



富士山会合 ヤング・フォーラム

Mt. FUJI DIALOGUE YOUNG FORUM

Survey on Japan-China relations in 2020

—Conducted by Chinese Studies Group—

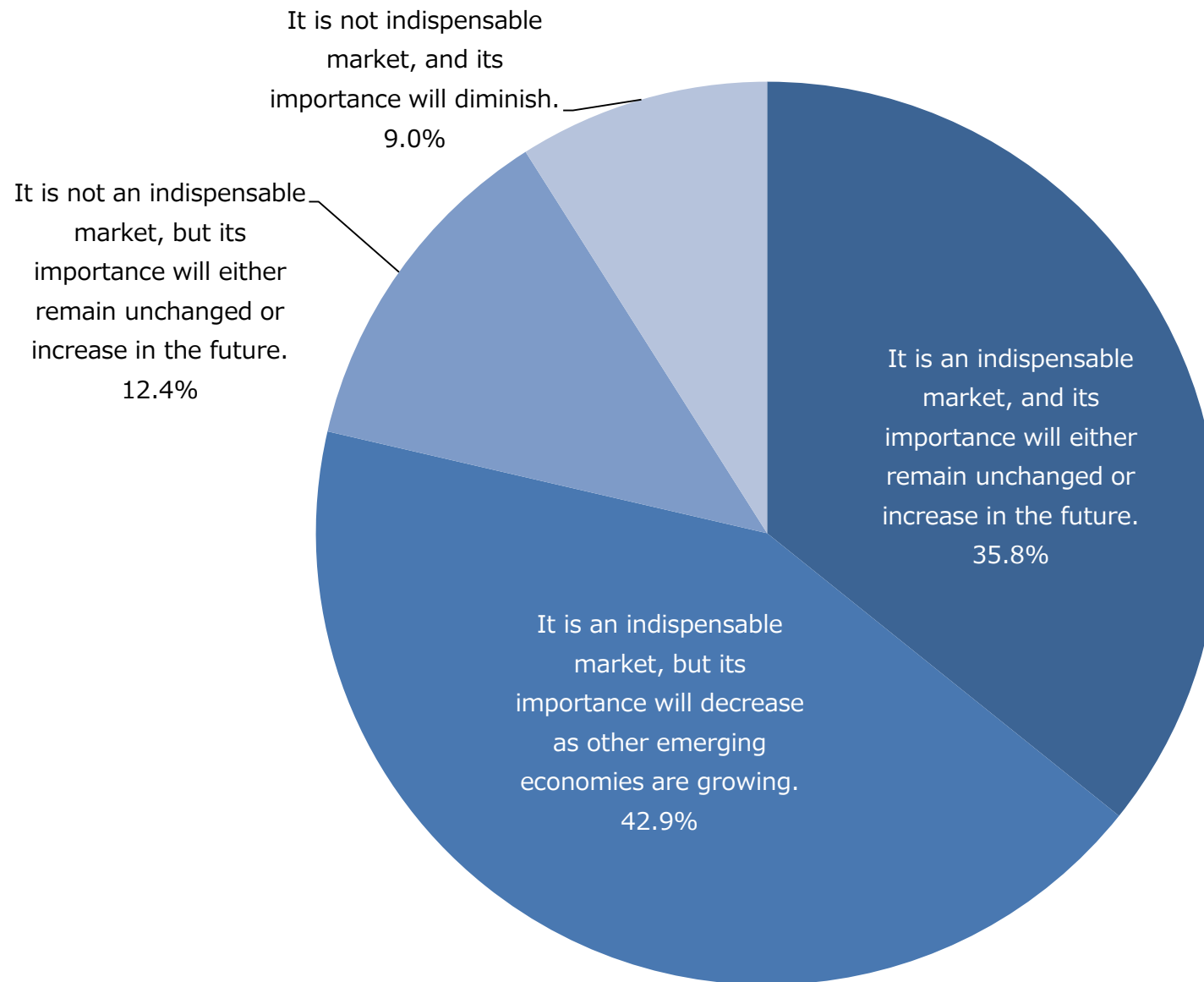
Research briefs

- **Area** Nationwide in Japan
- **Methodology** Internet survey
- **Respondent criteria** Business people aged 20 or over who is currently based in Japan, regularly employed at private company and positioned at chief clerk or higher level
- **Sampling source** Internet panel of Nikkei Research
- **Number of respondents** 3,044s
- **Survey period** From December 15 to 17, 2020
- **Conducted jointly with** Nikkei Research Inc.

Q1. Which statement best describes the significance of China as a market for Japanese companies?

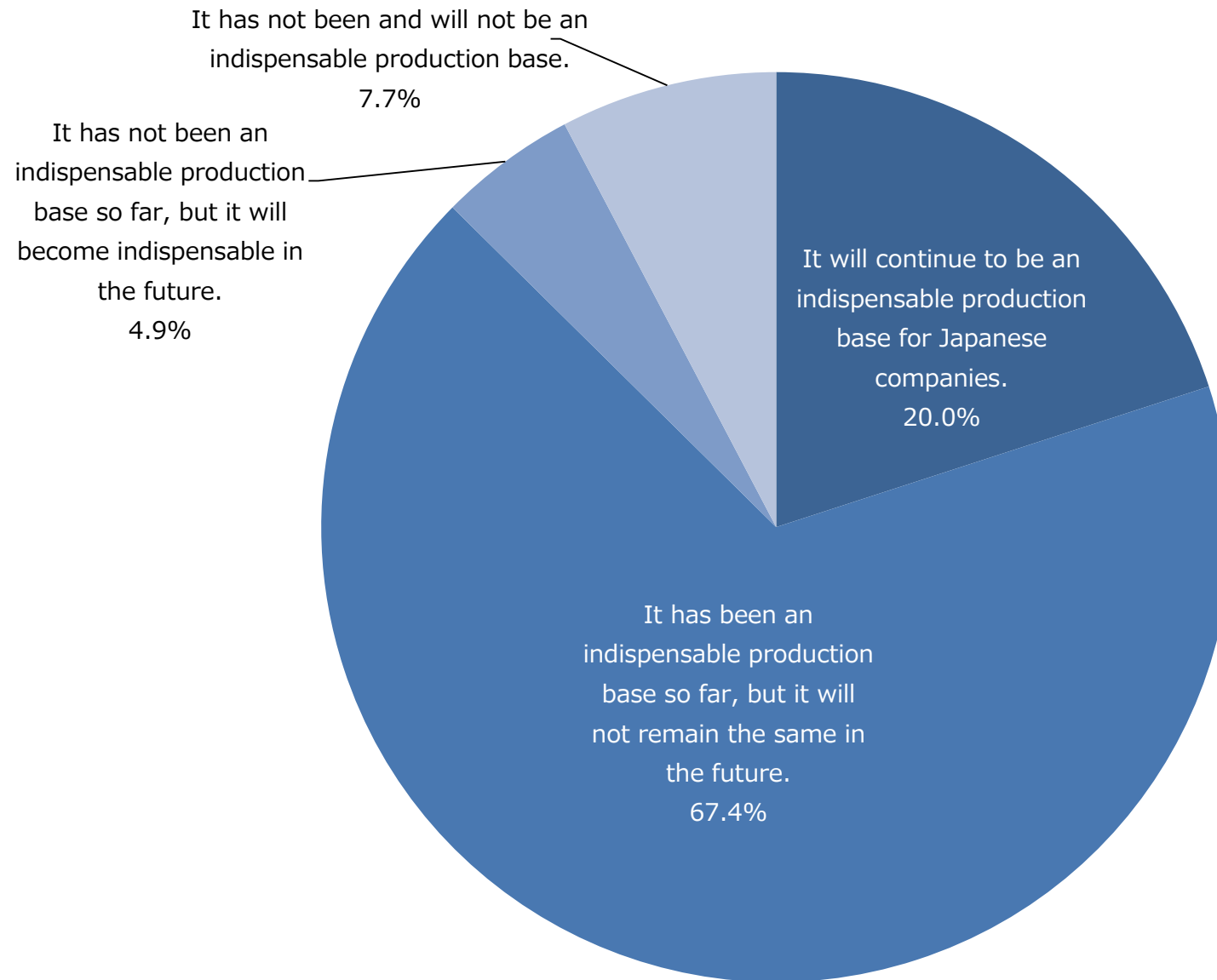
Please select one item from the followings.

