



## Survey: Europe's view of China and the US-Chinese conflict



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## Executive Summary

### *Conflict between the US and China: Europeans want a stronger Europe*

**The tensions between the US and China are a source of great concern to people living in the EU. At the same time, the uncertain global situation is increasing their desire for a more sovereign Europe. The world's two superpowers are viewed differently by Europeans: While the latter continue to feel a bond with the US, they see China largely as a competitor. One area where the EU's citizens are particularly critical of the People's Republic is data protection.**

To find out how people in the EU view China and the US–Chinese conflict, in September 2019 the Bertelsmann Stiftung commissioned an EU-wide survey in which 12,263 people from the 28 EU member states took part.

Three out of four Europeans (75 percent) are concerned about the conflict between the United States and China. The survey also reveals marked differences in how EU citizens perceive both superpowers. For example, approximately half of the respondents say their own country has common economic interests with both China and the US. Yet when it comes to common values and political interests, the survey shows that Europeans are significantly more skeptical of China than the US.

Almost half of the respondents, 45 percent, perceive the People's Republic mainly as a competitor; merely one-quarter view it as a partner. Only 9 percent of the respondents say that their own country has the same political interests as China or that they share the same values. By comparison, Europeans still feel a strong affinity with the United States, with 36 percent saying they have the same political interests as the US, and almost one-quarter citing common values as a unifying element.

Europeans are particularly critical of China when it comes to digitalization and data protection: Only 6 percent of the respondents trust a Chinese company to handle their data responsibly. One in five feels this way about American providers; for Japanese companies the figure is 16 percent. Europeans have the greatest confidence by far in their own companies, with 40 percent saying European providers adhere to high privacy standards.

Given today's tense geopolitical situation, the Europeans surveyed put the greatest faith in their own continent, with one in two saying the other EU member states are Europe's most important allies. In comparison, 17 percent say the US is their country's key ally, a role that is ascribed to China by only 5 percent of the respondents.

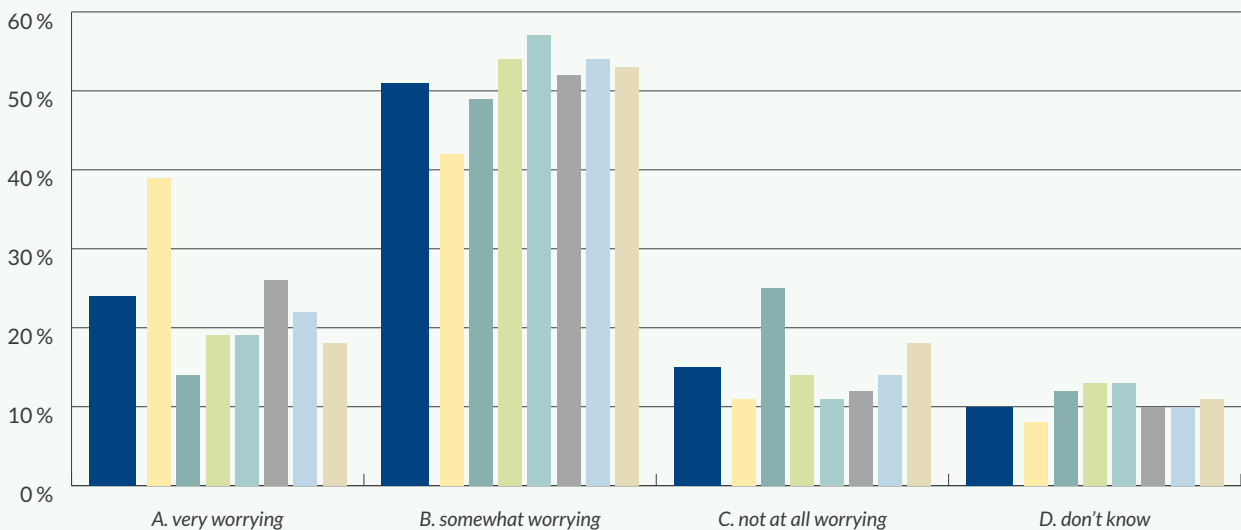
Public opinion reveals broad support for the EU's China policy, which is an important part of the strategy for creating a stronger, more sovereign Europe in general. Europeans are therefore also providing support for the course set by the new president of the European Commission, Ursula von der Leyen, who wants to use a "geopolitical Commission" to give Europe more of a say on the global stage.

The survey also shows that the public debate on China has not been particularly emotional, which is why Europe's policy makers have some leeway to implement fact-based policy responses.

### 1. Europeans view the conflict between the US and China with great concern

The escalation in Chinese-American relations began long before the Trump administration. After Donald Trump was elected in 2016, an open conflict ensued. Manifesting mainly as a trade war, it received extensive media coverage and caught the attention of Europeans: Figure 1 shows that 75 percent of Europeans view the conflict between the US and China as worrying. Only 15 percent of the respondents do not feel this is the case. The findings are particularly notable for Germany, where 81 percent of the respondents say they are very (39 percent) or somewhat (42 percent) worried; only 11 percent feel the conflict is not a cause of concern.

