



# MERICS

# CHINA FORECAST

# 2021

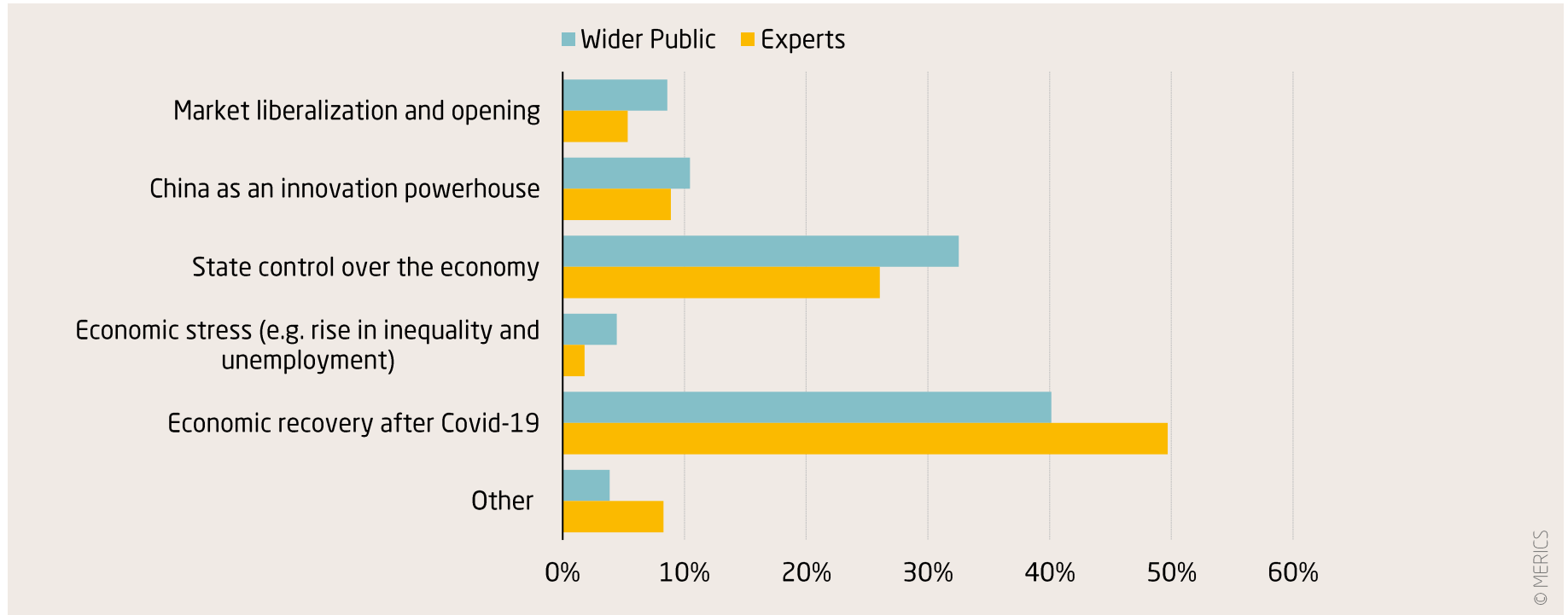
## **MERICS Survey on European China Policy**

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



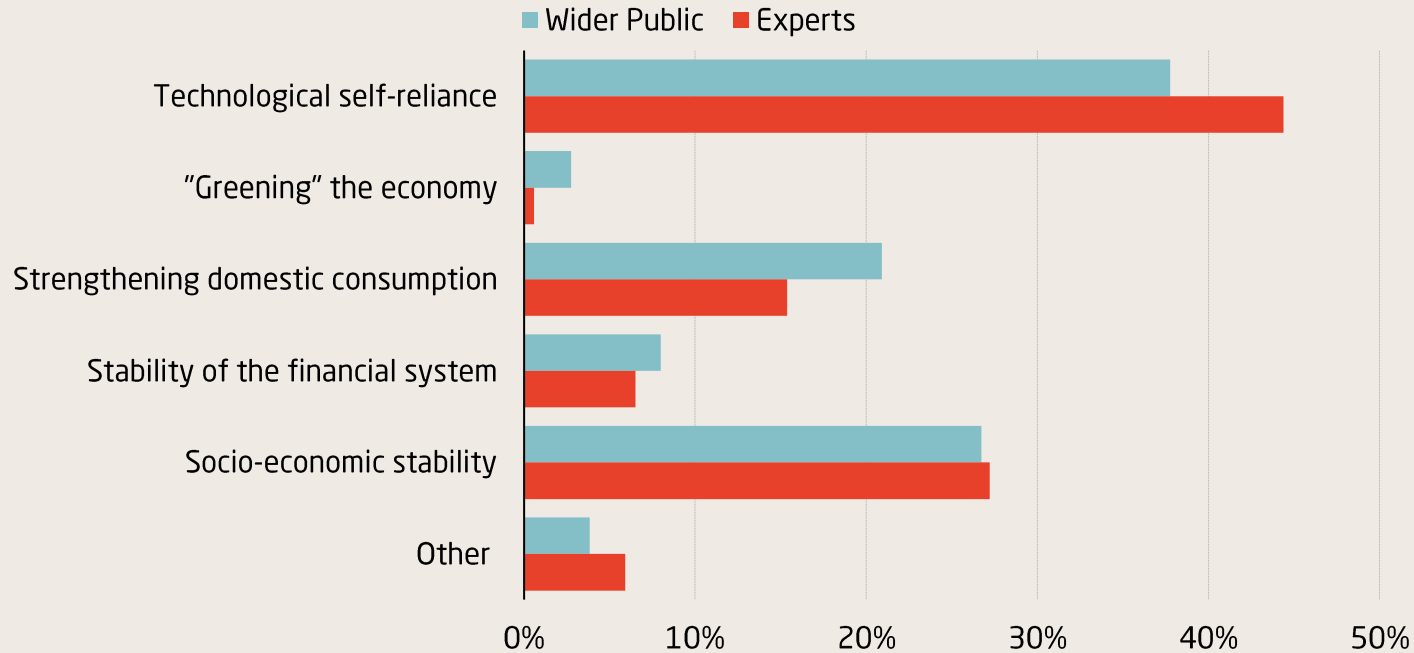
Q: In your view, what will be Europe's dominant narrative regarding China's economy in 2021?



