

DGAP POLICY BRIEF

Skeptical and Concerned – How Germans View China



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Two representative opinion polls conducted in 2020 and 2022 show that the German population supports a more principled China policy. At the same time, two-thirds of respondents identify as the policy priority co-operation with China to solve global challenges – narrowly followed by cyber security and human rights concerns. Although this approach resembles Germany's new China Strategy, the public is not yet convinced that the issue is being effectively addressed. Channeling public support to back concrete action is key for the Germany's China policy.

- 60% of Germans polled are willing to accept higher consumer prices to reduce economic dependencies on China, and only 31% approve of Chinese technology in Germany's 5G infrastructure.
- 48% of respondents want to prioritize human rights over economic benefits, while only 15% disagree. Only 25% do not hold German companies accountable for the human rights violations of their suppliers.
- Almost half of Germans surveyed are concerned the country's economy is not strong enough to reduce dependencies on Russia and China at the same time.
- The government needs to better explain the means, ends, and cost of its China policy and invest in China-related public education to reduce the feeling of unsurety. Closer EU alignment is widely supported and could increase the confidence of the population.

ABOUT THE POLL

As part of the Sinophone Borderlands project headed by Palacký University Olomouc in Czechia, a series of representative online public opinion surveys have been conducted in 2020 and 2022, investigating attitudes toward China and other related issues.* In collaboration with partners in the surveyed countries, the German Council on Foreign Relations being the German partner, we have surveyed 56 countries worldwide (four of them twice, including Germany) and have collected responses from more than 80,000 respondents on more than 300 datapoints in each country. These characteristics make this currently the broadest and most detailed public opinion study into global attitudes toward China.

The first German survey was run in September and October 2020 and gathered 1,501 respondents. The second German survey was run between August and October 2022 and gathered 1,508 respondents. The research samples in both cases were representative of gender, age, education level, urban-rural divide, and regions within the country. Both surveys were conducted online by NMS Market Research Agency in collaboration with Cint. The data collection was conducted in line with the guidelines of the ICC/ESOMAR International Code on Market, Opinion and Social Research and Data Analytics, and the research received a positive ethical statement from the Ethical Commission of the Faculty of Arts, Palacký University Olomouc.

“Sinophone Borderlands – Interaction at the Edges” was a research project based at the Palacký University Olomouc, Czechia. The project was funded by the European Regional Development Fund, project no. CZ.02.1.01/0.0/0.0/16_019/0000791. The Sinophone Borderlands research team consisted of researchers from various disciplines under three main Research Groups – Political Science, Anthropology, and Linguistics – allowing for a cross-disciplinary dialogue and cross-cultural comparisons pushing the academic studies of China and Asia beyond the limits of current disciplinary and national frameworks. This report, for the first time, reflects on the outcome of the results from the German public and draws policy conclusions for the German political leadership.

In normal times, foreign affairs are doomed to a shadowy existence in the perception of the general public. Not so since Russia’s war of aggression against Ukraine is dominating the political agenda and forces consumer prices upward. “Zeitenwende” – referring to a turning point in history or an end of an era – might very well be the term that is more associated with Olaf Scholz’s chancellorship than any other expression.

Germany’s two largest political parties are both being criticized for having been naïve about Russia. In particular, previous high dependency on Russian fossil fuels is now widely acknowledged as a strategic mistake. By extension, not only is Germany’s Russia policy being discussed but also whether the country and the entirety of the European Union (EU) is repeating the same mistake being overly dependent on the People’s Republic of China (PRC).

As media coverage and public interest in China has grown in recent years, so has the value of public opinion surveys covering public perception of the PRC and related policy preferences. Implicitly, it seems that many analysts assume that the German public is very sensitive regarding yet another potential conflict. Policymakers fear that the electorate is not willing to accept further economic costs. Company representatives similarly assume that consumers do not care much about their business ties with the PRC.

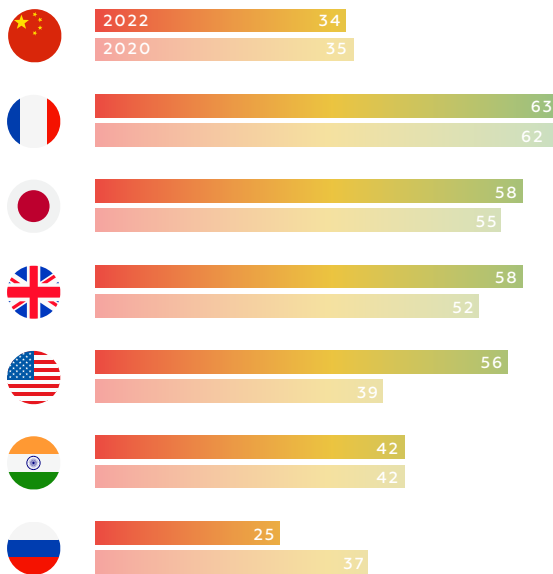
This paper examines the results of two comprehensive datasets of German public opinion on China from 2020 and 2022. Both datasets provide a solid empirical basis to investigate these assumptions. The findings from the poll demonstrate that the German public’s perception is much more nuanced. The results are discussed in the context of ongoing controversies to better understand which China policy the German public supports. What do Germans think of China? How do Germans want the bilateral relations to evolve?

* For more information, please consult Sinofon, “Global views on China,” Palacký University Olomouc (2023): <https://sinofon.cz/surveys> (accessed April 19, 2023).

CHINA'S NEGATIVE IMAGE IN GERMANY

The general image of the People's Republic of China among German respondents is negative with basically no change between the two surveys conducted in 2020 and 2022. China's geopolitical rival, the United States (US), in turn, has gained in popularity, increasing its score from 39 to 56. **Figure 1** demonstrates that only the image of Russia was substantially worse among seven selected countries that were subject to polling in both 2020 and 2022, falling from 37 before it attacked Ukraine to 25 in 2022.

Figure 1 – How positively or negatively do you assess the following countries on a scale of 0 (= negative) to 100 (= positive)?

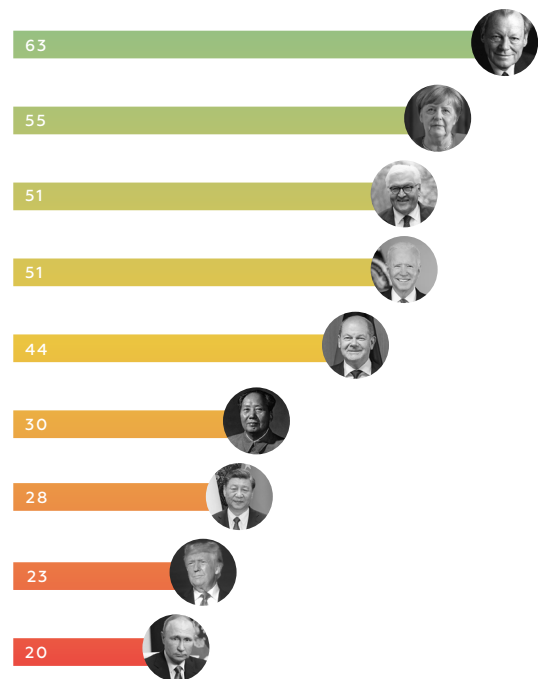


Source: Sinophone Borderlands 2020, 2022

In an international comparison, China's image in Germany is rather negative. **Figure 34** (see page 17) illustrates that Germans join a number of mostly Western countries that hold a negative perspective of the PRC. In the polling of 2022, when fifteen states in Europe, Northern America, and the Middle East were subject to polling, the respondents in only five countries were more critical than the German respondents.¹

While the United States and China were almost on par in 2020, US presidential elections in late 2020 may well explain the United States' lead over the PRC in 2022. As **Figure 2** demonstrates, Xi Jinping, China's president and general secretary of the Chinese Communist Party (CCP), is unpopular among the German public. Even Mao Zedong, China's leader during the Great Leap Forward and the Cultural Revolution, when millions of Chinese died, is rated better. Only Russian President Vladimir Putin and former US President Donald Trump score worse. US President Joe Biden, by contrast, is no burden for the United States.

Figure 2 – How do you feel about the individual on a scale of 0 (=negative) to 100 (=positive)?



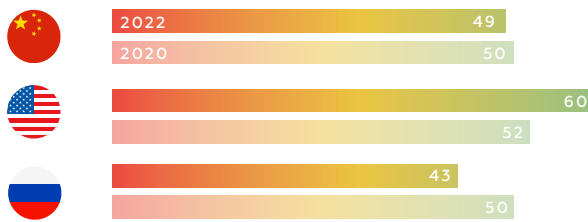
Source: Sinophone Borderlands 2022

All this is not to say that the German public is necessarily anti-Chinese. When asked how they assess the Chinese people, the score is significantly better than that of the PRC. When the results are put into international perspective, however, the image of the Chinese people in Germany is among the worst. In the 2022 survey covering the above-mentioned countries (see footnote 1), Chinese people had

¹ In 2022, China scored worse in Switzerland, Canada, the Czechia, Finland, and the United Kingdom. The PRC had a better image in Austria, Portugal, Belgium, the United States, Israel, Turkey, Latvia, Romania, and Greece. Richard Turcsányi et al., "Trans-atlantic public opinion on China: Great power competition amidst Russian invasion of Ukraine," CEIAS (2022): https://ceias.eu/wp-content/uploads/2022/12/Europe_and_North_America_Draft-FINAL.pdf (accessed April 18, 2023).

a more negative image only in four countries, namely Czechia, Switzerland, Turkey, and Austria.²

Figure 3 – How positively or negatively do you feel about the following groups of people on a scale of 0 (=negative) to 100 (=positive)?