(Total number of respondents: 3,044)



Q2. Which statement best describes the significance of China as a production base for Japanese companies?
Please select one item from the followings.

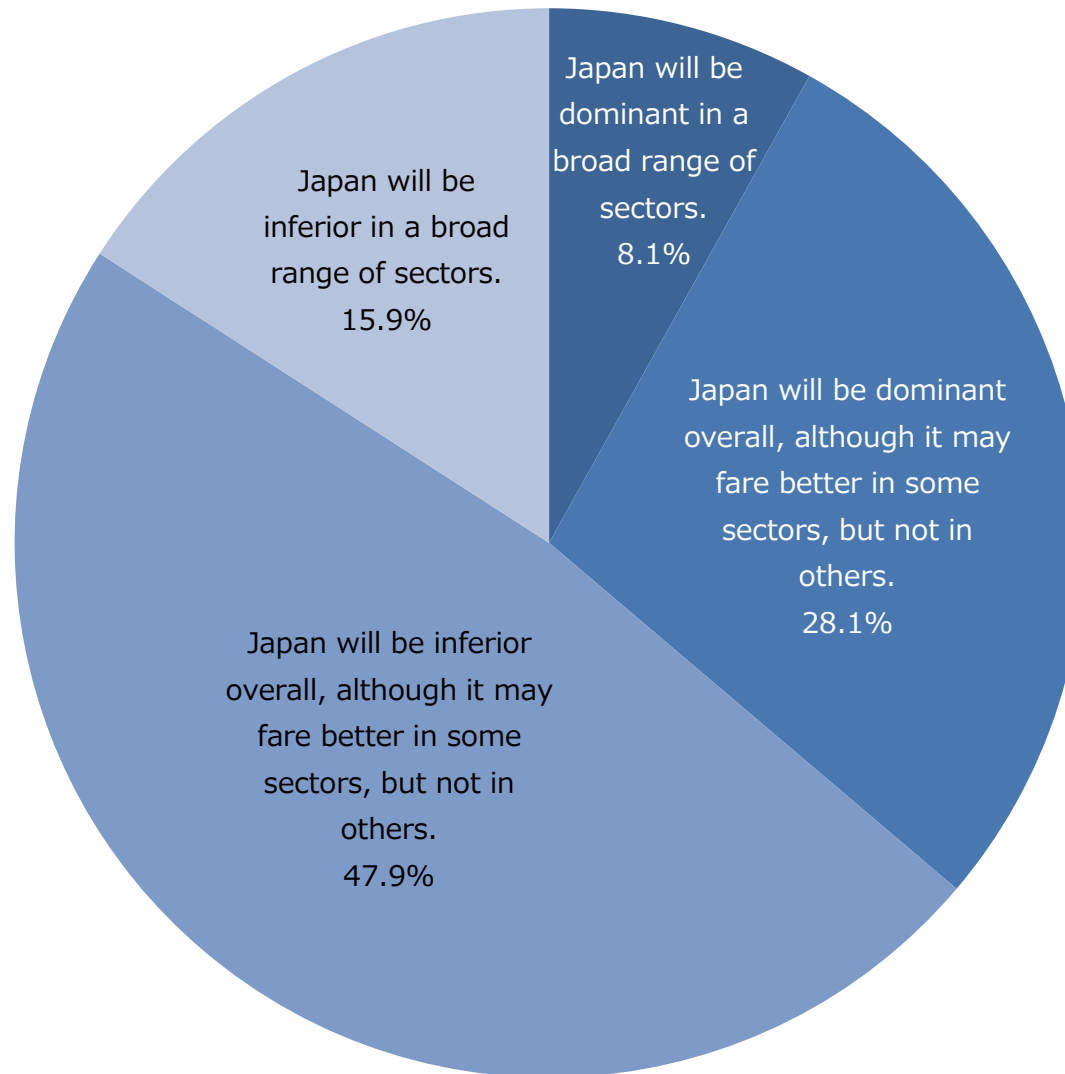
(Total number of respondents: 3,044)



Q3. Do you think Japan can maintain its competitiveness against China? Please select one of the following that is closest to your view in terms of the competitiveness of the manufacturing industry, the competitiveness of the service industry in terms of know-how, and the competitiveness in terms of the digital economy over the next decade.

[the competitiveness of the manufacturing industry]

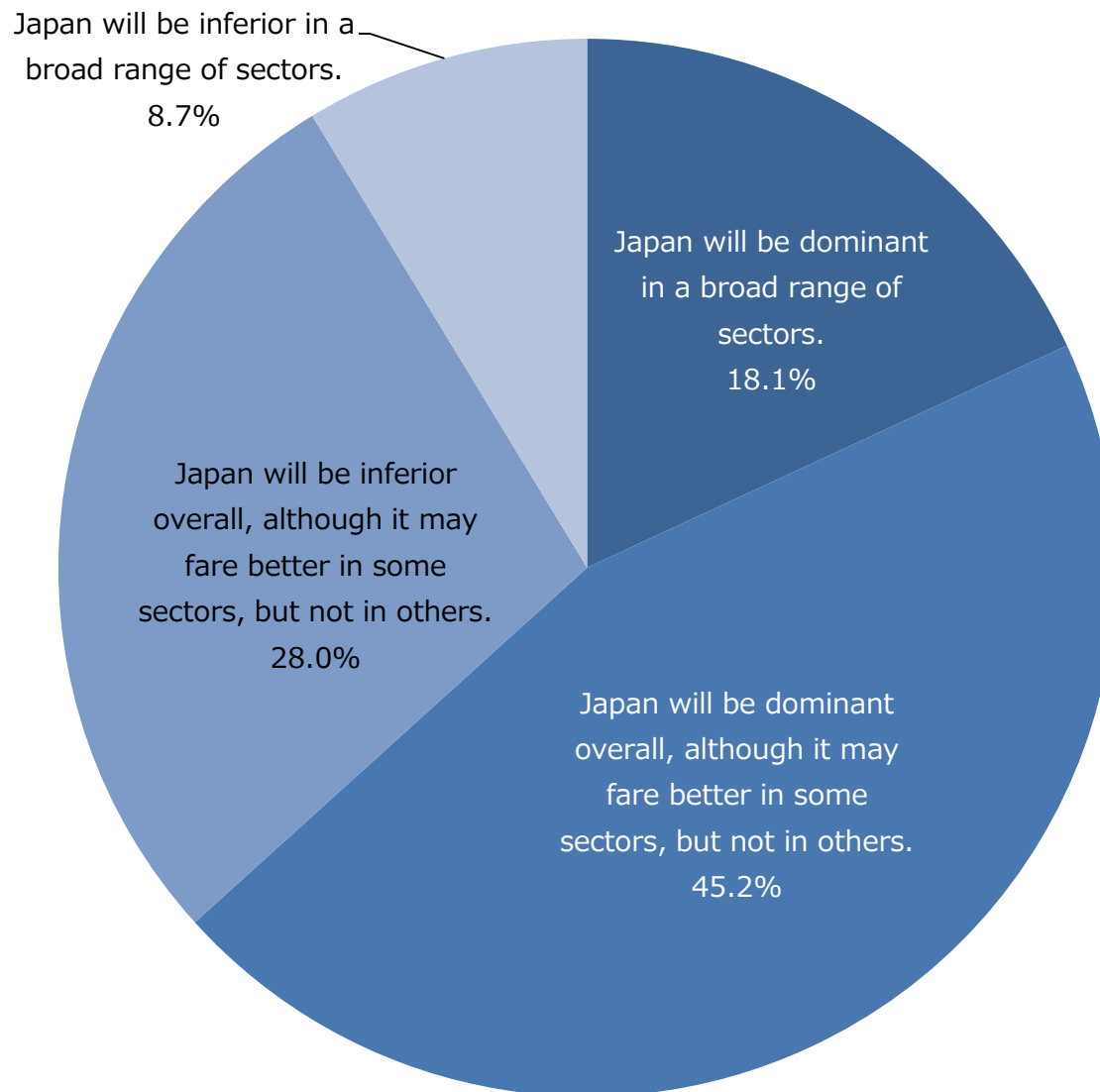
(Total number of respondents: 3,044)