FIGURE 1 How do people in the EU view the conflict between the US and China?  
I view the conflict between the US and China as ...



in %	EU 28	DE	FR	IT	NL	PL	ES	GB
A. very worrying	24	39	14	19	19	26	22	18
B. somewhat worrying	51	42	49	54	57	52	54	53
C. not at all worrying	15	11	25	14	11	12	14	18
D. don't know	10	8	12	13	13	10	10	11

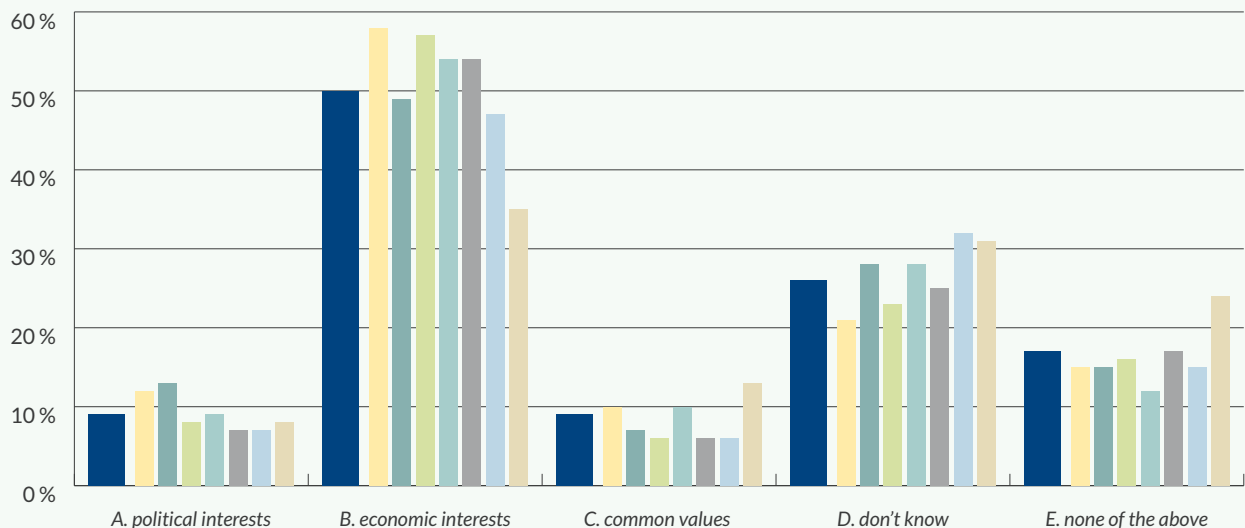
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Europeans seem aware of the significance of a dispute between the two superpowers; they know that such a conflict negatively impacts Europe and the rest of the world. Europe's economic ties to the US and China, which Europeans understand to be close, most likely play a crucial role in this

## 2. Europeans view their economic ties to both superpowers as equally important

As Figures 2 and 3 show, approximately half of the Europeans surveyed say that their country has common economic interests with both China and the US – 50 percent in the case of China and 54 percent for the US. Here, assessment and reality coincide, since the two countries are the EU’s most important trading partners. As in prior years, the US was Europe’s leading trading partner in 2018, when total trade in goods (imports and exports) amounted to €674 billion, equal to 17 percent of all EU trade in goods. China’s share was 15 percent.<sup>1</sup>

FIGURE 2 Views on commonalities with China  
China and my country share ...

