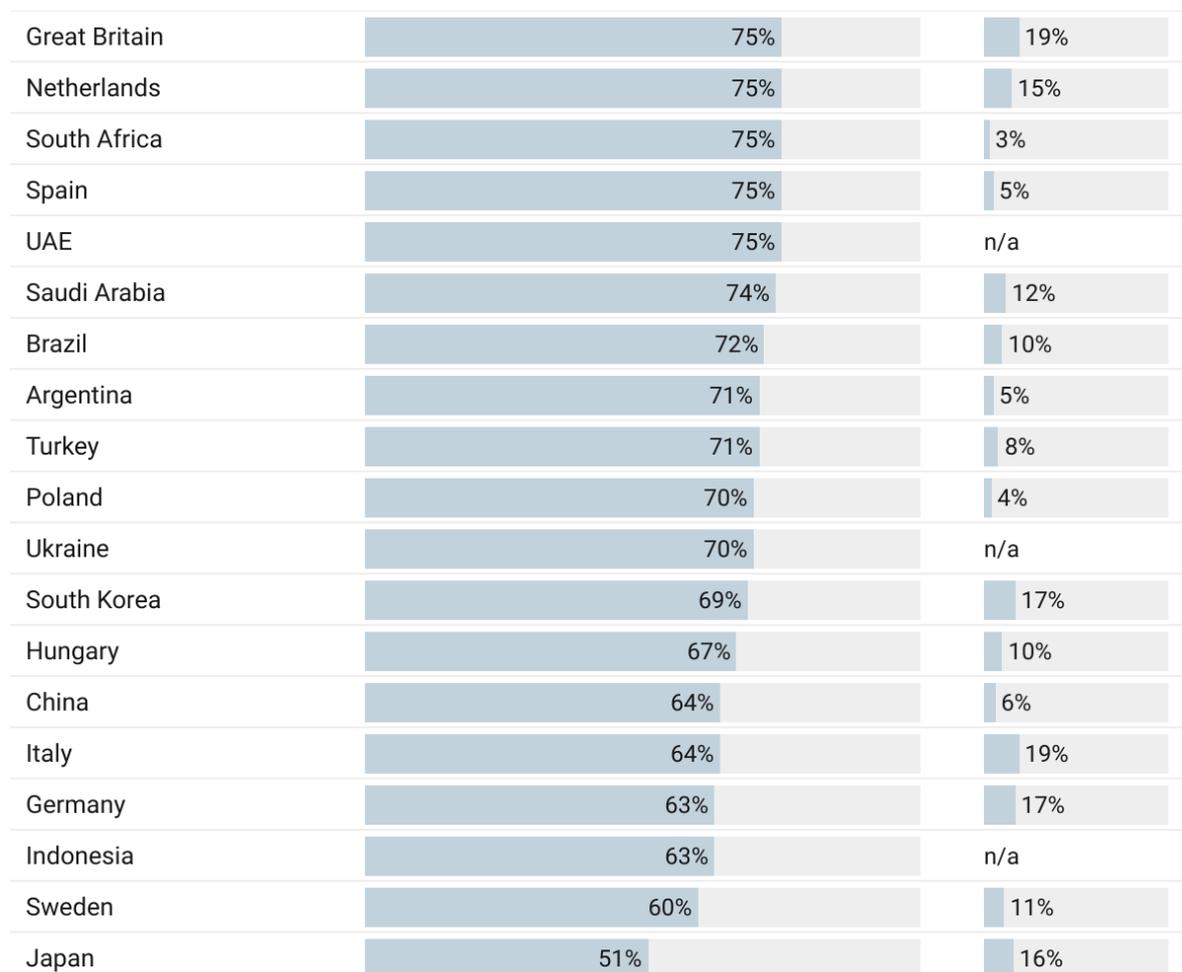
More than half of the people surveyed in the 33 countries by Ipsos between September 23 and October 7, 2022 expect that there could be a new world conflict before 2047. After the invasion of Ukraine in early February, the percentage of people expecting a global conflict increased year-over-year in all countries, from as low as 1 percentage point in Colombia (78%) to as high as 18 percentage points in Belgium (77%). Ukraine is new to this year's survey, and perhaps a little surprising given its proximity to a current conflict, only 70% of Ukrainians expect a global conflict similar to WWI or WWII in the next 25 years. Along with the increased expectation of a global conflict, there is an increase in support for strengthening the armed forces in several countries. Two in three (64%) somewhat agree or strongly agree that, given the dangers in the

world, their government needs to spend more on the capacity of its Armed Forces, an increase of 13 percentage points against last year. The country where there is a greater agreement to spend more on its Armed Forces is Ukraine (92%), followed by India (84%) and Poland (81%). Support for military spending increased in all countries year-over-year, from a 2-point increase in South Korea (71%) to 20 percentage points in Great Britain (71%).