Q3. Do you think Japan can maintain its competitiveness against China? Please select one of the following that is closest to your view in terms of the competitiveness of the manufacturing industry, the competitiveness of the service industry in terms of know-how, and the competitiveness in terms of the digital economy over the next decade.

[the competitiveness of the service industry in terms of know-how]

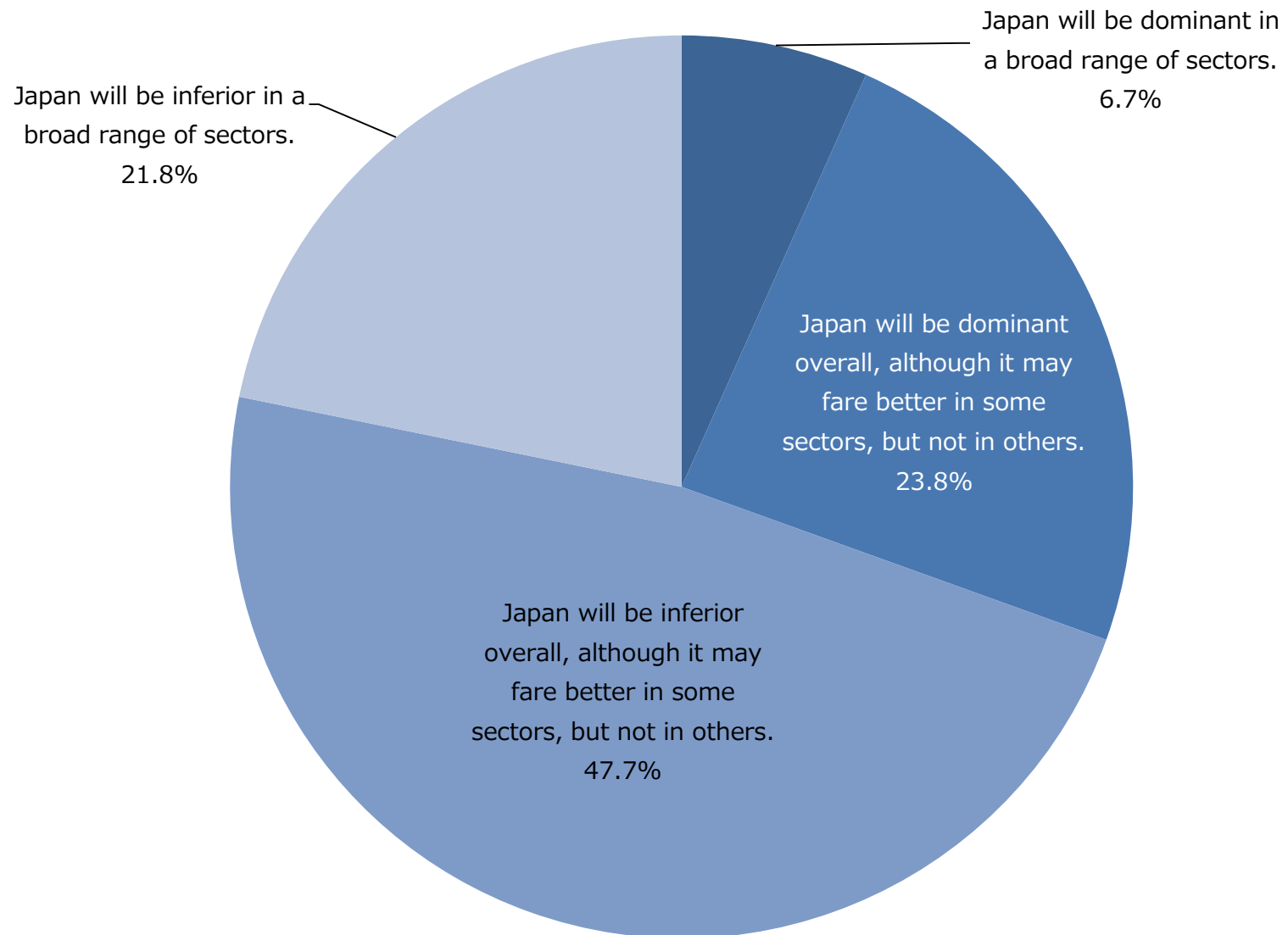
(Total number of respondents: 3,044)



Q3. Do you think Japan can maintain its competitiveness against China? Please select one of the following that is closest to your view in terms of the competitiveness of the manufacturing industry, the competitiveness of the service industry in terms of know-how, and the competitiveness in terms of the digital economy over the next decade.

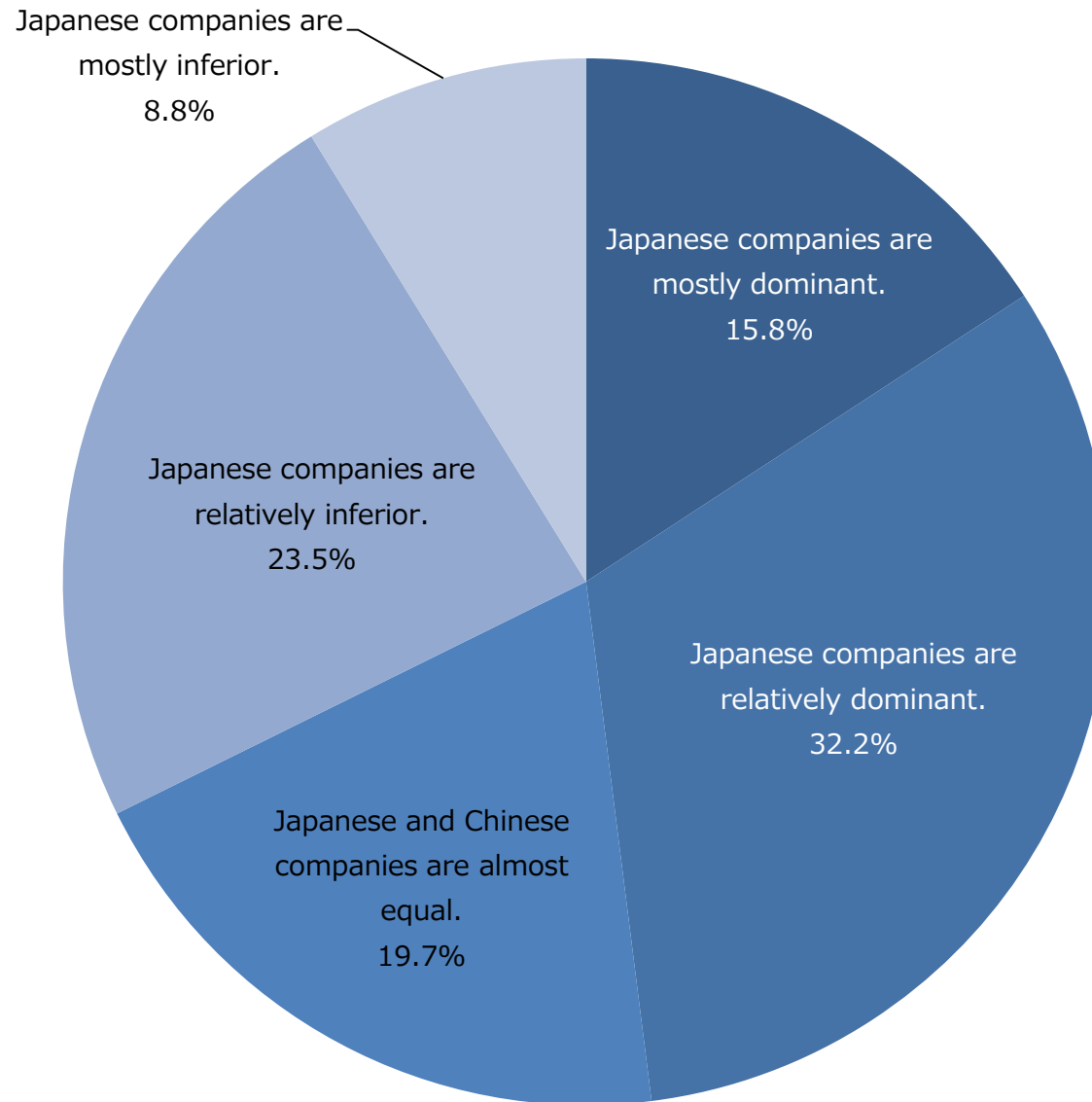
[the competitiveness in terms of the digital economy]