# Stability and self-reliance are keeping Beijing up at night



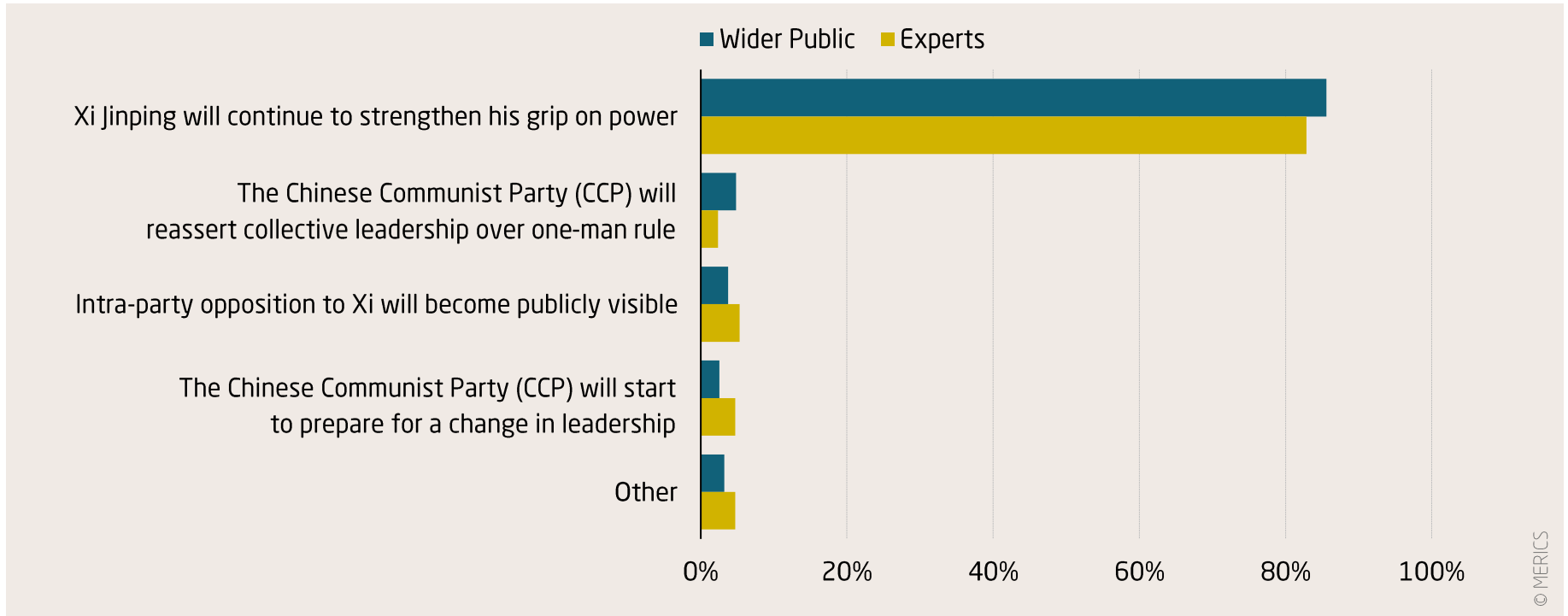
Q: In your opinion, what will be the focus of China's domestic politics in 2021?



# No doubts left about Xi Jinping's grip on power



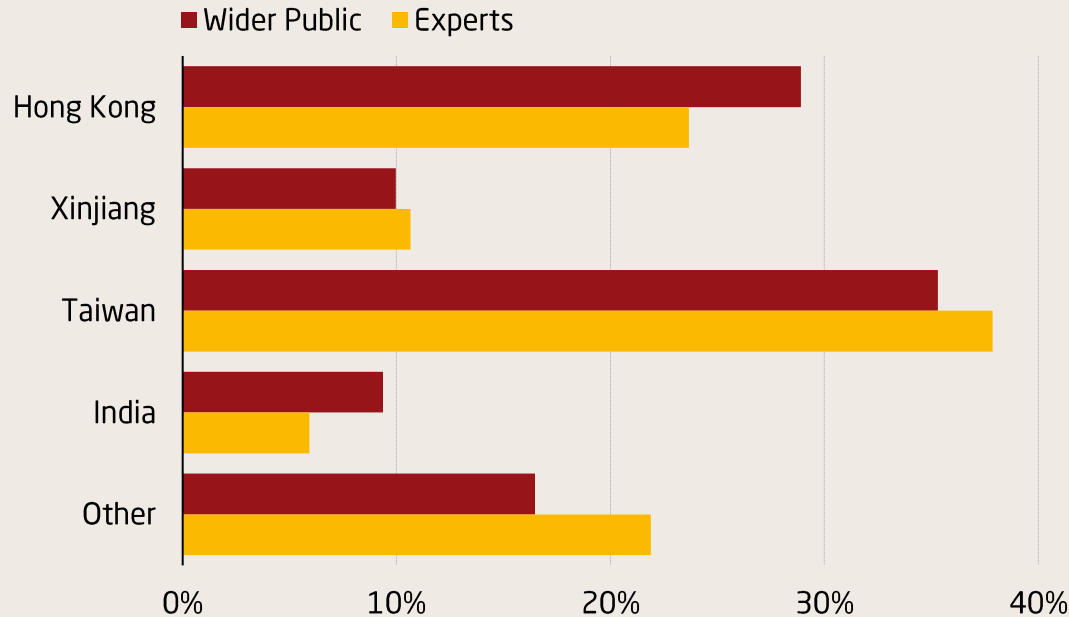
Q: In your view, which course will China's leadership take in 2021?



# Tensions with Taiwan seen as next flashpoint



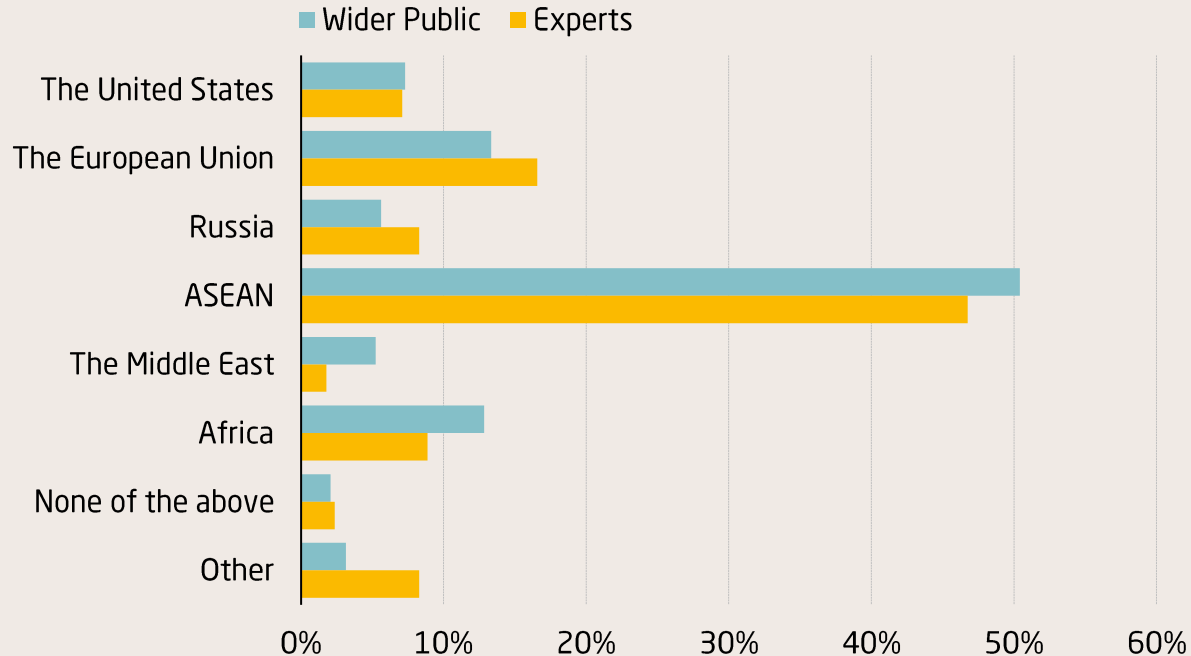
Q: In your opinion, which of the following regions and countries will prove the biggest challenge for the Chinese Communist Party's (CCP) leadership in 2021?