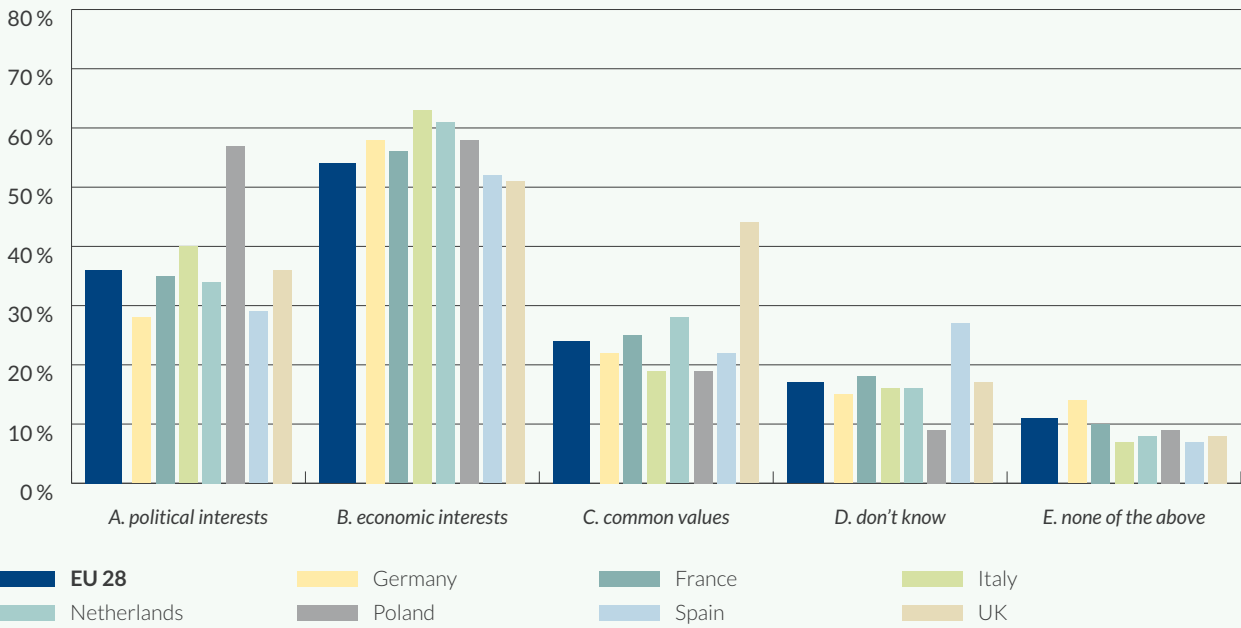


in %	EU 28	DE	FR	IT	NL	PL	ES	GB
A. political interests	9	12	13	8	9	7	7	8
B. economic interests	50	58	49	57	54	54	47	35
C. common values	9	10	7	6	10	6	6	13
D. don't know	26	21	28	23	28	25	32	31
E. none of the above	17	15	15	16	12	17	15	24

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<sup>1</sup> <https://ec.europa.eu/eurostat/documents/2995521/9678915/6-20032019-AP-DE.pdf/265b3a81-821d-464f-a5e5-b2473ea5d9af>.

**FIGURE 3 Views on commonalities with the US**  
*The US and my country share ...*



in %	EU 28	DE	FR	IT	NL	PL	ES	GB
A. political interests	36	28	35	40	34	57	29	36
B. economic interests	54	58	56	63	61	58	52	51
C. common values	24	22	25	19	28	19	22	44
D. don't know	17	15	18	16	16	9	27	17
E. none of the above	11	14	10	7	8	9	7	8

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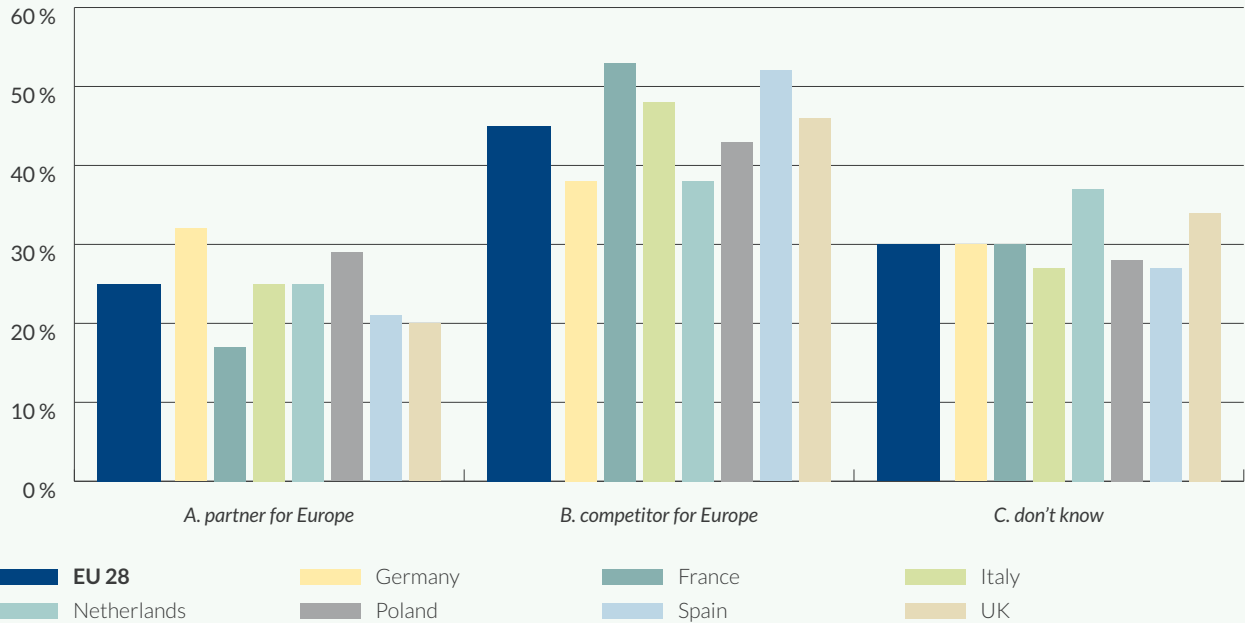
### 3. Europeans feel a much closer connection to the US than to China

Figures 2 and 3, however, reveal another aspect: Many Europeans say that their country shares not only economic and political interests with the US, but common values as well – something they feel does not apply to China. Overall, 36 percent believe that their country and the US have common political interests, and almost one-quarter, 24 percent, say they have common values as well. In contrast, few Europeans feel that their country has the same political interests as China (9 percent) or common values (9 percent) – on average, not even one in ten respondents. Europeans thus feel they have a much stronger connection, one that goes beyond economic interests, with the US. Conversely, China is largely perceived as a rival: Figure 4 shows that 45 percent of Europeans classify China as a competitor for Europe. One-quarter see China as a partner for Europe. At the same time, the group of respondents answering this question with “I don’t know” is exceptionally large, at 30 percent.