(Total number of respondents: 3,044)



Q3A. In the industry to which your company belongs, what is the current status of competitiveness against Chinese rivals?
Please select the one that is closest to your view.

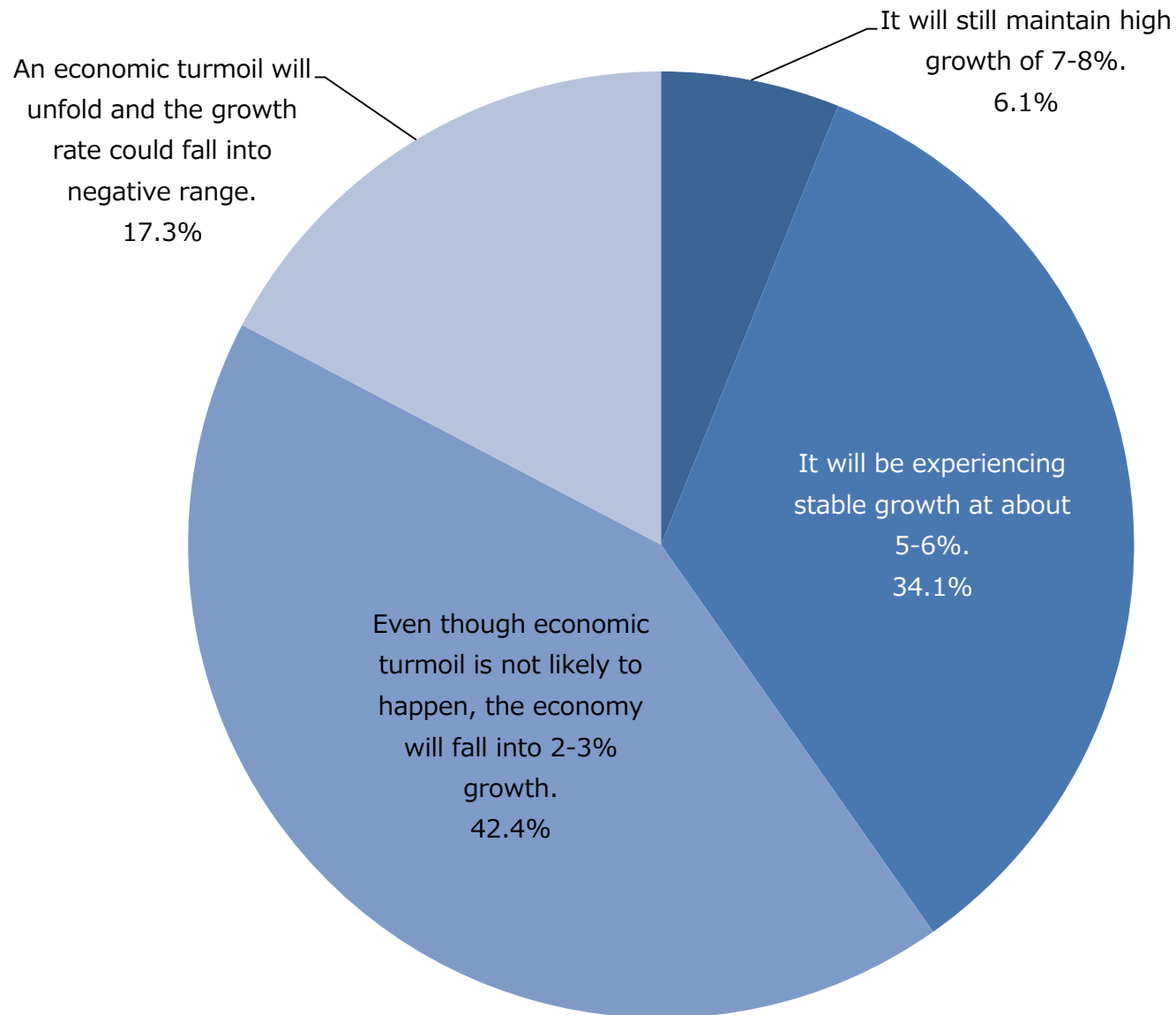
(Total number of respondents: 3,044)



Q4. What will China's economy look like in 10 years from now?

Please select one item that you think is the best description of the direction.