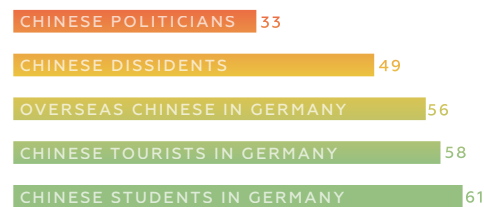


Source: Sinophone Borderlands 2020, 2022.

Figure 3 indicates that politics may have an impact on the perception of the people as the assessment of US-Americans has improved while that of Russians has gotten worse compared to 2020. However, respondents continue to distinguish between the country and the people.³

In 2020, Sinophone Borderlands asked German respondents to assess several subgroups of Chinese people. The results summarized in **Figure 4** confirm that Chinese politicians are rated worst by far. Chinese communities that come into contact with the German population because they study, travel, or live here are rated more favorably.

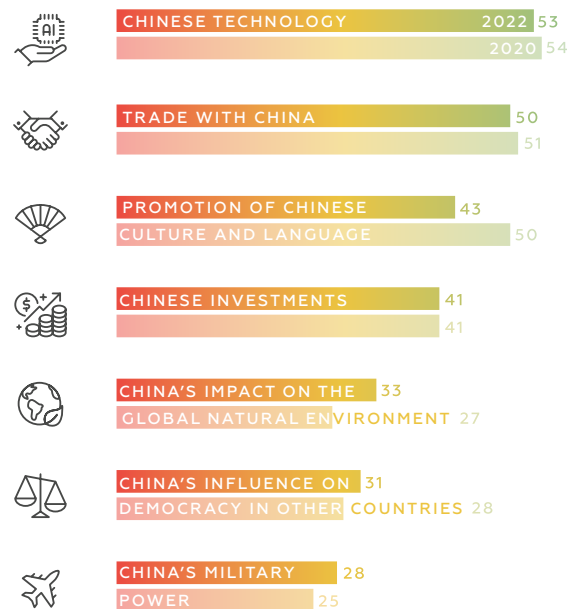
Figure 4 – How positive or negative do you assess the following groups of people on a scale of 0 (=negative) to 100 (=positive)?



Source: Sinophone Borderlands 2020

When asked for several politically relevant features of China, technology originating in the PRC still has a slightly positive image, as **Figure 5** shows. This is remarkable as the inclusion of equipment in the 5G mobile infrastructure has been a subject of controversy in recent years.⁴ The results are even more surprising as China’s military power is rated least favorable, and the discussion around the role of Chinese 5G vendor Huawei has focused on potential security implications. One explanation could be that German consumers continue to be surrounded by Chinese technology in their daily life and do not associate it primarily with political and security concerns. The poll further shows that the technological, economic, and cultural footprint of China largely meets a neutral attitude. Political influence is seen much more critically: Germans rate China’s impact on democracy in other countries very negatively. This might reflect reporting of Chinese pressure on critical European institutions and individuals and the discussion over the role of Confucius Institutes in universities.⁵

Figure 5 – How do you feel about the issues on a scale of 0 (=negative) to 100 (=positive)?



Source: Sinophone Borderlands 2020, 2022

2 Ibid.

3 Peter Gries and Richard Turcsányi (2021), “Chinese Pride and European Prejudice. How Growing Resentment of China Cools Feelings toward Chinese in Europe”, in: Asian Survey (2021, 61: 5), pp. 742-766.

4 Tim Rühlig and Maja Björk, “What to Make of the Huawei Debate? 5G Network Security and Technology Dependency in Europe,” UI Paper 1/2020: <https://www.ui.se/globalassets/ui.se-eng/publications/ui-publications/2020/ui-paper-no.-1-2020.pdf> (accessed April 19, 2023).

5 For a summary of such reporting, see for example Tim Rühlig, “Der lange Arm Chinas in Europa,” Mörfelden-Walldorf, Margit-Horvath-Foundation (2022): <https://www.margit-horvath.de/der-lange-arm-chinas-in-europa/> (accessed April 18, 2023).

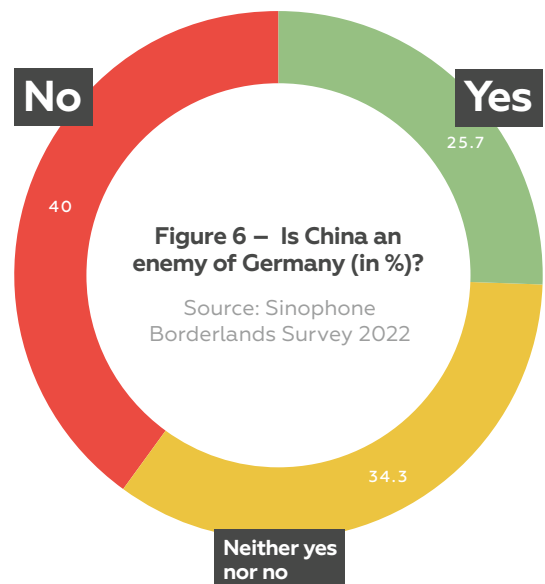
Chinese investments are seen less favorably, although there has been no change in public attitudes between 2020 and 2022. This is likely a result of various Chinese investment cases stirring public controversy, most notably the attempt of Chinese state-owned shipping company COSCO to acquire a minority share in one of the container terminals of Hamburg’s seaport. Six ministries, public agencies, and German intelligence services in charge of screening foreign investments proposed prohibiting the acquisition. Chancellor Olaf Scholz (Social Democratic Party) overruled the concerns. In November 2022, the federal cabinet green-lighted a minority share of 24 percent down from COSCO’s original request of 35 percent.⁶ In an exceptionally open sign of disagreement, German Foreign Minister Annalena Baerbock (Green Party of Germany) issued a public statement disagreeing with Scholz’s position on the day of the decision’s announcement. Vice-Chancellor Robert Habeck (Green Party), who is also Germany’s Minister of Economic Affairs, and Finance Minister Christian Lindner (Liberal Party) both explicitly backed Baerbock’s statement. In April 2023, the seaport deal re-appeared on the agenda as the terminal could be classified as “critical infrastructure” that provides for a tougher investment screening, but the decision was upheld.⁷ As the German population was polled ahead of the controversy, it is possible that the image of Chinese investments could further deteriorate.⁸

In turn, trade with China is seen neutrally, although economic dependencies on China have become a subject of concern and public discussion in Germany. At the same time, the PRC is Germany’s largest trading partner. The neutral rating might indicate that respondents acknowledge the double-edged sword of close trade relations. On the one hand, trade generates welfare in Germany. On the other hand, trade has created enormous dependencies.

Overall, **Figure 6** indicates that only 40 percent of respondents do not see China as Germany’s “enemy.” This demonstrates how negative the image of the PRC currently is.

CHINA: HARD POWER, BUT NO SOFT POWER IN GERMANY

Political scientists often distinguish hard power from soft power of states.⁹ While the former comprises military and economic means, the latter instead captures the attractiveness of a country. If this framework is applied, respondents in Germany believe that the PRC possesses enormous hard power capabilities, but little soft power. A comparison of the results from 2020 and 2022 does not exhibit major changes. As power cannot just be measured in absolute but also in relative terms, the Sinophone Borderlands poll compares the perception of power resources across several actors.

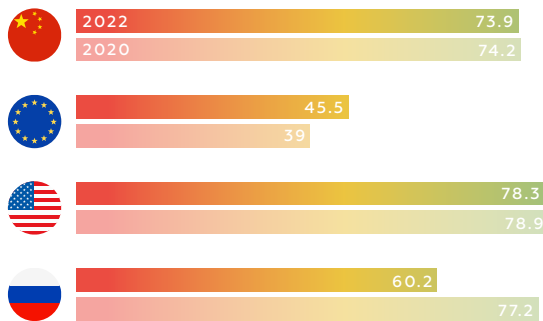


Militarily, German respondents continue to regard the United States as the leading global power, as **Figure 7** shows. This is congruent with an academic assessment of military capabilities, measured against military expenditure, for example.¹⁰ China comes in at a close second, overtaking Russia. This view may exaggerate China’s military strength though, as when measured by military expenditure, the United States’ lead is far greater. In 2021, the United States spent

6 Tim Rühlig, „Chinas Beteiligung am Hamburger Hafen. Investition mit Risiko,“ DGAP Online Kommentar, DGAP (2022): <https://dgap.org/de/forschung/publikationen/chinas-beteiligung-am-hamburger-hafen> (accessed April 19, 2023).
 7 Manuel Bewarder et al., „HHLA soll gegen Vorgaben verstoßen haben,“ ARD (April 19, 2023): <https://www.tagesschau.de/investigativ/ndr-wdr/bundesregierung-hamburg-hafen-containerterminal-103.html> (accessed April 19, 2023).
 8 Ellen Ehni, „Mehrheit sieht Verhältnis zu China kritisch,“ ARD (November 3, 2022): <https://www.tagesschau.de/inland/deutschlandtrend/deutschlandtrend-3199.html> (accessed April 19, 2023).
 9 Joseph S. Nye, *Bound to Lead. The Changing Nature of American Power* (New York, 1990), pp. 31ff.
 10 SIPRI, „World military expenditure passes \$2 trillion for first time“ (April 25, 2022): <https://www.sipri.org/media/press-release/2022/world-military-expenditure-passes-2-trillion-first-time> (accessed April 19, 2023).

an estimated \$801 billion compared to the PRC’s \$293 billion.¹¹ Russia is still considered militarily more capable than the European Union. However, the assessment of Russian capabilities has apparently suffered greatly after several months of the Ukraine War, in which Russian troops have not performed very efficiently.

