



# MERICs CHINA FORECAST 2024

## Survey results

Number of participants: 650

The survey was conducted online in November-December 2023



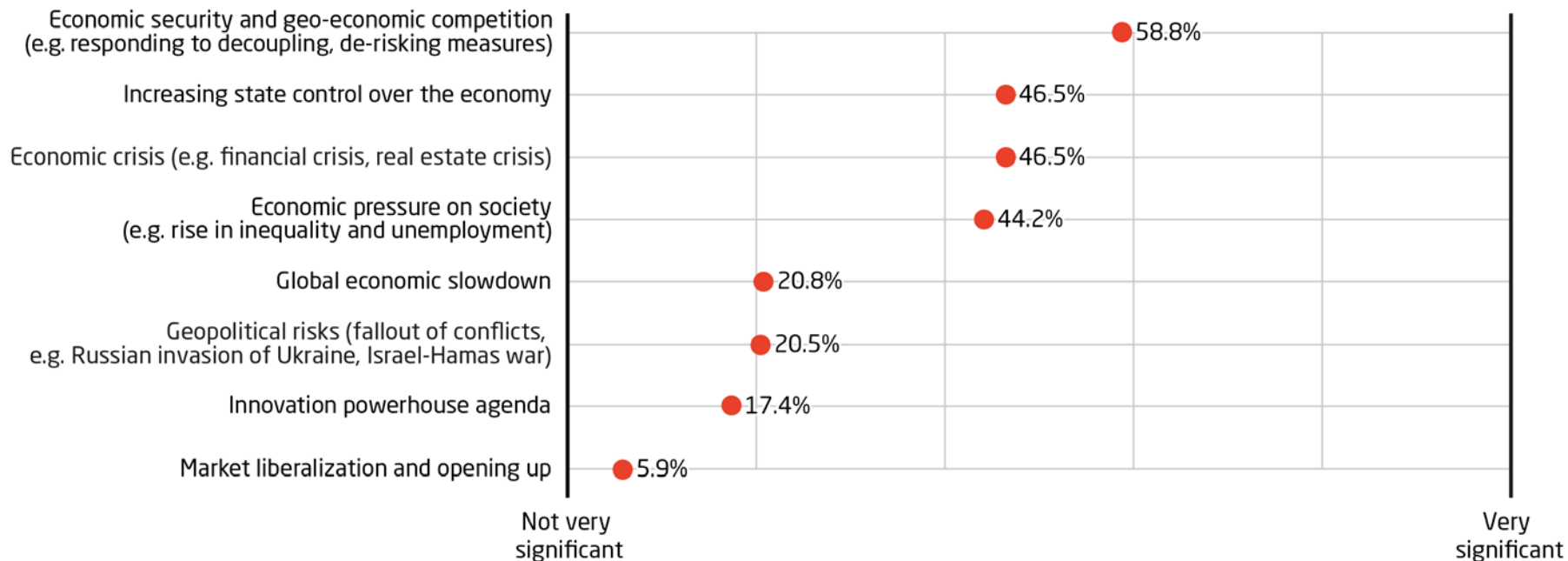
# Part 1: China's Domestic Development

Greater state control, less pragmatism, and high pressure on the economy

# State control and economic crisis pressure China's economy



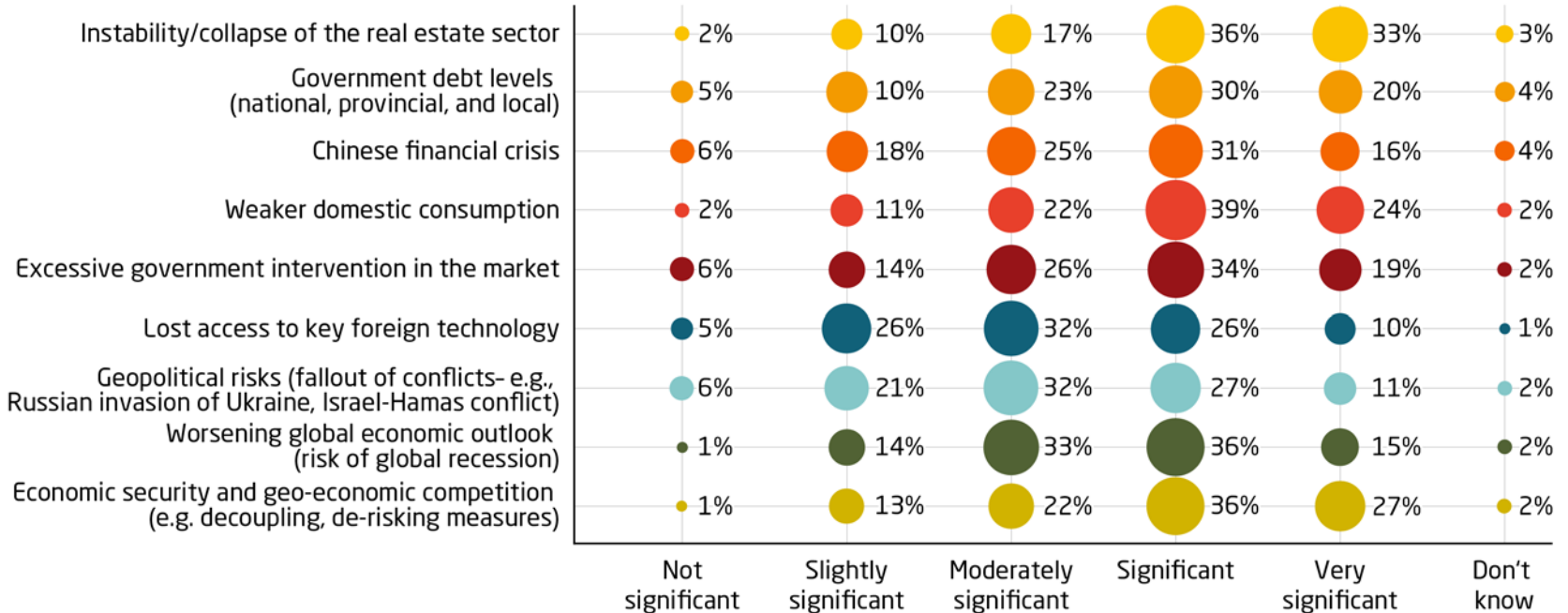
Q1: In your view, which of the following will shape China's economic development the most in 2024? Select up to three answers



# Weakened consumption and debt crisis clouds China's growth



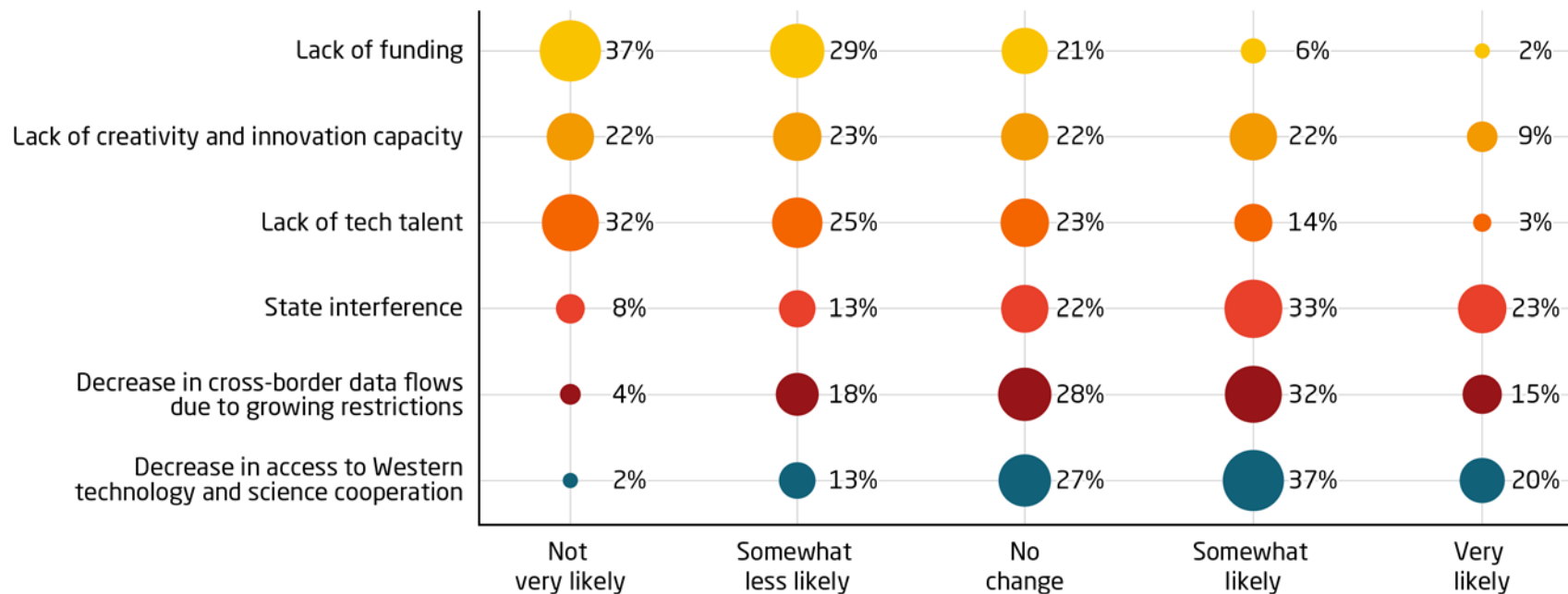
Q2: In your view, which of the following are significant risks for China's growth outlook in 2024?