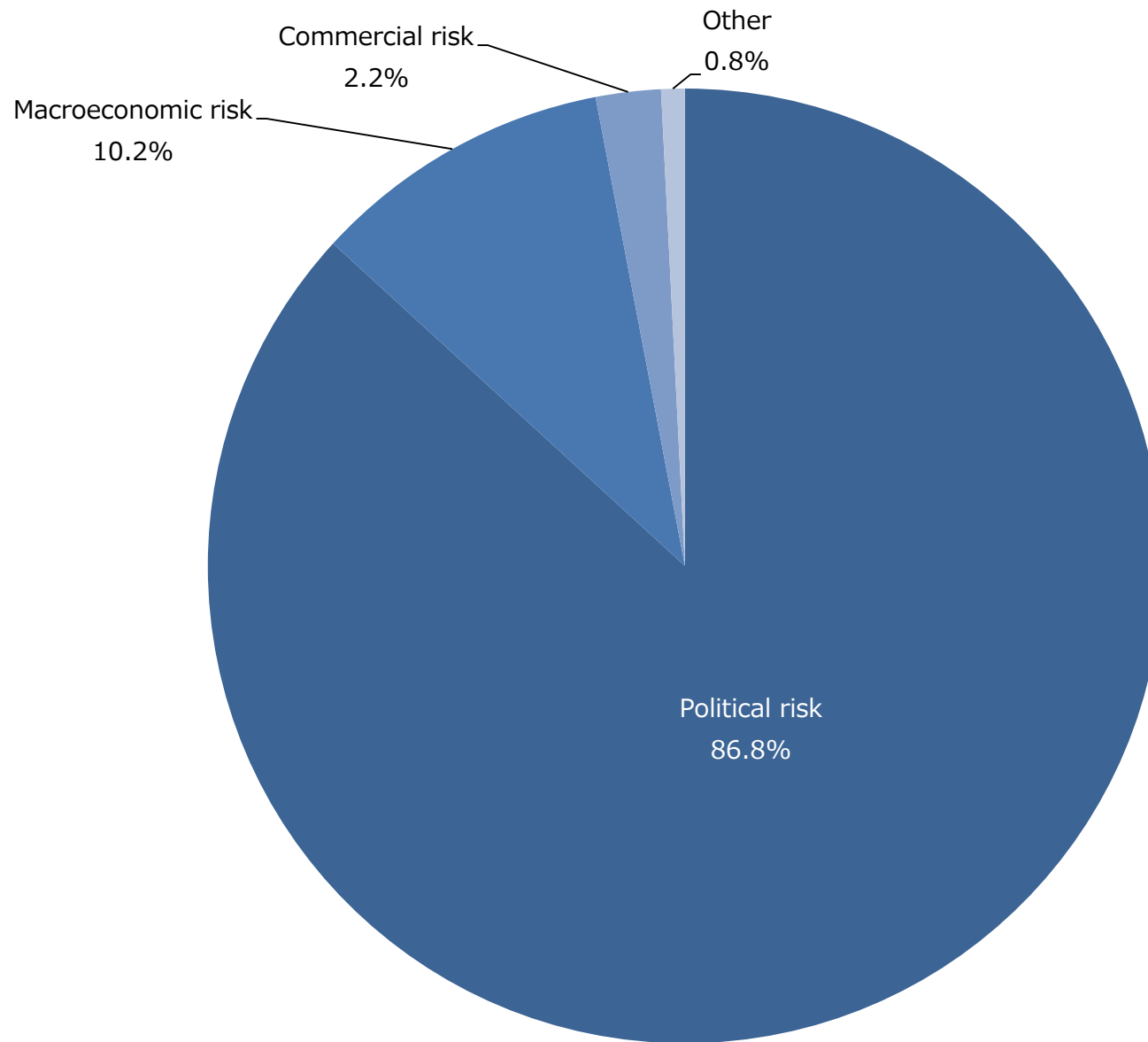
(Total number of respondents: 3,044)



Q6. Please select items that you see as the greatest, and the second greatest risk of doing business in China.

[The greatest risk]

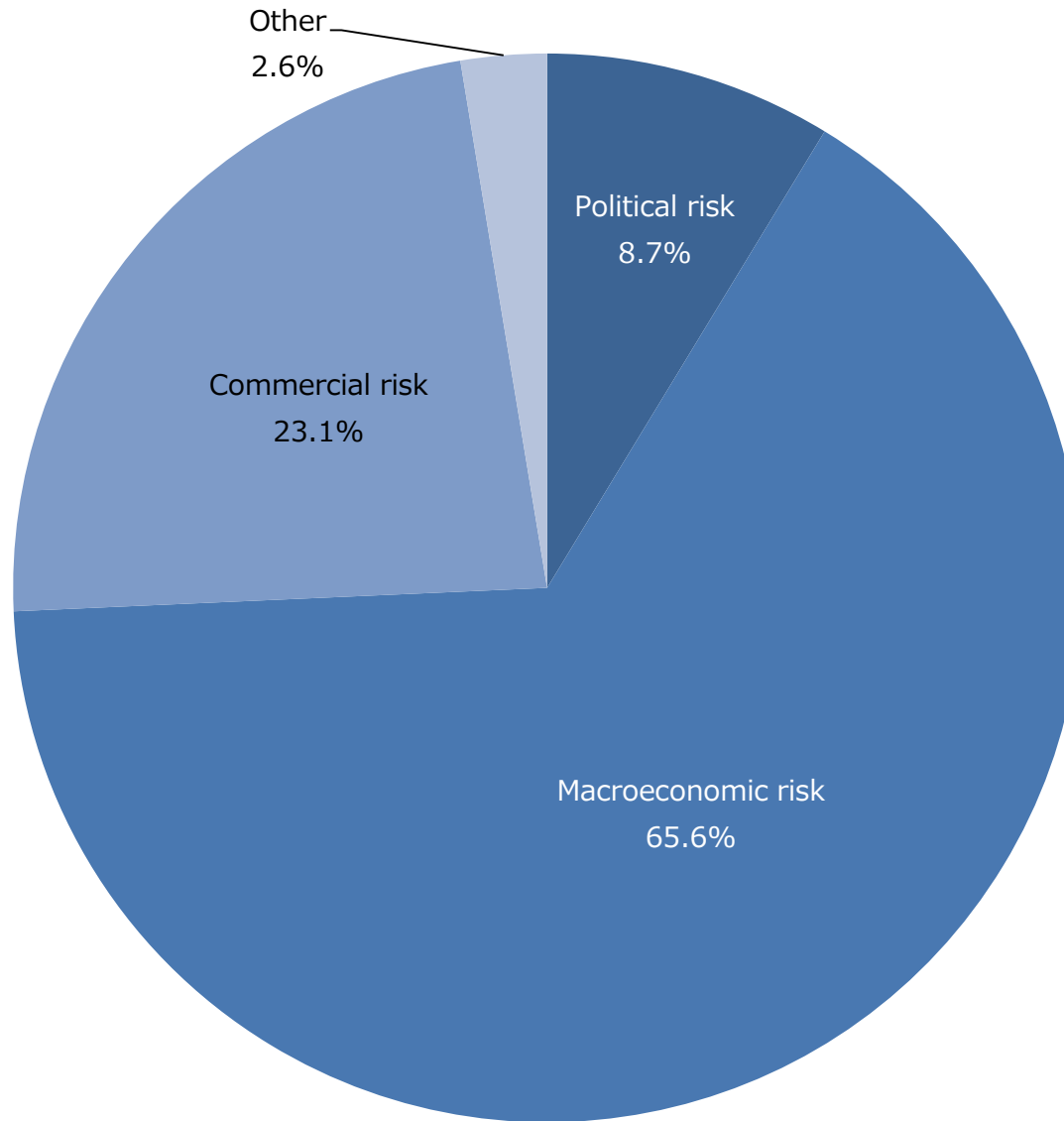
(Total number of respondents: 3,044)



Q6. Please select items that you see as the greatest, and the second greatest risk of doing business in China.

