



MERICs CHINA FORECAST 2023

Survey results

Number of participants: 880 (China experts and wider public)

The survey was conducted online in November-December 2022



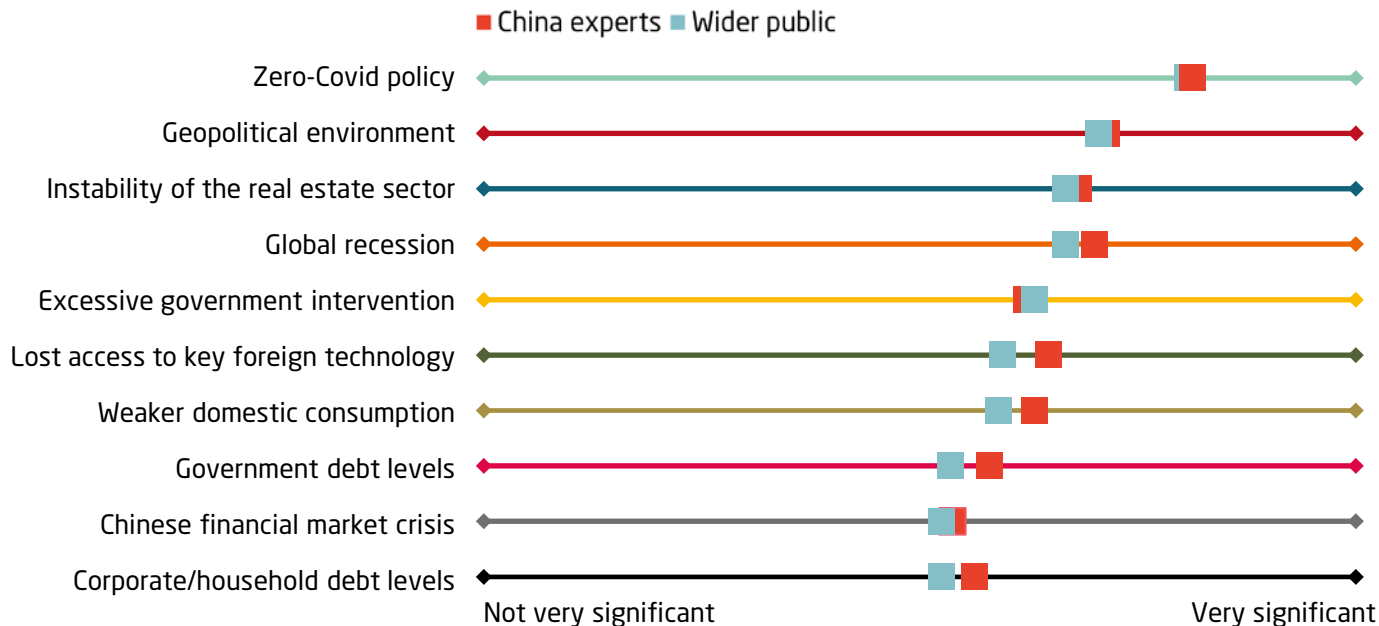
Part 1: China's Domestic Development

Greater state control, more ideology and high-risk Covid-19 developments

Challenges to China's economy



Q: In your view, which of the following are significant risks for China's growth outlook in 2023?*



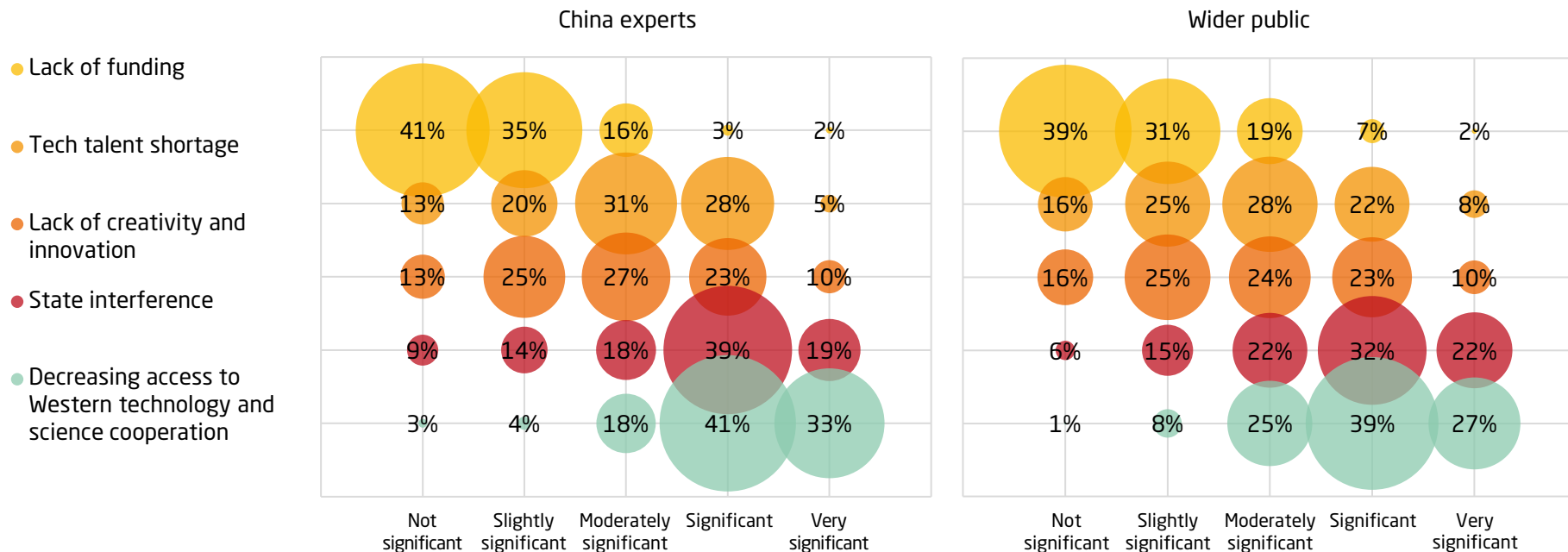
* Weighted averages

Note: More than 75 percent of the voting took place before December 5, 2022. Results have therefore been overtaken by events (zero-covid u-turn) to some extent.

Losing access to Western tech is China's biggest R&D obstacle



Q: In your view, which of the following are significant risks for China's research and development progress in 2023?

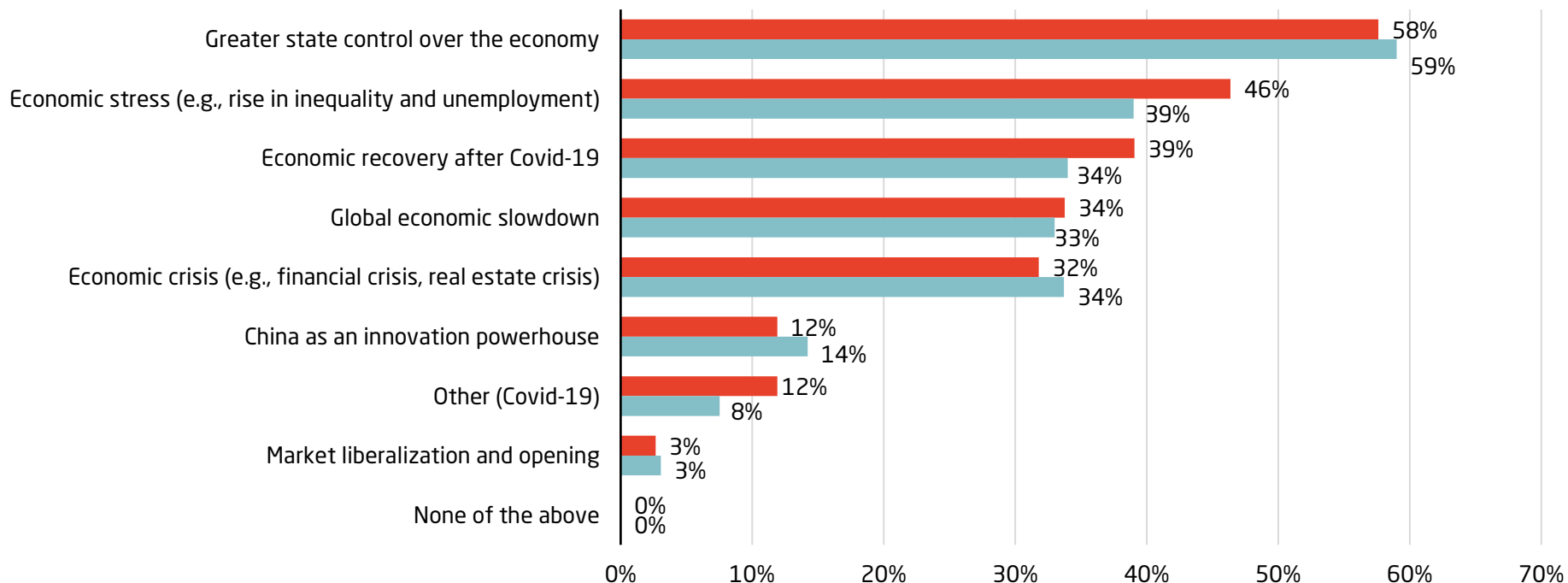


More state control over an economy under stress



Q: In your view, which of the following will shape China's economic development in 2023?
(Multiple choice)

