Survey results

Number of participants: 650
The survey was conducted online in November-December 2023
Part 1: China’s Domestic Development

Greater state control, less pragmatism, and high pressure on the economy
State control and economic crisis pressure China’s economy

Q1: In your view, which of the following will shape China’s economic development the most in 2024? Select up to three answers

- Economic security and geo-economic competition (e.g. responding to decoupling, de-risking measures) - 58.8%
- Increasing state control over the economy - 46.5%
- Economic crisis (e.g. financial crisis, real estate crisis) - 46.5%
- Economic pressure on society (e.g. rise in inequality and unemployment) - 44.2%
- Global economic slowdown - 20.8%
- Geopolitical risks (fallout of conflicts, e.g. Russian invasion of Ukraine, Israel-Hamas war) - 20.5%
- Innovation powerhouse agenda - 17.4%
- Market liberalization and opening up - 5.9%
Weakened consumption and debt crisis clouds China’s growth

Q2: In your view, which of the following are significant risks for China’s growth outlook in 2024?
China’s biggest R&D obstacle remains loss of tech access

Q3: In your view, which of the following are significant risks for China’s growth outlook in 2024?
Boosting while enhancing control over economy remains priority

Q4: In your view, what level of importance do you expect the CCP leadership to attach to the following domestic issues in 2024?
Securitization over pragmatism in leadership thinking

Q5: Which general course do you see China’s leadership taking in 2024?

- Securitization of everything with the trade off of growth and infliction of social costs: 67%
- Internal and external challenges mean that the CCP will be more pragmatic: 22%
- Intra-party opposition towards Xi will come with demands for a more fundamental change: 4%
- None of the above: 5%
Economic independence stays atop CCP’s security agenda

Q6: In 2024, what security concerns will top Chinese leadership’s comprehensive security agenda?

- Securitizing against dependence and de-risking policies
- Potential domestic dissent and instability
- Taiwan Strait tensions
- Perceived containment from the US (e.g., fears of NATO expansion to Asia)
- South China Sea disputes
- Russia-China security cooperation

* Weighted averages
Economic stress creates protest potential

Q7: In your view, which of the following issues are likely to see public dissent or protests in 2024?
Common Prosperity: No substantial steps expected

Q8: Will substantial new policies to address inequality be rolled out under the label of “common prosperity” in 2024?

- Yes, new policies and legislation will be put forth: 12%
- No substantial steps will be taken despite increased rhetoric: 58%
- The party state will pressure high-income groups and companies to donate: 18%
- Other (a mix of policies): 3%
Part 2: Foreign policy & EU-China relations

Stable ties with Russia, deteriorating relations with the West
China’s relations with Europe: Slight deterioration expected

Q9: In your view, how will China’s relations with the EU and the following member states develop in 2024?

* Weighted averages
China’s relations with non-EU countries: mostly unchanged

Q10: In your view, how will China’s relations with the following non-EU states develop in 2024?

* Weighted averages
Pro-Russian status quo to remain in place

Q11: In your view, how will China’s position towards Russia develop in 2024 in the context of Russia’s war against Ukraine?

- Expand support for Russia with lethal military equipment: 10%
- Expand support for Russia politically and economically: 37%
- Status quo from 2023 remains with the same level of support: 48%
- Decrease in support for Russia: 4%
Result of Taiwan’s election has high impact on China’s Cross-Strait relations policy

Q12: In your view, how decisive will the impact of the outcome of the 2024 elections in Taiwan be on China’s policy towards the island in the next four years?

0= least significant ; 10= most significant
US election result has high impact on China’s policy to Taiwan

Q13: In your view, how decisive will be the impact of the outcome of the 2024 US elections on China’s policy towards Taiwan in the following four years?

0= least significant ; 10= most significant

Significance of US Election in 2024

7.50
EU-China: decrease in both political and economic relations

Q14: How do you expect EU-China relations to evolve in 2024?