# China will bet on becoming a regional power first



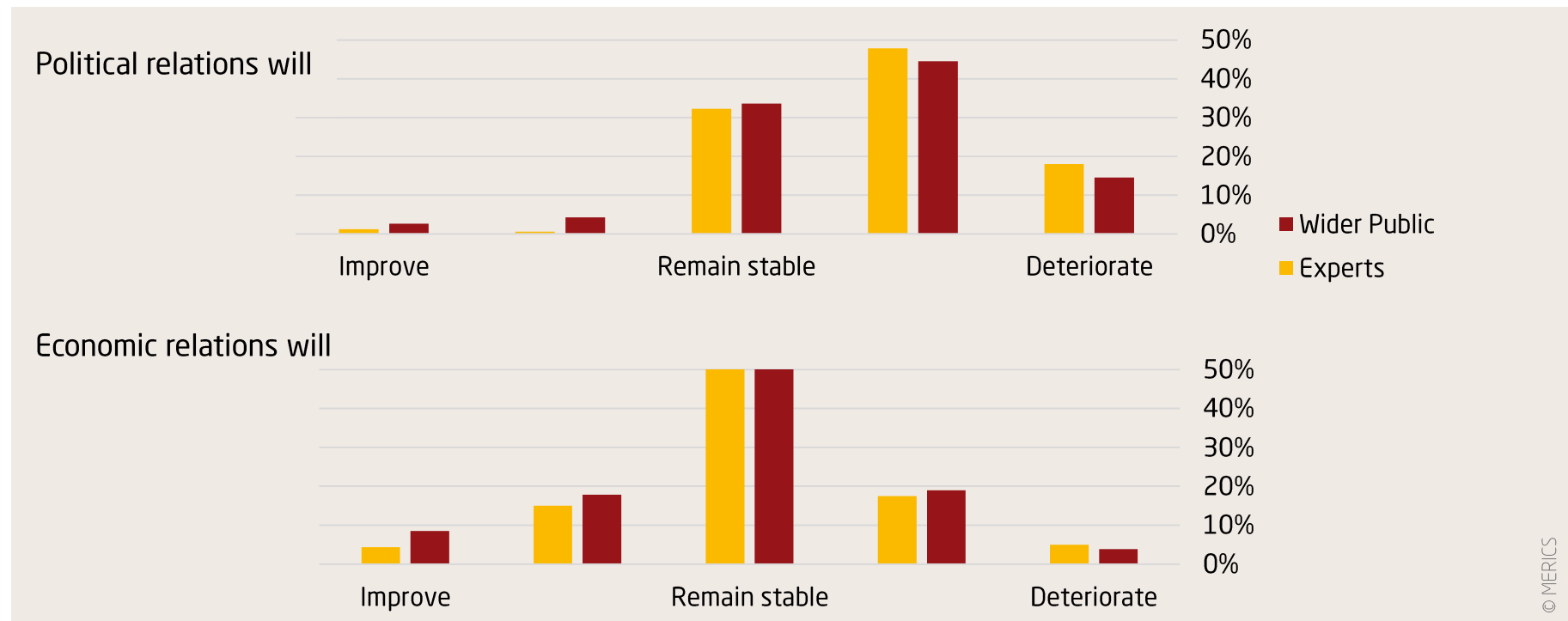
Q: In your view, which country or group of countries will China prioritize in 2021 to foster partnerships?



# Economic ties will remain stable despite sour politics



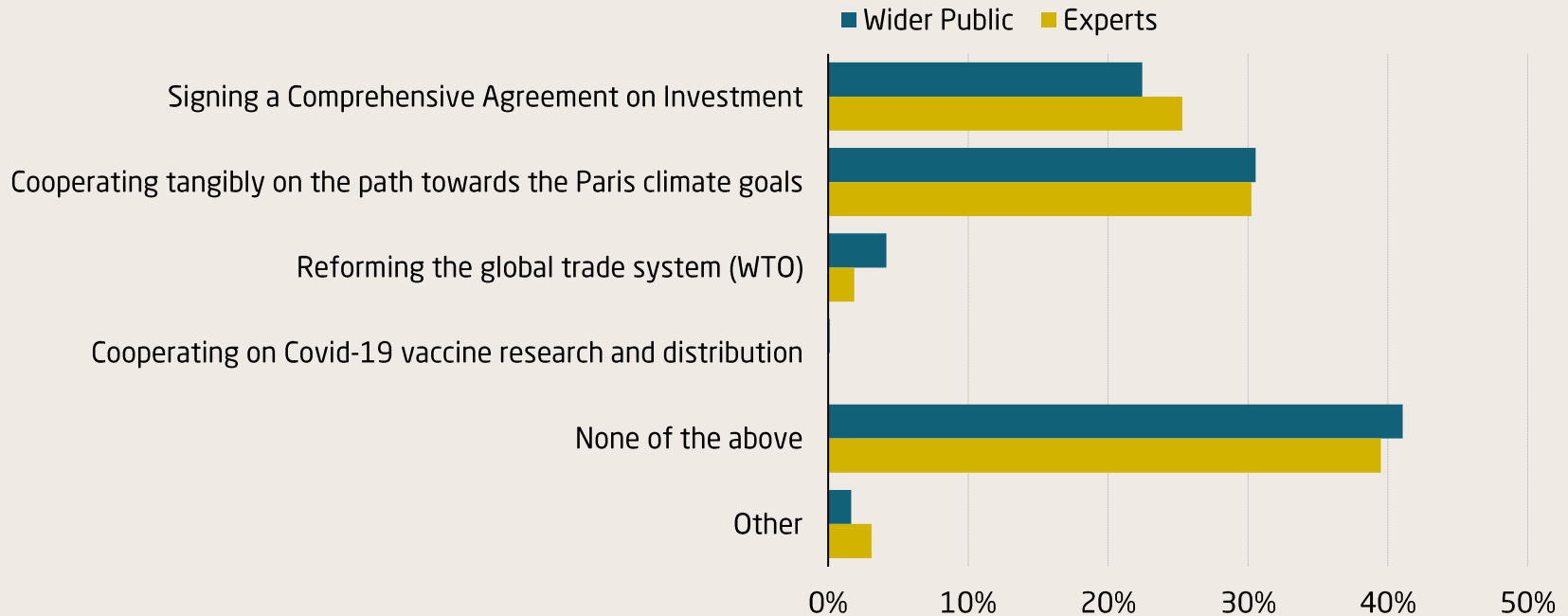
Q: Overall, how do you expect Europe-China relations to evolve in 2021?