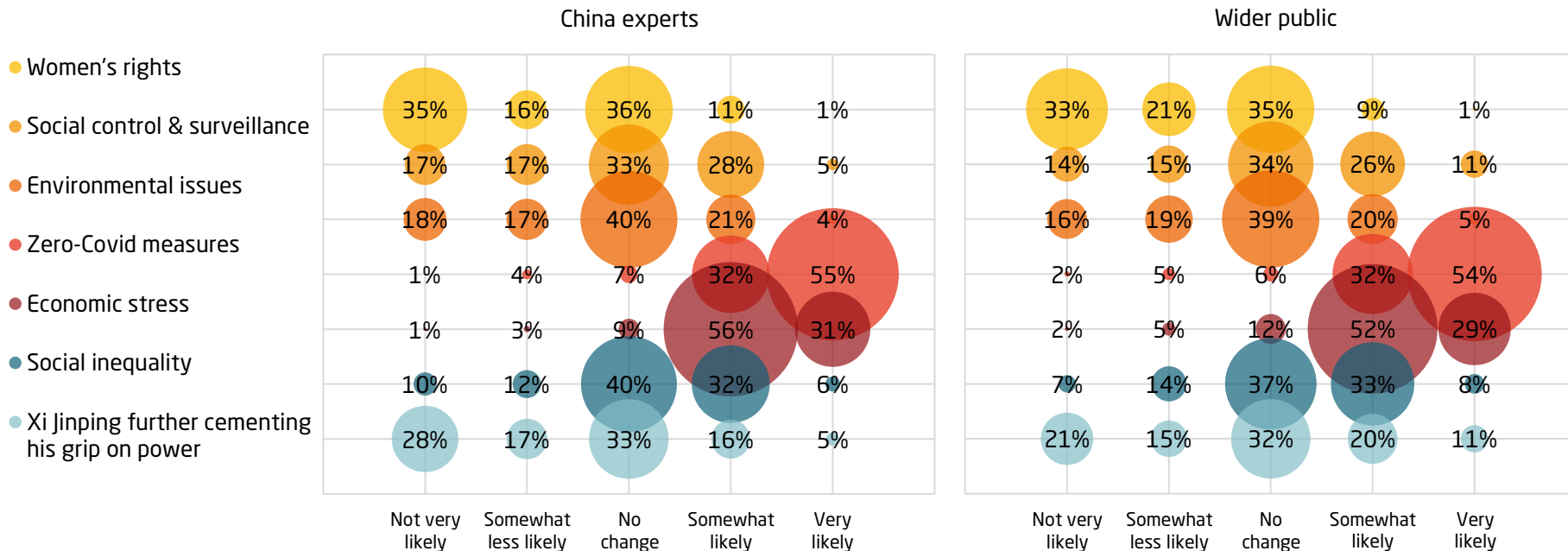
■ China experts ■ Wider public



Zero-Covid and economic stress create protest potential



Q: Which of the following issues are likely to see public dissent or protests in 2023?

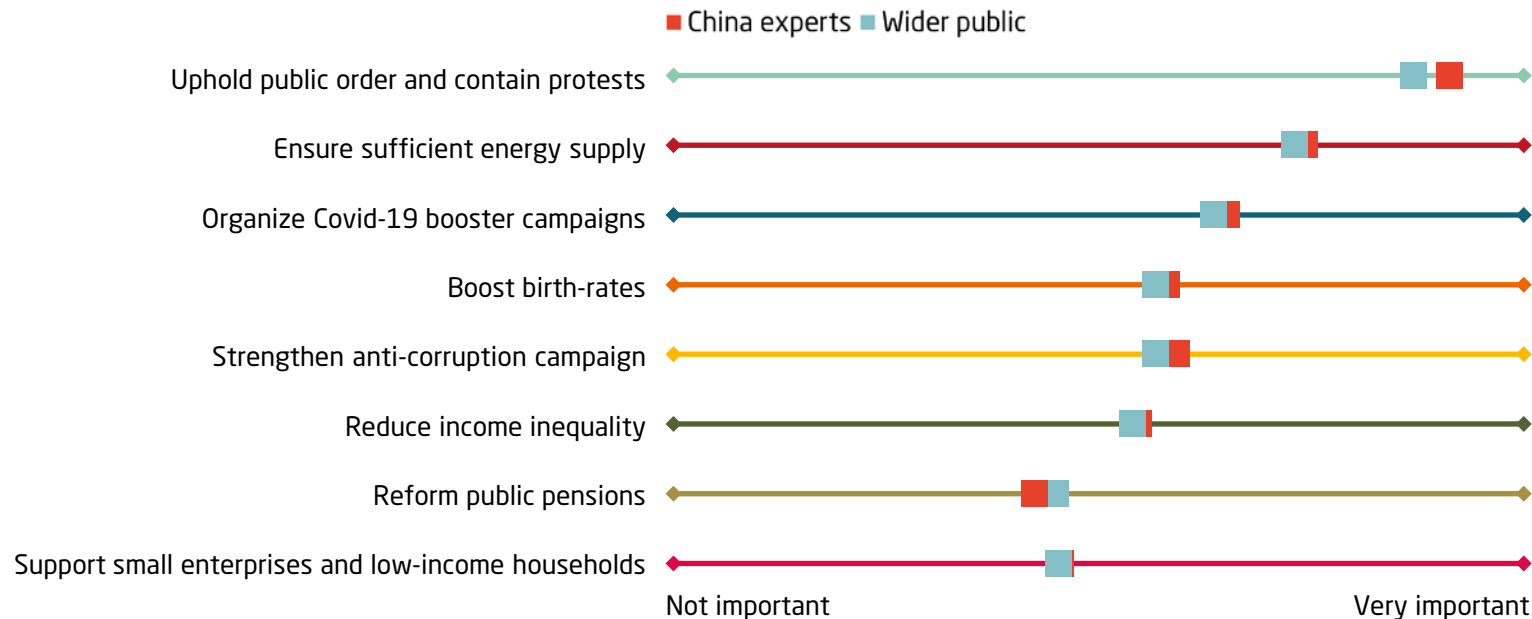


Note: More than 75 percent of the voting took place before December 5, 2022. Results have therefore been overtaken by events (zero-covid u-turn) to some extent.

Stability and public order are top priorities for the CCP



Q: In your view, what level of importance do you expect the CCP leadership to attach to the following domestic issues in 2023?*



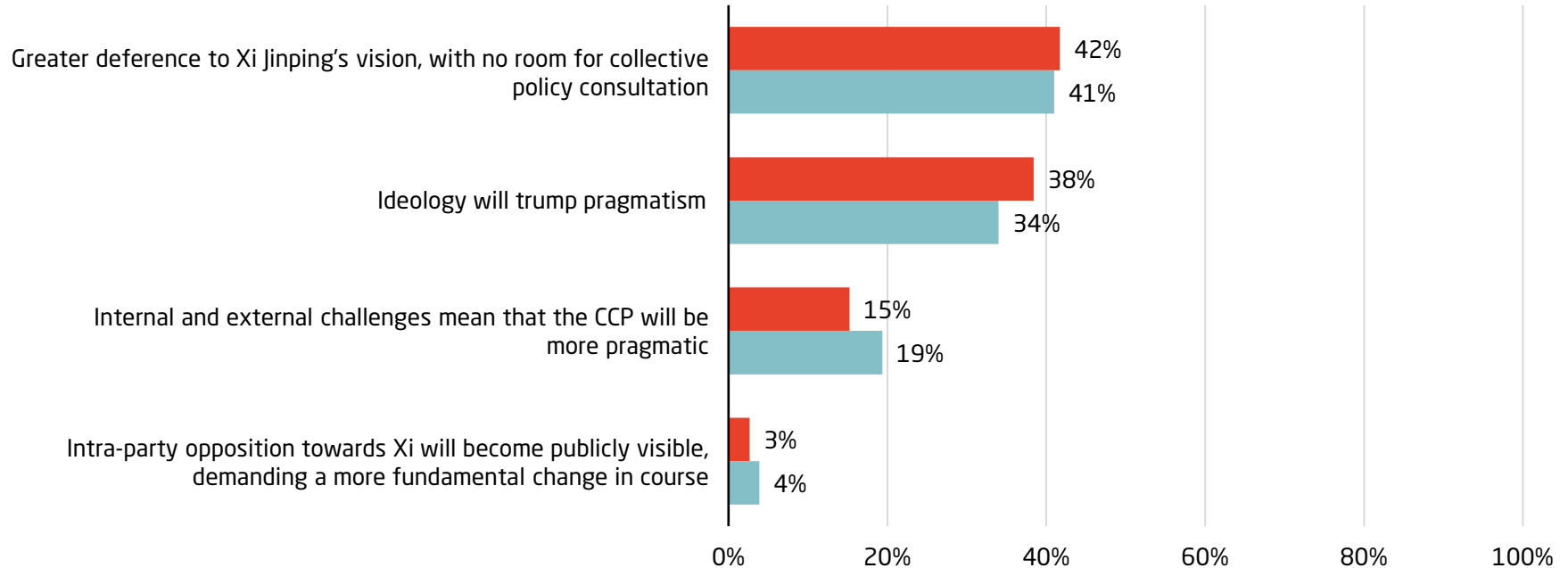
* Weighted averages

China's leadership: Deference to Xi's vision

Q: Which course do you see China's leadership taking in 2023?