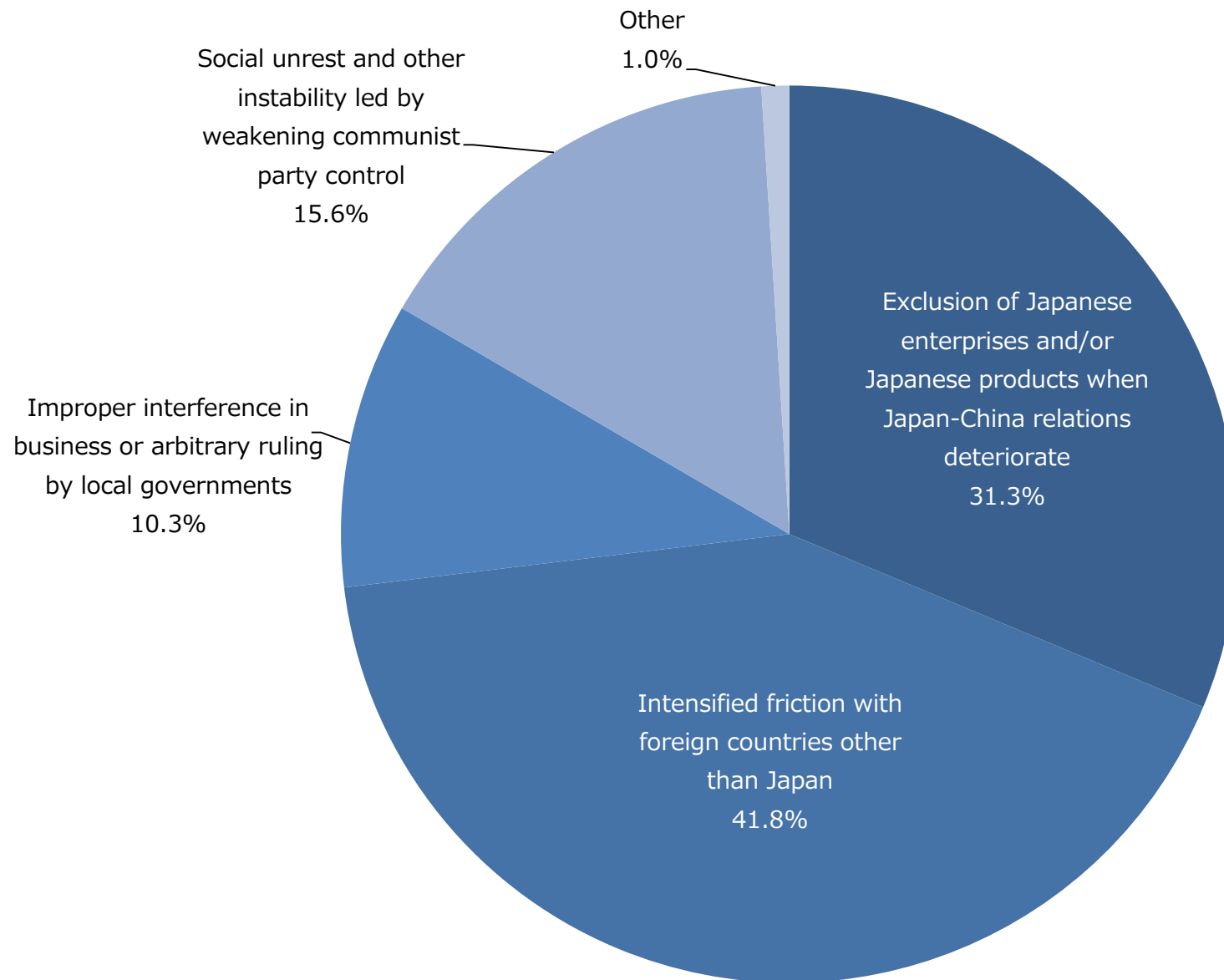
[The second greatest]

(Total number of respondents: 3,044)



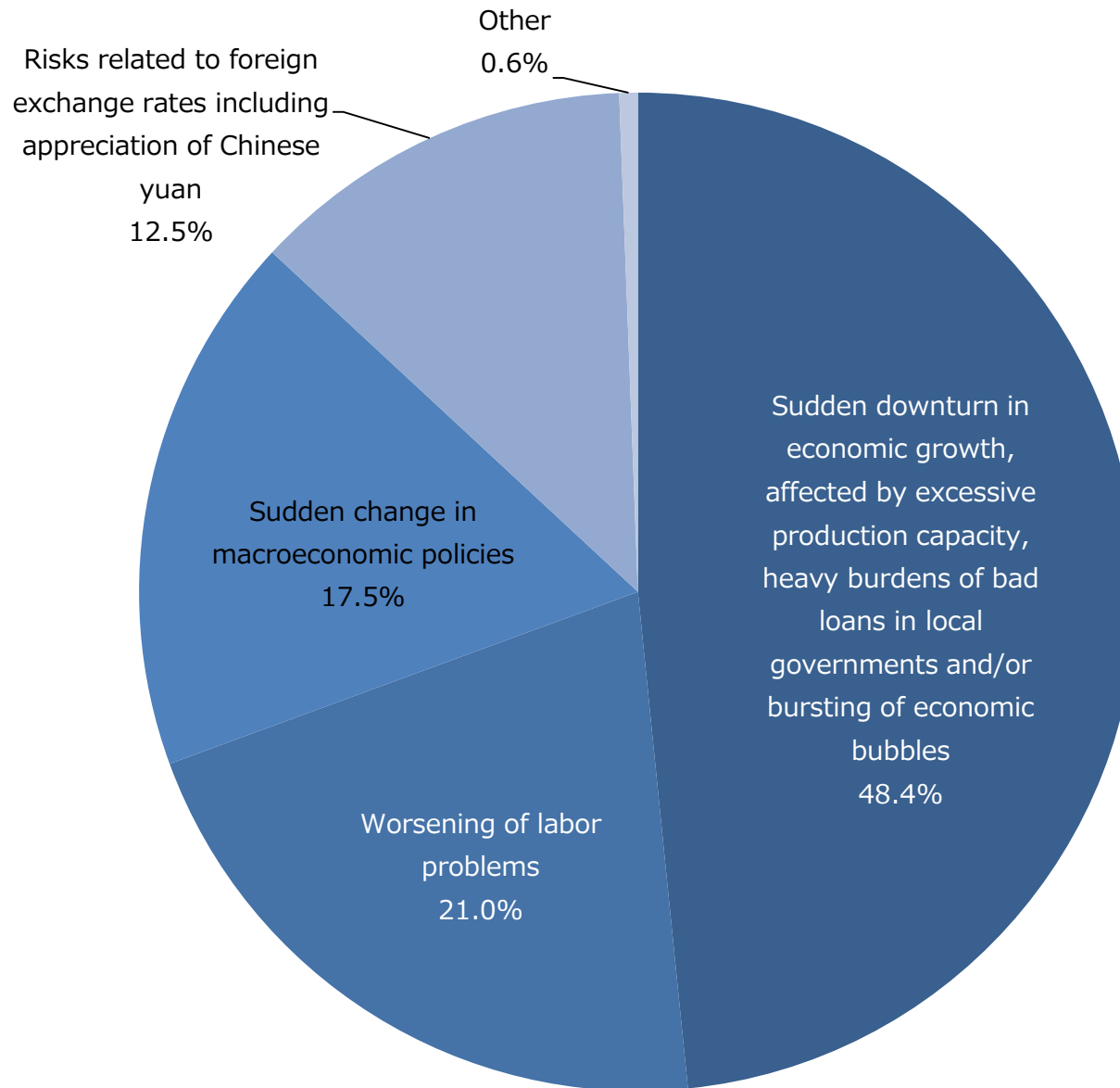
Q6SQ1.If you selected "political risk" as the greatest or the second greatest risk of all, then which specific risk should be most closely monitored?
Please select one item from the followings.

(Total number of respondents: 2,908)