FIGURE 4 Views on China's role for Europe

China's role for Europe: China is a ...



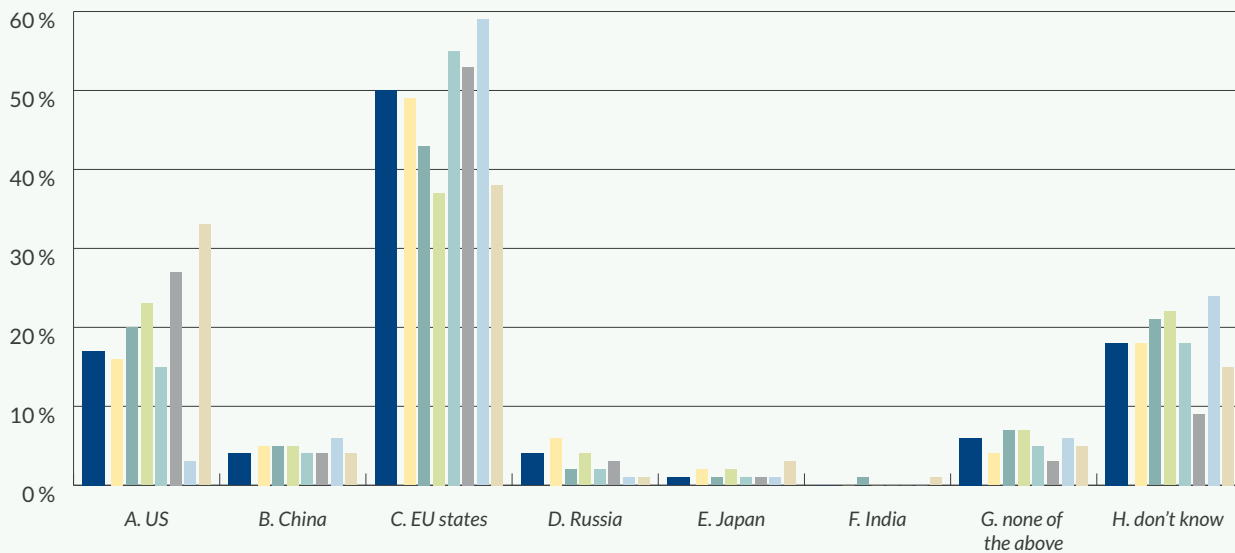
in %	EU 28	DE	FR	IT	NL	PL	ES	GB
A. partner for Europe	25	32	17	25	25	29	21	20
B. competitor for Europe	45	38	53	48	38	43	52	46
C. don't know	30	30	30	27	37	28	27	34

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#### 4. The conflict between the superpowers and the global uncertainty that has resulted are increasing Europeans' desire for a more sovereign Europe

Even if economic interests lead many Europeans to feel a connection to the US, they still prefer to rely on other European nations: Figure 5 shows that for half of Europeans, namely 50 percent, the most important partners for their own country are the other EU member states. Given the tensions between the US and China, which have resulted in a conflict for which there is foreseeably no quick or easy solution, Europeans largely put their trust in themselves. This finding suggests that the desire exists for a strong, sovereign Europe capable of taking action on a global scale. Of those queried in the survey, 17 percent view the US as their country's most important partner, something that only 4 percent say about China, the same as for Russia (4 percent).