■ China experts ■ Wider public

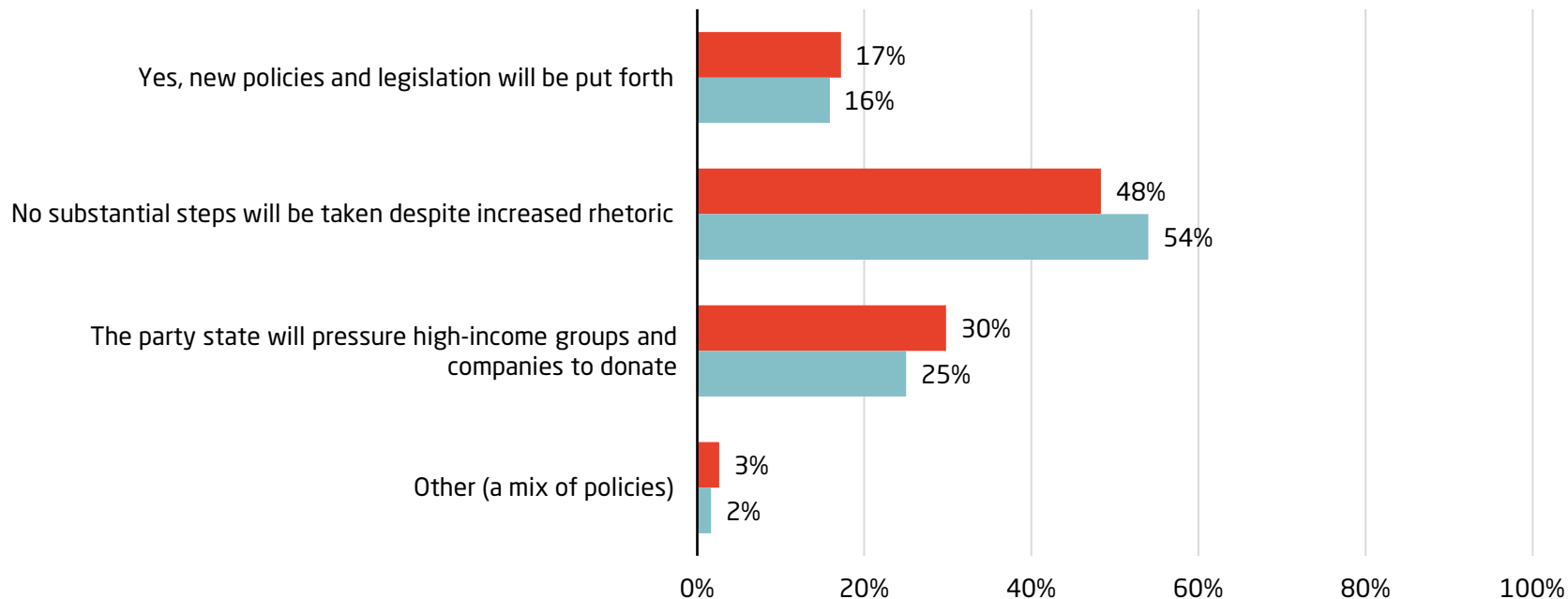


Common Prosperity: No substantial steps expected



Q: Will substantial new policies to address inequality be rolled out under the label of “common prosperity” in 2023?

China experts Wider public





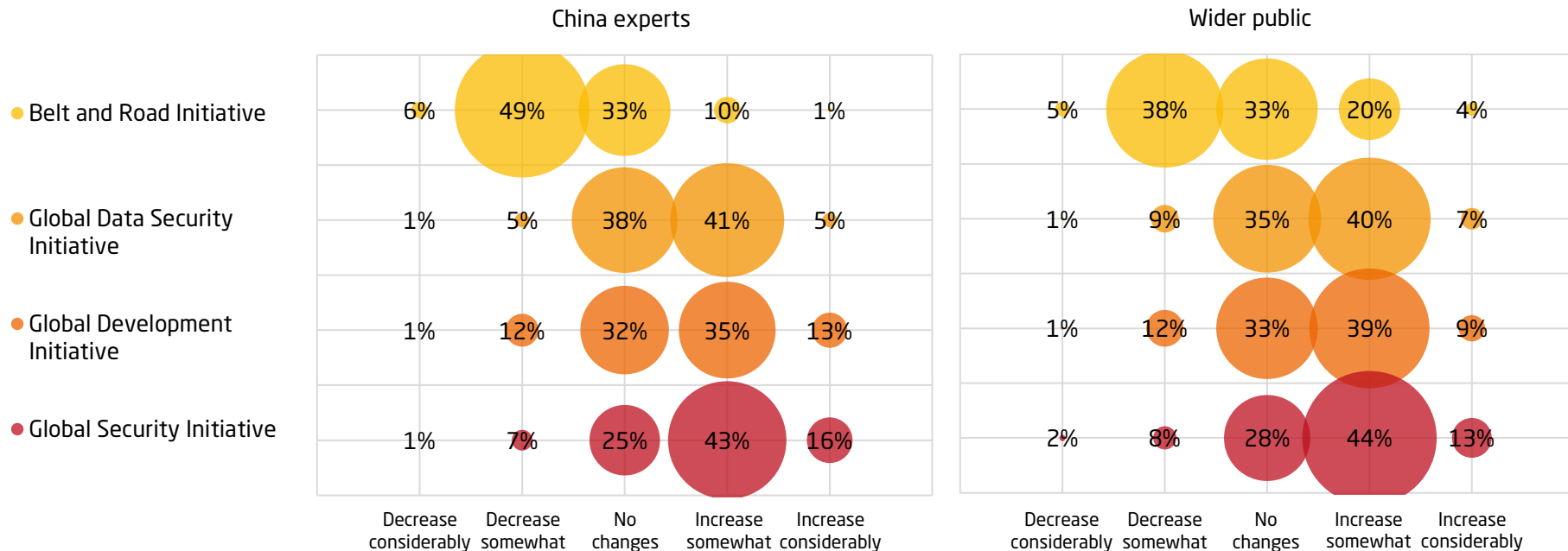
Part 2: Foreign policy & EU-China relations

Stable ties with Russia, deteriorating relations with the West

China shifts priorities in shaping the world order



Q: In your view, will the following Chinese initiatives increase or decrease in relevance for China in 2023 compared to 2022?

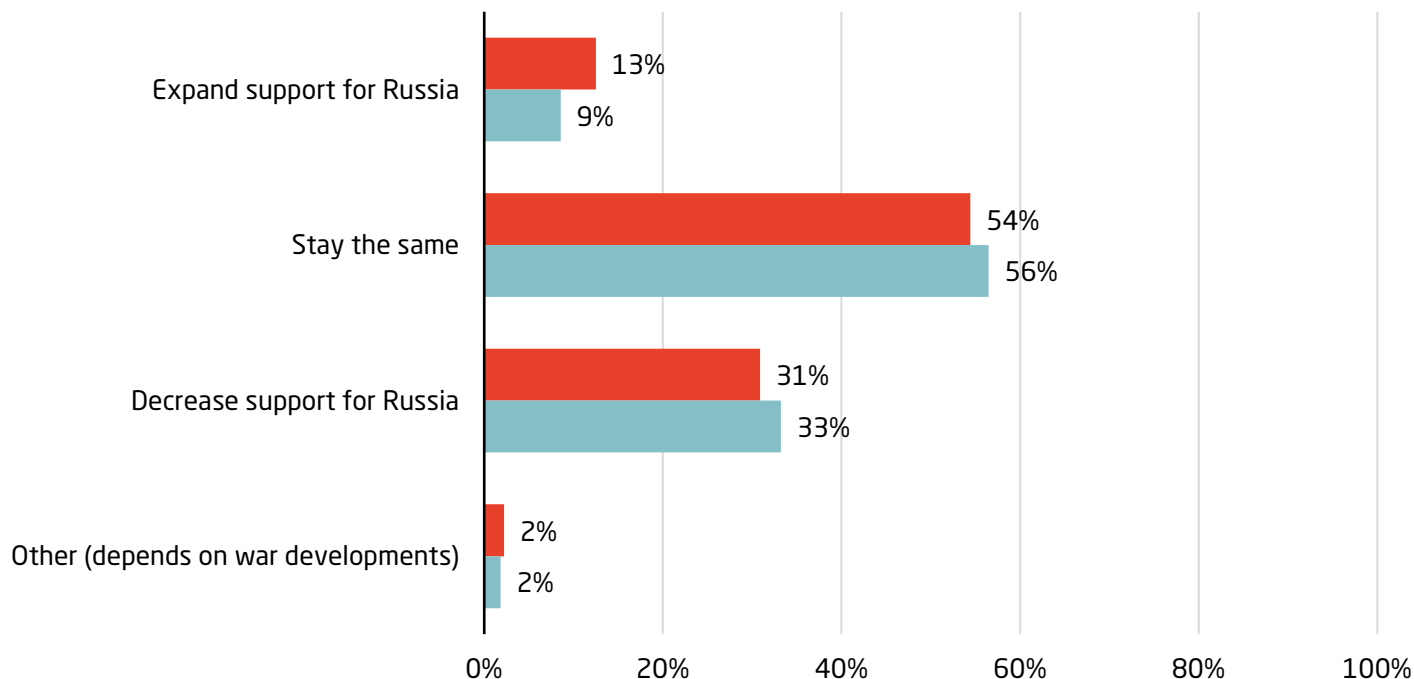


Pro-Russian neutrality to remain in place



Q: In your view, how will China's position on the war in Ukraine develop in 2023?