# 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?

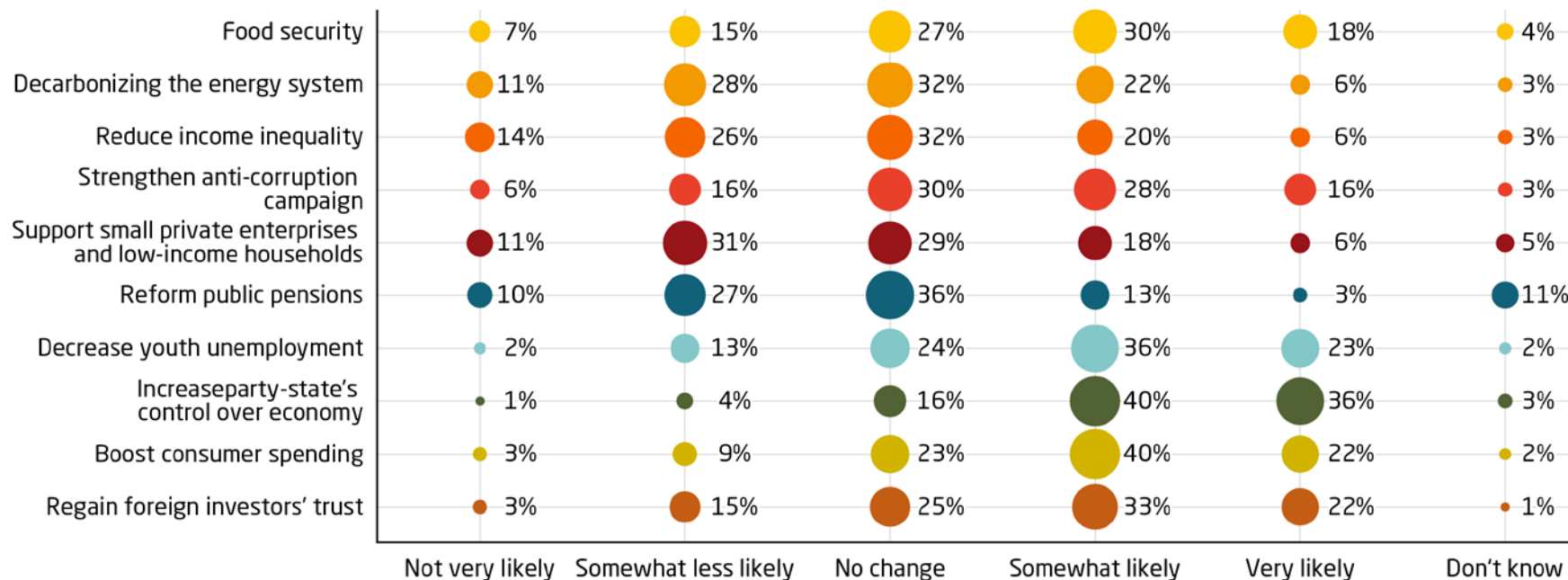


# Boosting while enhancing control over economy remains priority



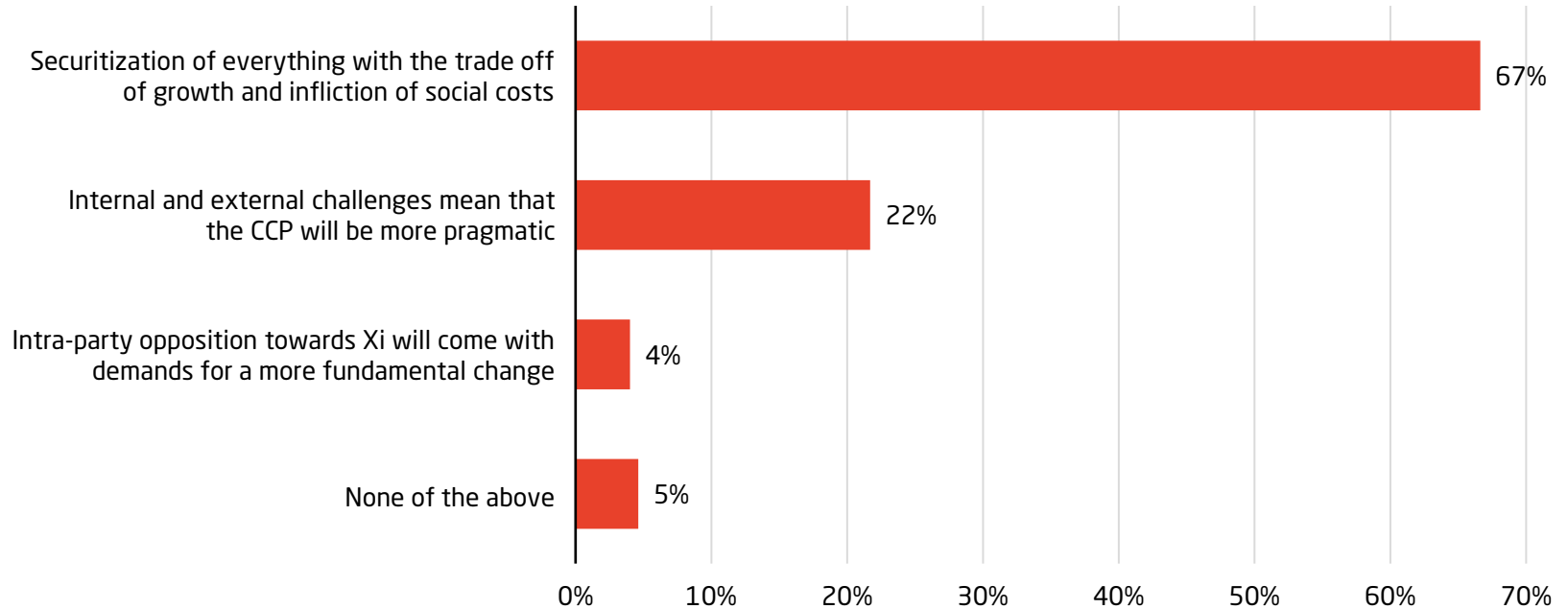
MERICs  
CHINA FORECAST  
2024

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

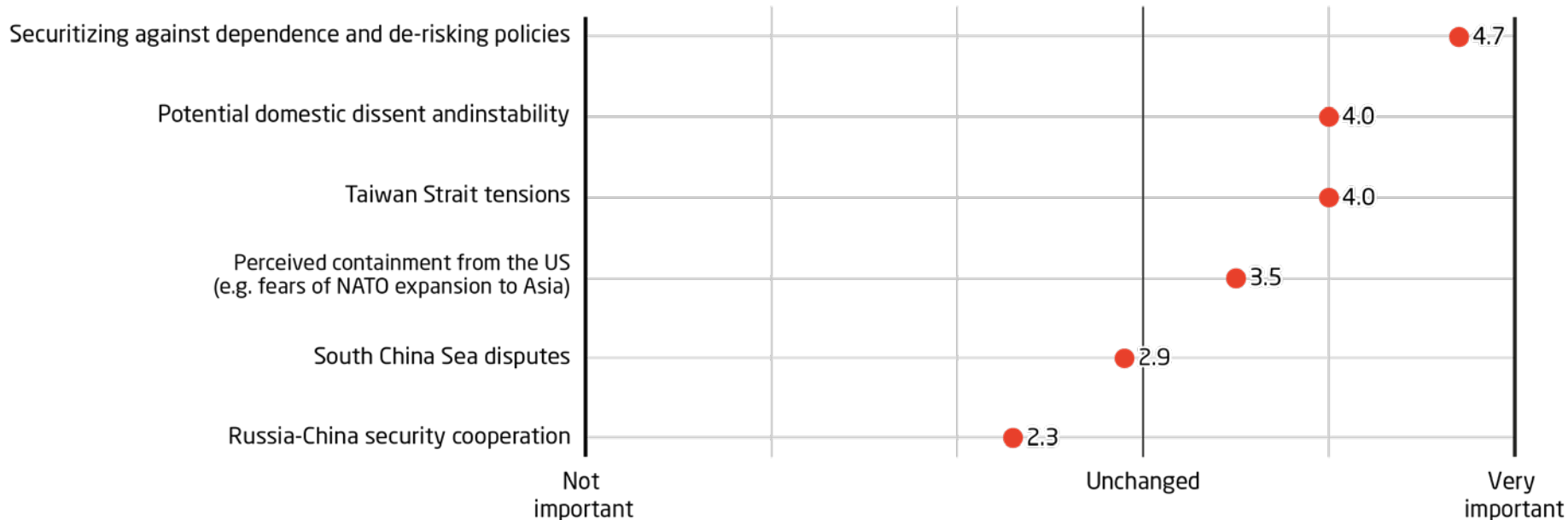
Q5: Which general course do you see China's leadership taking in 2024?