Figure 7 – How do you consider military power of the following entities? Percent of respondents considering the respective entities as strong.

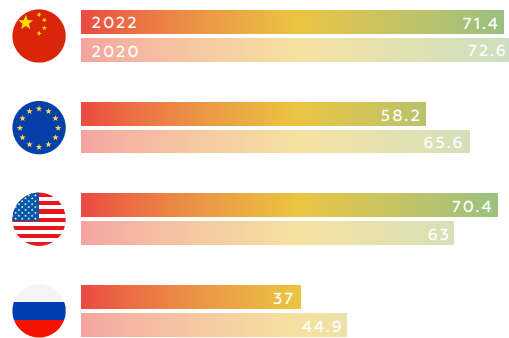


Source: Sinophone Borderlands 2020, 2022

Figure 8 illustrates that the respondents regard China as more economically powerful than the United States, although US economic power in 2022 is seen as stronger than in 2020. The perception of Russian economic power again deteriorated. The image of the economic power of the EU, however, has also worsened quite substantially, leaving the EU behind China and the United States. This perception conflicts with economic data. The United States remains the world’s leading economy with a gross domestic product (GDP) of \$23.32 trillion in 2021. The GDP of China, by comparison, accounts to “only” \$17.73 trillion.¹²

Still, when asked about the economic importance for Germany, respondents perceive the European Union as most important followed by the United States and China. Compared to 2020, the United States has

Figure 8 – How do you consider economy of the following entities? Percent of respondents considering the respective entities as strong.



Source: Sinophone Borderlands 2020, 2022

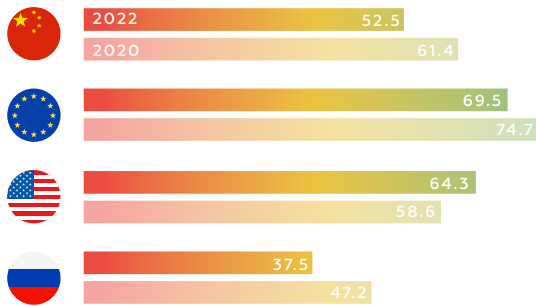
overtaken the PRC as **Figure 9** illustrates. If compared with the actual trade and investment data, intra-European economic cooperation indeed ranks first. However, Germany’s largest extra-European trading partner is not the United States but China. In 2022, imports and exports with China accounted to €298.6 billion compared to €248.2 billion with the United States.¹³ The United States is also the largest investor in Europe. In 2021, the United States accounted for €752 billion of investments compared to €10.6 billion from China. At its peak, China had invested around €46 billion in Europe (in 2016).¹⁴

In terms of cultural attractiveness, while in 2020 China ranked above the United States, this has changed dramatically by 2022 after China’s attractiveness deteriorated substantially. As **Figure 10** illustrates, only Russian attractiveness has scored worse. The EU has continued to rank as first place, even after significant deterioration.

When asked how Germans assess the political values of the EU, the United States, China, and Russia, the PRC scores only slightly better than Russia and is outperformed by both the United States and the European Union as summarized in **Figure 11**.

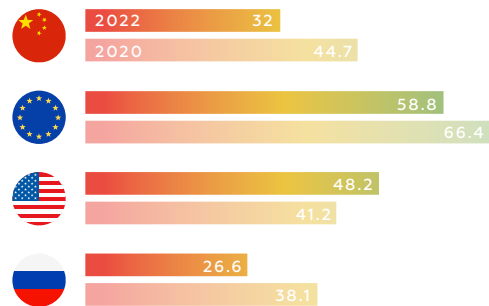
11 Ibid.
 12 World Bank, “GDP (current US\$) - United States, China” (2023): <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=US-CN> (accessed April 19, 2023).
 13 Statistisches Bundesamt, “Die Volksrepublik China ist erneut Deutschlands wichtigster Handelspartner” (2023): <https://www.destatis.de/DE/Themen/Wirtschaft/Aussenhandel/handelspartner-jahr.html> (accessed April 19, 2023).
 14 Eurostat, “United States led foreign direct investment in the EU”(2022): <https://ec.europa.eu/eurostat/de/web/products-eurostat-news/w/ddn-20221222-3#:text=In%202020%2C%20for%20the%2013,to%20%E2%82%AC2%20990%20billion> (accessed May 6, 2023). Max Zenglein and Gregor Sebastian, “Chinese foreign direct investment in Europe: the downward trend continues,” UNIDO (December 2022): <https://iap.unido.org/articles/chinese-foreign-direct-investment-europe-downward-trend-continues> (accessed May 6, 2023).

Figure 9 – How important for Germany’s economy do you consider the following entities? Percent of respondents considering the respective entities as important.



Source: Sinophone Borderlands 2020, 2022

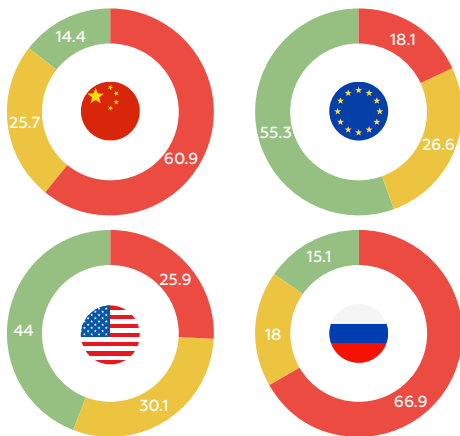
Figure 10 – How attractive do you consider the culture of the following entities? Percent of respondents considering the respective entities as attractive.



Source: Sinophone Borderlands 2020, 2022

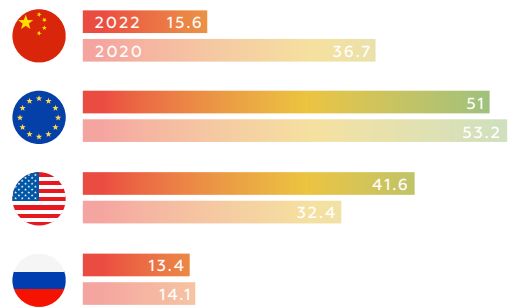
Figure 11 – How do you perceive the political values of the following entities (in %)?

Negatively Neither positive nor negative Positively



Source: Sinophone Borderlands 2022

Figure 12 – How do you assess the foreign policy of the following entities? Percent of respondents considering the respective entities’ foreign policy as positive.



Source: Sinophone Borderlands 2020, 2022.

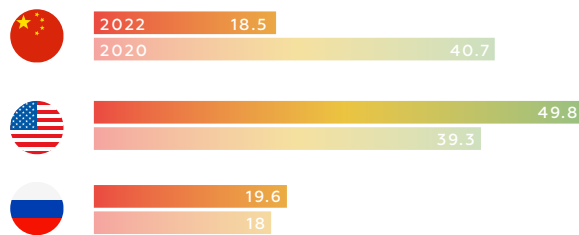
Particularly harmful to China’s image is the deterioration of the approval of the country’s foreign policy. In 2020, the PRC slightly outperformed the United States. **Figure 12** shows that approval has been cut by more than half and is now almost as low as the support for Russia’s foreign policy. US foreign policy under Joe Biden is seen much more favorably than that of the Trump administration.

Finally, when generally asked about the quality of life in the United States, China, and Russia, the perception

of the PRC has plummeted even below that of Russia as **Figure 13** summarizes. One needs to bear in mind, however, that at the time of polling, China had still adopted a Zero Covid policy with strict lockdowns to contain the pandemic, while Europe had opened its societies again. This may have negatively impacted the perception of people’s lives in the PRC.

In sum, Germans acknowledge China’s hard power resources, but there is little attraction to PRC. Hence, Chinese soft power in Germany remains weak.

Figure 13 – How good or bad would life be for a person like you if you were to live in these places? Percent of respondents considering life in the respective entities as good.



Source: Sinophone Borderlands 2020, 2022.