World conflict involving superpower

Q: I expect in the next 25 years we could see another world conflict involving superpowers similar to World Wars 1 & 2 (% somewhat/strongly agree)

	2022	Change from 2021
Global Country Average	73%	10%
Australia	81%	8%
Ireland	80%	n/a
Mexico	80%	8%
Peru	80%	3%
India	79%	3%
Chile	78%	3%
Colombia	78%	1%
Malaysia	78%	4%
Thailand	78%	n/a
Belgium	77%	18%
Romania	77%	n/a
Canada	76%	13%
United States	76%	6%
France	75%	16%
Great Britain	75%	19%



Source: Ipsos's Global Advisor for the Halifax International Security Forum. 32,507 people surveyed online across 33 countries from Sept. 23 – Oct. 7, 2022.

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Despite this, the public opinion perceives the economy as a dominant weapon in conflicts. The percentage of people who somewhat or strongly agree with the statement: “Economic power is more important in world affairs than military power” declined one percentage point and settled at 77% by 2022. This year, the effectiveness of economic sanctions against Russia came under scrutiny and may have influenced some people's perceptions of economic versus military power. The percentage who believe that economic power is more important increased significantly in three countries: 4 points in the US (68%), 5 points in Saudi Arabia (81%) and 8 points in Peru (84%). At the other extreme, in eight countries a significant decrease was perceived compared to 2021: 4 points less in Argentina (78%); 5 in France (75%), Germany (74%) and Poland (73%); 6 in Japan (71%); 8 in Belgium (75%); and 9 in Sweden (73%) and Turkey (72%). Despite the declines, majorities in all countries (68% in the US to 86% in Thailand) somewhat or strongly agree that economic power is more important in

world affairs than military power. As for the study, it is a survey in 33 markets carried out by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 32,507 adults between the ages of 18 and 74 in the United States, Canada, Malaysia, South Africa, and Turkey; ages 20-74 in Thailand, ages 21-74 in Indonesia, and ages 16-74 in 27 other markets between September and October 2022.

The world public opinion seems to have become aware that the world is facing the risk of a third global conflict of similar dimensions to the two that took place in the 20th century. This is not the opinion that prevailed when Russia invaded Ukraine on February 24, 2022. At that time it was thought -both by the leaders and by public opinion- that a circumscribed and limited war was beginning, like those that had taken place after the fall communism (Balkan wars, Afghanistan, the two wars in Iraq, Syrian civil war, etc.). A few months later, when it began to be assumed that we were facing a war whose dimension and significance was greater than expected, we began to think about the limited wars of the Cold War, such as those in Korea and Vietnam. When the highest authorities in the Ukraine conflict - the NATO command on one side and the Russian President on the other - began to say publicly that the use of tactical nuclear weapons in Ukraine could not be ruled out, the public opinion ended assuming that there was a concrete risk of a third world war. NATO Secretary General Jens Stoltenberg himself said in December 2022 that there was a risk that the war in Ukraine would “get out of control”. The passage of time, thus, has increased the risk of a more widespread conflagration. Added to this is the emergence of other strategic-military points of tension that involve Asia, such as those of Taiwan, North Korea and Iran.

In conclusion: there is a growing perception in world public opinion that the world faces the risk of a third global war, like the two of the 20th century. More than half of the people polled in 33 countries on the 5 continents think this way and consider the possibility of a conflict of these characteristics at some point before 204. Despite this, the public opinion believes that the economy continues to dominate global conflicts, at a time when issues such as energy, food and semiconductors are involved in war. Finally, 10 months after Russia's invasion of Ukraine, the passage of time and references to the possible use of tactical nuclear weapons have increased the risk of global war according to the people.