**FIGURE 5 Views on the most important partners**  
Who is the most important partner for your country?



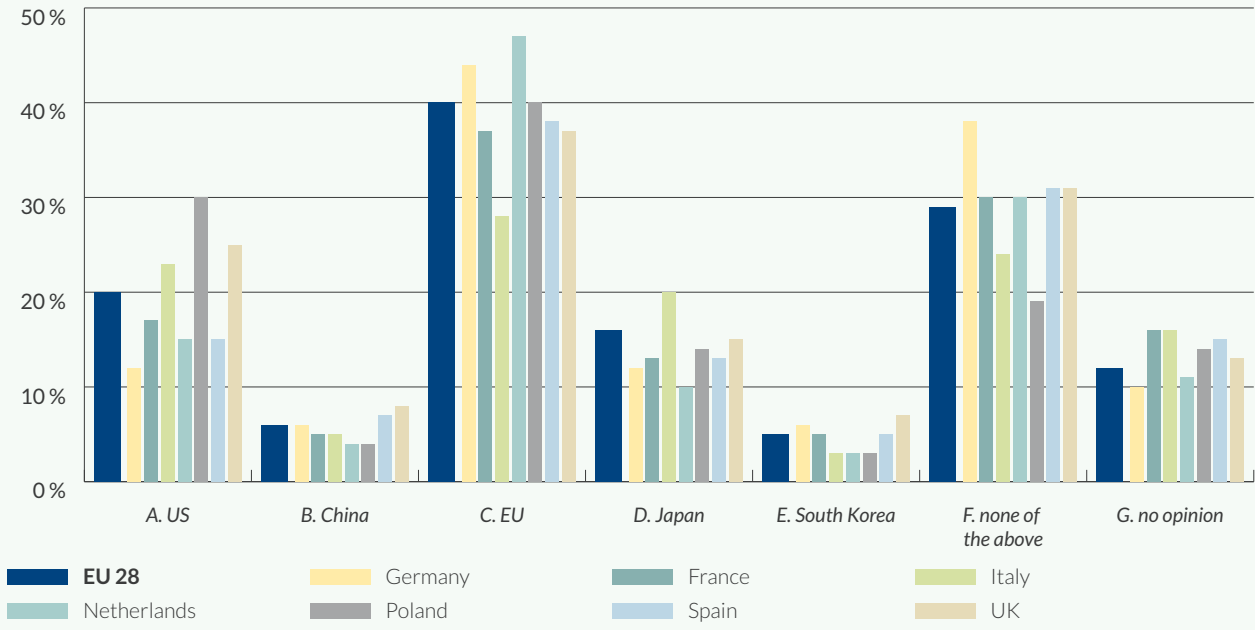
in %	EU 28	DE	FR	IT	NL	PL	ES	GB
A. US	17	16	20	23	15	27	3	33
B. China	4	5	5	5	4	4	6	4
C. EU states	50	49	43	37	55	53	59	38
D. Russia	4	6	2	4	2	3	1	1
E. Japan	1	2	1	2	1	1	1	3
F. India	0	0	1	0	0	0	0	1
G. none of the above	6	4	7	7	5	3	6	5
H. don't know	18	18	21	22	18	9	24	15

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## 5. Reservations about China are particularly evident in the currently much discussed topic of data security

That almost no one in Europe views the People’s Republic as their most important partner could very well have to do with skepticism about China’s approach to data security (Figure 6): Only 6 percent of Europeans believe that Chinese companies handle their data responsibly. Both Japan (16 percent) and the US (20 percent) are clearly ahead of China. Yet here, too, Europeans have the greatest confidence in their own companies, with 40 percent saying they believe European firms handle their data responsibly. Europeans are skeptical when it comes to this issue in general, something that can be seen in the high level of respondents, 29 percent, who do not trust any of the countries mentioned in the survey. Nonetheless, this figure is lower than the percentage of respondents who trust European companies.

FIGURE 6 Views on data security by companies from selected countries  
Data security: In which of these countries would you trust companies to handle your data responsibly?



in %	EU 28	DE	FR	IT	NL	PL	ES	GB
A. US	20	12	17	23	15	30	15	25
B. China	6	6	5	5	4	4	7	8
C. EU	40	44	37	28	47	40	38	37
D. Japan	16	12	13	20	10	14	13	15
E. South Korea	5	6	5	3	3	3	5	7
F. none of the above	29	38	30	24	30	19	31	31
G. no opinion	12	10	16	16	11	14	15	13

## 6. The European Commission's China policy enjoys a high level of support from the European public

In 2019, the European Commission, then led by Commission President Jean-Claude Juncker, presented a new strategic outlook for its policy towards China.<sup>2</sup> The policy's core message is that the EU views China simultaneously as a partner, competitor and systemic rival. The communication calls for making the EU's China policy a key part of a strategy for creating a stronger, more sovereign Europe.

This policy is being maintained as a core element in Ursula von der Leyen's call for a "geopolitical Commission."<sup>3</sup> This requires having one China policy that has been agreed upon and is supported by all member states equally – a "whole-of-Europe" approach, as it were.

The findings from the present study show that the European Commission can rely on considerable support from the European public for its China policy. Although Europeans view China with skepticism, they do not take a fundamentally negative stance toward the country and are willing to enter into partnerships with it. In Europe, the public debate on China is not very charged emotionally, unlike in the US. People living in the EU tend to have mixed feelings instead.