GERMAN-CHINA RELATIONS: IN FAVOR OF A MORE PRINCIPLED APPROACH WHEREVER POSSIBLE

Germany's relations with China have become subject to domestic controversy. The coalition government is divided. When forming a new government, the Social Democrats (SPD), the Greens, and the Free Democrats (FDP) signaled a radical shift in their coalition agreement before taking office in December 2021. Cooperation, the three parties wrote, would be conditional on China's compliance with international law and human rights. All sensitive issues ranging from the crackdown on civil liberties in Hong Kong to grave human rights violations against Muslim minorities in Xinjiang or a looming crisis over Taiwan were all covered by the text.¹⁵

Only days after the agreement had been concluded, press reports suggested that Olaf Scholz, even before being sworn into office, asked Charles Michel,

President of the European Council, to assure Chinese President Xi Jinping that he would make sure relations would stay the same.¹⁶

Since then, German policy on China has remained controversial. In November 2022, for example, Scholz decided to pay Beijing a visit. In an exceptionally open acknowledgment of disagreement, Baerbock publicly demanded from the chancellor that he stick to the coalition agreement in his exchanges with President Xi.¹⁷

Since then, the lines of conflict appear to be set. The Green Party and the Liberals advocate a tougher approach on the PRC in line with the coalition agreement, while at least some parts of the Social Democratic Party advocate a more cautious approach. The public narrative overlooks, however, that in the analysis of China, the coalition partners are closer than one might think. All parties advocate reducing strategic dependencies in light of geopolitical tensions.¹⁸ This is also reflected in the first China Strategy that a German government has ever adopted.¹⁹ Striving to strike a balance between cooperation with China and defending Germany's values and interests wherever they conflict with China's, the Strategy is analytically sharp but falls short of concrete measures of implementation.²⁰ While government consultations in summer 2023 emphasized cooperation with the PRC, Germany is likely to massively reduce the market share of Chinese equipment in its 5G infrastructure through mid-2026.²¹

But what do the Germans think? A comparison across political parties demonstrates that while the degree to which voters perceive China unfavorably varies, skepticism outperforms positive views across the political spectrum. Voters of the Green Party are the most critical; those voting for the Christian Social Union (CSU) are less skeptical. Comparing the party leaderships' positions with those of their

15 SPD, Grüne, FDP, "Mehr Fortschritt wagen. Bündnis für Freiheit, Gerechtigkeit und Nachhaltigkeit," Bundesregierung (2021): <https://www.bundesregierung.de/resource/blob/974430/1990812/1f422c60505b6a88f8f3b3b5b8720bd4/2021-12-10-koav2021-data.pdf?download=1> (accessed April 19, 2023).

16 Silke Wettach, "Scholz hat Chinas Präsident Xi Fortsetzung von Merkels Kurs signalisiert," *WirtschaftsWoche* (December 5, 2021): <https://www.wiwo.de/politik/ausland/china-kurs-scholz-hat-chinas-praesident-xi-fortsetzung-von-merkels-kurs-signalisiert/27863738.html> (accessed April 19, 2023).

17 Paul-Anton Krüger, "Baerbock: Deutsche China-Politik muss sich verändern," *Süddeutsche Zeitung*, (November 1, 2022): <https://www.sueddeutsche.de/politik/baerbock-scholz-china-1.5685051> (accessed April 19, 2023).

18 Tim Rühlig, "Why Germany's new China strategy needs to go beyond symbolism," *Internationale Politik Quarterly* (March 24, 2023): <https://ip-quarterly.com/en/why-germanys-new-china-strategy-needs-go-beyond-symbolism> (accessed April 19, 2023).

19 Federal Foreign Office, "Strategy on China of the Government of the Federal Republic of Germany," Bundesregierung (2023): <https://www.auswaertiges-amt.de/blob/2608580/49d50fecc479304c3da2e2079c55e106/china-strategie-en-data.pdf> (accessed September 20, 2023).

20 Tim Rühlig, "Germany's new China Strategy: following Brussels," *CHOICE* (July 20, 2023): <https://chinaobservers.eu/germanys-new-china-strategy-following-brussels/> (accessed September 20, 2023). Tim Rühlig, "Germany's new China Strategy: A step forward, no breakthrough" (2023): <https://timruehlig.eu/blog/china-strategy-germany> (accessed September 20, 2023).

21 Dana Heide et al., "Harte Linie gegen Huawei – Berlin will 'zweiten Fall Nord Stream' verhindern," *Handelsblatt* (September 19, 2023): <https://www.handelsblatt.com/politik/deutschland/mobilfunkstandard-5g-harte-linie-gegen-huawei-berlin-will-zweiten-fall-nord-stream-verhindern/29397214.html> (accessed September 20, 2023).

Figure 14 – Feelings toward China among voters of political parties currently represented in the German parliament (in %)

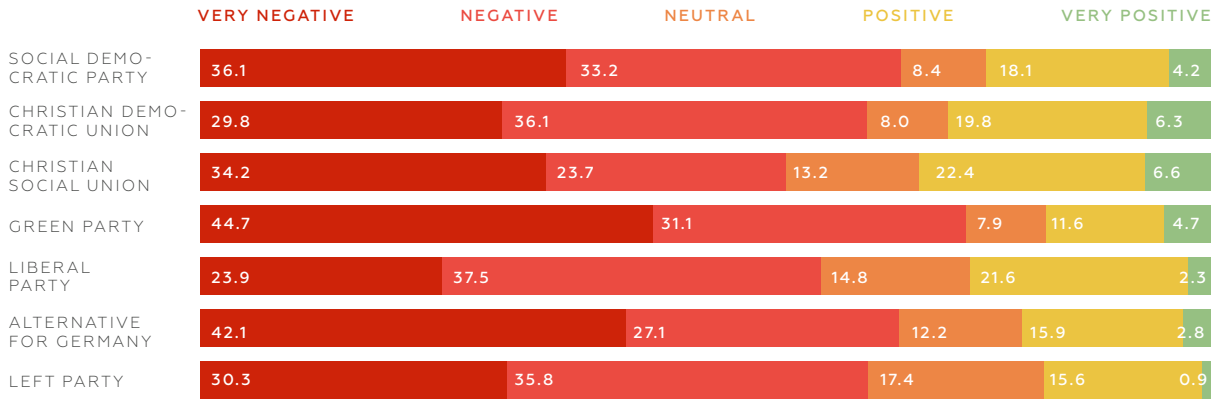
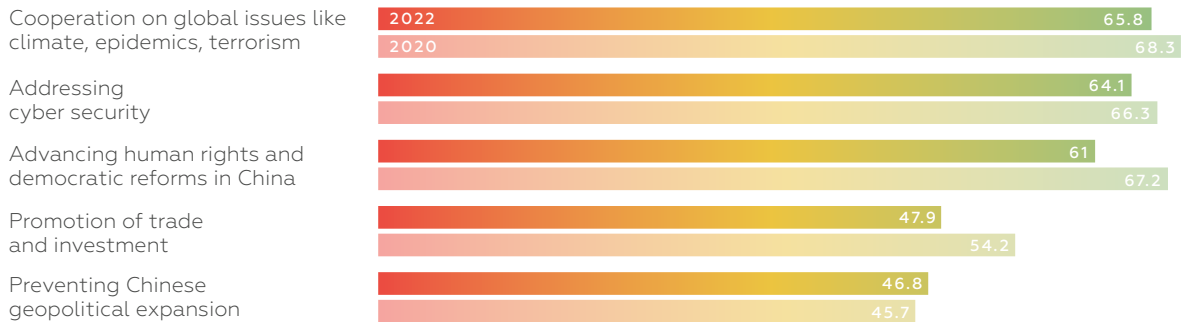


Figure 15 – In relations with China, should the following be a policy priority of Germany? Agreement to respective priority (in %)



Source Figure 14: Sinophone Borderlands 2022; Figure 15: Sinophone Borderlands 2020, 2022

voter bases, a few findings are interesting. Firstly, the Social Democratic Party (SPD) – often regarded as the most cautious among the parties forming the current government when it comes a policy realignment – has a voter base more critical of China than that of any other party, with the exception of the Green Party. The voters of the Alternative for Germany, a right-wing populist party, are only slightly less skeptical than the supporters of the SPD. Remarkably, even these voters seem to be skeptical toward China’s authoritarianism. Thirdly, even the voters of the Left Party, traditionally skeptical of the United States and NATO, appear to be as critical as those of other parties like the Christian Democratic Union (CDU). Fourthly, somewhat surprisingly, the voters of the liberal Free Democratic Party (FDP), whose leadership is outspoken and critical of China, hold fewer negative views of the PRC

compared to other voters. Only CSU voters are more positive about China. Fifthly, the critical position of Green voters is in light with its political leadership. Strikingly, CSU has a long tradition of party-to-party ties with the Chinese Communist Party. However, given the fact that this is not a well-known fact to the German public, it appears unlikely to be the reason for the fewer critical positions among CSU supporters. Instead, the fact that the CSU only runs in Bavaria – a stronghold of Germany’s car industry with a strong export exposure to China – might influence the results. However, such reasons cannot be drawn from the data directly and remain speculative.

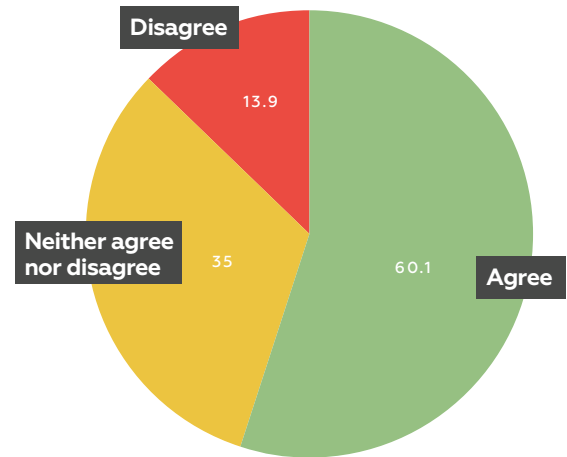
But what follows from these findings? What policy should be prioritized by the government? The Sinophone Borderlands poll provides nuanced results. Asked what goals should be priority in 2022

policies, most affirm that cooperation with the PRC on global challenges like combating climate change, epidemics, and terrorism should be at the top of Germany’s agenda. This is consistent with the findings of 2020, as **Figure 15** demonstrates. It is closely followed by a demand to address cyber security and attempts to advance human rights and democratic reforms within the PRC. The prioritization of the latter has somewhat dropped but so has the approval of the promotion of trade and investment that no longer finds support from the majority of respondents. Prevention of Chinese geopolitical expansion ranks lowest.

