MERICS Survey on European China Policy

The survey results are based on aggregate responses by 170 European China professionals and experts and more than 1,000 members of the wider international public participating in a MERICS survey conducted in December 2020 and early January 2021. The results were featured on 13 January 2021 at the “MERICS China Forecast 2021”. 
Controlling the economic shock of Covid-19

Q: In your view, what will be Europe’s dominant narrative regarding China’s economy in 2021?

- Market liberalization and opening
- China as an innovation powerhouse
- State control over the economy
- Economic stress (e.g. rise in inequality and unemployment)
- Economic recovery after Covid-19
- Other

Wider Public vs. Experts
Stability and self-reliance are keeping Beijing up at night

Q: In your opinion, what will be the focus of China’s domestic politics in 2021?

- Technological self-reliance: Wider Public (40%), Experts (40%)
- "Greening" the economy: Wider Public (5%), Experts (5%)
- Strengthening domestic consumption: Wider Public (20%), Experts (15%)
- Stability of the financial system: Wider Public (10%), Experts (8%)
- Socio-economic stability: Wider Public (30%), Experts (30%)
- Other: Wider Public (5%), Experts (5%)
No doubts left about Xi Jinping’s grip on power

Q: In your view, which course will China’s leadership take in 2021?

- Xi Jinping will continue to strengthen his grip on power
- The Chinese Communist Party (CCP) will reassert collective leadership over one-man rule
- Intra-party opposition to Xi will become publicly visible
- The Chinese Communist Party (CCP) will start to prepare for a change in leadership
- Other
Tensions with Taiwan seen as next flashpoint

Q: In your opinion, which of the following regions and countries will prove the biggest challenge for the Chinese Communist Party’s (CCP) leadership in 2021?

<table>
<thead>
<tr>
<th>Region</th>
<th>Wider Public</th>
<th>Experts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hong Kong</td>
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<td>Xinjiang</td>
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<td>Taiwan</td>
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<td>India</td>
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<tr>
<td>Other</td>
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</table>
**China will bet on becoming a regional power first**

Q: In your view, which country or group of countries will China prioritize in 2021 to foster partnerships?

<table>
<thead>
<tr>
<th>Country/Region</th>
<th>Wider Public</th>
<th>Experts</th>
</tr>
</thead>
<tbody>
<tr>
<td>The United States</td>
<td>10%</td>
<td>10%</td>
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<tr>
<td>The European Union</td>
<td>10%</td>
<td>20%</td>
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<tr>
<td>Russia</td>
<td>5%</td>
<td>15%</td>
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<tr>
<td>ASEAN</td>
<td>50%</td>
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<tr>
<td>The Middle East</td>
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<td>Africa</td>
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<td>10%</td>
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<tr>
<td>None of the above</td>
<td>5%</td>
<td>5%</td>
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<tr>
<td>Other</td>
<td>5%</td>
<td>5%</td>
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Economic ties will remain stable despite sour politics

Q: Overall, how do you expect Europe-China relations to evolve in 2021?

Political relations will

- Improve
- Remain stable
- Deteriorate

Economic relations will

- Improve
- Remain stable
- Deteriorate
There is hope for EU-China cooperation on investment and climate but not on fighting Covid-19

Q: In your view, the EU and China in 2021 will achieve a breakthrough by...

- Signing a Comprehensive Agreement on Investment
- Cooperating tangibly on the path towards the Paris climate goals
- Reforming the global trade system (WTO)
- Cooperating on Covid-19 vaccine research and distribution
- None of the above
- Other
China’s coercive diplomacy is Europe’s main concern

Q: In your opinion, EU-China relations in 2021 will most likely be burdened by...

1. China’s coercive diplomacy
   - Score: 5.63
   - Experts: 5.56

2. China’s human rights violations
   - Score: 5.22
   - Wider Public: 5.17

3. Continued deterioration of US-China relations
   - Score: 5.05
   - Wider Public: 5.14

4. More assertive EU policy
   - Score: 4.7
   - Wider Public: 4.93

5. Lack of progress in CAI negotiations
   - Score: 4.68
   - Wider Public: 4.65
Human rights and supply chain diversification should top the EU’s China agenda

Q: In your opinion, how important will the following actions be for EU countries in 2021?

<table>
<thead>
<tr>
<th>Experts</th>
<th>Weighted average</th>
<th>Wider Public</th>
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</tbody>
</table>

- Adopting sanctions against China for human rights violations in Hong Kong and Xinjiang: 3.93 (38% experts, 3.91 (35% wider public)
- Diversifying critical supply chains away from China: 3.89 (35% experts, 3.81 (35% wider public)
- Imposing levies on CO2-intensive imports: 3.61 (31% experts, 3.69 (31% wider public)
- Revising rules for research & innovation cooperation with Chinese actors affiliated with the party state: 3.23 (15% experts, 3.3 (17% wider public)
- Creating tools to address China’s disinformation campaigns: 3.18 (20% experts, 3.28 (17% wider public)
- Placing Chinese social media platforms under greater scrutiny: 3.03 (20% experts, 2.81 (17% wider public)
- Deploying troops to the Indo-Pacific: 2.04 (20% experts, 1.86 (20% wider public)

*Not important* | *Somewhat important* | *Very important*

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Germany might get tougher on China after federal elections

Q: In your view, to what extent will the German national election in the latter half of 2021 impact Germany’s China policy?
The EU and the US will get closer under Biden

Q: In 2021, the EU and the majority of its member states* will draw closer to...