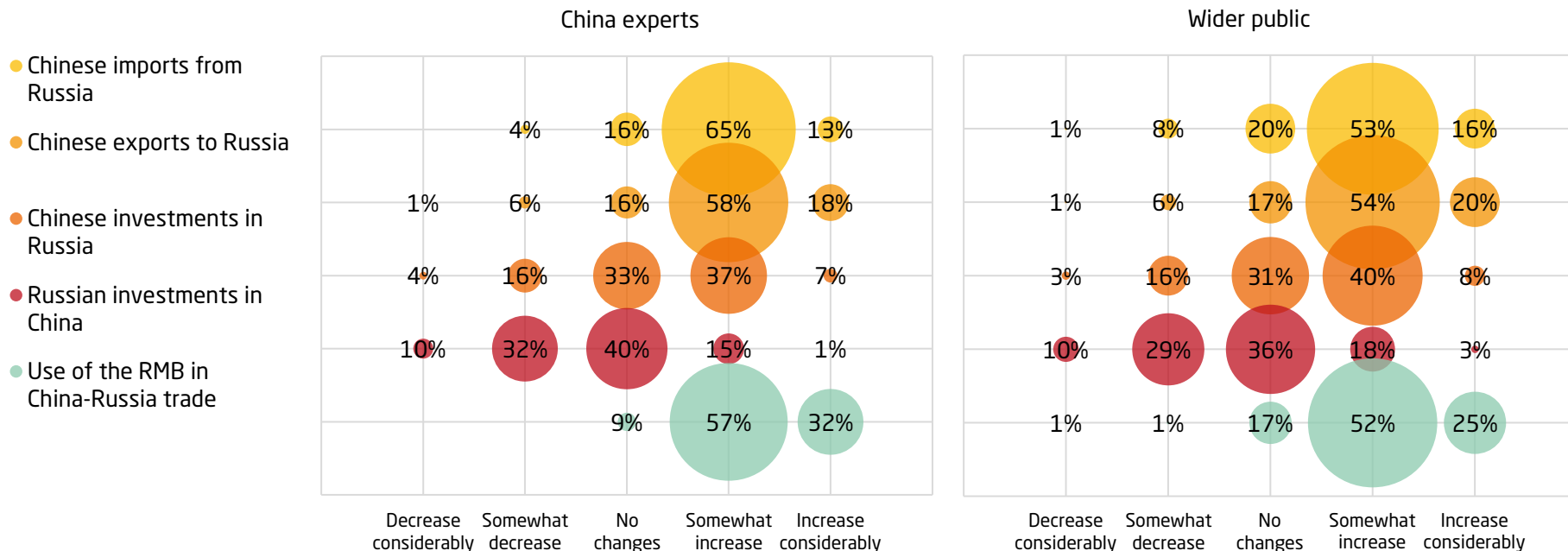
China experts Wider public



Sino-Russian economic ties expected to intensify



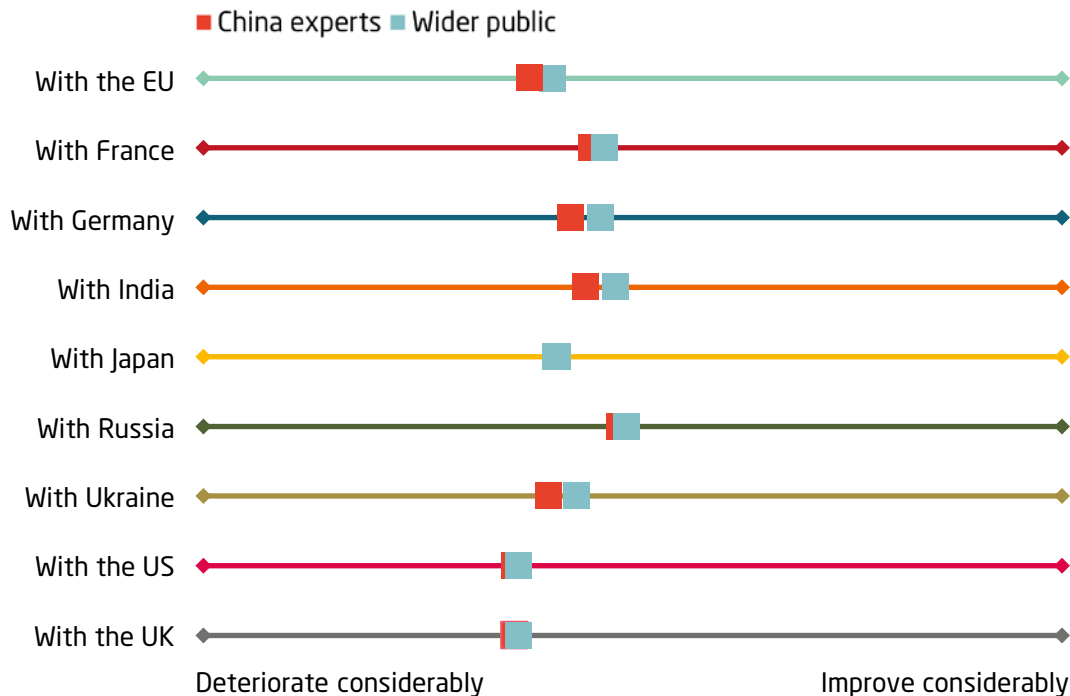
Q: In your view, how will China-Russia economic ties develop in 2023?



China's foreign relations: Slight deterioration expected



Q: In your view, how will China's relations with the following states and entities develop in 2023?*