# 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...

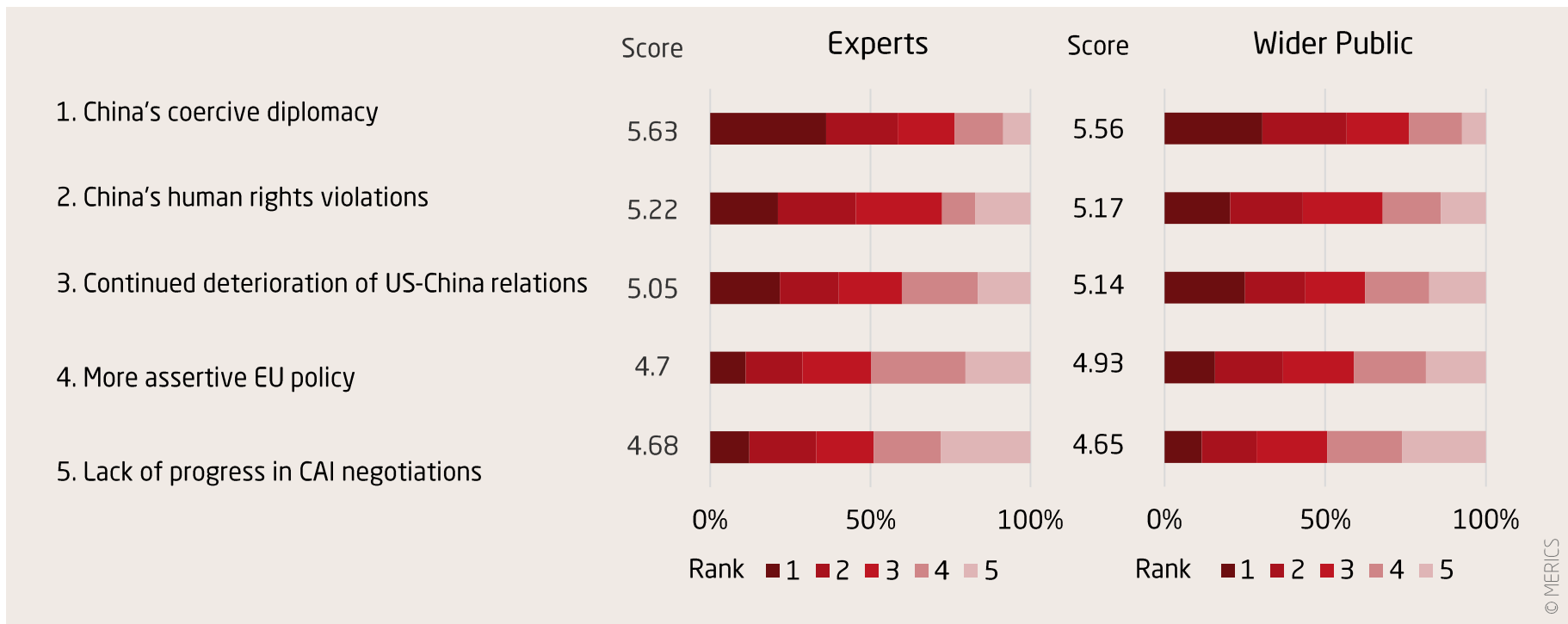




# China's coercive diplomacy is Europe's main concern



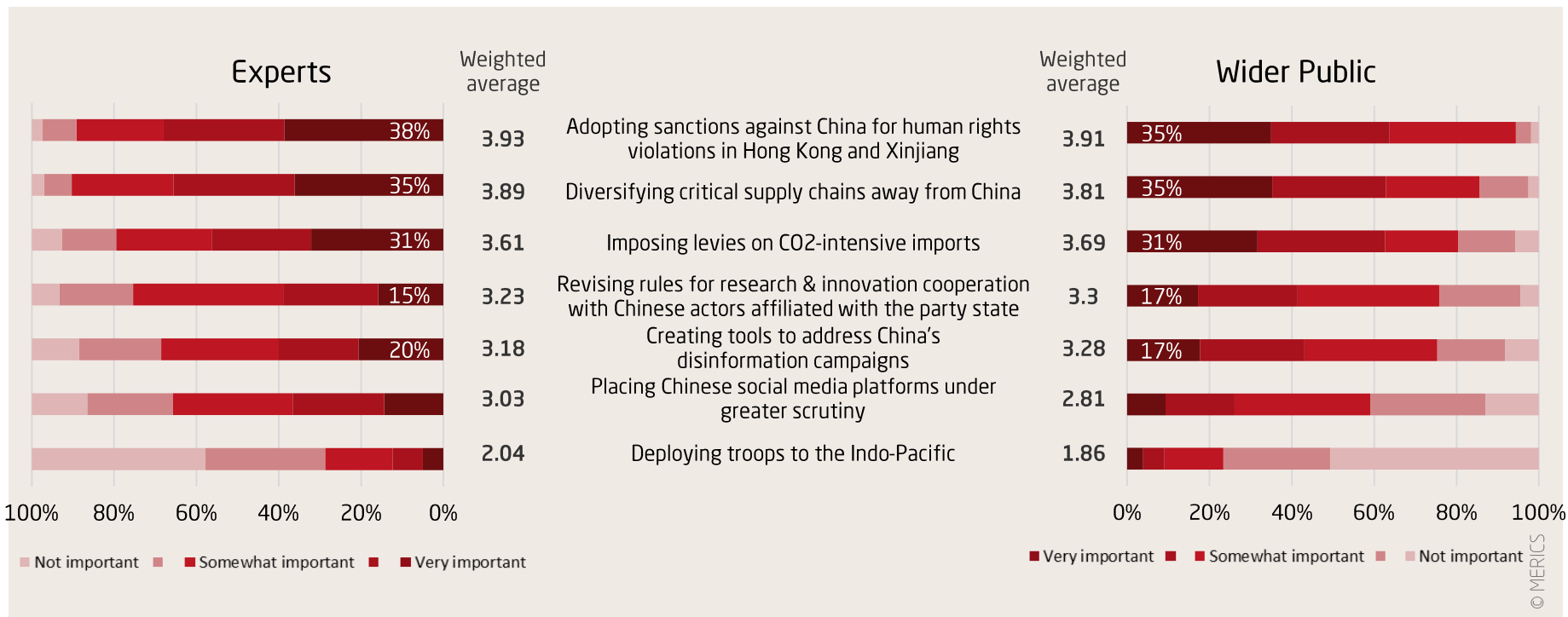
Q: In your opinion, EU-China relations in 2021 will most likely be burdened by...



# Human rights and supply chain diversification should top the EU's China agenda



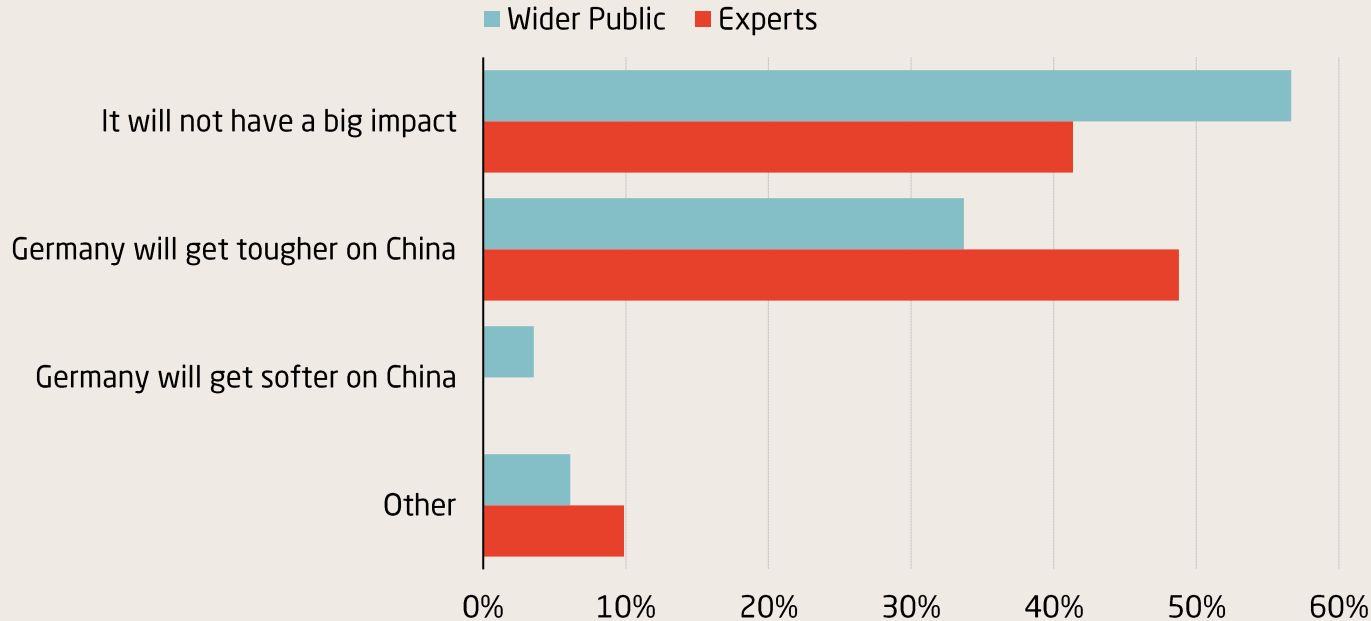
Q: In your opinion, how important will the following actions be for EU countries in 2021?