# Economic independence stays atop CCP's security agenda



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



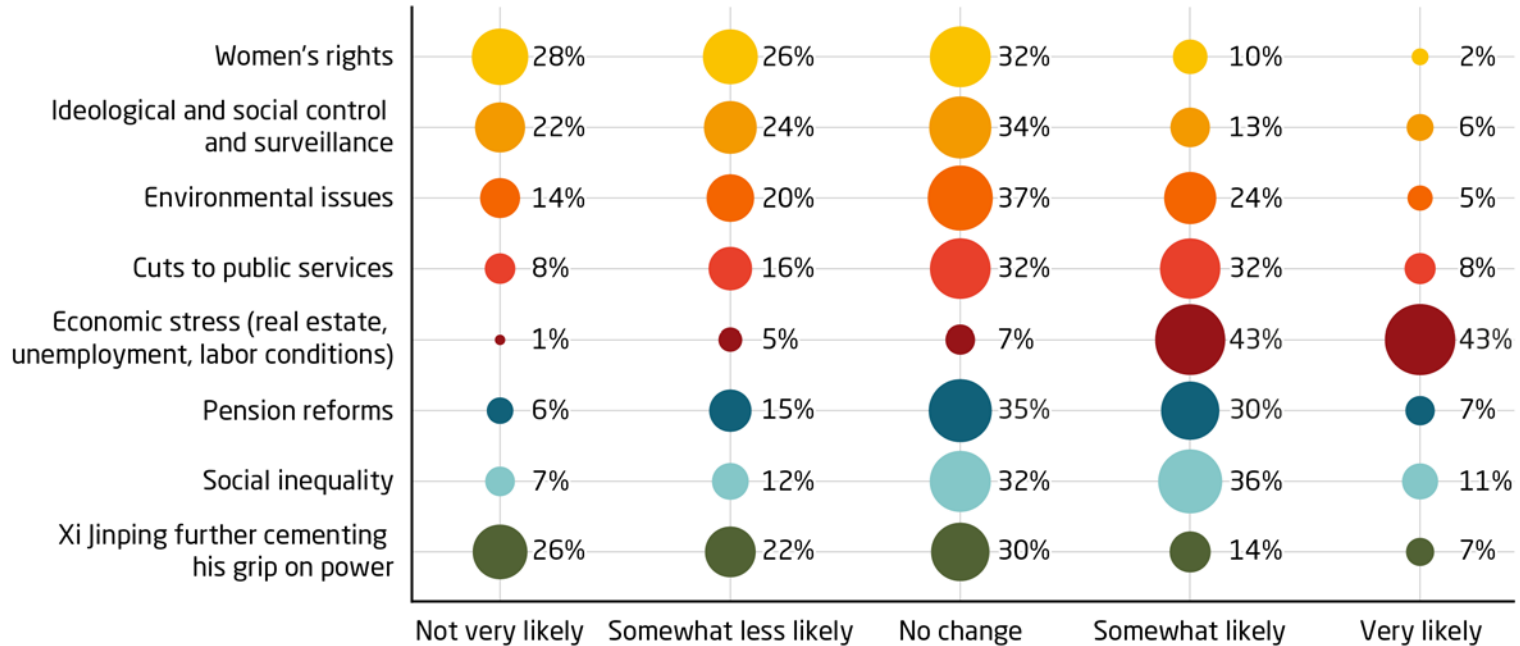
\* Weighted averages



# Economic stress creates protest potential



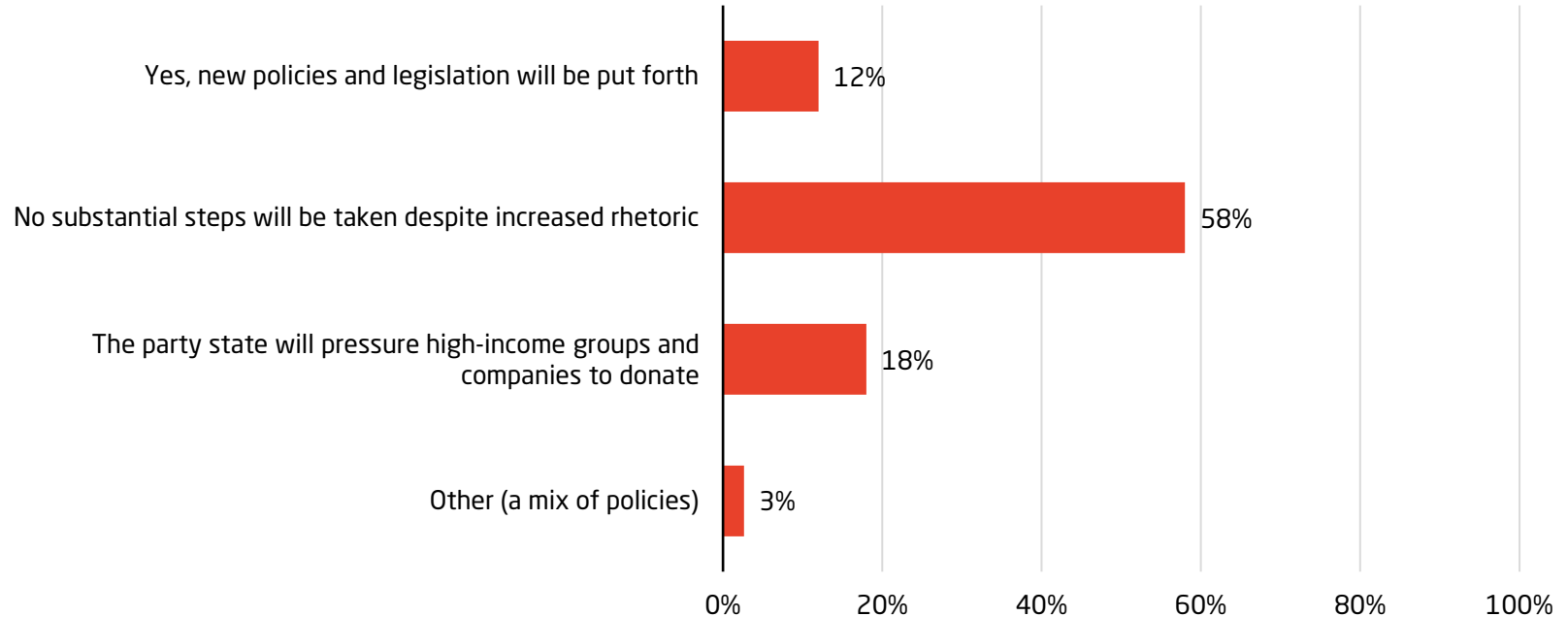
Q7: In your view, which of the following issues are likely to see public dissent or protests in 2024?



# 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?





# Part 2: Foreign policy & EU-China relations

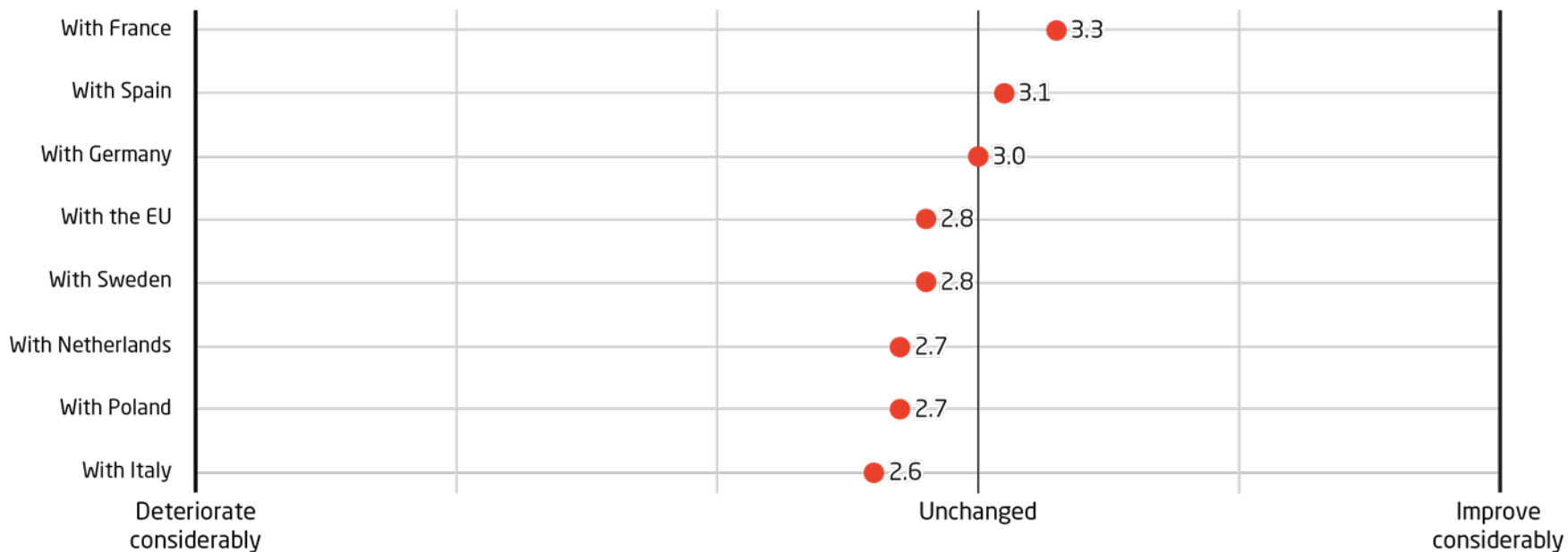
Stable ties with Russia, deteriorating relations with the West

# China's relations with Europe: Slight deterioration expected



MERICs  
CHINA FORECAST  
2024

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

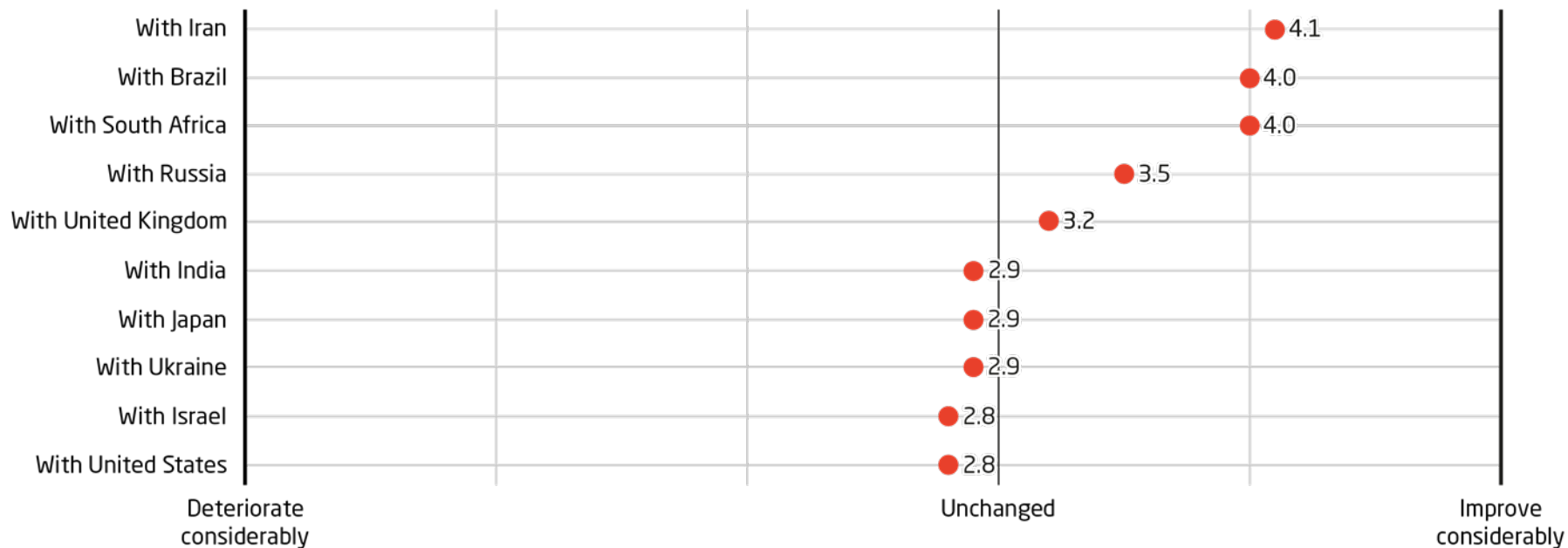


\* Weighted averages

# China's relations with non-EU countries: mostly unchanged



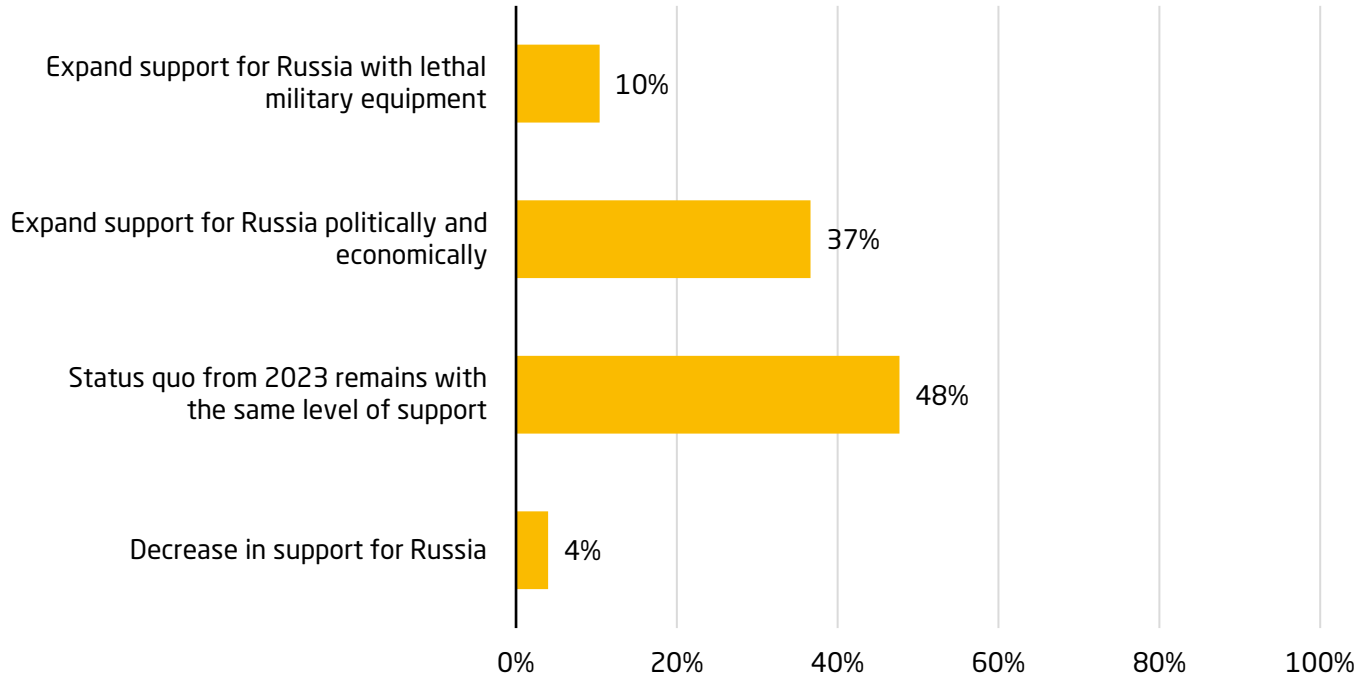
Q10: In your view, how will China's relations with the following non-EU states develop in 2024?