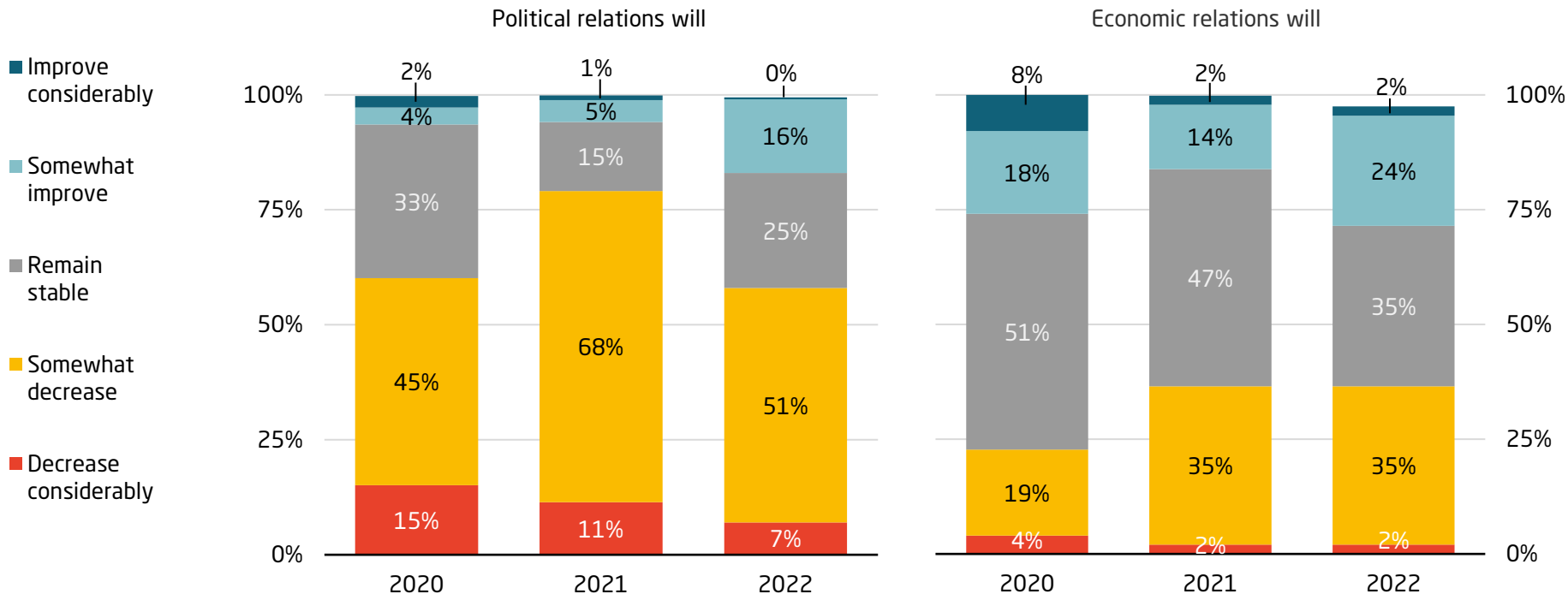


* Weighted averages

EU-China relations: politically tense, economically stable



Q: How do you expect EU-China relations to evolve in 2023?*

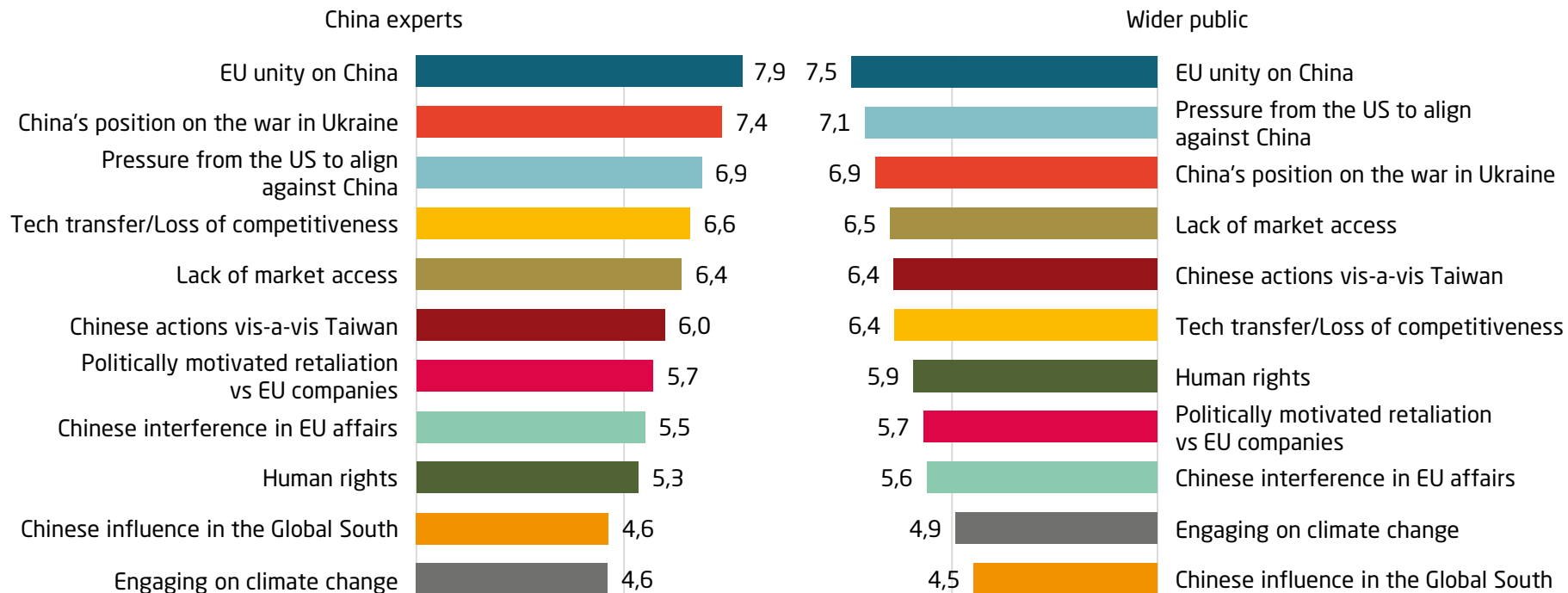


* Merged responses of China experts and the wider public

EU-China relations: Challenges on many levels



Q: In 2023, the biggest challenge for the EU in EU-China relations will be...*

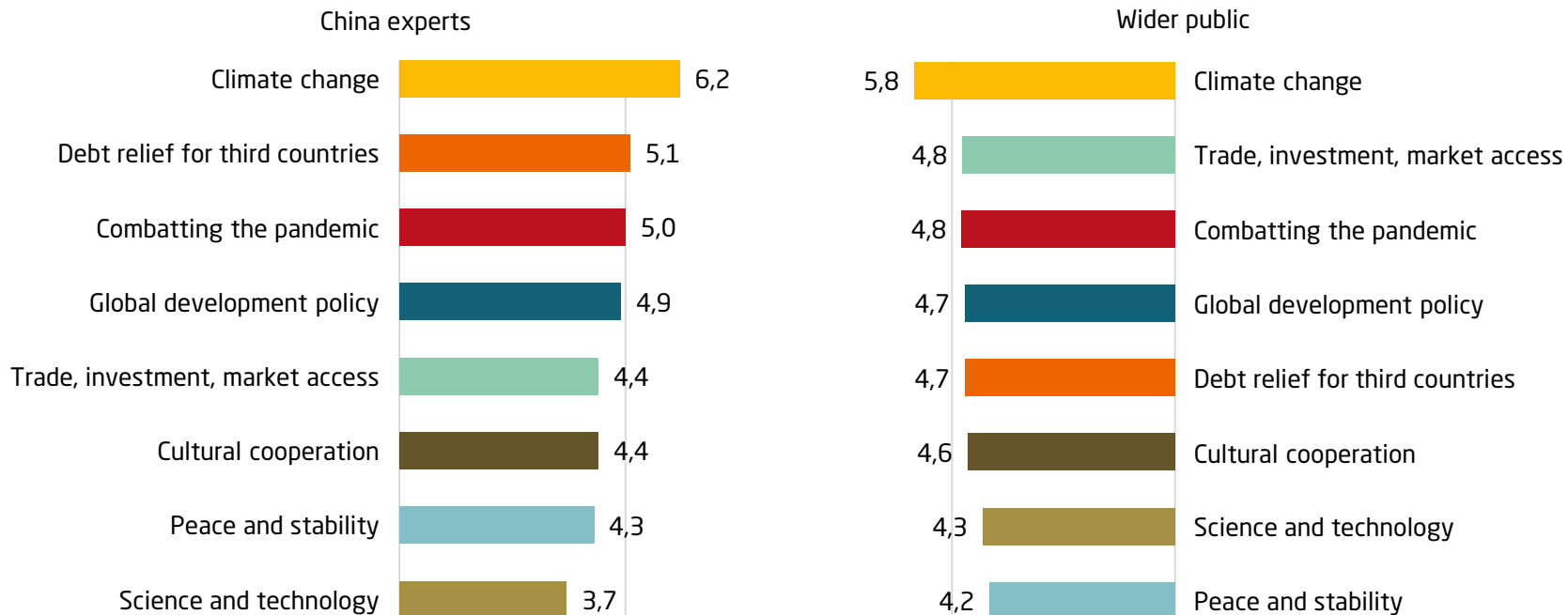


* Average ranks

EU-China relations: Opportunities for cooperation



Q: In 2023, in which areas are the EU and its member states likely to be able to make relevant progress with regard to cooperation opportunities with China?*



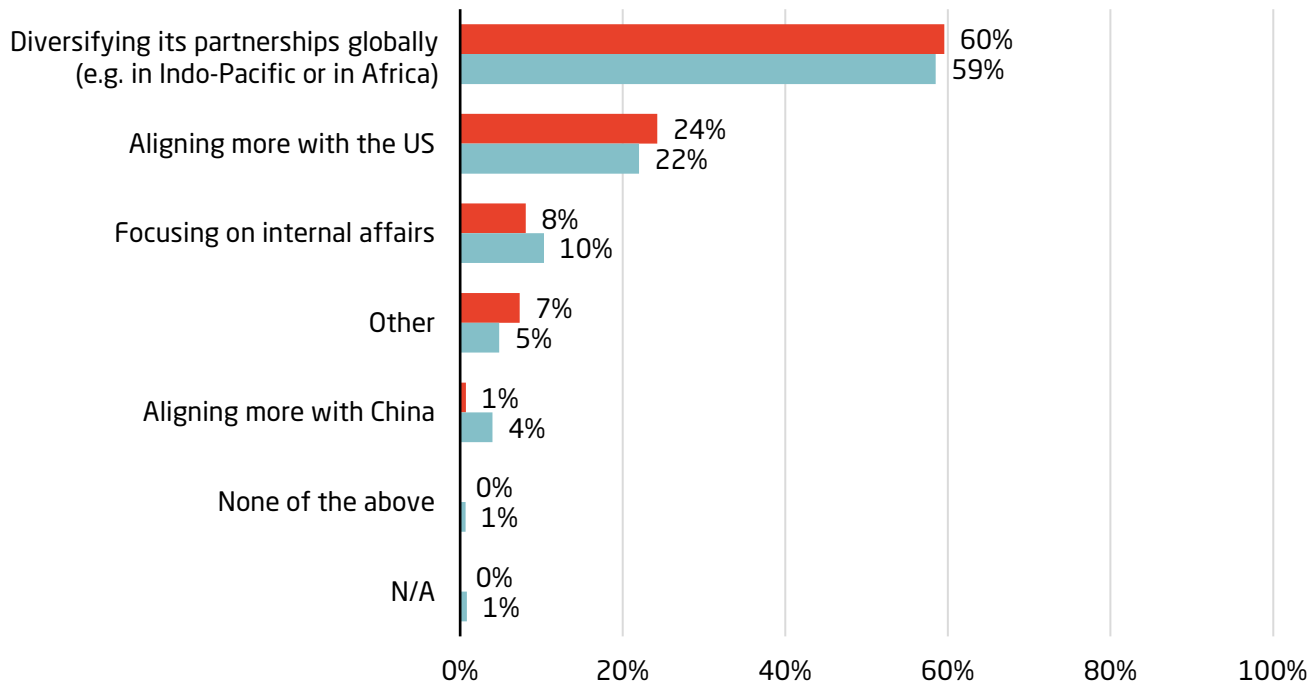
* Average ranks from most progress to least with regard to cooperation opportunities