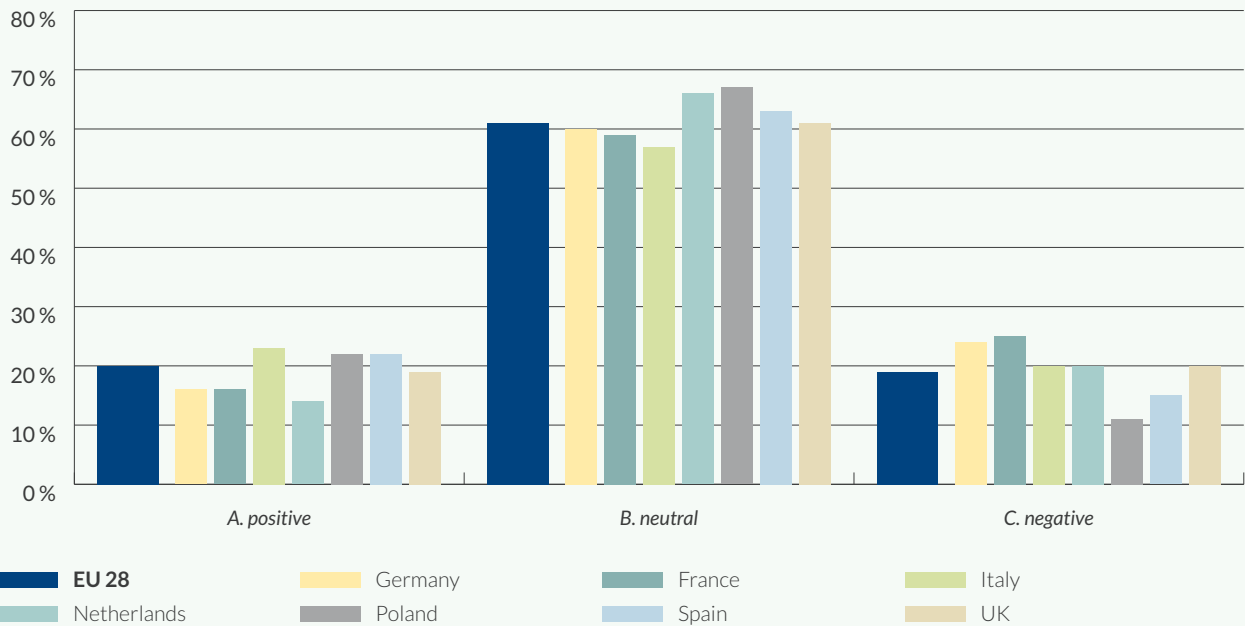
According to the survey, 61 percent say that if they had a conversation with a friend or colleague about China, it would be neutral (Figure 7). Only 19 percent believe it would be negative and 20 percent say it would be positive. As Figure 8 shows, such conversations could cover a wide range of topics. The issues of human rights and surveillance play a particularly prominent role in Germany. Almost half of the respondents (46 percent) say that they view products "made in China" neutrally (Figure 9). The impact of China's rise on the respondents' own countries is seen very differently: 42 percent view it negatively, 34 percent positively. When interpreting the findings, it must be noted that China is not part of the respondents' everyday world: For only 16 percent does China play a direct or indirect role in their professional lives (Figure 10). In general, many Europeans (47 percent) would like to see China take on more responsibility and become more involved in global policy-making – an idea that is rejected by 34 percent of the respondents.

<sup>2</sup> The European Commission's joint communication "EU-China – a strategic outlook" from 2019.

<sup>3</sup> [https://ec.europa.eu/germany/news/20190910-team-struktur-von-der-leyen-kommission\\_de](https://ec.europa.eu/germany/news/20190910-team-struktur-von-der-leyen-kommission_de).

FIGURE 7 Views on conversations about China

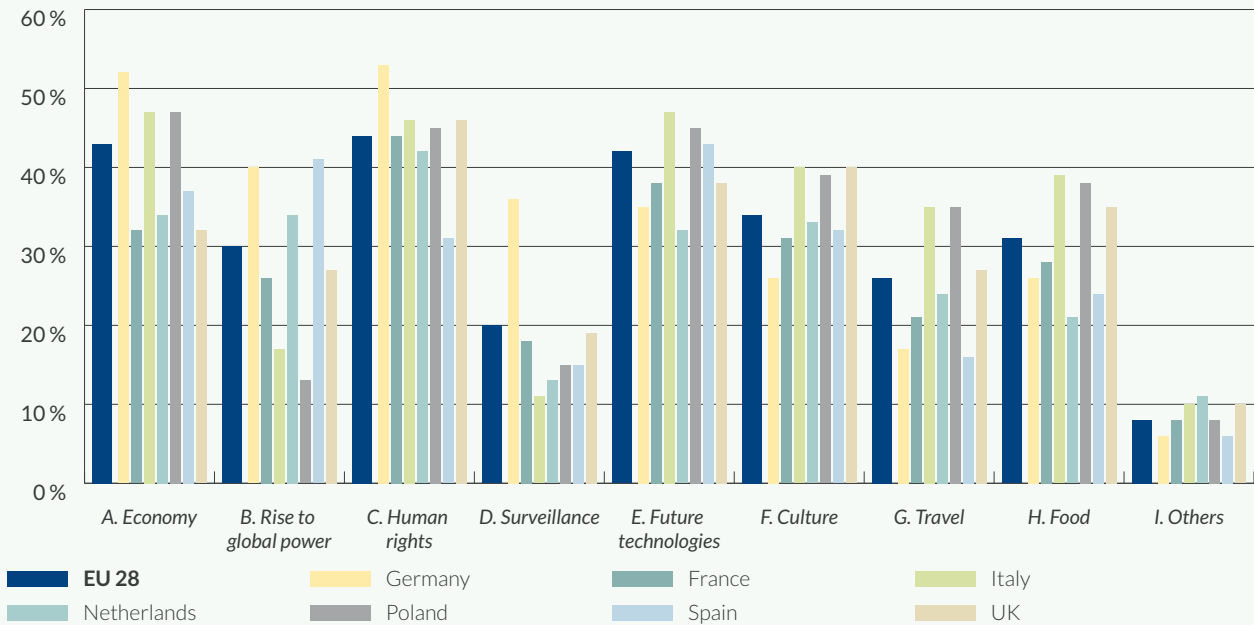
Imagine you were talking to a friend or colleague about China. Would your conversation be:



in %	EU 28	DE	FR	IT	NL	PL	ES	GB
A. positive	20	16	16	23	14	22	22	19
B. neutral	61	60	59	57	66	67	63	61
C. negative	19	24	25	20	20	11	15	20