# 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?

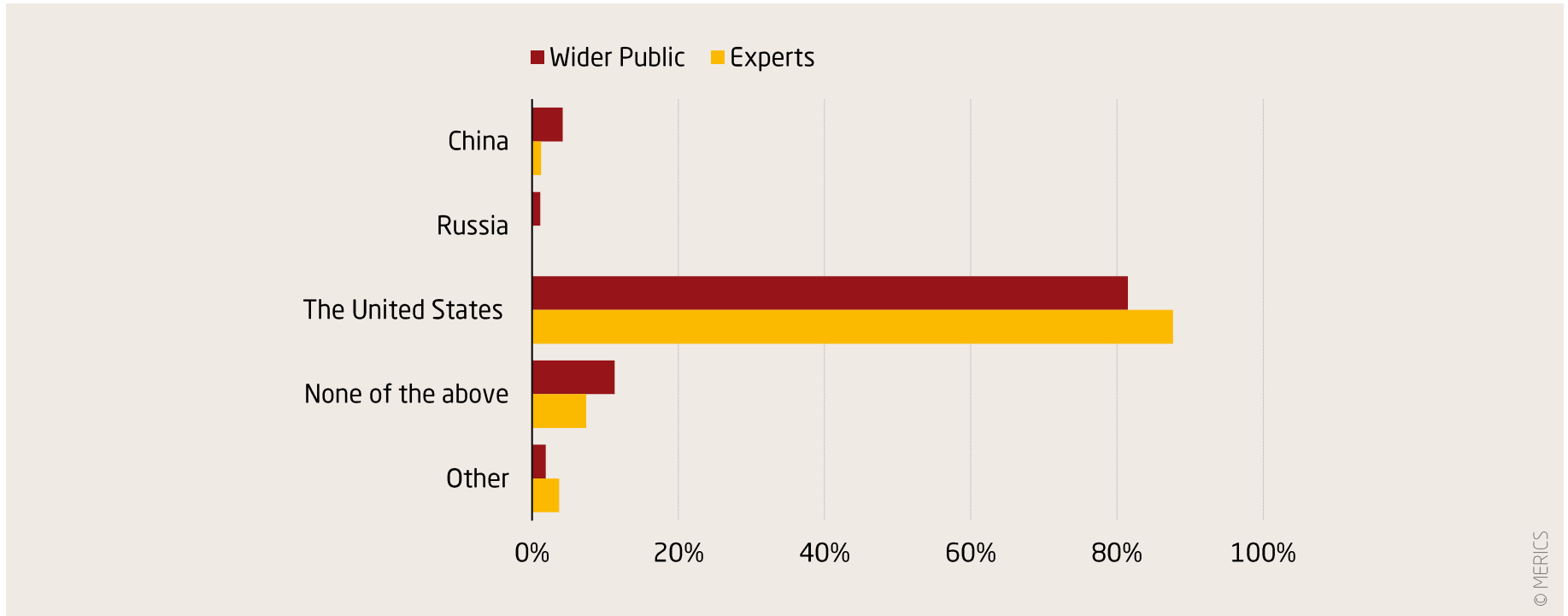


# The EU and the US will get closer under Biden



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

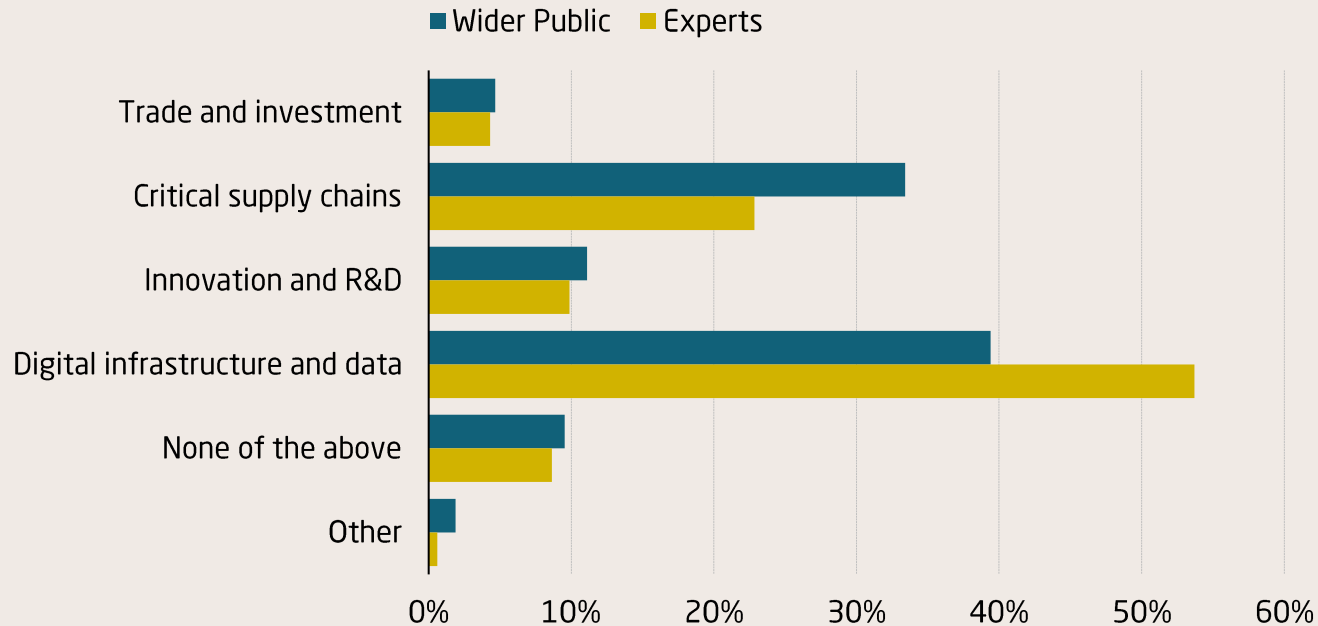
\*Still including the UK



# The EU's bit-er divorce from China? Decoupling the digital economy



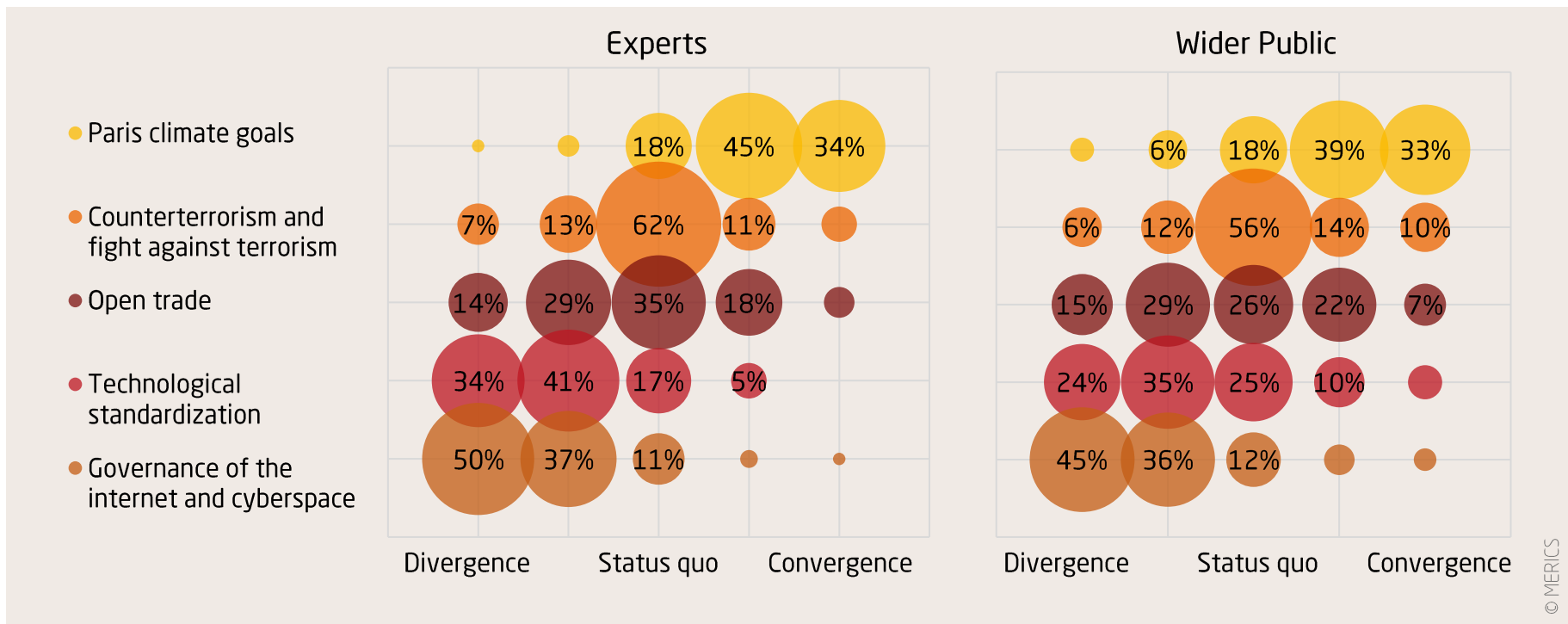
Q: In your view, which of the following aspects of the EU-China relationship do you expect to “decouple” most in 2021?