The EU on the global stage: More focus on diversification



Q: In 2023, the EU and the majority of its member states should prioritize:

■ China experts ■ Wider public



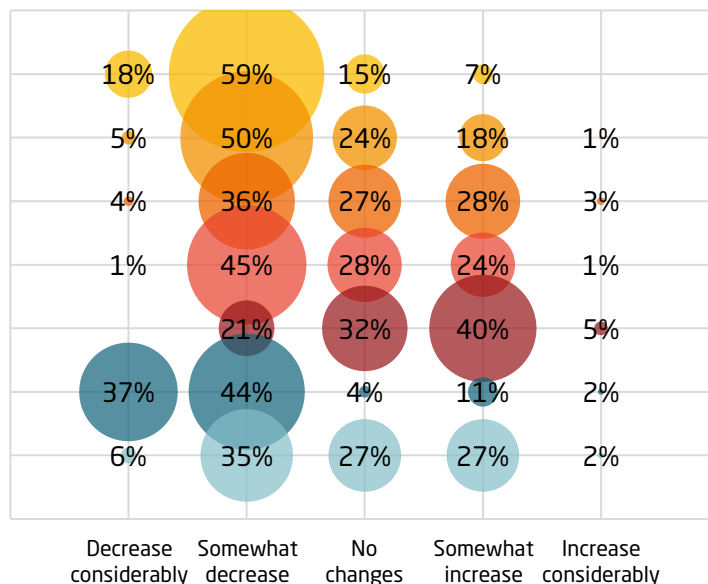
Economic ties between China and EU expected to weaken



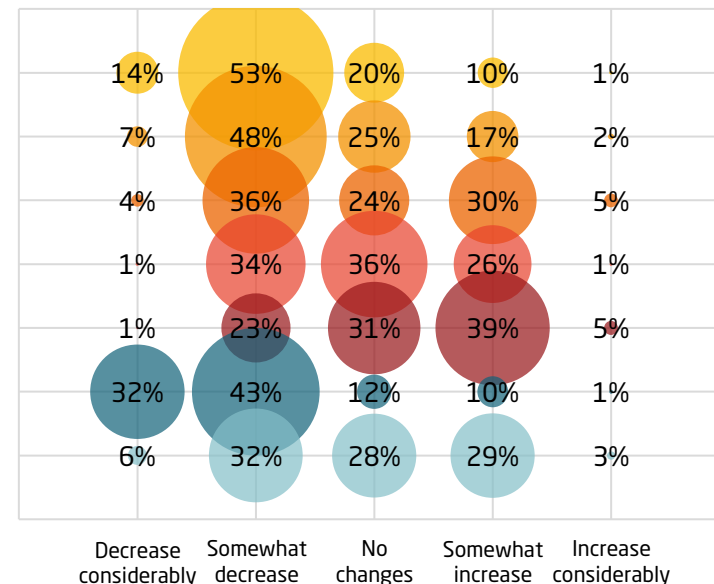
Q: In your view, how will the following economic ties between China and the EU develop in 2023?

- Science & tech cooperation
- EU investments into China
- Chinese investments into the EU
- EU exports to China
- Chinese exports to the EU
- EU citizens working in China
- Chinese citizens working in the EU

China experts



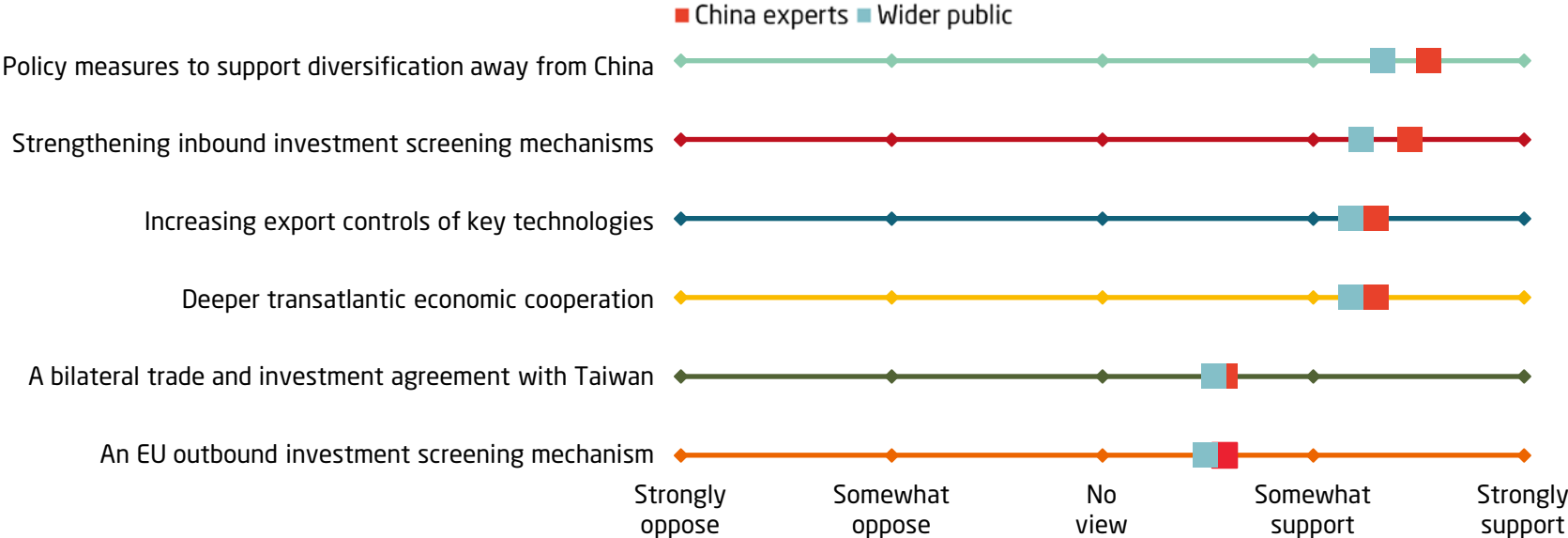
Wider public



EU-China economic relations: Support for diversifying



Q: To what degree do you support or oppose the following policy options for the EU’s economic approach towards China in 2023?*



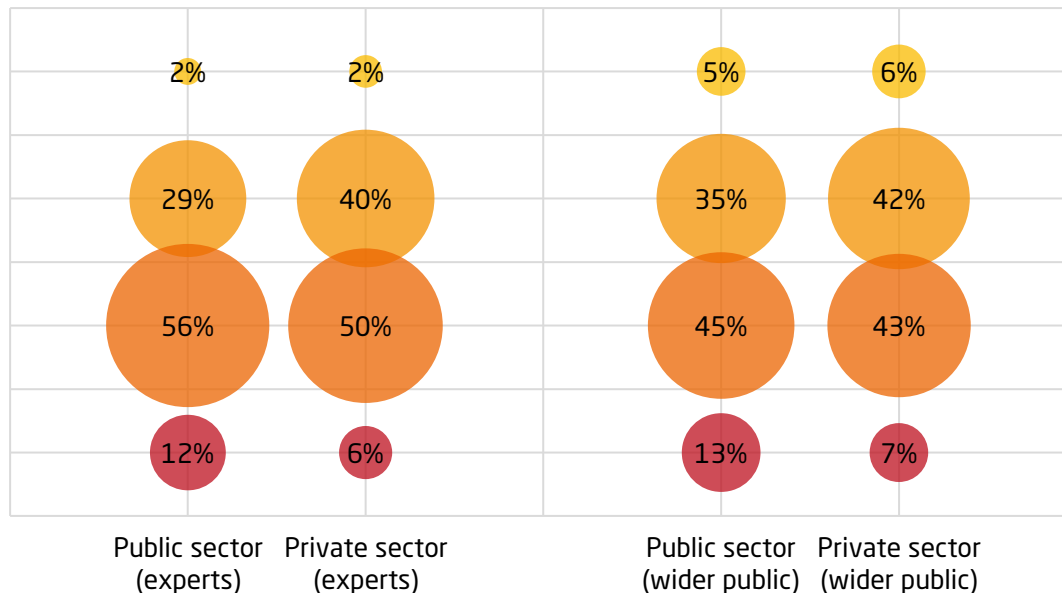
* Weighted averages

EU-China science and tech collaboration: More restrictive and selective



Q: What should Europe's general approach to (public sector / private sector) science and technology cooperation with China be?