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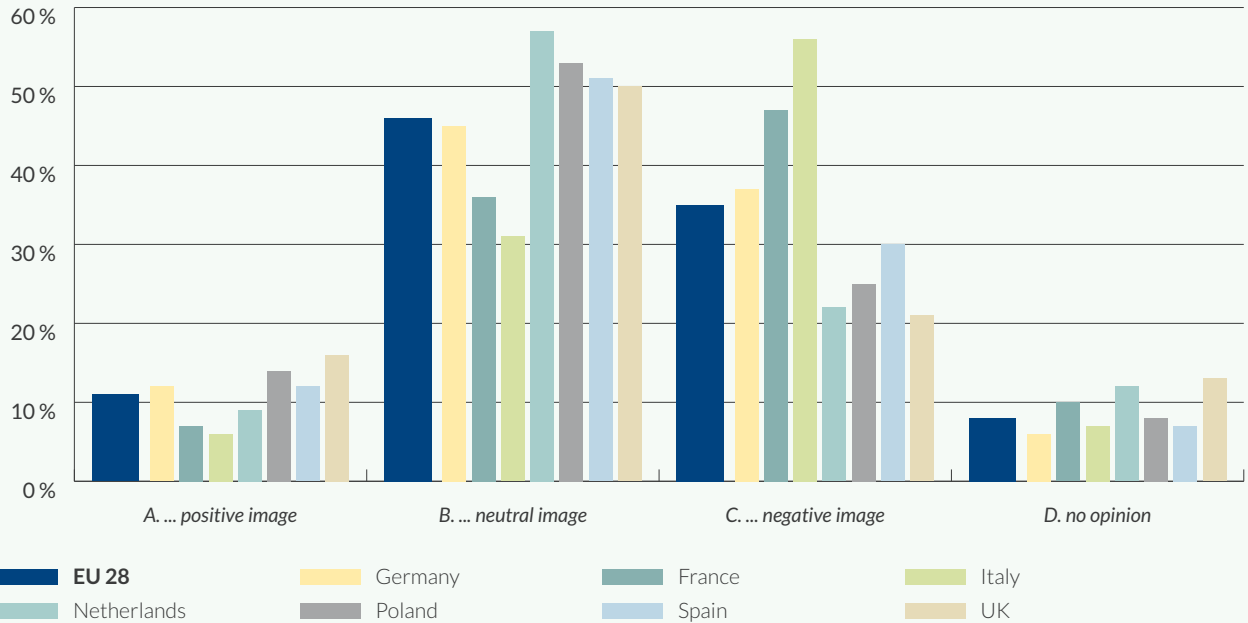
**FIGURE 8 Views on topics in conversations about China (topics regarding China)**  
Which of the following topics would your conversations be about?



in %	EU 28	DE	FR	IT	NL	PL	ES	GB
A. Economy	43	52	32	47	34	47	37	32
B. Rise to global power	30	40	26	17	34	13	41	27
C. Human rights	44	53	44	46	42	45	31	46
D. Surveillance	20	36	18	11	13	15	15	19
E. Future technologies	42	35	38	47	32	45	43	38
F. Culture	34	26	31	40	33	39	32	40
G. Travel	26	17	21	35	24	35	16	27
H. Food	31	26	28	39	21	38	24	35
I. Others	8	6	8	10	11	8	6	10