*Still including the UK

![](chart.png)
The EU’s bit-er divorce from China? Decoupling the digital economy

Q: In your view, which of the following aspects of the EU-China relationship do you expect to “decouple” most in 2021?

- Trade and investment
- Critical supply chains
- Innovation and R&D
- Digital infrastructure and data
- None of the above
- Other

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US-China relations in 2021: intensified tech and cyber competition

Q: In your view, which of these issues will lead to convergence and which to divergence between the US administration and the Chinese leadership?

Experts

- Paris climate goals
  - Divergence: 7%, Status quo: 13%, Convergence: 18%
  - Divergence: 11%, Status quo: 35%, Convergence: 45%
- Counterterrorism and fight against terrorism
  - Divergence: 14%, Status quo: 29%, Convergence: 34%
  - Divergence: 17%, Status quo: 41%, Convergence: 50%
- Open trade
  - Divergence: 18%, Status quo: 35%, Convergence: 45%
  - Divergence: 5%, Status quo: 11%, Convergence: 37%
- Technological standardization
  - Divergence: 34%, Status quo: 41%, Convergence: 50%
- Governance of the internet and cyberspace
  - Divergence: 50%, Status quo: 37%, Convergence: 11%

Wider Public

- Paris climate goals
  - Divergence: 6%, Status quo: 12%, Convergence: 18%
  - Divergence: 14%, Status quo: 29%, Convergence: 39%
- Counterterrorism and fight against terrorism
  - Divergence: 15%, Status quo: 29%, Convergence: 26%
  - Divergence: 22%, Status quo: 25%, Convergence: 10%
- Open trade
  - Divergence: 12%, Status quo: 35%, Convergence: 24%
- Technological standardization
  - Divergence: 35%, Status quo: 25%, Convergence: 10%
- Governance of the internet and cyberspace
  - Divergence: 45%, Status quo: 36%, Convergence: 12%

Q: In your opinion, will other countries in 2021 draw lessons from any of the following policies pursued by China?

- Mass surveillance through technology
- More rigorous Covid-19 management
- Repression of national minorities
- Reliance on coal energy

**Experts**

- None at all:
  - 100%
  - 50%
  - 0%

- Some:

- A lot:

**Wider Public**

- None at all:
  - 0%
  - 50%
  - 100%

- Some:

- A lot:
Covid-19 in 2021: the US and Europe face uphill battle

Q: In your view, which region by the end of 2021 will have the most Covid-19 cases per 100,000 people?
Q: In your opinion, what climate agenda should Europe focus on with China in 2021?

- A new, cooperative grand bargain involving climate goals
- A narrow agenda of getting China to live up to its domestic agenda and its pledges to “green” BRI
- A name-and-shame approach that highlights the shortcomings of China’s climate goals
- Other
Vaccine diplomacy in 2021: a new arena for heightened competition with China

Q: In your view, how likely is “vaccine diplomacy” to deepen global divisions?

**Wider Public**

- Very unlikely: 3%
- Unlikely: 17%
- Neutral: 28%
- Likely: 44%
- Very likely: 8%

**Experts**

- Very unlikely: 2%
- Unlikely: 16%
- Neutral: 27%
- Likely: 45%
- Very likely: 9%
Origin of survey participants (1)

Survey respondents consisted of 1,016 members of the wider public and 169 experts.

**Wider Public**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Under 18</td>
<td>2%</td>
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<tr>
<td>18-24</td>
<td>21%</td>
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<td>25-34</td>
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<td>35-44</td>
<td>19%</td>
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<td>45-54</td>
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<td>55-64</td>
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**Experts**

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**Degree Distribution**

- **Graduate degree**: 88%
- **Bachelor degree**: 7%
- **Associate degree**: 1%
- **Some college but no degree**: 2%
- **High school degree or equivalent (e.g., GED)**: 2%
- **Less than high school degree**: 0%

**Gender Distribution**

- **Male**: 62%
- **Female**: 34%
- **I prefer not to answer**: 3%
- **Non-binary/third gender**: 1%
- **Other**: 0%
Origin of survey participants (2)

Q: Which of the following best describes your current professional affiliation?

- Trade union
- NGO
- Company
- Media
- Think tank
- Academic institution
- Political party
- Government
- Diplomatic service
- EU institution
- Other international organization
- Other

<table>
<thead>
<tr>
<th>Origin of Survey Participants</th>
<th>Wider Public</th>
<th>Experts</th>
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<tbody>
<tr>
<td>Trade union</td>
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<td>NGO</td>
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<tr>
<td>Company</td>
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<td>Think tank</td>
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<td>Academic institution</td>
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<td>Political party</td>
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<td>Government</td>
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<td>Diplomatic service</td>
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<td>Other international organization</td>
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<tr>
<td>Other</td>
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</tbody>
</table>
Origin of survey participants (3)

Q: What is your nationality?
Q: In which country is your organization headquartered?
Contact
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