\* 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?

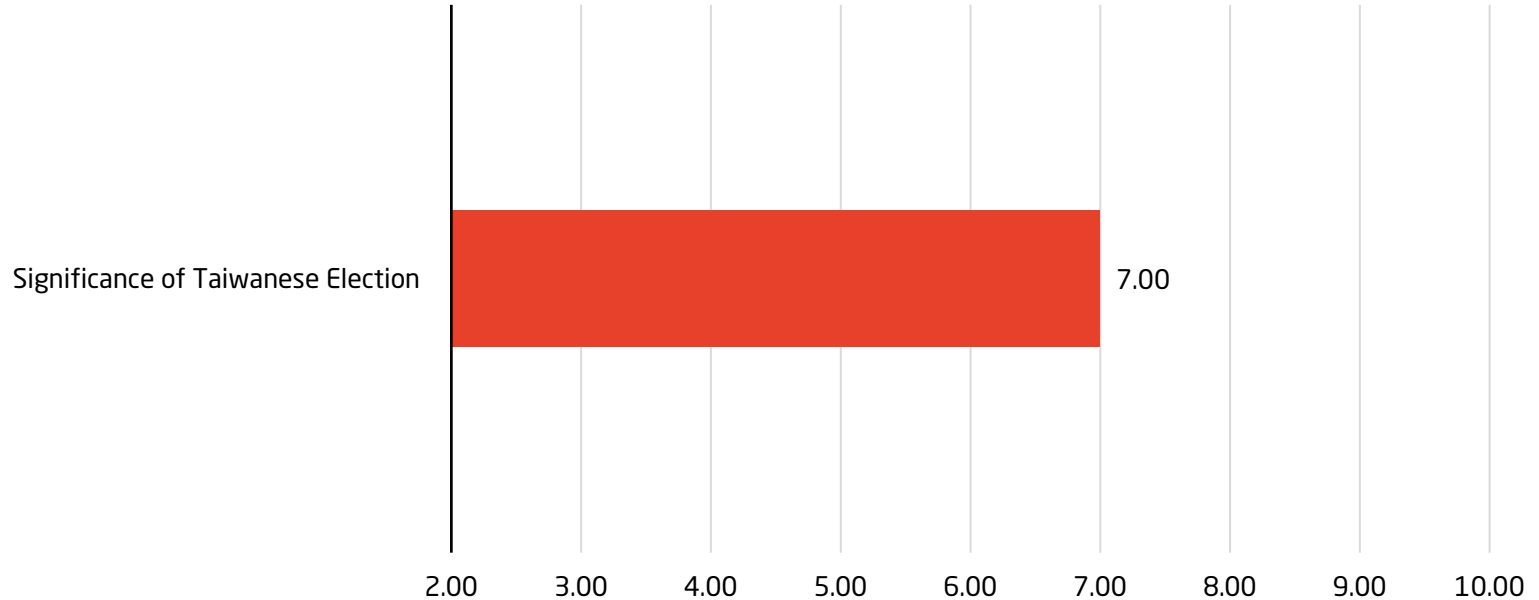


# Result of Taiwan's election has high impact on China's Cross-Strait relations policy



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



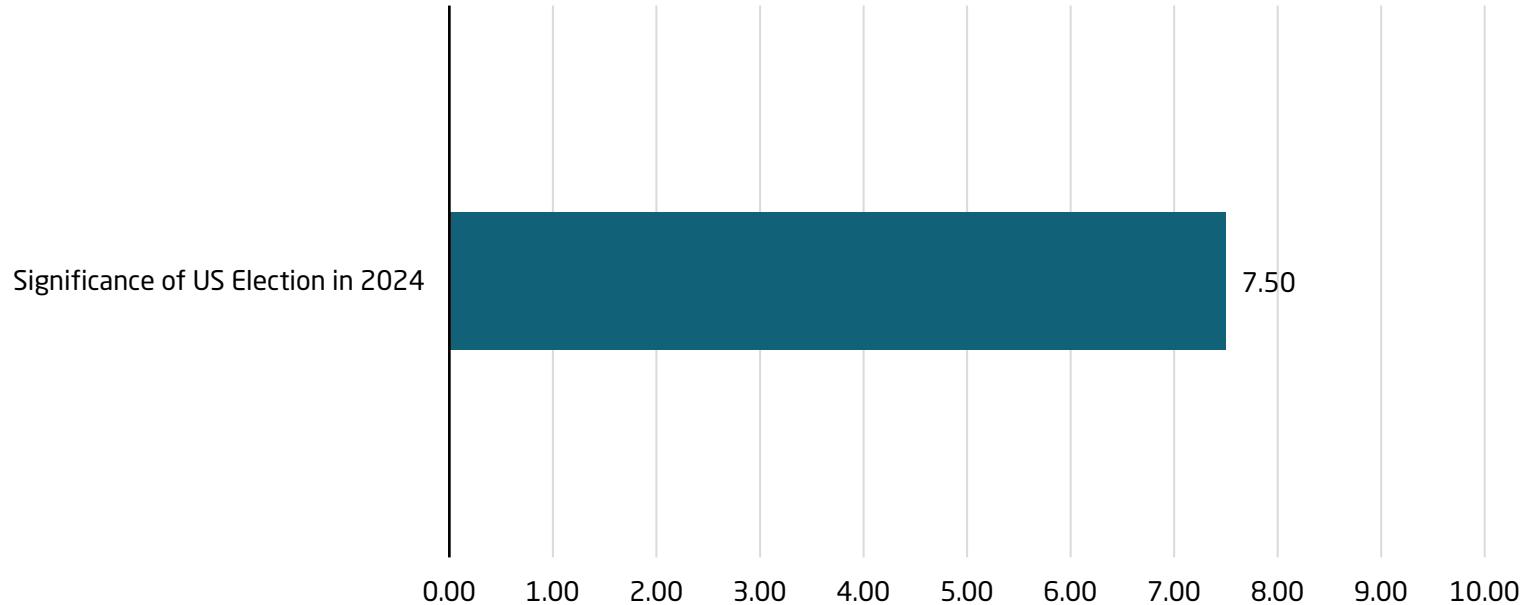
# US election result has high impact on China's policy to Taiwan