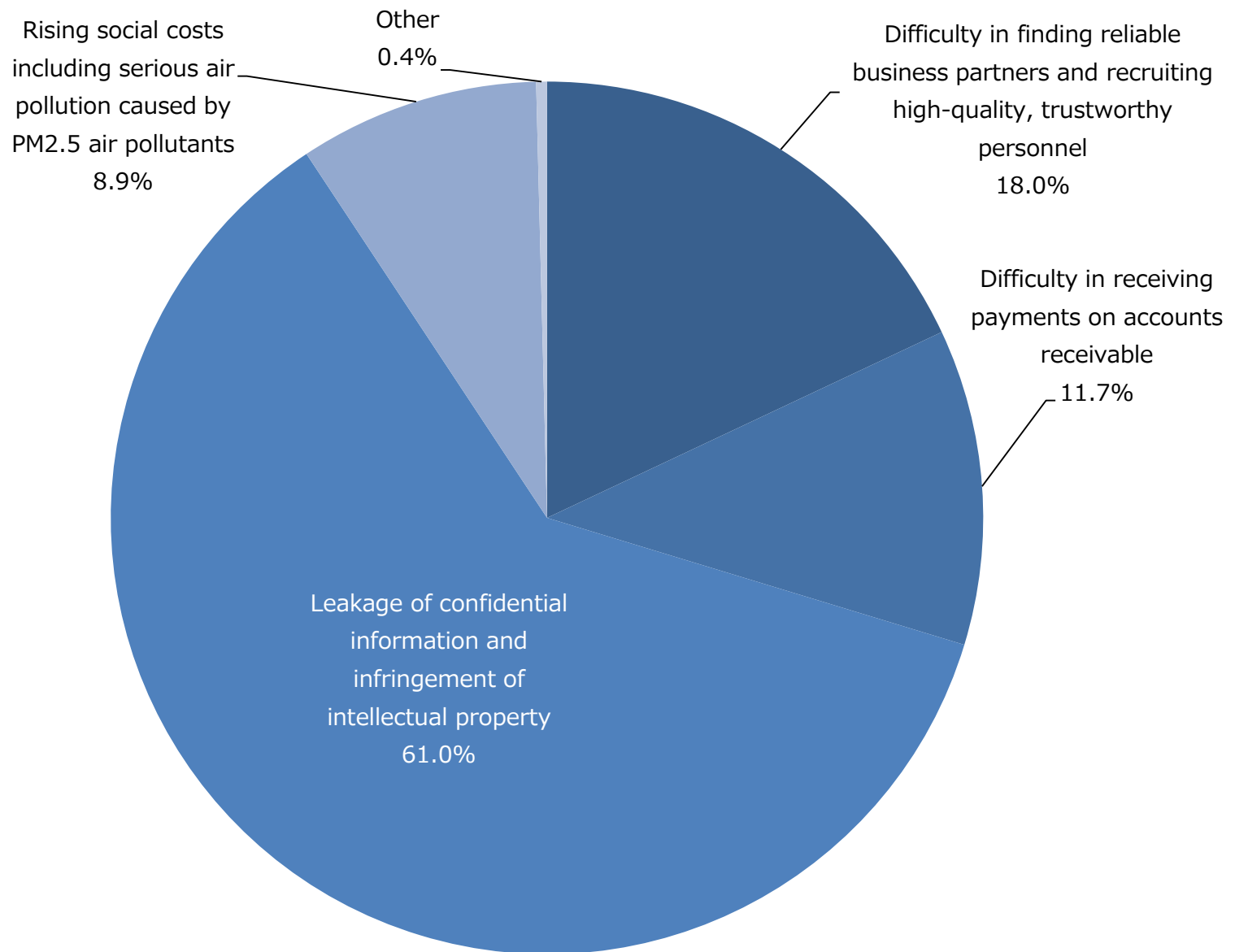
Q6SQ2. If you selected "macroeconomic risk" as the greatest or the second greatest risk of all, then which specific risk should be most closely monitored? Please select one item from the followings.
Please select one item from the followings.

(Total number of respondents: 2,307)



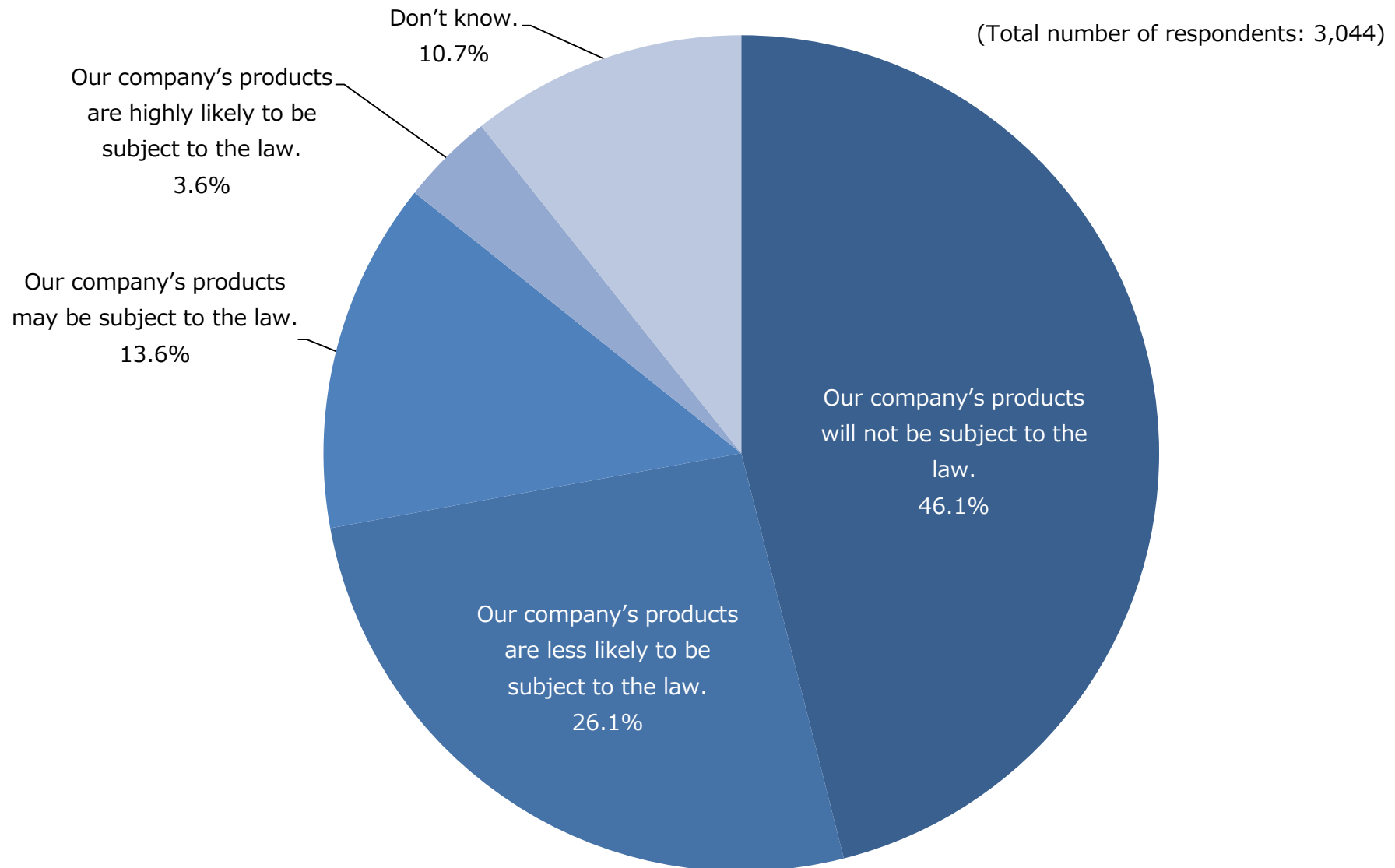
Q6SQ3. If you selected "commercial risk" as the greatest or the second greatest risk of all, then which specific risk should be most closely monitored?
Please select one item from the followings.