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



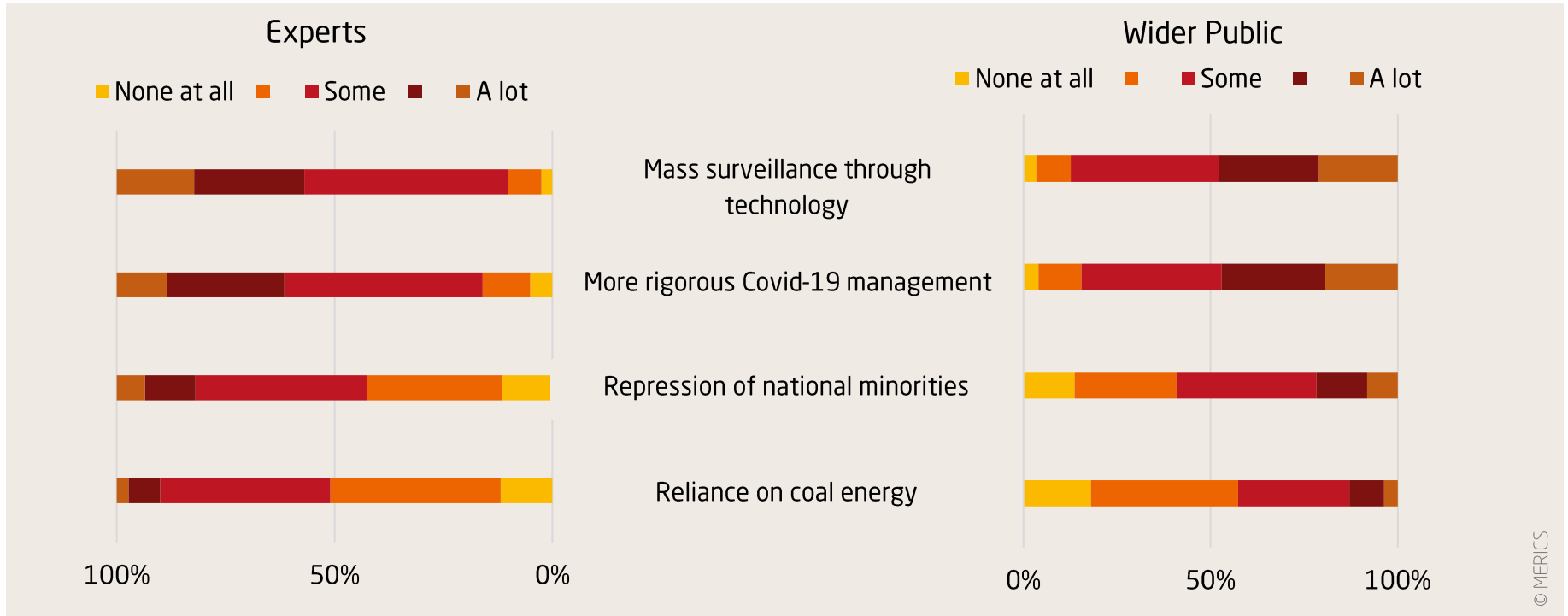
Q: In your view, which of these issues will lead to convergence and which to divergence between the US administration and the Chinese leadership?



# The China Model in 2021: human rights repression versus Covid-19 suppression



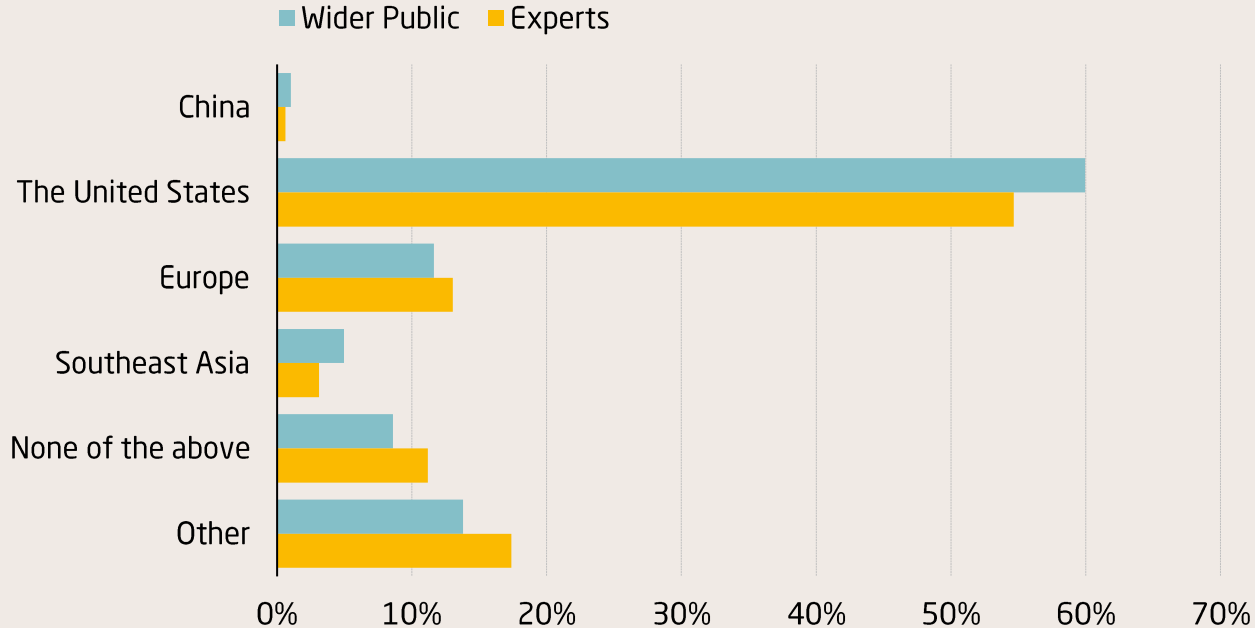
Q: In your opinion, will other countries in 2021 draw lessons from any of the following policies pursued by China?



