MERICS Survey on European China Policy

Number of participants: 850 (European China experts and watchers)
The survey was conducted online in December 2021
Q: Which course do you see China’s leadership taking in 2022?

China’s leadership:
Xi likely to consolidate power this year

85%
4%
4%
3%
3%
1%
0%
80%
6%
3%
6%
4%
2%
1%
0%

Xi Jinping will further strengthen his grip on power

Intra-party opposition towards Xi will become publicly visible

The Chinese Communist Party (CCP) will start preparing for a change in leadership

The CCP will reassert collective leadership over one-man rule

None of the above

N/A

Other

China Experts Wider Public
Q: Do you expect Xi Jinping to use the following slogans more or less frequently in 2022 compared to 2021?

**China Experts**

- **Common Prosperity**
  - Much less: 4%
  - Somewhat less frequently: 17%
  - No change: 37%
  - Somewhat more frequently: 42%

- **Self-reliance**
  - Much less: 6%
  - Somewhat less frequently: 21%
  - No change: 44%
  - Somewhat more frequently: 28%

- **Dual Circulation**
  - Much less: 1%
  - Somewhat less frequently: 10%
  - No change: 44%
  - Somewhat more frequently: 31%
  - Much more frequently: 11%

**Wider Public**

- **Common Prosperity**
  - Much less: 2%
  - Somewhat less frequently: 4%
  - No change: 17%
  - Somewhat more frequently: 37%
  - Much more frequently: 38%

- **Self-reliance**
  - Much less: 2%
  - Somewhat less frequently: 4%
  - No change: 17%
  - Somewhat more frequently: 46%
  - Much more frequently: 31%

- **Dual Circulation**
  - Much less: 2%
  - Somewhat less frequently: 10%
  - No change: 36%
  - Somewhat more frequently: 31%
  - Much more frequently: 13%
Economic development:
State control expected to set tone

Q: In your view, what will shape China’s economic development in 2022?

- State control over the economy: 66%
- Economic stress (e.g., rise in inequality and unemployment): 10%
- Economic recovery after Covid-19: 9%
- Other: 8%
- China as an innovation powerhouse: 6%
- None of the above: 1%
- Market liberalization and opening: 0%

China Experts ■ Wider Public
Domestic priorities:
Energy supply and stricter entertainment regulations

Q: In your view, what will be the domestic priorities for the CCP leadership in 2022?*

- Ensure sufficient energy supply
- Enforce stricter entertainment and online content management rules
- Reduce income inequality
- Strengthen anti-corruption campaign
- Provide affordable housing for all
- Reform public pensions

* Weighted averages
Key economic policy: Stability and tech self-reliance top of the list

Q: In your opinion, what will China’s key economic policy priority be in 2022?

- Socio-economic stability: 41% (China Experts), 55% (Wider Public)
- Technological self-reliance: 32% (China Experts), 25% (Wider Public)
- Financial stability: 12% (China Experts), 10% (Wider Public)
- Domestic consumption: 12% (China Experts), 9% (Wider Public)
- Other: 2% (China Experts), 1% (Wider Public)
- N/A: 0% (China Experts), 0% (Wider Public)
- Carbon reduction targets: 0% (China Experts), 0% (Wider Public)
- None of the above: 0% (China Experts), 0% (Wider Public)
**Regulation:**

“Big Tech” should prepare for tighter control

Q: By the end of 2022 what, in your view, will best describe the relationship between the CCP and big Chinese technology companies?

- **China Experts**
- **Wider Public**

<table>
<thead>
<tr>
<th>Option</th>
<th>China Experts</th>
<th>Wider Public</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intensified state guidance of companies and increased control over executive-level decisions</td>
<td>87%</td>
<td>79%</td>
</tr>
<tr>
<td>Forced break-ups of large conglomerates and cases of partial nationalisation</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>Decreased regulatory action and strengthened market mechanisms</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>None of the above</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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*MERICS CHINA FORECAST 2022*
Game over:
Olympics are expected to worsen China’s image

Q: Will the Beijing Winter Olympics 2022 improve or worsen China’s reputation in Europe?

- Significantly worsen
- Somewhat worsen
- No changes
- Somewhat improve
- Significantly improve

China Experts:
- 7% significantly worsen
- 55% somewhat worsen
- 30% no change
- 5% somewhat improve
- 1% significantly improve

Wider Public:
- 11% significantly worsen
- 38% somewhat worsen
- 40% no change
- 8% somewhat improve
- 1% significantly improve
EU-China relations: Stable economy but possible political instability ahead

Q: Overall, how do you expect Europe-China relations to evolve in the next year?*

Political relations will

- Improve considerably: 32%
- Somewhat improve: 33%
- Remain stable: 42%
- Somewhat deteriorate: 15%
- Deteriorate considerably: 11%

Economic relations will

- Improve considerably: 9%
- Somewhat improve: 18%
- Remain stable: 53%
- Somewhat deteriorate: 19%
- Deteriorate considerably: 14%

* Merged responses of China experts and the wider public
Post-Covid: Eageriness to travel to China again

Q: In 2022, if Covid-19 related measures were lifted both in your home country and China, would you travel to China?