- Deep engagement through tech cooperation
- Selective expansion of tech cooperation
- Active de-risking and restrictions for tech cooperation
- Slowing China's rate of innovation

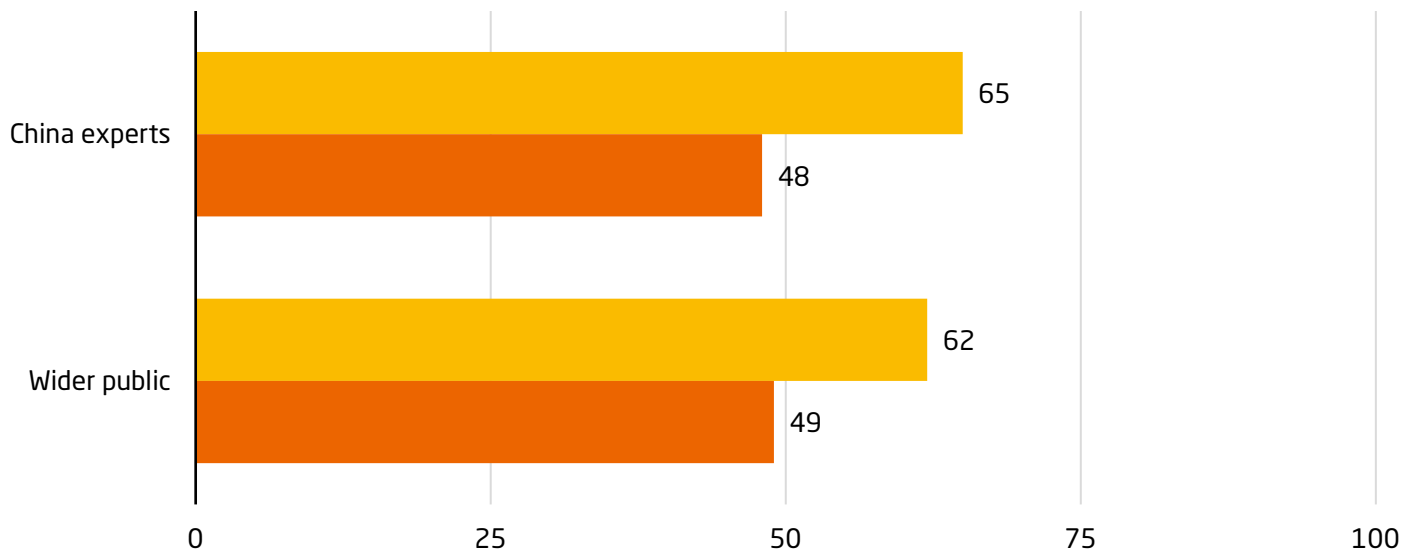


EU-China economic dependence: From integration to decoupling?



Q: On a scale from 0 to 100, where 0 is “full-fledged economic decoupling” and 100 is “deep global integration”, where do you assess EU-China economic relations to be today and in 5 years?

■ Today ■ In 5 years

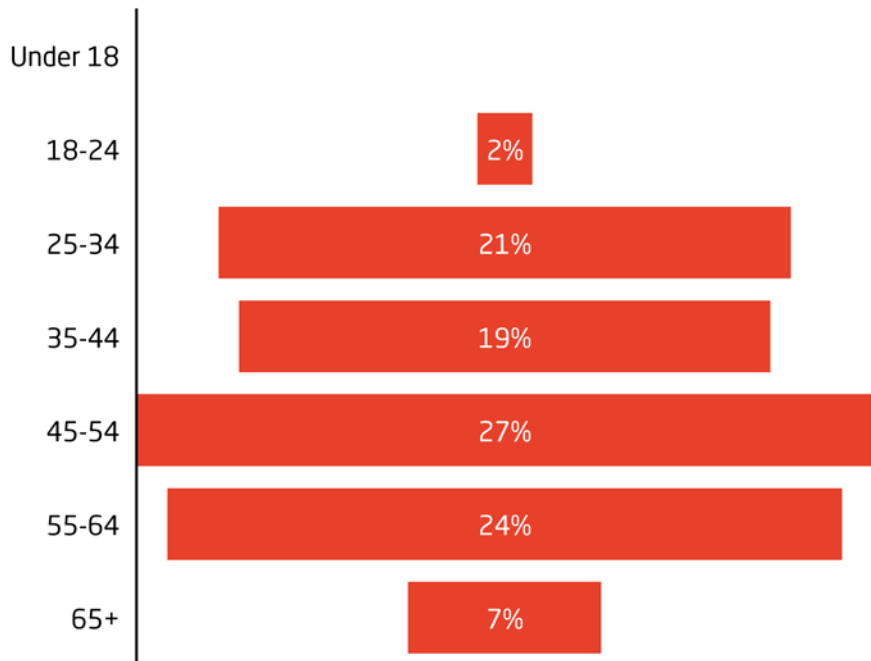


Survey statistics: Origin of survey participants (1)

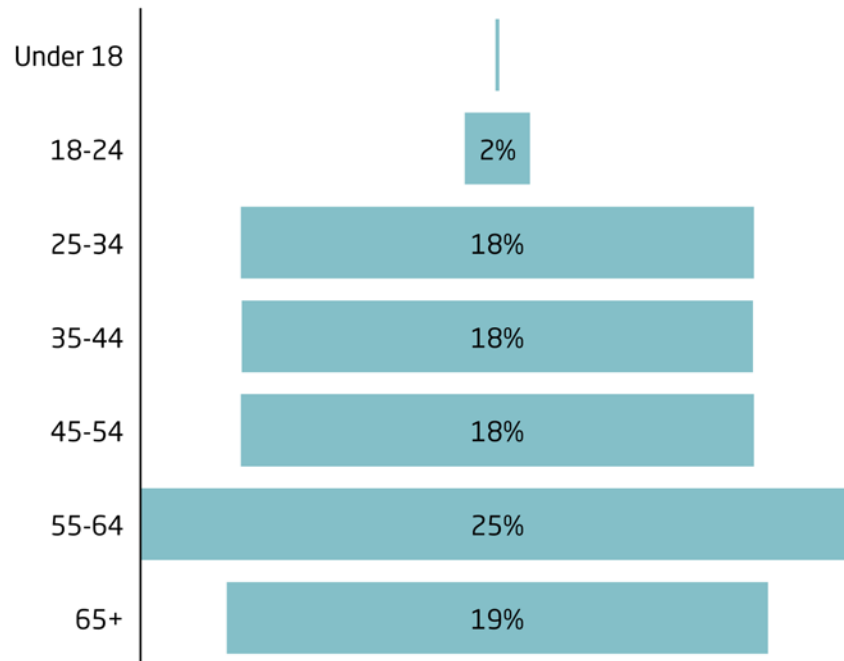
Survey respondents consisted of 729 members of the wider public and 151 experts



China experts



Wider public

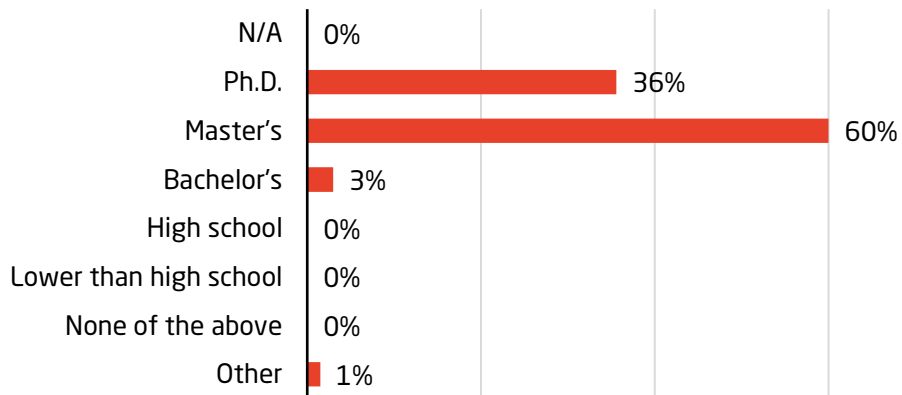


Survey statistics: Origin of survey participants (2)