Although a cooperative item ranks first among all policy priorities, the results can hardly be interpreted as tailwinds for those that are in favor of a cautious China policy. Critical issues draw only slightly less approval and – most remarkably – promotion of trade and investment is low on the agenda with dropping consent rates. It is widely known how export-dependent the German economy is and that China is Germany’s most important trading partner. **Figure 16** confirms that respondents are willing to pay an economic price for the sake of becoming less dependent on the PRC. The results of the survey indicate that economic de-risking from China finds some support among Germans.

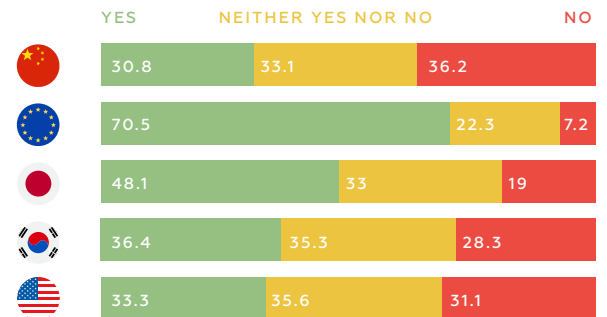
Internationally, export controls in the semiconductor industry may have attracted the most attention.²² In Germany, the inclusion of Chinese tech giant Huawei in critical infrastructure has resurfaced in early 2023. Huawei’s technology is eyed critically, whether the 5G mobile network, Germany’s railway communication, or the equipment of the Federal Office of Information Security (BSI) is concerned.²³ In 2020, the Sinophone Borderlands survey found that in the rollout of 5G infrastructure, Germans prefer to rely on vendors from EU member states. **Figure 17** shows that Chinese suppliers found the lowest approval, but the United States scored only slightly better under the Trump administration. That China as a 5G partner is met with skepticism confirms that the respondents support a de-risking approach.

Figure 16 – We should become less economically dependent upon China even if that means some more expensive products



Source: Sinophone Borderlands 2022

Figure 17 – Should Germany cooperate with the following entities in the rollout of 5G (in %)?



Source: Sinophone Borderlands 2020

22 For example, Jan-Peter Kleinhans and John Lee, “China’s rise in semiconductors and Europe. Recommendations for policymakers,” Stiftung Neue Verantwortung (December 2021): https://www.stiftung-nv.de/sites/default/files/chinas_rise_in_semiconductors_and_europe.pdf (accessed April 19, 2023).

23 Philipp Alvares des Souza Soares et al., “Regierung plant Verbot von Huawei und ZTE im deutschen Netz,” *Handelsblatt* (March 8, 2023): <https://www.handelsblatt.com/politik/deutschland/5g-netz-regierung-plant-verbot-von-huawei-und-zte-im-deutschen-netz/29019480.html> (accessed April 19, 2023). Dietmar Neuerer, “Deutsche Bahn wegen Nutzung von Huawei-Technik unter Druck,” *Handelsblatt* (March 21, 2023): <https://www.handelsblatt.com/politik/deutschland/it-infrastruktur-deutsche-bahn-wegen-nutzung-von-huawei-technik-unter-druck/29049514.html> (accessed April 19, 2023). Dietmar Neuerer, “Deutschlands oberste Cybersicherheitsbehörde setzt Huawei-Technik ein,” *Handelsblatt* (April 5, 2023): <https://www.handelsblatt.com/politik/deutschland/bsi-deutschlands-oberste-cybersicherheitsbehoerde-setzt-huawei-technik-ein/29074218.html> (accessed April 19, 2023).

At the same time, however, almost half of the population is uncertain whether Germany can economically afford to become more independent from China. In the wake of the Russia-Ukraine War, decoupling from Russian energy sources has fueled inflation. As economic and technological dependencies from China are deeper and more complex, tackling them is time consuming and costly. **Figure 18** summarizes that only 27 percent of respondents are confident that Germany is strong enough to tackle strategic dependencies from Russia and China at the same time.

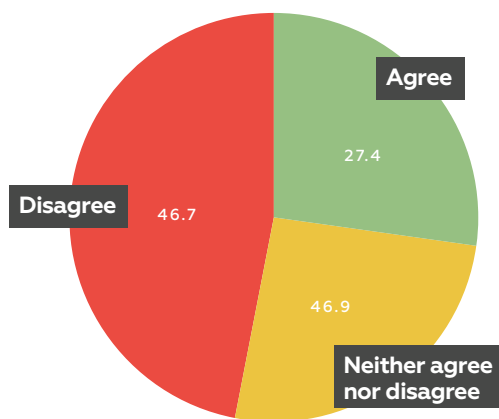
Germans may be concerned that the country cannot de-risk from Russia and China at the same time, but the respondents draw parallels between Russia and China. **Figure 19** demonstrates that a relative majority of 43 percent support application of the *Zeitenwende* approach of the German government not only to Russia but also China. Only 18.5 percent outright disagree with the statement.

This by no means implies that respondents consider the PRC responsible for the Russia-Ukraine War. China’s role in the war has become the subject of controversial discussions. At one extreme, the

PRC is implicitly accused of complicity because it backs up Russia. Shortly before the war broke out, China and Russia signed a joint statement that reads like a close partnership aiming to reshape global affairs in what the two sides referred to as “limitless friendship.”²⁴ At the other extreme, China is being perceived as a key to peace because it could be the only country with significant leverage over the Kremlin. When the PRC issued a 12-point position paper on the occasion of the first anniversary of the outbreak of the war, many dubbed it a “peace plan” even though the document does not describe a path to peace but simply explains China’s stance.²⁵ While some European policymakers, most prominently French President Emmanuel Macron, put high hopes in Russia striving to engage the PRC, others – like European Commission President Ursula von der Leyen – seem disillusioned and instead remind China that lethal support for the Russian Federation would cause a serious setback for Europe-China relations.²⁶

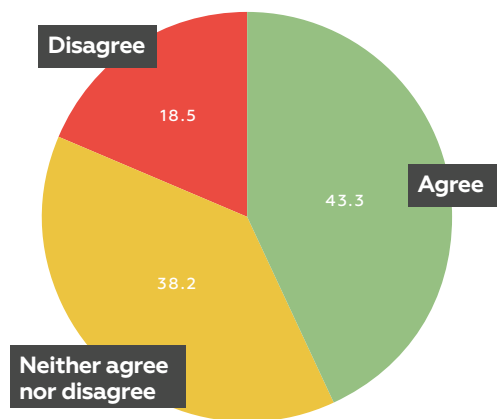
The German population attributes responsibility for the war overwhelmingly to Russia. In a survey that allowed the blaming of several actors for the outbreak of the war, fewer respondents consider Ukraine, the

Figure 18 – German economy is strong enough to reduce dependency on both Russia and China at the same time (in %)



Source: Sinophone Borderlands 2022

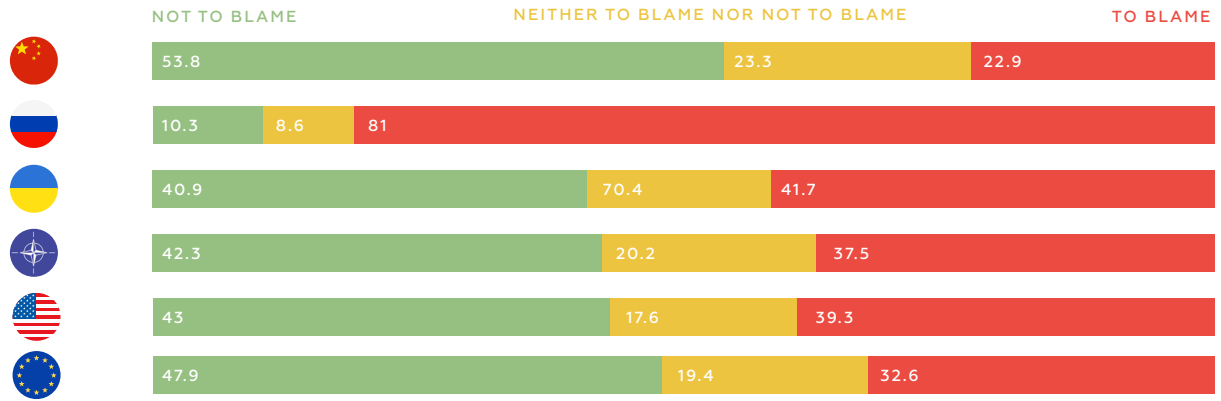
Figure 19: *Zeitenwende* should be extended also to deal with China, not just Russia (in %)



Source: Sinophone Borderlands 2022

24 President of Russia, “Joint Statement of the Russian Federation and the People’s Republic of China on the International Relations Entering a New Era and the Global Sustainable Development,” Kremlin (2022): <http://www.en.kremlin.ru/supplement/5770> (accessed April 19, 2023).
 25 Ministry of Foreign Affairs of the People’s Republic of China, “China’s Position on the Political Settlement of the Ukraine Crisis,” People’s Republic of China (February 24, 2023): https://www.fmprc.gov.cn/mfa_eng/zxxx_662805/202302/t20230224_11030713.html (accessed April 19, 2023).
 26 Jamil Anderlini and Clea Caucutt, “Europe must resist pressure to become ‘America’s followers,’ says Macron,” *Politico* (April 9, 2023): <https://www.politico.eu/article/emmanuel-macron-china-america-pressure-interview/> (accessed April 19, 2023).