MERICs  
CHINA FORECAST  
**2024**

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

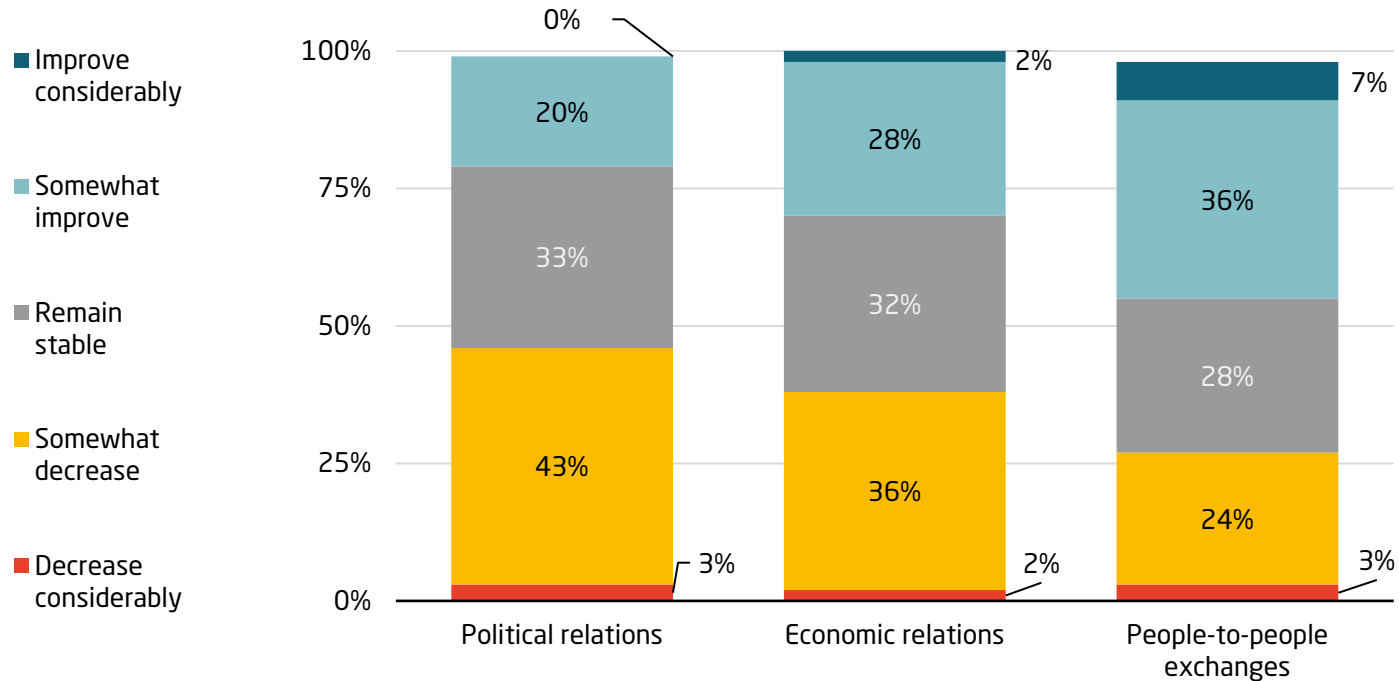




# EU-China: decrease in both political and economic relations

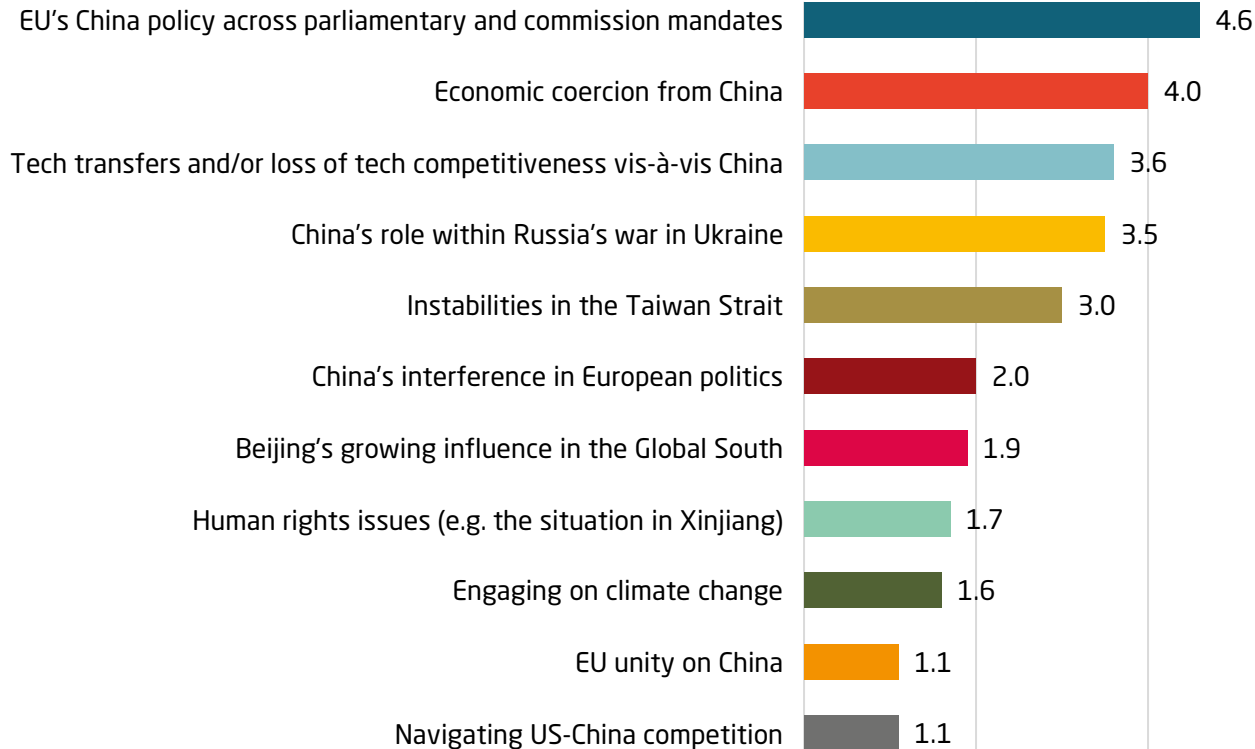


Q14: How do you expect EU-China relations to evolve in 2024?



# EU-China relations: challenges on many levels

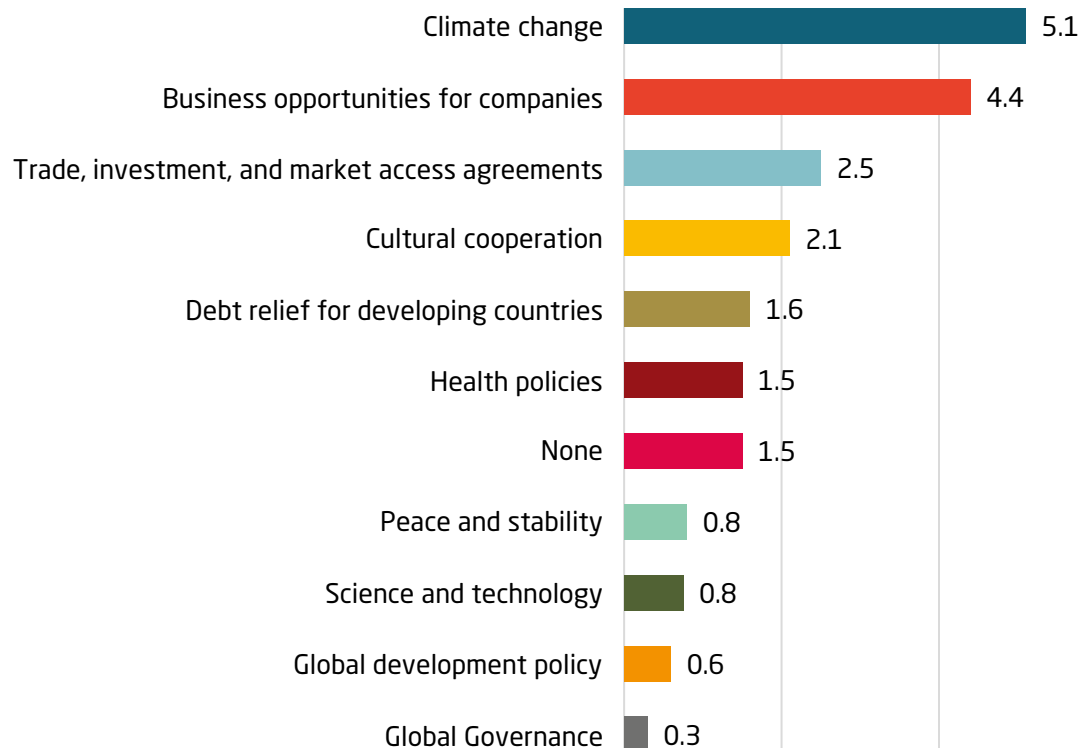
Q15: In 2024, the biggest challenges for the EU in EU-China relations will be:



# EU-China relations: Decreasing opportunities for cooperation

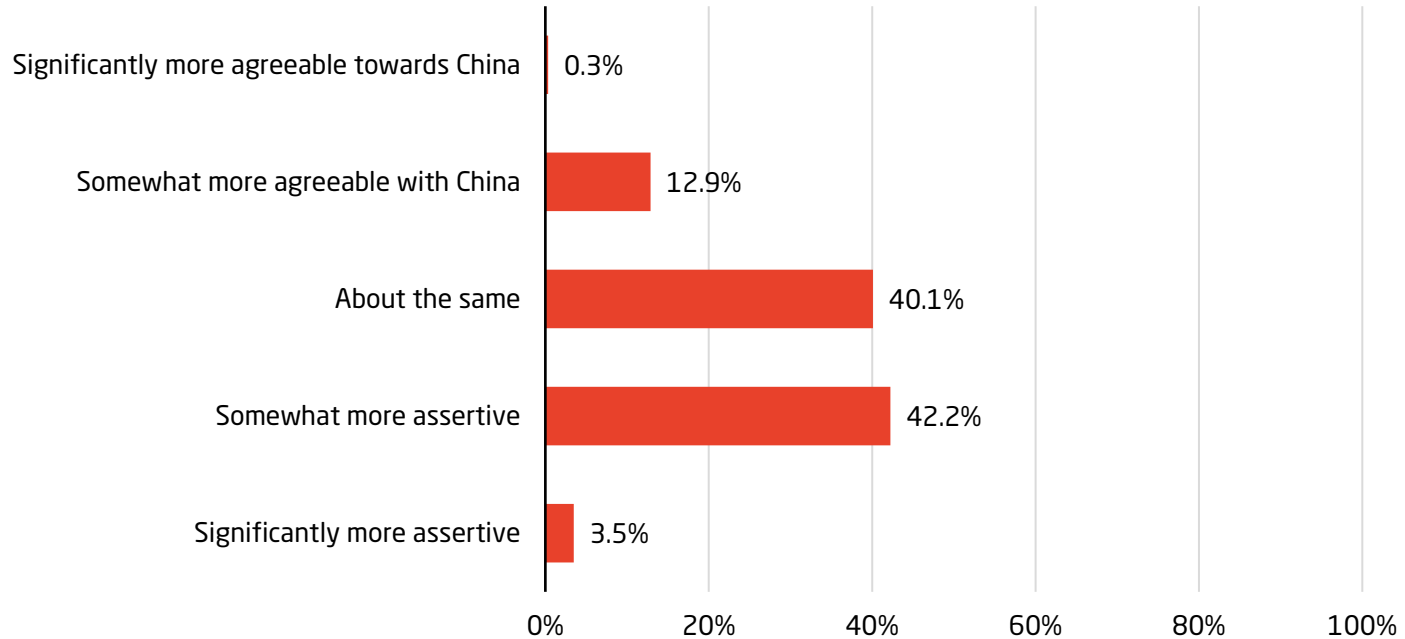


Q16: In 2024, in which areas are the EU and its member states likely to be able to make relevant progress with regard to cooperation with China?



# EU's more hawkish policy in 2024

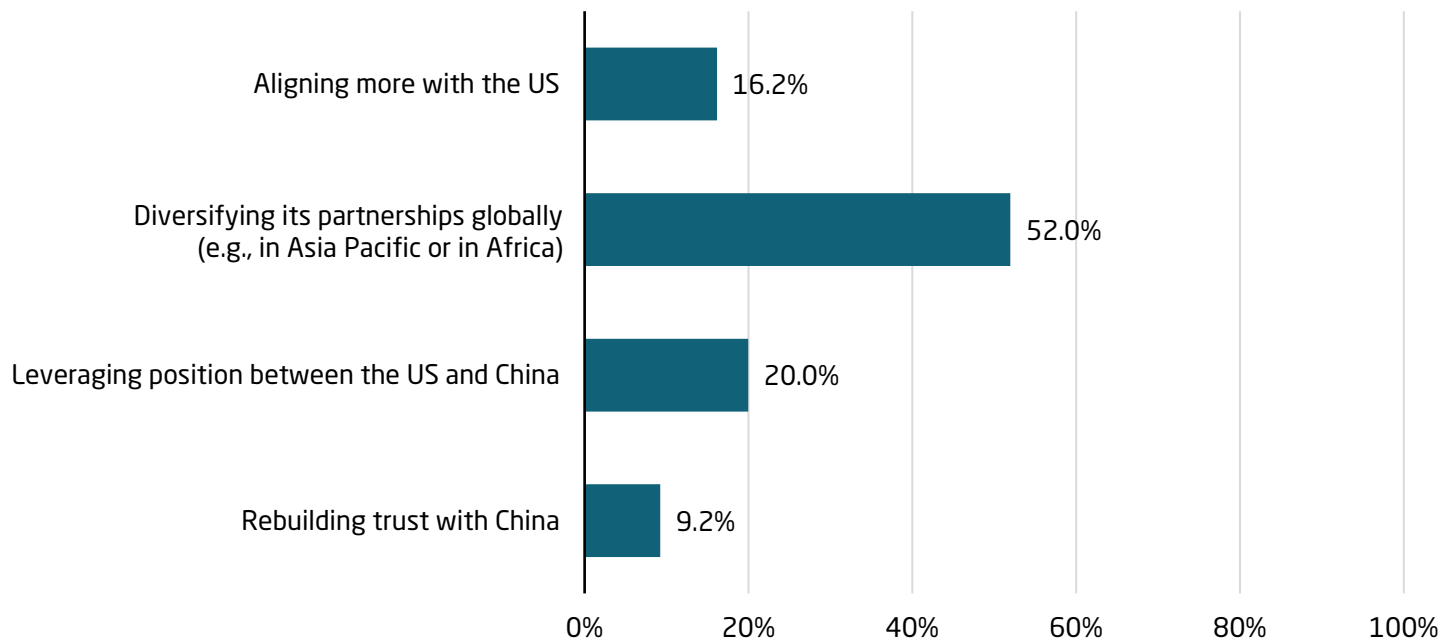
Q17: In 2024, the EU member states will overall pursue a China policy that will be:



# Diversifying global partnerships for EU beyond US and China



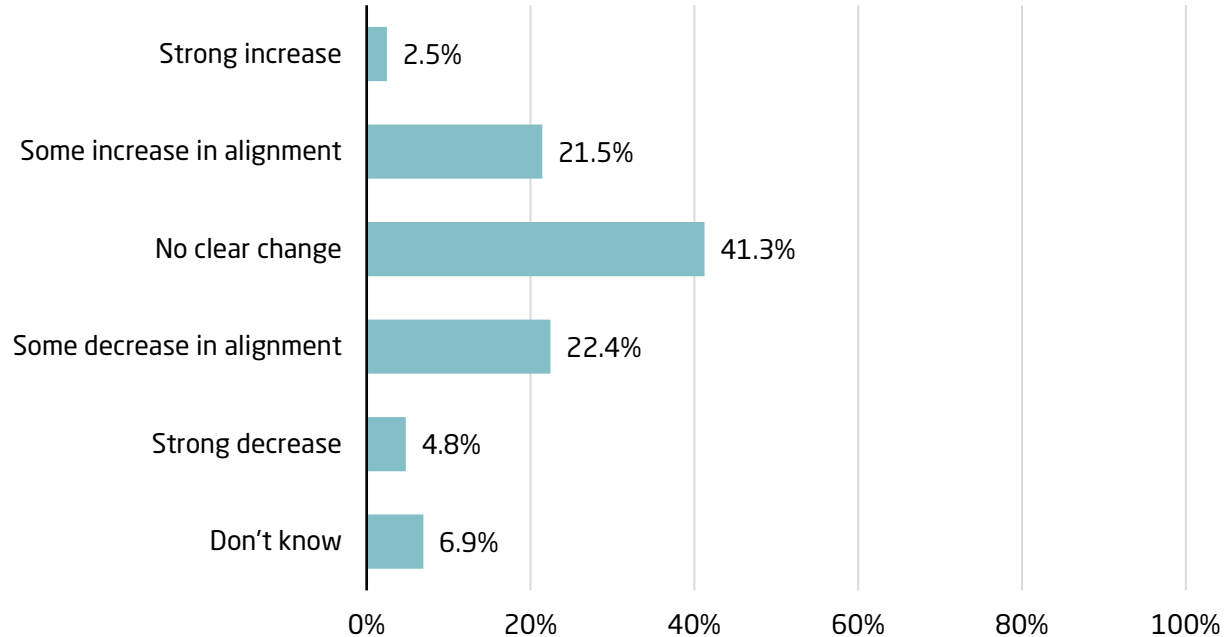
Q18: In 2024, internationally the EU and its member states should prioritize...



# 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?

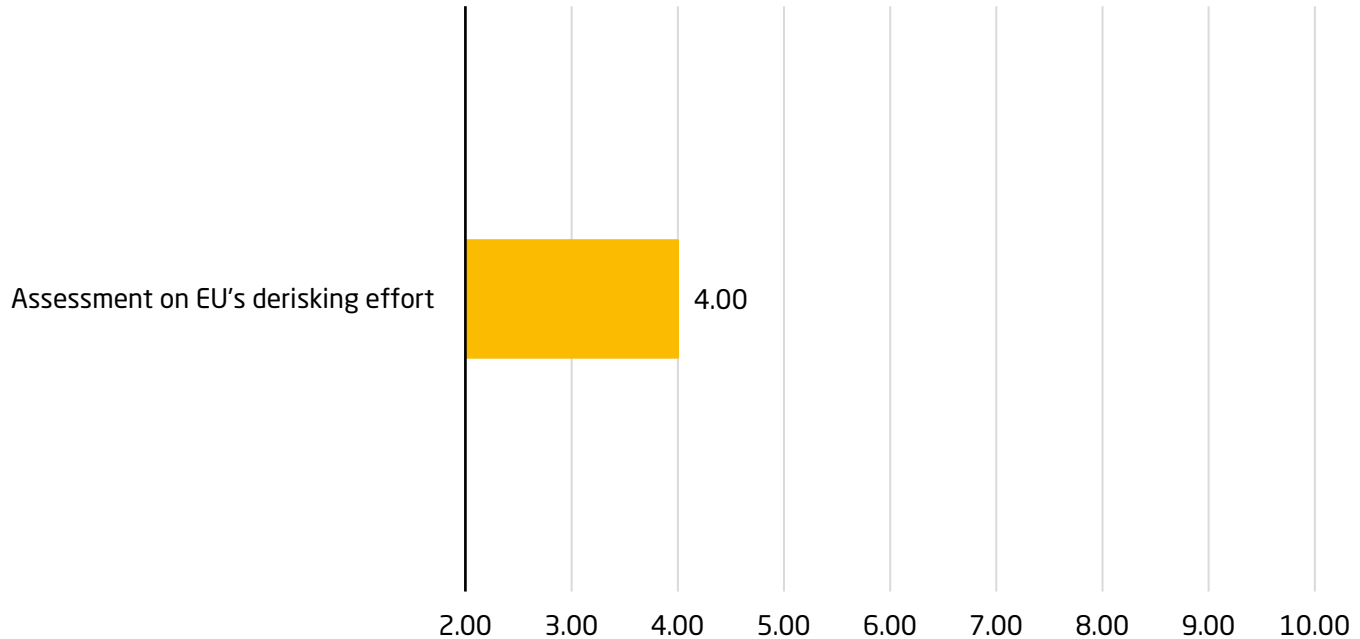


# EU needs greater effort to implement de-risking



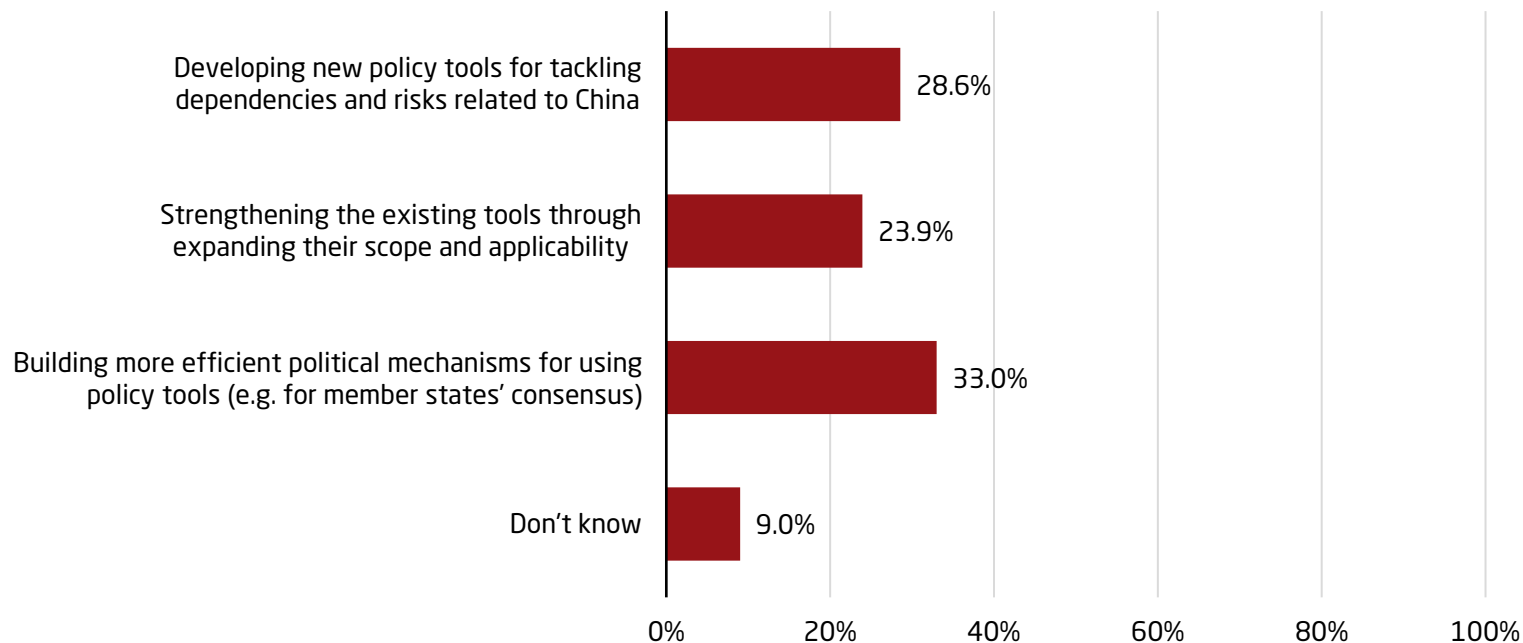
Q20: How do you assess EU efforts and progress achieved so far in implementing de-risking agenda?

0= lowest; 10= highest



# Mixed view over EU's de-risking priorities

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





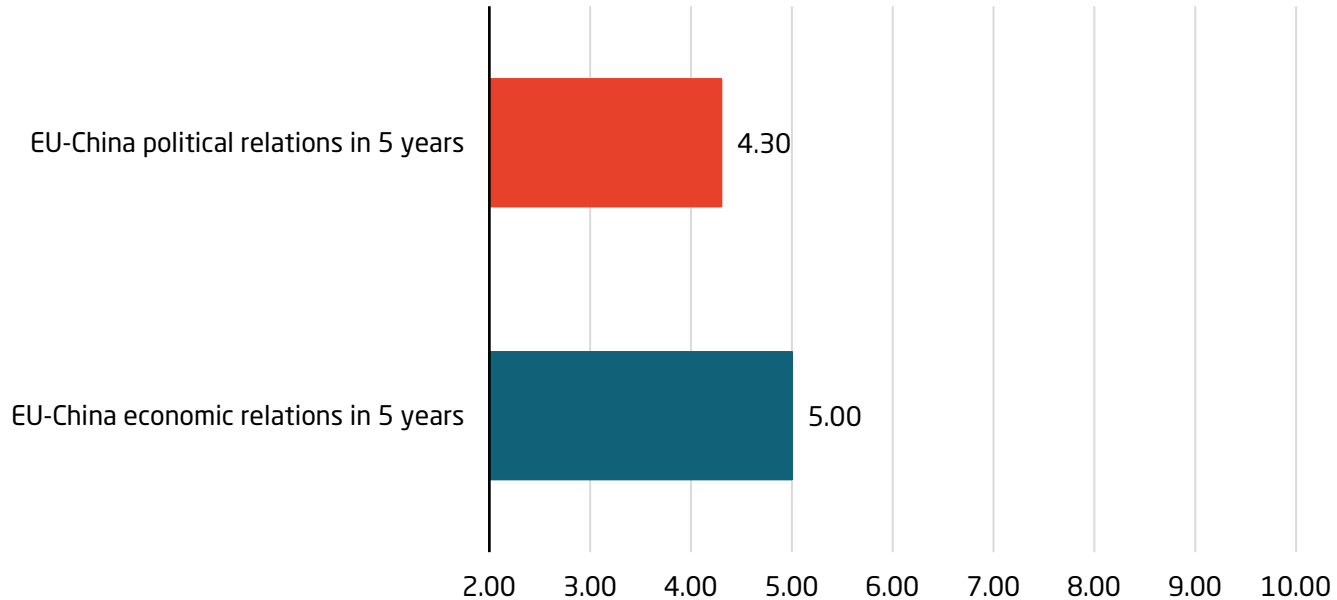
# EU-China relations in next five years: economic relations stay neutral, political relations are more pessimistic



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?