# 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?

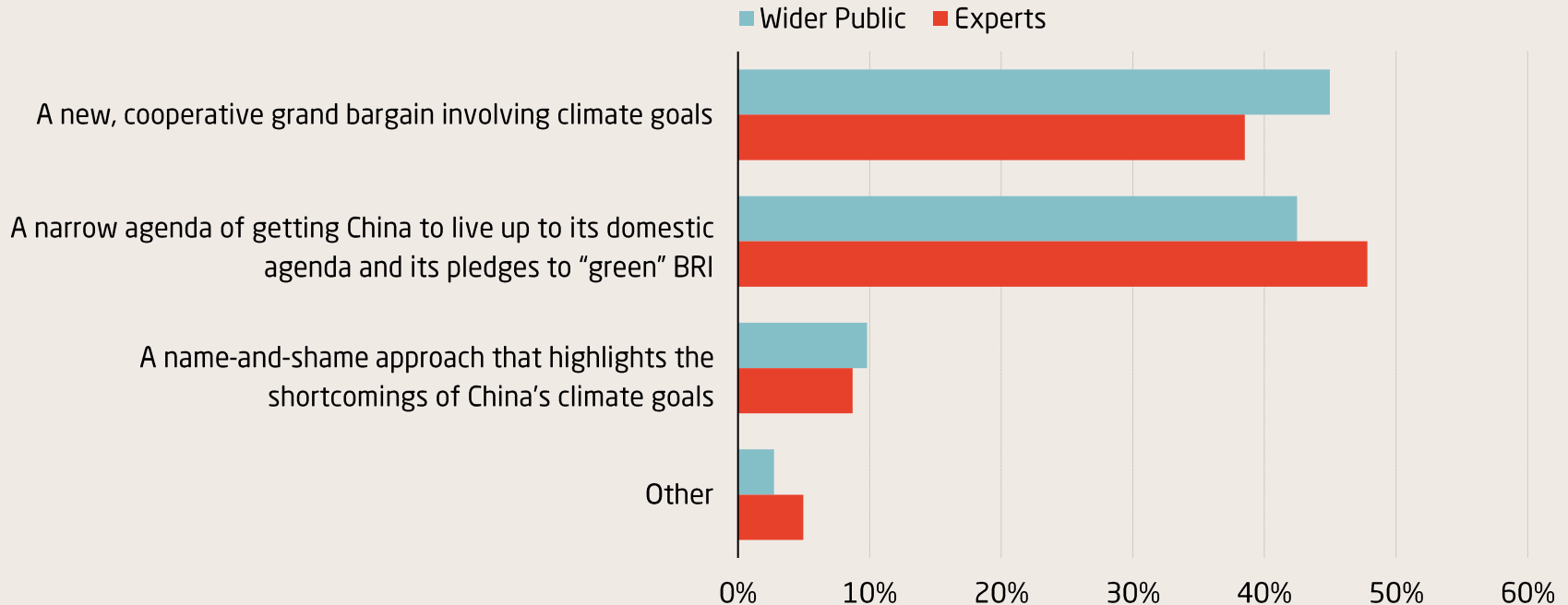




# China, Europe and climate in 2021: a grand bargain and greening the BRI



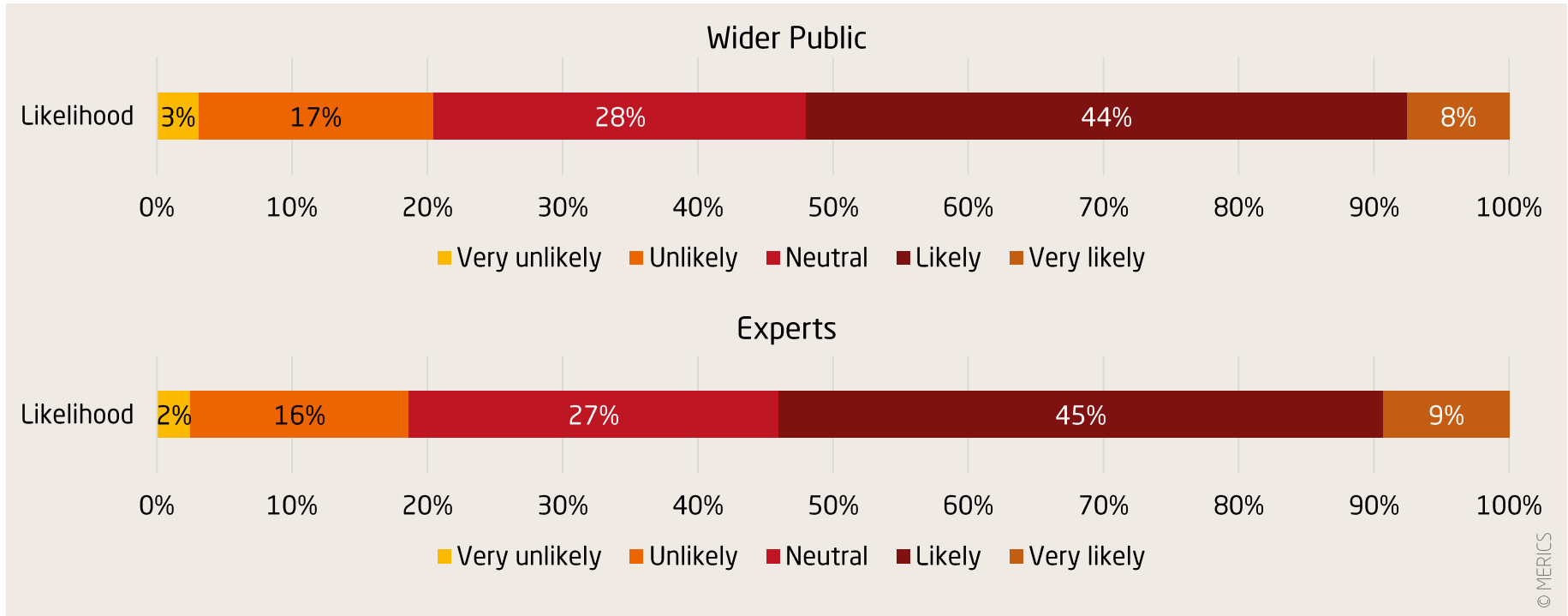
Q: In your opinion, what climate agenda should Europe focus on with China in 2021?



# 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?

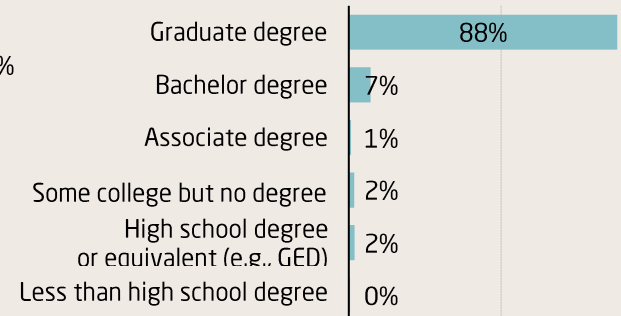
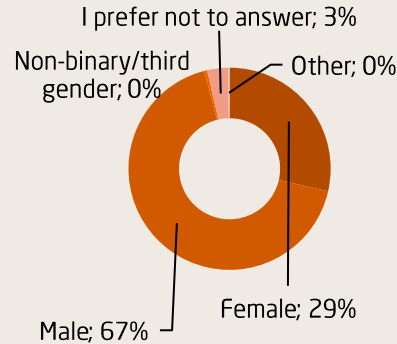
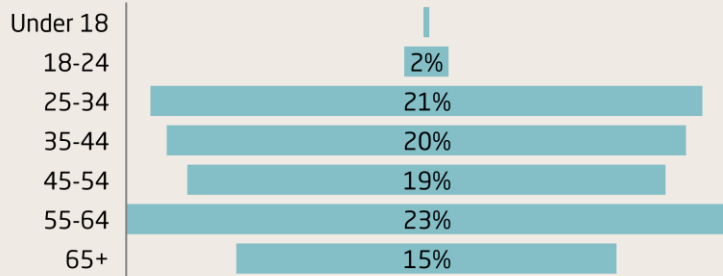


# Origin of survey participants (1)

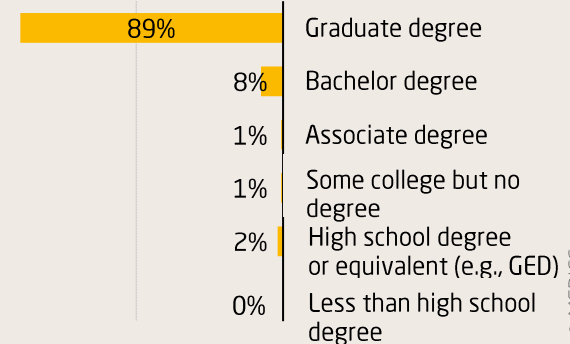
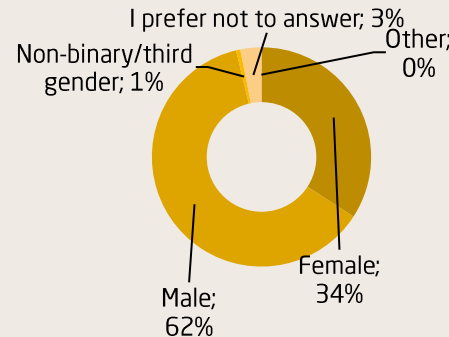
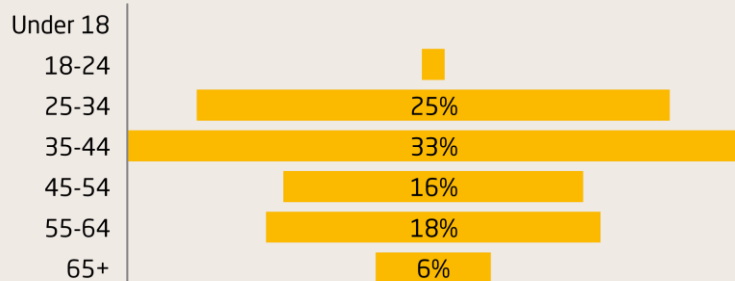