Figure 20 – How much blame do the actors bear for the Russia-Ukraine War (in %)?



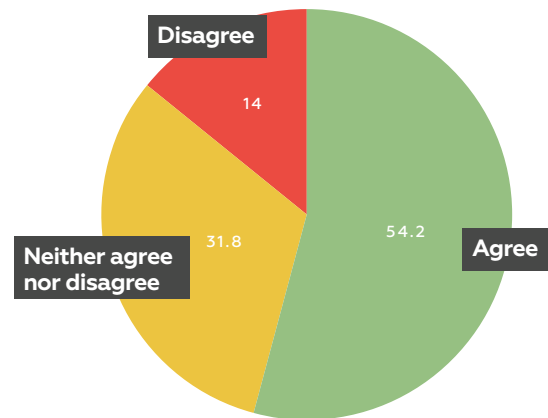
Source: Sinophone Borderlands 2022.

United States, the North Atlantic Treaty Organization (NATO), and the European Union as responsible. As **Figure 20** shows, the German population does not hold the PRC accountable for the Russia-Ukraine War.

At the same time, German respondents clearly identify a block confrontation in which Russia and China closely align. No less than 54 percent believe that Germany’s relations with the PRC and Russia have deteriorated to an extent that we find ourselves in a new Cold War, **Figure 21** shows.

Geopolitical confrontation is not only discussed with regard to the Russia-Ukraine War but also with an eye on a potential escalation over the status of Taiwan. At the core of these debates is not only how severe the risk of a war over Taiwan is but also what economic price Germany and Europe are willing to pay as economic disengagement from the PRC could be costly. Regarding this background, some – including the leader of the Social Democratic grouping in Germany’s parliament, Rolf Mützenich – fear that Europe could be caught in the middle of a large-scale US-China conflict over Taiwan.²⁷ Others, for example Annalena Baerbock, emphasize that Germany

Figure 21 – Our relations with China and Russia have deteriorated to the extent that we are now in a Cold War (in %).

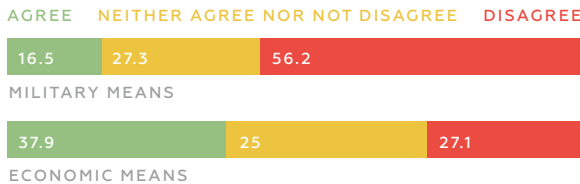


Source: Sinophone Borderlands 2022

would be heavily affected by a crisis over Taiwan – not least economically. This hints at more active roles for Germany and Europe.²⁸

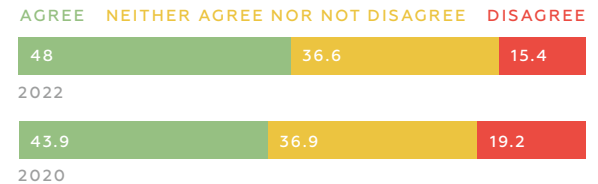
27 “SPD-Fraktionschef Mützenich: Nicht Partei werden im Großkonflikt China/Taiwan,” ARD (April 12, 2023): <https://www.daserste.de/information/politik-weltgeschehen/morgenmagazin/politik/SPD-Fraktionschef-Rolf-Muetzenich-Nicht-Partei-werden-im-Grosskonflikt-China-Taiwan-100.html> (accessed April 19, 2023).
 28 Dominik Rzepka, “Baerbock: ‘ÜRden Eskalation nicht hinnehmen,’” ZDF (April 16, 2023): <https://www.zdf.de/nachrichten/politik/baerbock-interview-china-100.html> (accessed April 19, 2023).

Figure 22 – If China attacks Taiwan, should Germany use the following means to support Taiwan (in %)?



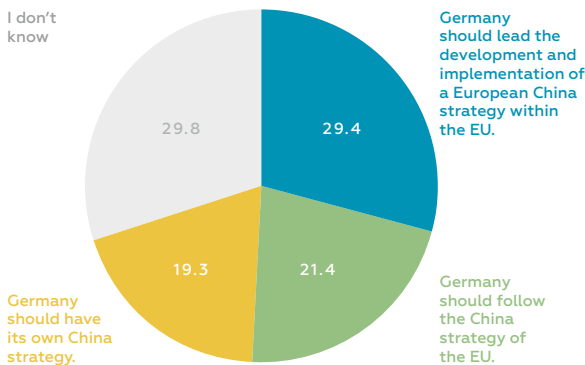
Source: Sinophone Borderlands 2022

Figure 24 – Germany should prioritize human rights over economic benefits in dealings with China (in %)



Source: Sinophone Borderlands 2022

Figure 23 – Should Germany have its own China strategy or contribute to a European strategy within the EU (in %)?



Source: Sinophone Borderlands 2022

about the development and favor a de-risking approach – but are concerned about whether Germany can afford such a course – it is no wonder that European alignment finds broad support. In 2020, the Sinophone Borderlands survey saw less than 20 percent in favor of a China strategy that is independent of the EU course, as **Figure 23** illustrates.

HUMAN RIGHTS: WILLING TO MAKE ECONOMIC SACRIFICES

Although inflation is high and growth rates low, support for the prioritization of human rights over economic benefits has expanded since 2020. Only a meagre 15.4 percent reject such a priority, **Figure 24** proves.

Figure 22 shows that Germans do not want to support Taiwan militarily in case of an armed conflict and are divided over the question of whether they should come to Taiwan's assistance with economic means. This reflects that Europe, let alone Germany, are of no military significance in the Pacific region.

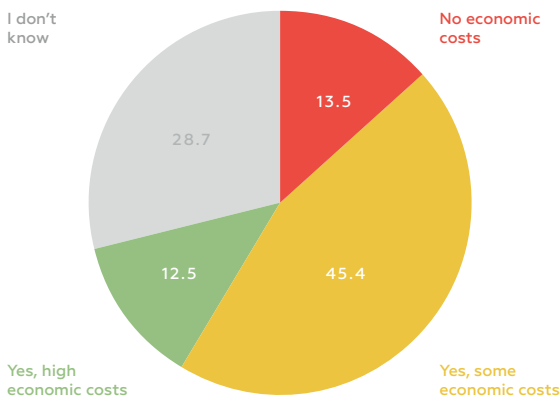
Data from 2020 further illustrates that the Germans believe they are already paying an economic price. **Figure 25** indicates, however, that they disagree on the degree to which Germany is economically affected. Only 13.5 percent see no effect.

Regarding the background of growing geopolitical tensions, the German government adopted its China Strategy that takes into account the changing role and behavior of China in the world.²⁹ In light of the fact that most respondents appear to be deeply concerned

The general support for a more principled approach prioritizing human rights over economic interests is also mirrored in concrete cases. **Figure 26** shows support for a boycott of cotton from China's western province of Xinjiang. Reportedly, China is violating the human rights of Muslim minorities in Xinjiang, most prominently those of Uyghurs.³⁰ It is widely believed that cotton production in the province is not free of forced labor.³¹

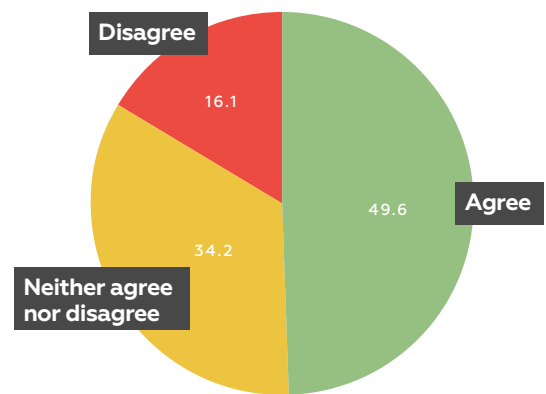
29 Tim Rühlig, "Why Germany's new China strategy needs to go beyond symbolism," *Internationale Politik Quarterly* (March 24, 2023): <https://ip-quarterly.com/en/why-germanys-new-china-strategy-needs-go-beyond-symbolism> (accessed April 19, 2023).
 30 United Nations Human Rights Office of the High Commissioner, "OHCHR Assessment of human rights concerns in the Xinjiang Uyghur Autonomous Region, People's Republic of China," OHCHR (August 31, 2022): <https://www.ohchr.org/sites/default/files/documents/countries/2022-08-31/22-08-31-final-assessment.pdf> (accessed April 19, 2023).
 31 Fleur Britten, "US ban on cotton from forced Uyghur labour comes into force," *The Guardian* (June 21, 2022): <https://www.theguardian.com/world/2022/jun/21/us-ban-on-cotton-from-forced-uyghur-labour-comes-into-force> (accessed April 19, 2023).