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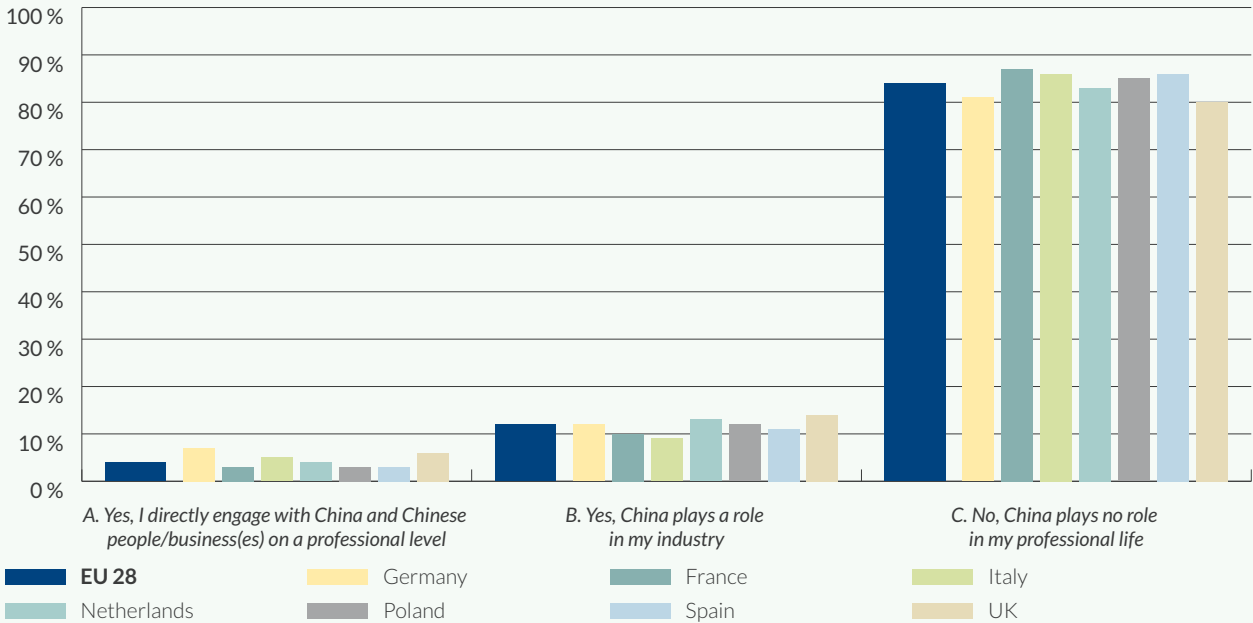
**FIGURE 9 Views on Chinese products**  
For me, Chinese products have a ...



in %	EU 28	DE	FR	IT	NL	PL	ES	GB
A. ... positive image	11	12	7	6	9	14	12	16
B. ... neutral image	46	45	36	31	57	53	51	50
C. ... negative image	35	37	47	56	22	25	30	21
D. no opinion	8	6	10	7	12	8	7	13

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**FIGURE 10 Views on China's impact on the individual working environment (China in your professional life)**  
*Does China play a role in your professional life?*



in %	EU 28	DE	FR	IT	NL	PL	ES	GB
A. Yes, I directly engage with China and Chinese people/business(es) on a professional level	4	7	3	5	4	3	3	6
B. Yes, China plays a role in my industry	12	12	10	9	13	12	11	14
C. No, China plays no role in my professional life	84	81	87	86	83	85	86	80

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As the survey's findings clearly show: The European public's views on China provide enough room for fact-based policy responses. The US should serve as a cautionary tale of how quickly populist politics can skew public opinion and lead to an open conflict.



## Methodology

This report presents an overview of a public opinion survey across 28 EU Member States (including the United Kingdom). The data used for the study were collected by Berlin-based Dalia Research from September 11 to 21, 2019. The sample (n=12,263) was drawn from all 28 EU Member States, taking into account current population distributions with regard to age (16 to 65 years), gender and region/country. The data were weighted based upon the most recent Eurostat statistics. The target weighting variables were age, gender, level of education (as defined by ISCED 2011, levels 0–2, 3–4, and 5–8), and degree of urbanization (rural and urban). An iterative algorithm was used to identify the optimal combination of weighting variables based on sample compositions within each country. An estimation of the overall design effect based on the distribution of weights was calculated at 1.21 at the global level. Calculated for a sample of this size and considering the design effect, the margin of error would be 1% at a confidence level of 95%.

In addition to an evaluation for all of Europe, the survey also allows for individual evaluations of the seven member states (Germany, France, UK, Italy, Netherlands, Spain and Poland). This survey is part of the Bertelsmann Stiftung's "eupinions" series conducted in cooperation with Dalia Research, which regularly queries EU citizens on the European Union's ongoing development and on individual policy fields. More information on the project is available at: <https://eupinions.eu/de/home/>.

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Carl-Bertelsmann-Str. 256

33311 Gütersloh

Germany

Phone + 49 5241 81-0

[www.bertelsmann-stiftung.de](http://www.bertelsmann-stiftung.de)

### **Responsible for content**

Bernhard Bartsch

Anika Laudien

### **Authors**

Bernhard Bartsch

Anika Laudien

### **Translation/Editing**

Tim Schroder

### **Graphic design**

Nicole Meyerholz, Bielefeld

### **Cover Image**

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image edited

## **Address | Contact**

Bertelsmann Stiftung  
Carl-Bertelsmann-Straße 256  
33311 Gütersloh  
Germany  
Phone +49 5241 81-0

**Bernhard Bartsch**  
Senior Expert  
Germany and Asia Program  
Phone +49 30 275788-129  
bernhard.bartsch@bertelsmann-stiftung.de

**Anika Laudien**  
Project Manager  
Germany and Asia Program  
Phone +49 5241 81-81246  
anika.sina.laudien@bertelsmann-stiftung.de

[www.bertelsmann-stiftung.de](http://www.bertelsmann-stiftung.de)