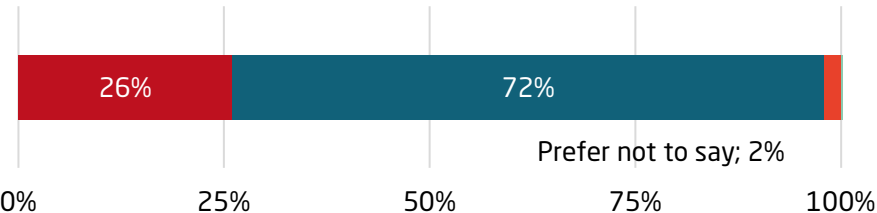
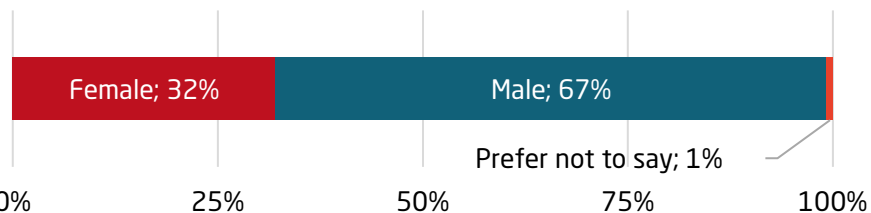
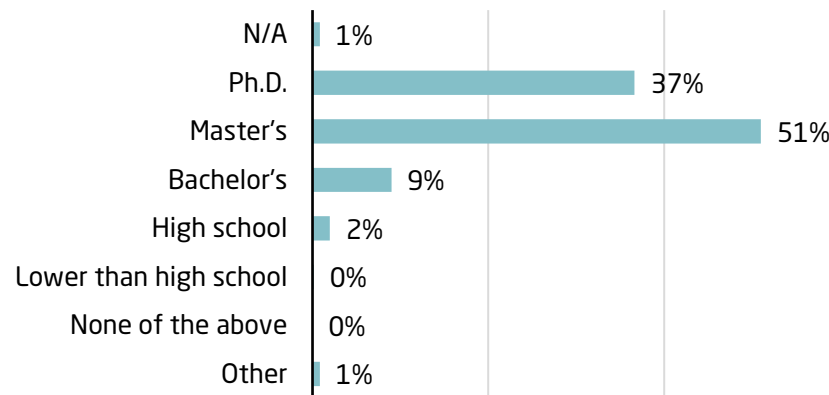
Survey respondents consisted of 729 members of the wider public and 151 experts



China experts



Wider public

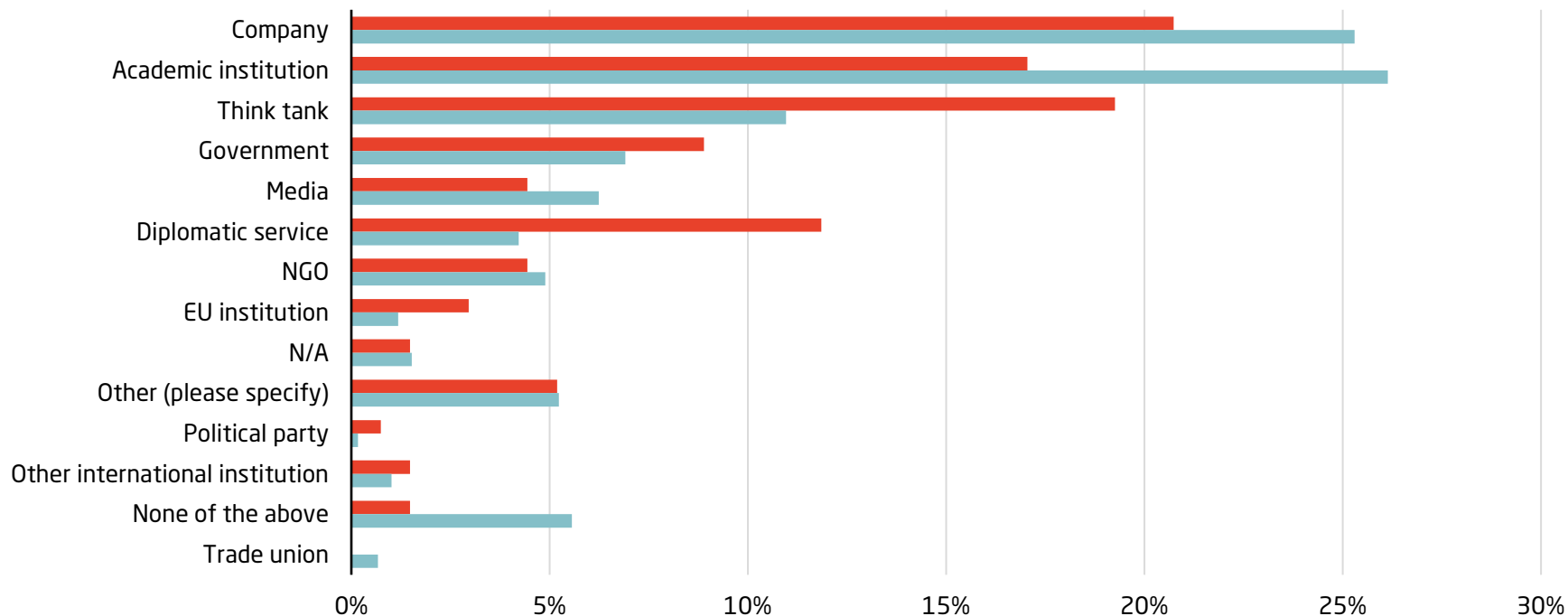


Survey statistics: Origin of survey participants (3)

Survey respondents consisted of 729 members of the wider public and 151 experts



■ China experts ■ Wider public

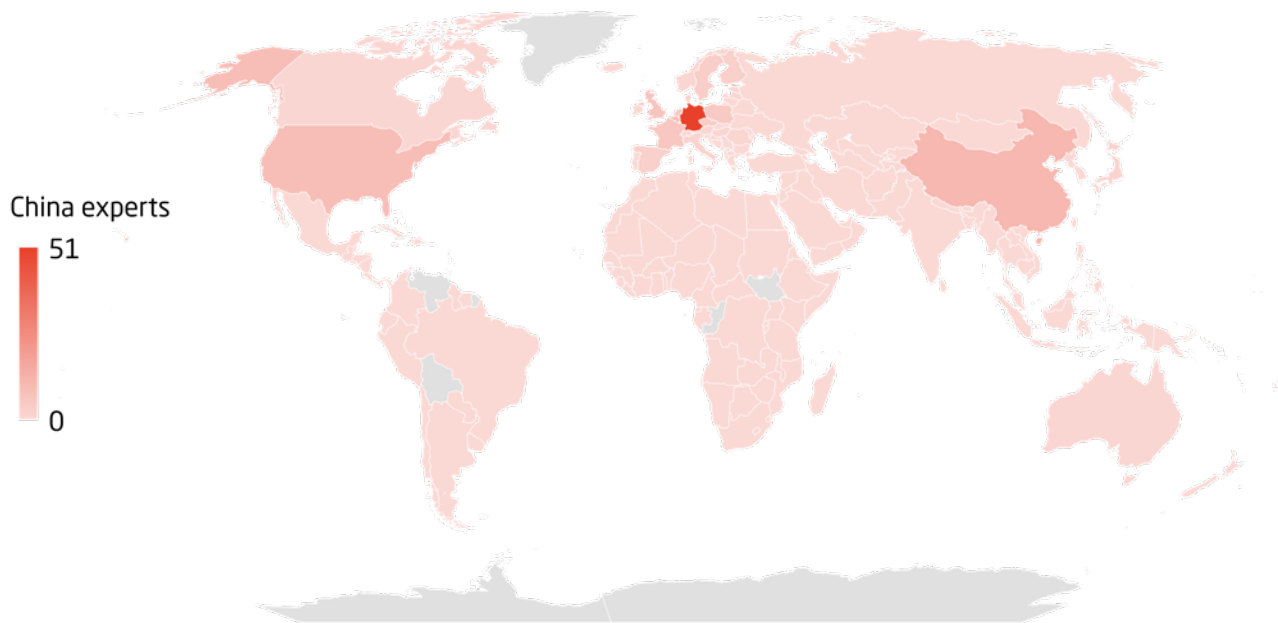


Survey statistics: Origin of survey participants (4)

Survey respondents consisted of 729 members of the wider public and 151 experts



China experts



COUNTRY	PERCENT
Germany	39%
China	8%
United States	7%
Belgium	7%
United Kingdom	5%
France	5%
Poland	4%
Netherlands	4%
Sweden	3%
Czech Republic	3%

Survey statistics: Origin of survey participants (4)

Survey respondents consisted of 729 members of the wider public and 151 experts



Wider public



COUNTRY	PERCENT
Germany	44%
China	9%
United States of America	7%
United Kingdom	5%
Belgium	4%
France	3%
Italy	3%
Switzerland	2%
Austria	2%
Singapore	2%



MERICS
CHINA FORECAST
2023

Contact

MERICS | Mercator Institute for China Studies

Klosterstraße 64

10179 Berlin

Tel.: +49 30 3440 999 0

Mail: info@merics.de

www.merics.org



Funded by
the European Union

The MERICS China Forecast 2023 has received funding from the European Union's Horizon Europe research and innovation program under grant agreement number 101061700. The event is part of "China Horizons", a multi-year project bringing together nine research institutions from seven EU member states. Its aim is to strengthen Europe's independent knowledge base on China's politics, society and economy.

Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or [name of the granting authority]. Neither the European Union nor the granting authority can be held responsible for them.