Figure 25 – Do you think that Germany pays an economic price for defending human rights in its relations with China (in %)?



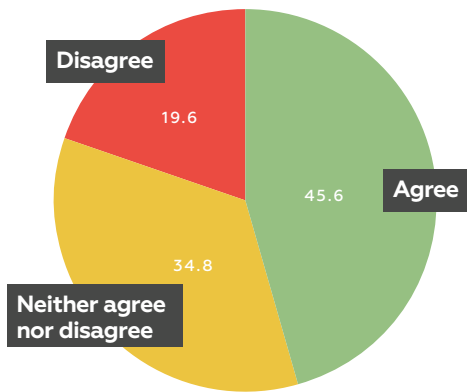
Source: Sinophone Borderlands 2020

Figure 26 – Should we boycott cotton from Xinjiang, China, because forced Uyghur labour is used in its production (in %)?



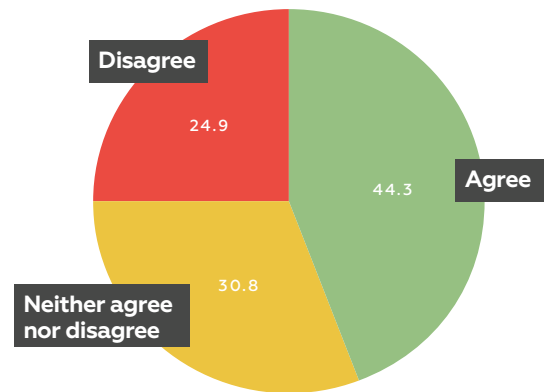
Source: Sinophone Borderlands 2022

Figure 27 – We should support the Hong Kong people in their struggle with the Chinese government for political freedoms (in %)



Source: Sinophone Borderlands 2022

Figure 28 – German companies should be made responsible for human rights violations committed by their Chinese suppliers (in %)



Source: Sinophone Borderlands 2022

Only slightly weaker is the support for the Hong Kong people's struggle with the Chinese government for political freedoms. A minority of less than 20 percent rejects such support, **Figure 27** illustrates. Hong Kong, a former British colony, experienced several mass protests since 2014 demanding the democratization of China's Special Administrative Region

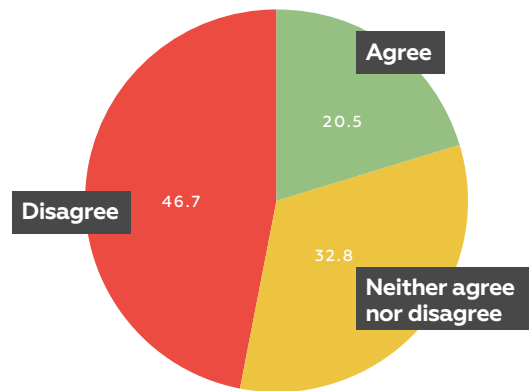
and the protection of the rule of law in the city. Upon its handover to the PRC in 1997, China had guaranteed the city far-reaching freedoms under the dictum of "One Country, Two Systems" until 2049. In 2020, China imposed a draconian National Security Law in violation of international law and Hong Kong's Basic Law, effectively ending protests in the city.³²

32 Tim Rühlig, *China's Foreign Policy Contradictions* (New York, 2022), chapter 4.

The respondents to the poll not only prefer that German policymakers prioritize human rights but also consider German companies to be accountable. Only 25 percent do not think that German companies are responsible for human rights violations committed by their Chinese suppliers, **Figure 28** demonstrates. This is a clear sign that a majority of the population stands in support with the German Supply Chain Act that took force on January 1, 2023, and holds companies accountable for certain human rights violations in their global supply chain.³³

Given the broad support for prioritizing human rights, it is no wonder that the respondents approve support for business activities in China by the state only when the human rights situation is properly taken into account, **Figure 29** proves. Robert Habeck’s decision to limit state investment guarantees for German companies in China is in line with public opinion, though not only human rights considerations have led to this decision.³⁴

Figure 29 – We should support German companies in making business in China without taking into account the human rights situation (in %).



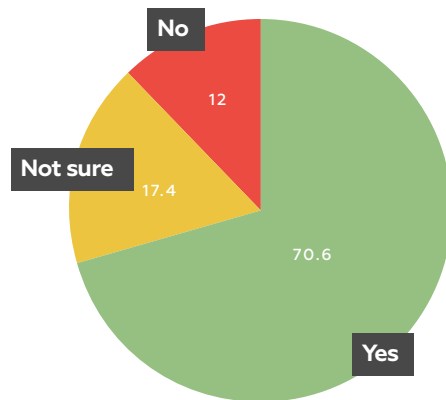
Source: Sinophone Borderlands 2022

COVID-19: CRITICAL PERSPECTIVE ON CHINA

The COVID-19 pandemic leaves Germany’s population with a feeling of uncertainty. Almost 30 percent are not sure if the virus actually exists or outright reject the existence of it, **Figure 30** shows.

The population is even more confused when it comes to the question of who is responsible for the outbreak of the pandemic. **Figure 31** shows that only 40.3 percent believe that the virus has jumped naturally from animals to humans, which is the interpretation that most experts hold.³⁵ While Chinese accusations that the virus might have been brought by the US military to the PRC finds little support within Germany,³⁶ respondents hold mixed views on the question of whether China may have artificially produced the virus and spread it globally. The latter is a suspicion that has been voiced mostly in the United States, not least by the Trump administration.³⁷

Figure 30 – Does the COVID-19 virus really exist (in %)?



Source: Sinophone Borderlands 2022

33 “Gesetz über die unternehmerischen Sorgfaltspflichten in Lieferketten,” Bundesgesetzblatt (July 16, 2021): https://www.bgbl.de/xaver/bgbl/start.xav?startbk=Bundesanzeiger_BGBI&jumpTo=bgbl121s2959.pdf#_bgbl_%2F%2F%5B%40attr_id%3D%27bgbl121s2959.pdf%27%5D_1681897872501 (accessed October 16, 2023).

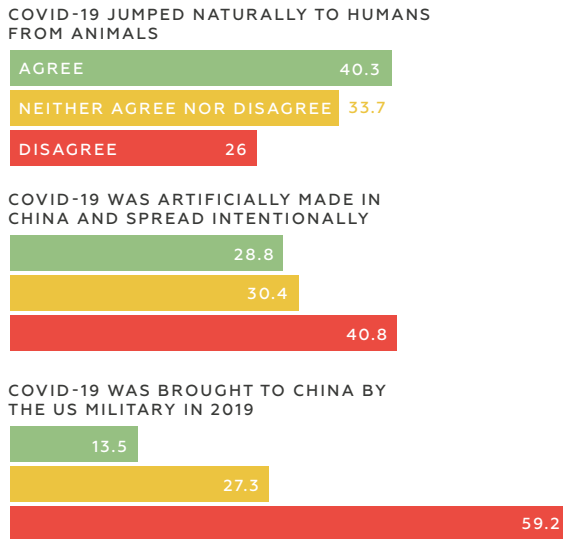
34 Julia Lühr, “Habecks Plan für weniger Investitionen in China,” *Frankfurter Allgemeine Zeitung* (November 11, 2022): <https://www.faz.net/aktuell/wirtschaft/weniger-investitionen-in-china-der-plan-von-robert-habeck-18455029.html> (accessed April 19, 2023).

35 Joachim Müller-Jung, “Corona sieht nicht aus wie eine Laborgeburt,” *Frankfurter Allgemeine Zeitung* (June 1, 2022): <https://www.faz.net/aktuell/wissen/medizin-ernaehrung/corona-sieht-nicht-aus-wie-eine-laborgeburt-18073264.html> (accessed April 19, 2023).

36 Steven Lee Myers, “China spins tale that the U.S. army started the coronavirus epidemic,” *The New York Times* (March 13, 2020): <https://www.nytimes.com/2020/03/13/world/asia/coronavirus-china-conspiracy-theory.html> (accessed April 19, 2023).

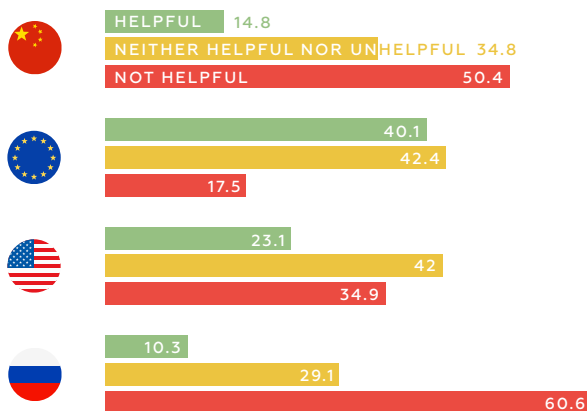
37 Erin Banco and Daniel Lippman, “Top Trump officials pushed the Covid-19 lab-leak theory. Investigators had doubts,” *Politico* (June 15, 2021): <https://www.politico.com/news/2021/06/15/wuhan-lab-trump-officials-covid-494700> (accessed April 19, 2023).

Figure 31 – Do you agree with the statement (in %)?