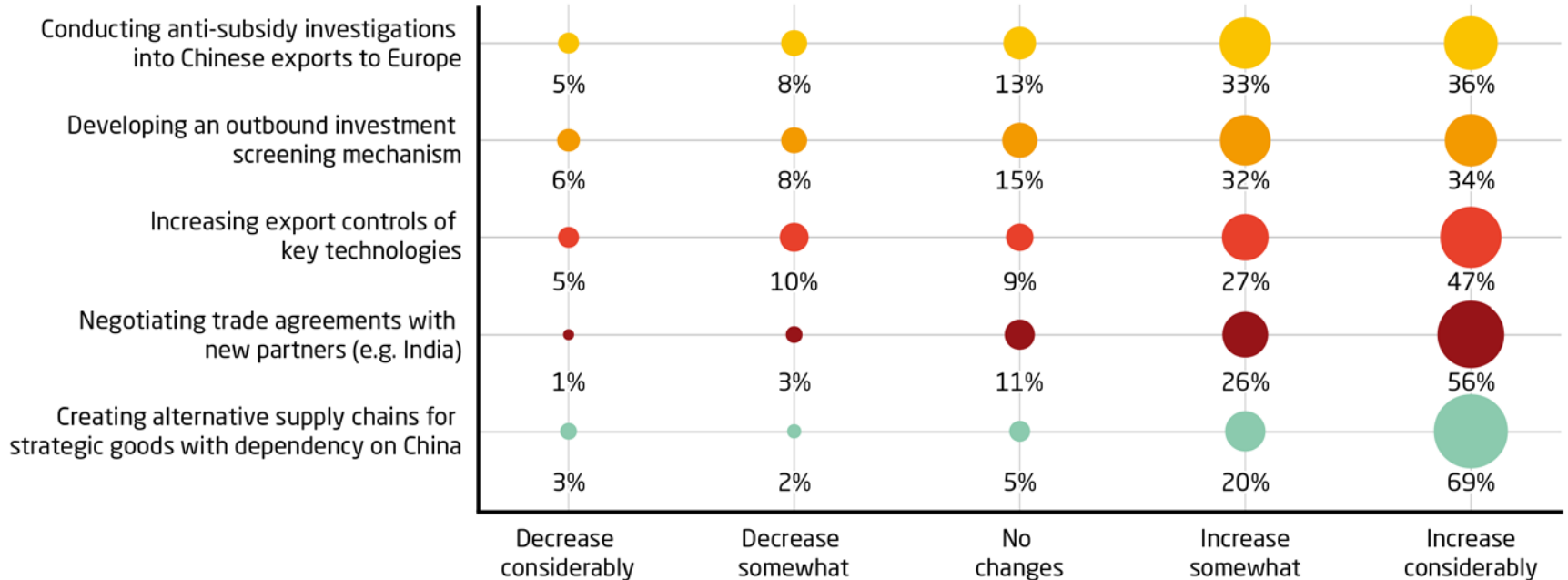
0= most negative ; 10= most positive



# 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?

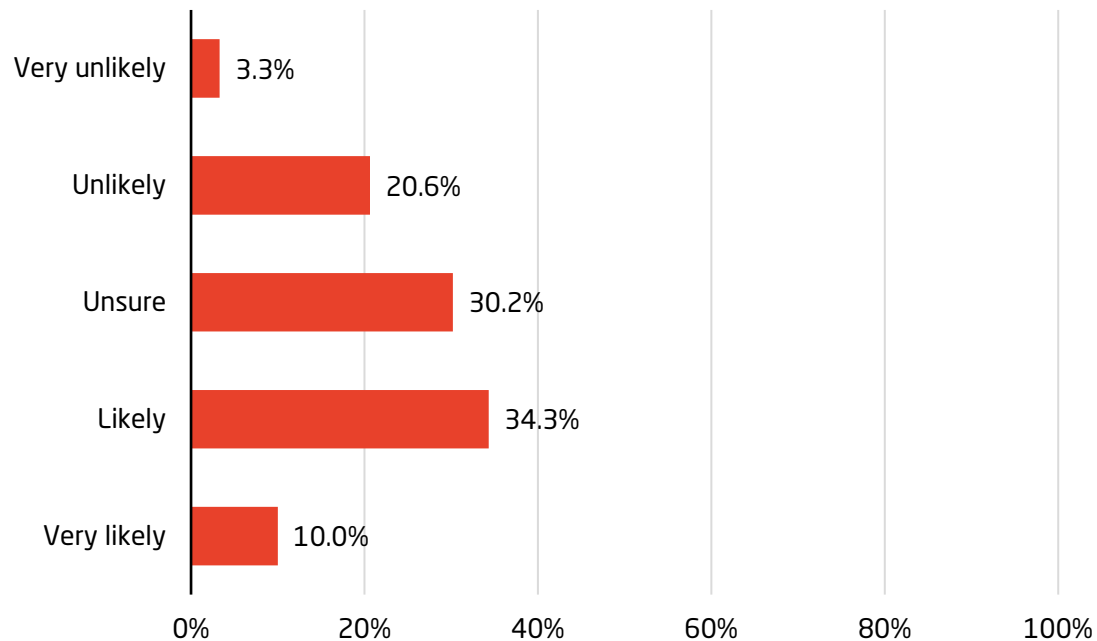


# Mixed view over likeliness of a future major EU policy on China



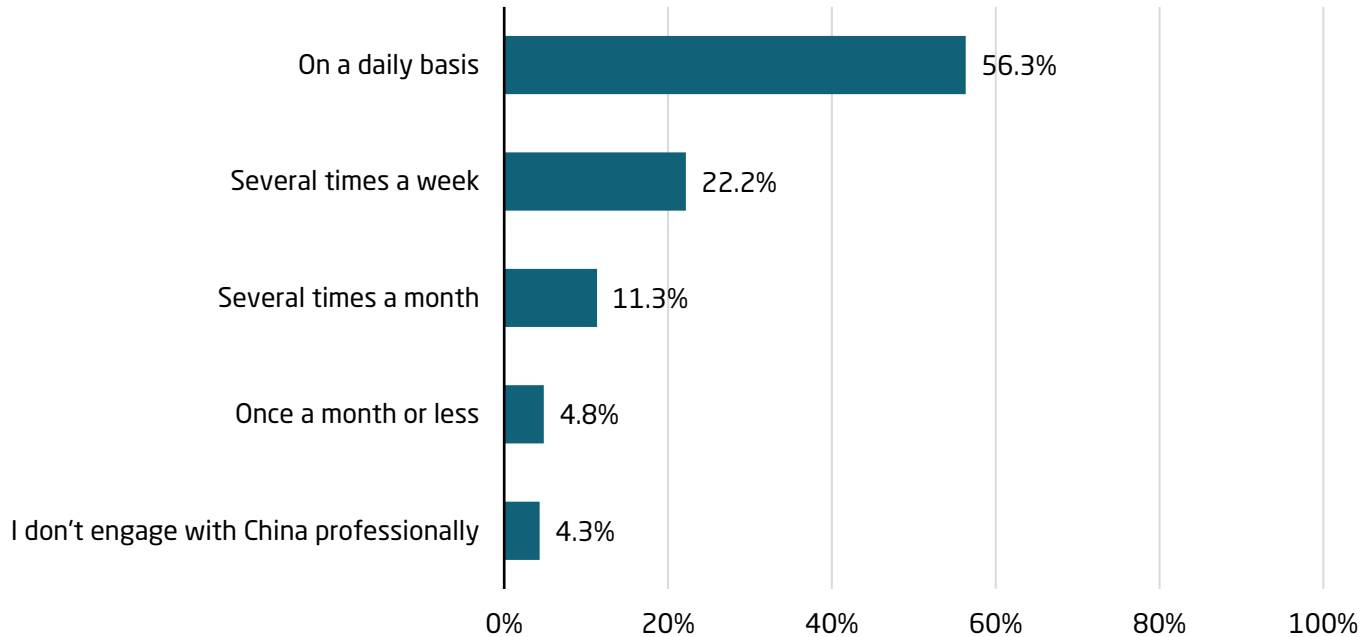
MERICs  
CHINA FORECAST  
2024

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)

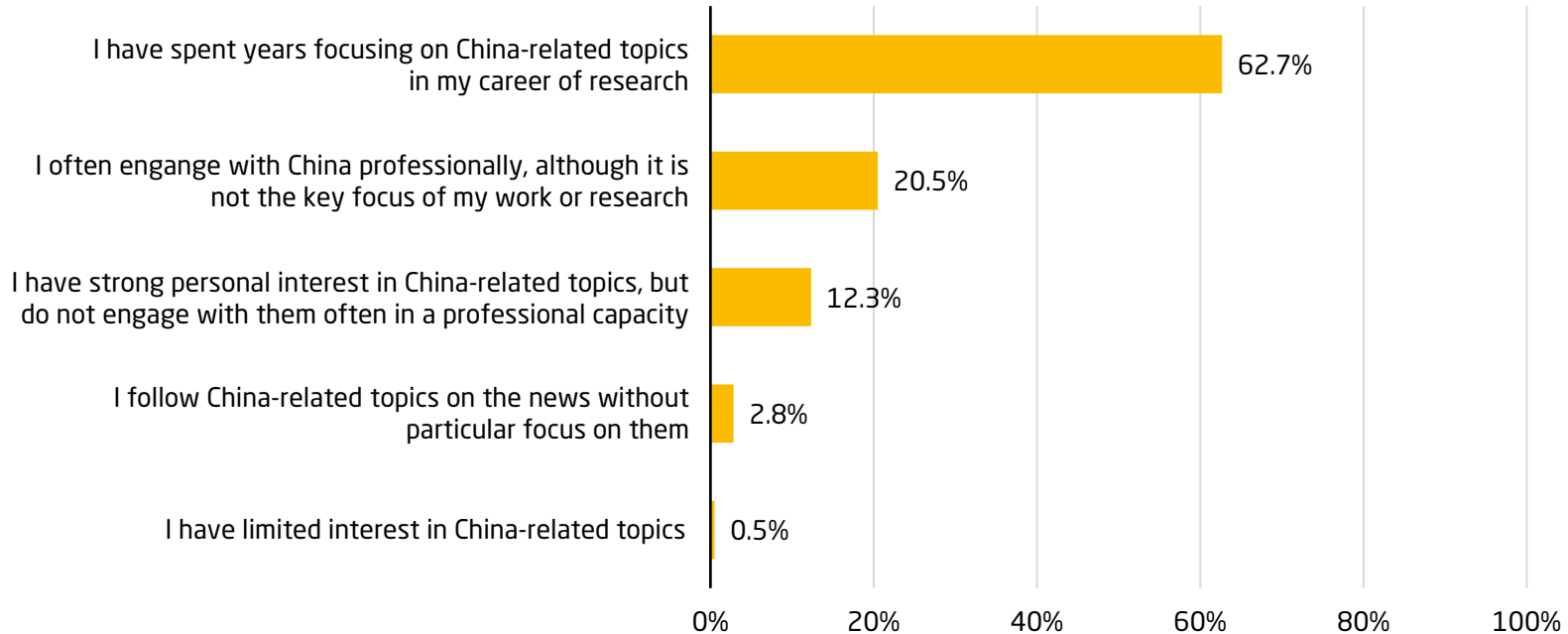
Q29: How often do you engage with China-related topics professionally?