- **Political relations**
  - Improve considerably: 20%
  - Somewhat improve: 33%
  - Remain stable: 43%
  - Somewhat decrease: 3%
  - Decrease considerably: 0%

- **Economic relations**
  - Improve considerably: 28%
  - Somewhat improve: 32%
  - Remain stable: 36%
  - Somewhat decrease: 2%
  - Decrease considerably: 3%

- **People-to-people exchanges**
  - Improve considerably: 7%
  - Somewhat improve: 36%
  - Remain stable: 28%
  - Somewhat decrease: 24%
  - Decrease considerably: 3%
EU-China relations: challenges on many levels

Q15: In 2024, the biggest challenges for the EU in EU-China relations will be:

- EU's China policy across parliamentary and commission mandates: 4.6
- Economic coercion from China: 4.0
- Tech transfers and/or loss of tech competitiveness vis-à-vis China: 3.6
- China's role within Russia's war in Ukraine: 3.5
- Instabilities in the Taiwan Strait: 3.0
- China's interference in European politics: 2.0
- Beijing's growing influence in the Global South: 1.9
- Human rights issues (e.g. the situation in Xinjiang): 1.7
- Engaging on climate change: 1.6
- EU unity on China: 1.1
- Navigating US-China competition: 1.1
Q16: In 2024, in which areas are the EU and its member states likely to be able to make relevant progress with regard to cooperation with China?

<table>
<thead>
<tr>
<th>Area</th>
<th>Score</th>
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<tbody>
<tr>
<td>Climate change</td>
<td>5.1</td>
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<tr>
<td>Business opportunities for companies</td>
<td>4.4</td>
</tr>
<tr>
<td>Trade, investment, and market access agreements</td>
<td>2.5</td>
</tr>
<tr>
<td>Cultural cooperation</td>
<td>2.1</td>
</tr>
<tr>
<td>Debt relief for developing countries</td>
<td>1.6</td>
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<tr>
<td>Health policies</td>
<td>1.5</td>
</tr>
<tr>
<td>None</td>
<td>1.5</td>
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<tr>
<td>Peace and stability</td>
<td>0.8</td>
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<tr>
<td>Science and technology</td>
<td>0.8</td>
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<tr>
<td>Global development policy</td>
<td>0.6</td>
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<tr>
<td>Global Governance</td>
<td>0.3</td>
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</tbody>
</table>
EU’s more hawkish policy in 2024

Q17: In 2024, the EU member states will overall pursue a China policy that will be:

- **Significantly more agreeable towards China**: 0.3%
- **Somewhat more agreeable with China**: 12.9%
- **About the same**: 40.1%
- **Somewhat more assertive**: 42.2%
- **Significantly more assertive**: 3.5%
Diversifying global partnerships for EU beyond US and China

Q18: In 2024, internationally the EU and its member states should prioritize...

- Aligning more with the US: 16.2%
- Diversifying its partnerships globally (e.g., in Asia Pacific or in Africa): 52.0%
- Leveraging position between the US and China: 20.0%
- Rebuilding trust with China: 9.2%
Mixed view on the future of transatlantic cooperation on China

Q19: How do you expect the transatlantic cooperation on China to develop in the run-up to the US elections in 2024 compared to 2023?

- Strong increase: 2.5%
- Some increase in alignment: 21.5%
- No clear change: 41.3%
- Some decrease in alignment: 22.4%
- Strong decrease: 4.8%
- Don’t know: 6.9%
EU needs greater effort to implement de-risking

Q20: How do you assess EU efforts and progress achieved so far in implementing de-risking agenda?

0 = lowest; 10 = highest

Assessment on EU's derisking effort: 4.00
Mixed view over EU’s de-risking priorities

Q21: In 2024, the EU’s de-risking agenda should prioritize...