Survey respondents consisted of 1,016 members of the wider public and 169 experts

## Wider Public



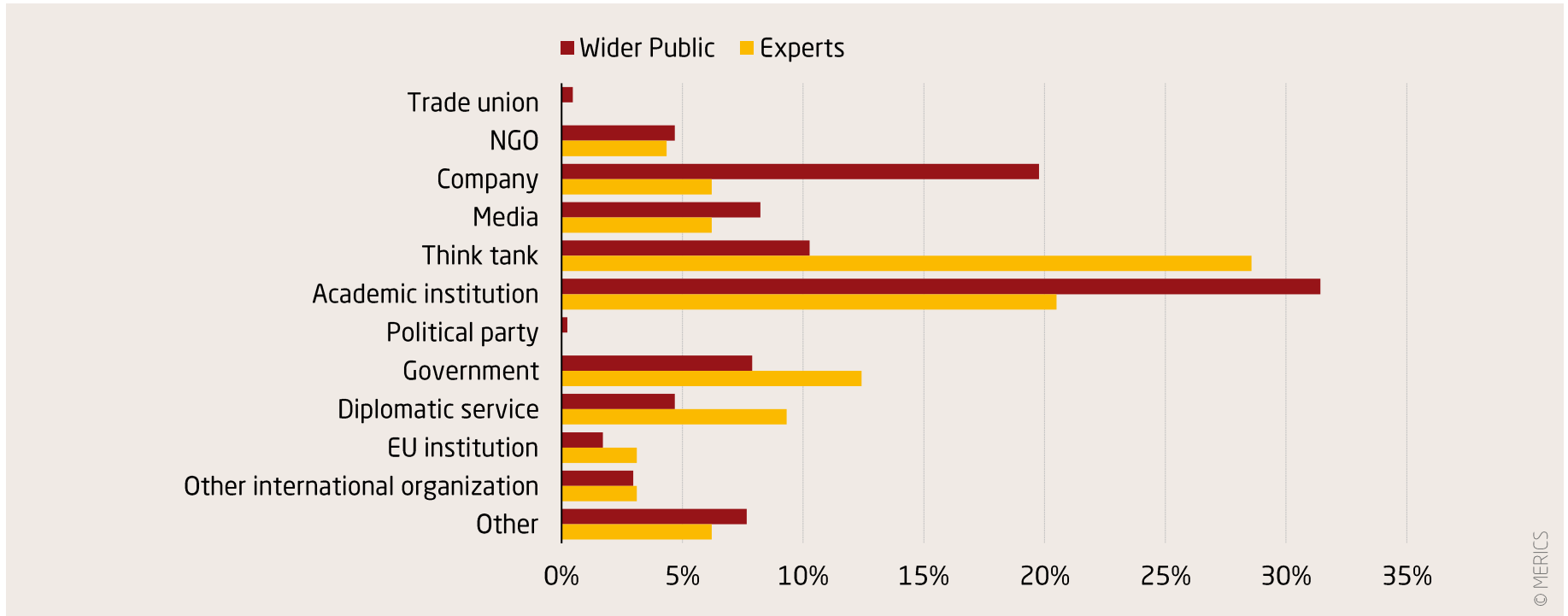
## Experts



# Origin of survey participants (2)



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



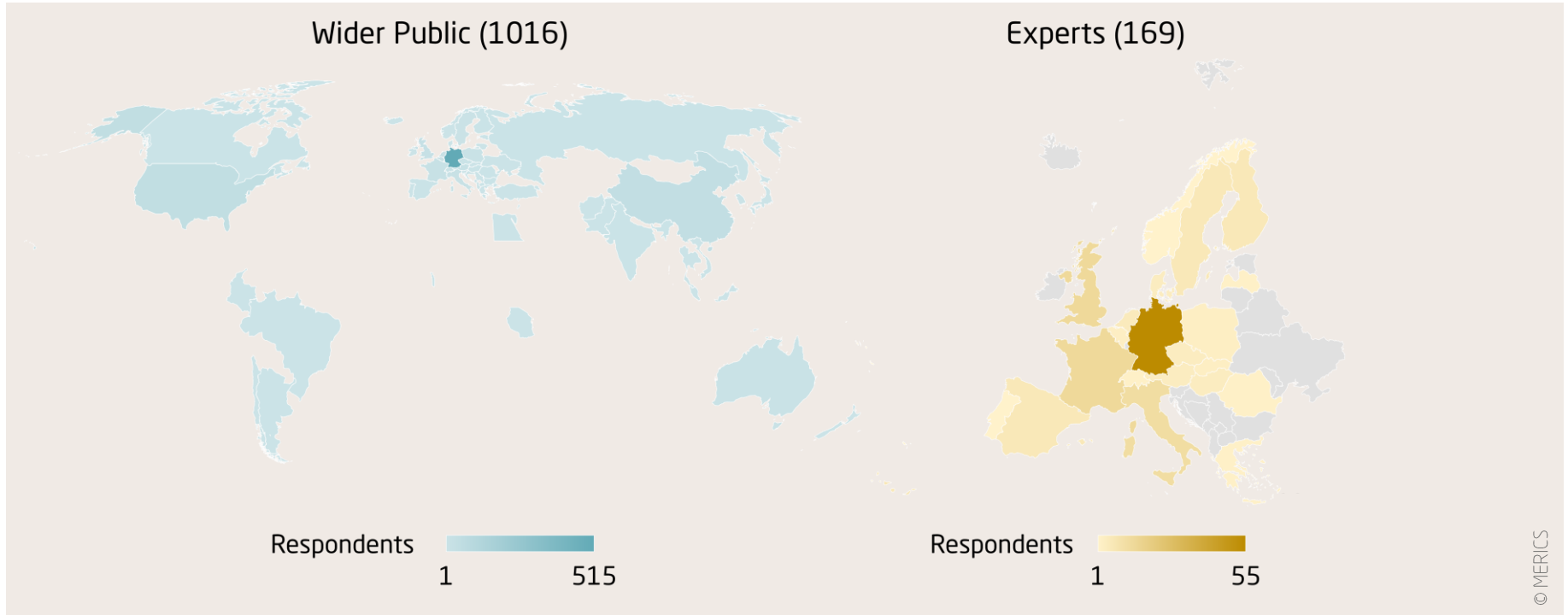
# Origin of survey participants (3)



Q: What is your nationality?

Wider Public (1016)

Experts (169)



# Origin of survey participants (4)

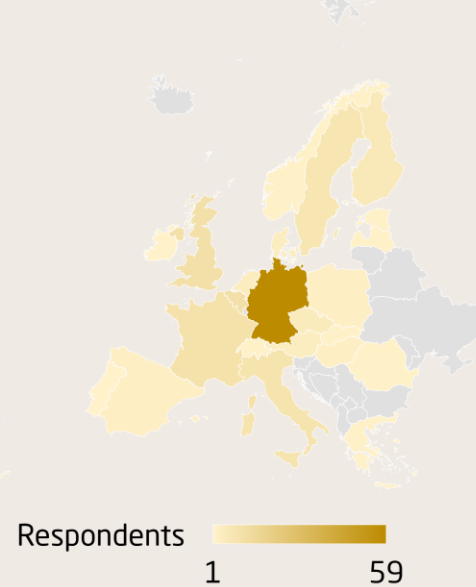


Q: In which country is your organization headquartered?

Wider Public (1016)



Experts (169)





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