Source: Sinophone Borderlands 2022

Figure 32 – How much did the following entities help Germany during COVID-19 (in %)?



Source: Sinophone Borderlands 2022

When asked which entity has helped Germany curbing the COVID-19 pandemic, no actor scores well. **Figure 32** indicates that Germans found themselves mostly supported by the EU followed by the United States. Only 14.8 percent believe the PRC has helped Germany. This indicates that the Chinese shipment of face masks has not positively impacted public opinion in Germany.³⁸ Instead, the fact that the virus was first detected in the PRC may have further deteriorated the PRC's image.

This is also reflected in the trust in vaccines. **Figure 33** shows that only 22.2 percent of the respondents would be willing to receive a vaccine produced in the PRC. Only Russian vaccines are met with less trust. However, only European vaccines find trust among a majority of the population and even vaccines from the EU fall short of a two-thirds majority – yet another sign of the widespread feeling of uncertainty.

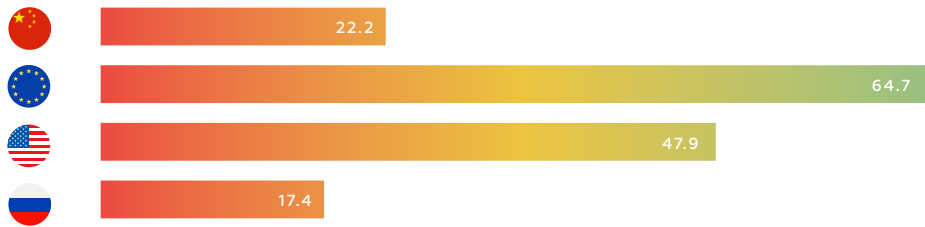
CONCLUSION AND POLICY RECOMMENDATIONS

Foreign policy hardly ever wins democratic elections. The electorate mostly cares about domestic affairs and economic well-being and largely ignores foreign policy. Growing geopolitical tensions, the Russia-Ukraine War, supply chain shortages, and rising inflation have painfully illustrated the impact of foreign affairs with domestic affairs and prosperity. Apart from Russia, the People's Republic of China has taken center stage in Germany's foreign policy controversies. As more and more people care about China and its relations with Germany, public opinion polling becomes more meaningful.

A widespread assumption among policymakers, company representatives, and observers is that German voters and consumers are mostly concerned with prosperity and welfare. This paper is based on comprehensive opinion polling in 2020 and 2022 funded by the European Regional Development Fund as part of the Sinophone Borderlands project. It provides exceptional insights into the German public's perception of China and German-China relations. It demonstrates that public opinion is more nuanced than the general assumption suggests.

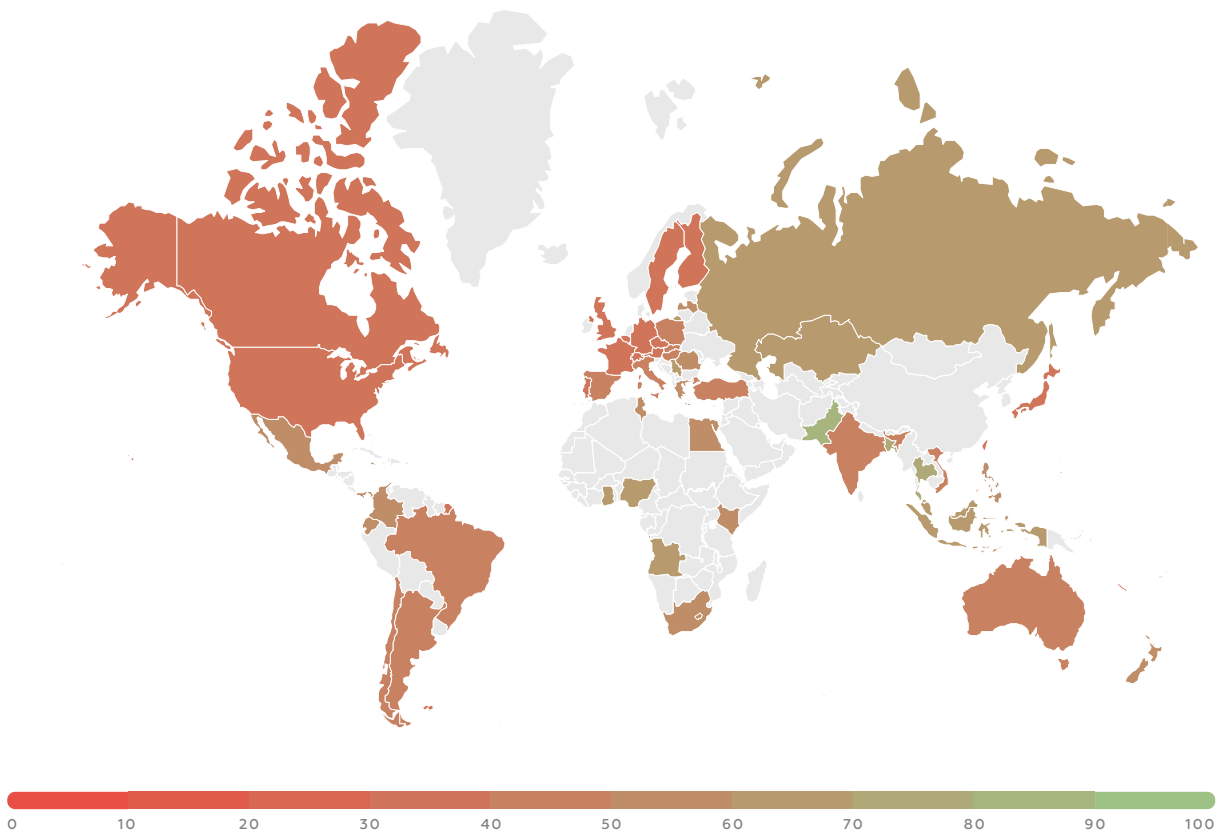
38 Andreas Fuchs et al., "Chinas Maskendiplomatie: Die Rolle politischer und wirtschaftlicher Beziehungen bei der Beschaffung medizinischer Güter in der Corona-Krise," Kiel Policy Brief 146, Kiel Institut für Weltwirtschaft (October 2020): https://www.ifw-kiel.de/fileadmin/Dateiverwaltung/ifw-Publications/-ifw/Kiel_Policy_Brief/2020/KPB_146.pdf (accessed April 19, 2023).

Figure 33 – Willingness to receive a vaccine produced by the following entities (in %)



Source: Sinophone Borderlands 2022

Figure 34 – China’s image in all surveyed countries (the higher the value the more positive the attitude)



Source: Sinophone Borderlands 2020, 2022

We find that China’s image in Germany is generally negative. This is less the case of the Chinese people, but the political regime – including President Xi Jinping – is unpopular. China, a country that only 40 percent clearly do not classify as Germany’s enemy, is seen as possessing enormous hard power resources but little soft power.

Respondents advocate a more principled China policy wherever this is possible. Human rights are considered a priority over economic interests. The polls show robust support for the reduction of dependencies, an exclusion of Chinese technology from critical infrastructure, and the adoption of the *Zeitenwende* paradigm in dealings with China. However, concerns

remain whether Germany can afford to economically disentangle itself from Russia and China at the same time. The public opinion is divided on whether Germany should provide economic assistance to Taiwan in case of a war.

German voters are also consumers. As the polls demonstrate the expectations for a more principled China policy, they also indicate that the respondents hold companies accountable for human rights violations committed by their suppliers.

All in all, the German population is willing to pay an economic price but feels insecure and uncertain about the country's capabilities. Companies are well-advised to carefully consider human rights violations and their ethical responsibility. German policymakers should draw the following three conclusions from this public opinion poll.

First, Germany needs to urgently strengthen its China competence. The poll displays high values for "neither/nor answers" indicating a high degree of uncertainty. Existing knowledge needs to be made ready for public consumption more easily. As China is being attributed a high degree of power (and thereby, inherently, importance) and an apparent uncertainty exists as to whether Germany can afford to do what is needed, better educating the public could help grow confidence.

Second, as the German public supports a more principled approach but is uncertain about what is realistic, policymakers should strive to explain their precise goals, the means at their disposal, and the costs that they entail. There is enough evidence that momentum within the population exists that policymakers can use to reshape Germany's China policy – if they explain themselves.

Third, an overwhelming majority of Germans support acting in coordination with the European Union. As China's power is growing and confidence in German strength is diminishing, the federal government should implement its promise to "Europeanize" Germany's China policy. The China Strategy is a good first step and should be implemented in a spirit of alignment with the EU. Germany can hardly simply follow the EU but will need to actively strive for a European consensus. The poll indicates that such an initiative finds the support of the population.

If the German government succeeds in making sense of its new, more principled China policy and explains its means, the German population seems to be ready to bear the economic cost. This may help reduce the widespread feeling of insecurity. Closer EU alignment and clear communication can help increase confidence and support for Germany's new China policy.

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DGAP receives funding from the German Federal Foreign Office based on a resolution of the German Bundestag.

Publisher

Deutsche Gesellschaft für
Auswärtige Politik e.V.

ISSN 2198-5936

Editing Bernadette Geyer

Layout Luise Rombach

Design Concept WeDo

Author picture(s) © DGAP



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