# Survey statistics: Origin of survey participants (2)

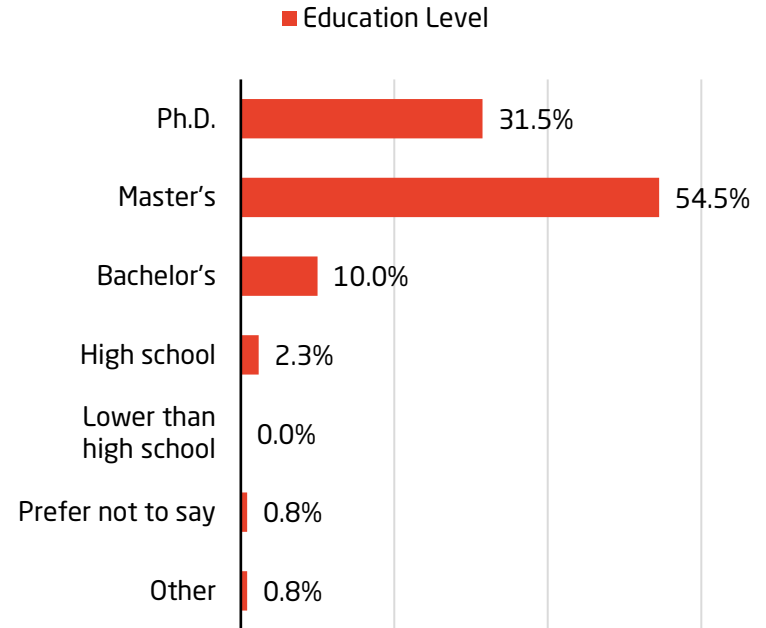
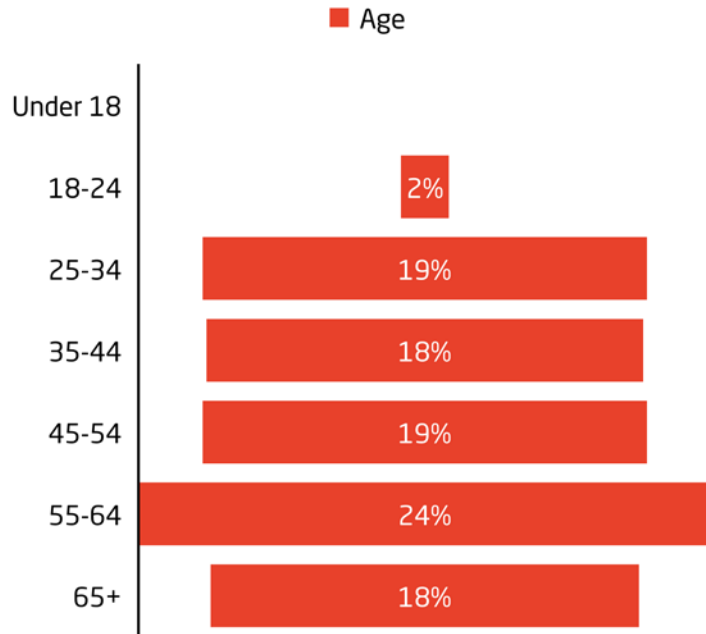


Q30: Which statement best describes your engagement with China-related topics?



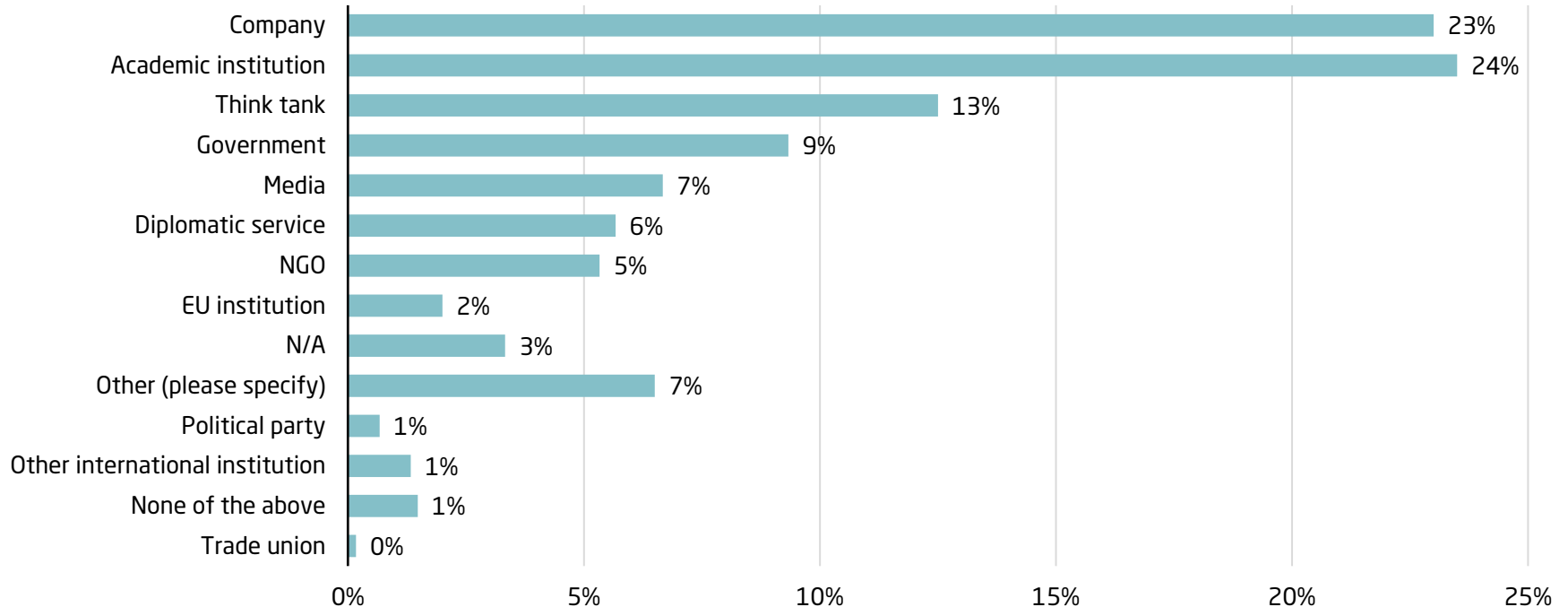
# Survey statistics: Origin of survey participants (3)

Survey respondents consisted of 650 participants



# Survey statistics: Origin of survey participants (4)

Survey respondents consisted of 650 participants

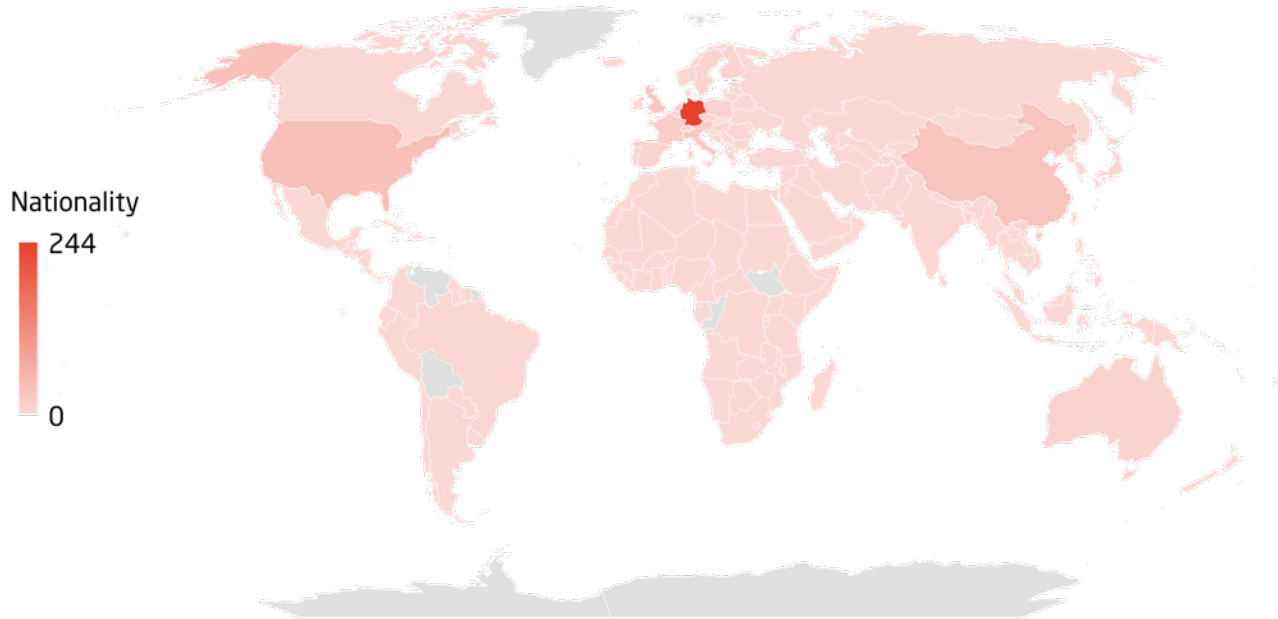


# Survey statistics: Origin of survey participants (5)

Survey respondents consisted of 650 participants



## Nationality



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 (6)

Survey respondents consisted of 650 participants



## Residence



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%



## Contact

MERICS | Mercator Institute for China Studies

Klosterstraße 64

10179 Berlin

Tel.: +49 30 3440 999 0

Mail: [info@merics.de](mailto:info@merics.de)

[www.merics.org](http://www.merics.org)



Funded by  
the European Union

*The **MERICS China Forecast 2024** is part of the “Dealing with a Resurgent China” (DWARC) project, which has received funding from the European Union’s Horizon Europe research and innovation programme under grant agreement number 101061700.*

*Views and opinions expressed do not necessarily reflect those of the European Union. Neither the European Union nor the granting authority can be held responsible for them.*