Yes, for business and/or study purposes: 50% (China Experts), 47% (Wider Public)
No: 30% (China Experts), 32% (Wider Public)
Yes, as tourist: 13% (China Experts), 19% (Wider Public)
Yes, to visit friends and family: 12% (China Experts), 15% (Wider Public)
N/A: 5% (China Experts), 1% (Wider Public)
Yes, for the Olympic Winter Games: 4% (China Experts), 1% (Wider Public)
Other: 6% (China Experts), 4% (Wider Public)
The EU’s China policy: New German government considered decisive factor

Q: Please rank the following events in terms of their importance for EU-China relations in 2022*

<table>
<thead>
<tr>
<th>China Experts</th>
<th>Wider public</th>
</tr>
</thead>
<tbody>
<tr>
<td>New German government</td>
<td>New German government</td>
</tr>
<tr>
<td>French elections</td>
<td>The EU’s “Strategic Compass”</td>
</tr>
<tr>
<td>French EU Presidency</td>
<td>NATO Strategic Concept</td>
</tr>
<tr>
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<td>German G7 presidency</td>
</tr>
<tr>
<td>NATO Strategic Concept</td>
<td>French elections</td>
</tr>
<tr>
<td>German G7 presidency</td>
<td>French EU Presidency</td>
</tr>
<tr>
<td>European Defence Summit</td>
<td>European Defence Summit</td>
</tr>
<tr>
<td>EU - AU Summit</td>
<td>EU - AU Summit</td>
</tr>
<tr>
<td>Hungarian elections</td>
<td>Hungarian elections</td>
</tr>
</tbody>
</table>

* Average ranks from 1 to 9
Q: Which member state / institution should play a greater role in shaping European China policy?

**The EU’s China policy: Commission should lead**

European Commission: 55%
European Parliament: 46%
Germany: 42%
Council of the European Union: 36%
France: 25%
Italy: 12%
Lithuania: 10%
China Experts: 4%
Wider Public: 3%
No (please specify): 9%
None of the above: 2%

* Multiple answers were possible
The EU’s China policy:
Economic security and climate cooperation should be main drivers

Q: What should Europe focus on in its China policy in 2022?*

- Enhance EU’s economic security
- Enhance climate cooperation
- Criticize information manipulation and disinformation
- Raise human rights related issues
- Strengthen regional cooperation outside of the EU
- Restart ratification process of the CAI
- Enhance economic exchange
- Broaden cultural exchanges
- Enhance science, technology and innovation cooperation
- Impose further economic sanctions
- Other
- Remove / soften standing sanctions
- N/A
- None of the above

* Multiple answers were possible
**EU-China trade:**
High hopes for green tech

Q: Will the EU either decrease or increase trade, investment and R&D with China with regard to the following goods and technologies in 2022?

<table>
<thead>
<tr>
<th>Goods and Technologies</th>
<th>China Experts</th>
<th>Wider Public</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green energy technology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pharmaceuticals and medical devices</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial machinery and software</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Semiconductors and chips</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5G technology</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Decrease considerably:**
- **Decrease somewhat:**
- **No changes:**
- **Increase somewhat:**
- **Increase considerably:**

- **EU-China trade:** High hopes for green tech

- **Decrease considerably:**
- **Decrease somewhat:**
- **No changes:**
- **Increase somewhat:**
- **Increase considerably:**
Q: Would you support or oppose the following options for the EU’s economic approach towards China in 2022?

- Strong support for cooperation with like-minded countries
- Restrictions on China’s EU market access as leverage for China’s opening
- A stronger push for bilateral engagement with China to gain better domestic market access
- A revived EU-China Comprehensive Agreement on Investment

* Weighted averages
Q: In 2022, the EU and the majority of its member states should prioritize

Diversifying its partnerships globally (e.g., in Indo-Pacific or in Africa) - 50% (54%)
Aligning with the US - 20% (17%)
Focusing on internal affairs - 15% (14%)
Other - 7% (4%)
Aligning with China - 5% (3%)
Aligning with Russia - 2% (2%)
None of the above - 3% (3%)
N/A - 1% (0%)
### Survey statistics:

#### Origin of survey participants (1)

Survey respondents consisted of 733 members of the wider public and 117 experts.

#### Demographic Breakdown

<table>
<thead>
<tr>
<th>Age Group</th>
<th>China Experts</th>
<th>Wider Public</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>18-24</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>25-34</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>35-44</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>45-54</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>55-64</td>
<td>10%</td>
<td>18%</td>
</tr>
<tr>
<td>65+</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Survey statistics:
Origin of survey participants (2)

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Survey statistics:
Origin of survey participants (3)

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Survey statistics:
Origin of survey participants (4)

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<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>PERCENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>43%</td>
</tr>
<tr>
<td>China</td>
<td>13%</td>
</tr>
<tr>
<td>France</td>
<td>5%</td>
</tr>
<tr>
<td>Belgium</td>
<td>4%</td>
</tr>
<tr>
<td>Denmark</td>
<td>4%</td>
</tr>
<tr>
<td>Sweden</td>
<td>4%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>4%</td>
</tr>
<tr>
<td>Italy</td>
<td>3%</td>
</tr>
<tr>
<td>Austria</td>
<td>2%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>2%</td>
</tr>
</tbody>
</table>
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**Origin of survey participants (5)**

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>PERCENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>42%</td>
</tr>
<tr>
<td>China</td>
<td>10%</td>
</tr>
<tr>
<td>United States of America</td>
<td>7%</td>
</tr>
<tr>
<td>Belgium</td>
<td>4%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>3%</td>
</tr>
<tr>
<td>France</td>
<td>3%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>3%</td>
</tr>
<tr>
<td>Italy</td>
<td>3%</td>
</tr>
<tr>
<td>Austria</td>
<td>2%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2%</td>
</tr>
</tbody>
</table>