- Developing new policy tools for tackling dependencies and risks related to China: 28.6%
- Strengthening the existing tools through expanding their scope and applicability: 23.9%
- Building more efficient political mechanisms for using policy tools (e.g. for member states’ consensus): 33.0%
- Don’t know: 9.0%
EU-China relations in next five years: economic relations stay neutral, political relations are more pessimistic

Q22: How do you expect EU-China political relations to look in 5 years time?
Q23: How do you expect EU-China economic relations to look in 5 years time?

0 = most negative; 10 = most positive
Alternative to China-supply chain is mostly supported

Q24: What is your position on the following EU measures linked to the EU’s de-risking towards China in 2024?

- Conducting anti-subsidy investigations into Chinese exports to Europe: 5% decrease considerably, 8% decrease somewhat, 13% no changes, 33% increase somewhat, 36% increase considerably
- Developing an outbound investment screening mechanism: 6% decrease considerably, 8% decrease somewhat, 15% no changes, 32% increase somewhat, 34% increase considerably
- Increasing export controls of key technologies: 5% decrease considerably, 10% decrease somewhat, 9% no changes, 27% increase somewhat, 47% increase considerably
- Negotiating trade agreements with new partners (e.g. India): 1% decrease considerably, 3% decrease somewhat, 11% no changes, 26% increase somewhat, 56% increase considerably
- Creating alternative supply chains for strategic goods with dependency on China: 3% decrease considerably, 2% decrease somewhat, 5% no changes, 20% increase somewhat, 69% increase considerably
Mixed view over likeliness of a future major EU policy on China

Q25: A release of a new major EU-level policy document on China policy over the course of the next 3 years is...
Survey statistics: Origin of survey participants (1)

Q29: How often do you engage with China-related topics professionally?

- **On a daily basis**: 56.3%
- **Several times a week**: 22.2%
- **Several times a month**: 11.3%
- **Once a month or less**: 4.8%
- **I don’t engage with China professionally**: 4.3%
Survey statistics: Origin of survey participants (2)

Q30: Which statement best describes your engagement with China-related topics?

- I have spent years focusing on China-related topics in my career or research: 62.7%
- I often engage with China professionally, although it is not the key focus of my work or research: 20.5%
- I have strong personal interest in China-related topics, but do not engage with them often in a professional capacity: 12.3%
- I follow China-related topics on the news without particular focus on them: 2.8%
- I have limited interest in China-related topics: 0.5%
Survey statistics: Origin of survey participants (3)

Survey respondents consisted of 650 participants.
Survey statistics: Origin of survey participants (4)

Survey respondents consisted of 650 participants

- Company: 23%
- Academic institution: 24%
- Think tank: 13%
- Government: 9%
- Media: 7%
- Diplomatic service: 6%
- NGO: 5%
- EU institution: 2%
- N/A: 3%
- Other (please specify): 7%
- Political party: 1%
- Other international institution: 1%
- None of the above: 1%
- Trade union: 0%
Survey statistics: Origin of survey participants (5)

Survey respondents consisted of 650 participants

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>PERCENT</th>
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<tbody>
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<td>Germany</td>
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<tr>
<td>China</td>
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<td>United States</td>
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<tr>
<td>Belgium</td>
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<tr>
<td>United Kingdom</td>
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<td>France</td>
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<tr>
<td>Poland</td>
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<tr>
<td>Netherlands</td>
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<tr>
<td>Sweden</td>
<td>3%</td>
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<tr>
<td>Czech Republic</td>
<td>3%</td>
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</tbody>
</table>
Survey statistics: Origin of survey participants (6)

Survey respondents consisted of 650 participants

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<tr>
<th>COUNTRY</th>
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<tr>
<td>Germany</td>
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<tr>
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<td>United Kingdom</td>
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<td>France</td>
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<td>Austria</td>
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<td>Singapore</td>
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Contact
MERICS | Mercator Institute for China Studies
Klosterstraße 64
10179 Berlin
Tel.: +49 30 3440 999 0
Mail: info@merics.de
www.merics.org

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