(Total number of respondents: 771)



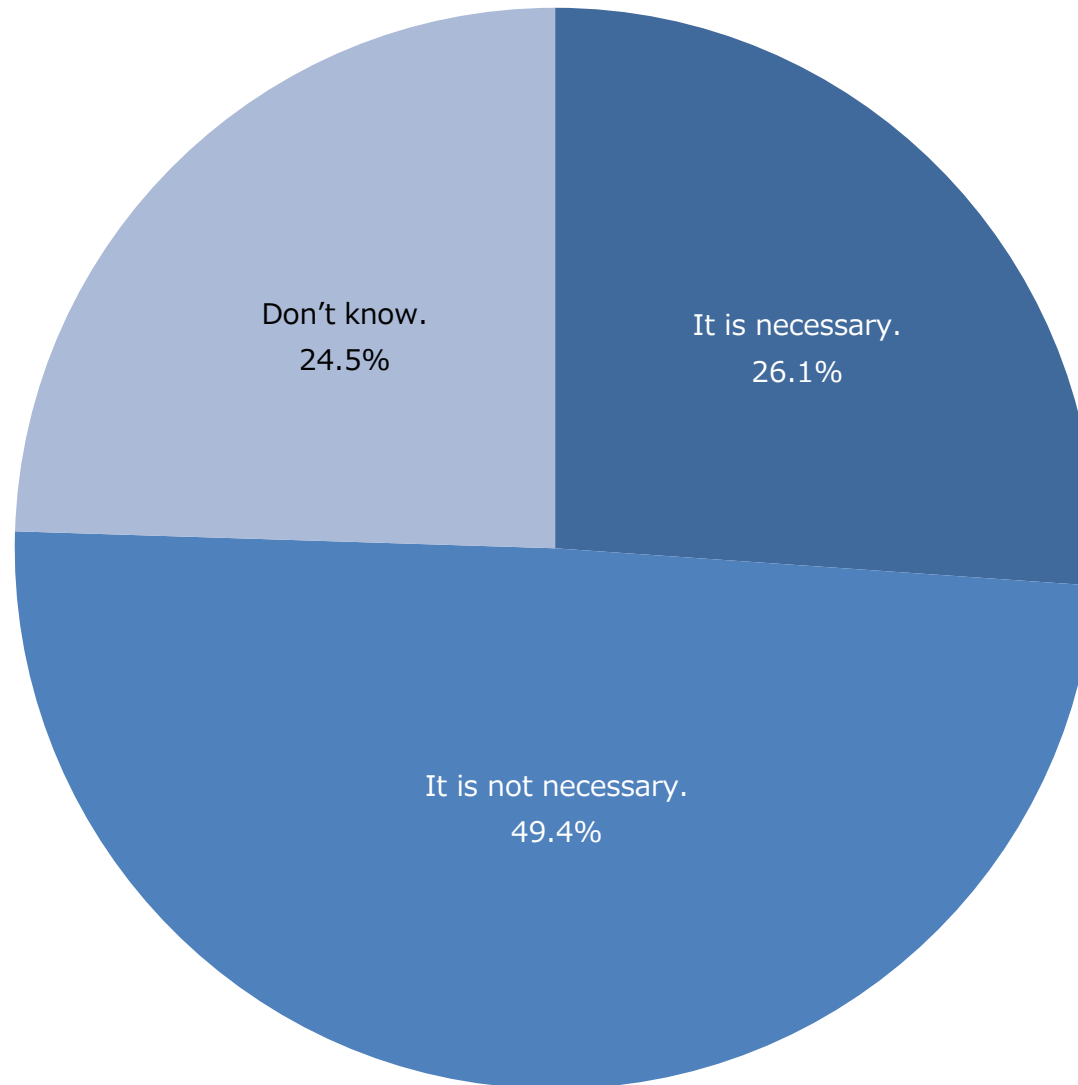
Q7A1. What do you think about items subject to the Export Control Law that was enforced by the Chinese government on December 1? Regardless of whether your company does business with Chinese business partners or not, please select one that is closest to your view.

The items to be controlled have not yet been announced, but are expected to include the following:
Dual-use items for both military and civilian purpose, military supplies, nuclear-related materials, as well as cargos, technologies and services related to the performance of international obligations, such as protection of national security and national interests and prevention of nuclear proliferation.



Q7A2. Following the enforcement of the Export Control Law by the Chinese government as described above, do you think it necessary for your company to closely examine or review its trade relations with Chinese business partners?
Please select one that is closest to your view.

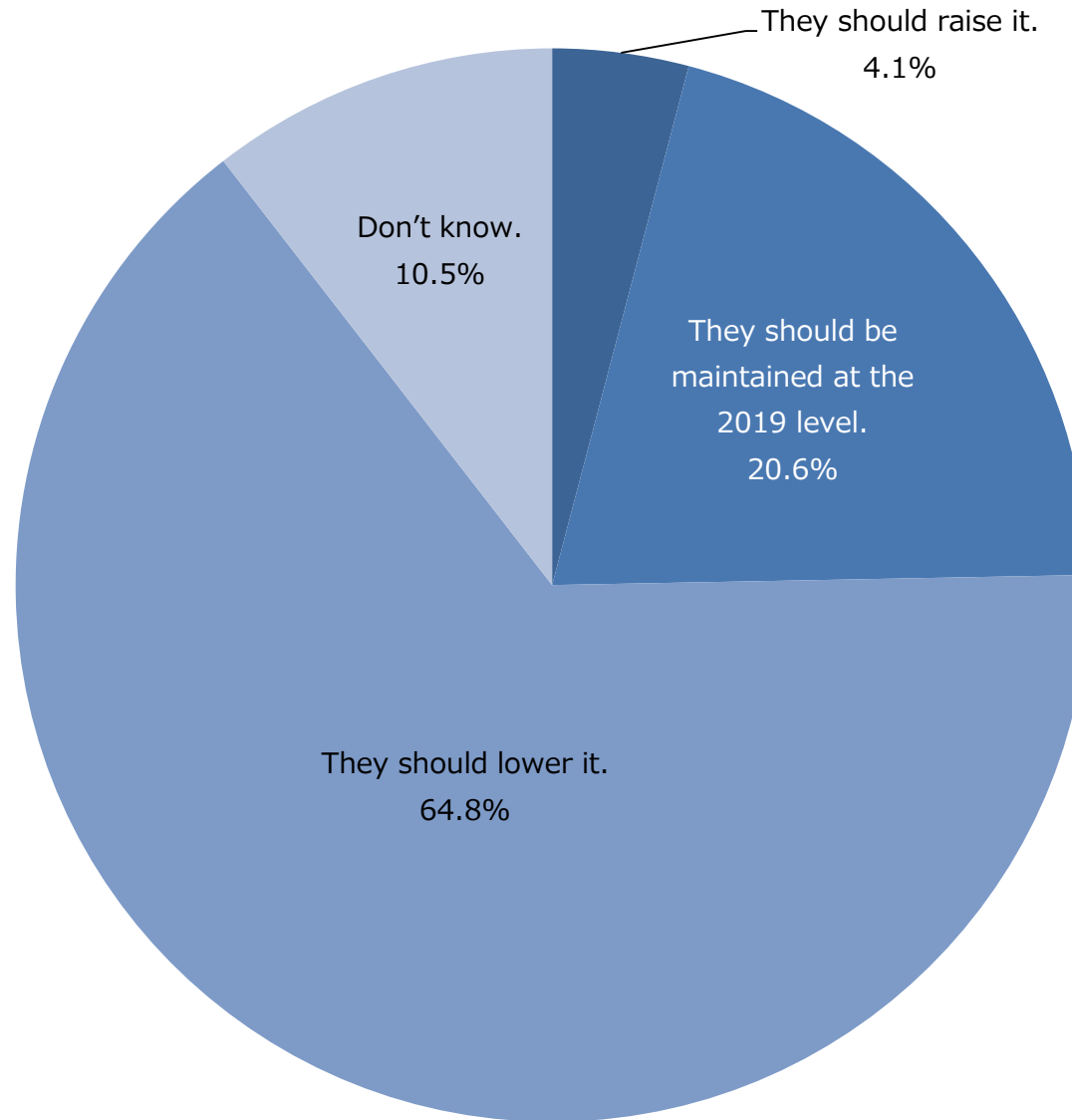
(Total number of respondents: 3,044)



Q7B. Some people are concerned about Japanese companies' high dependence on China. Compared to 2019 before the COVID-19 pandemic, what do you think Japanese companies should do with Chinese products and their market shares in China in the future in the following areas? Please select one item which is closest to your view.

[The percentage of products made in China in the overall products]

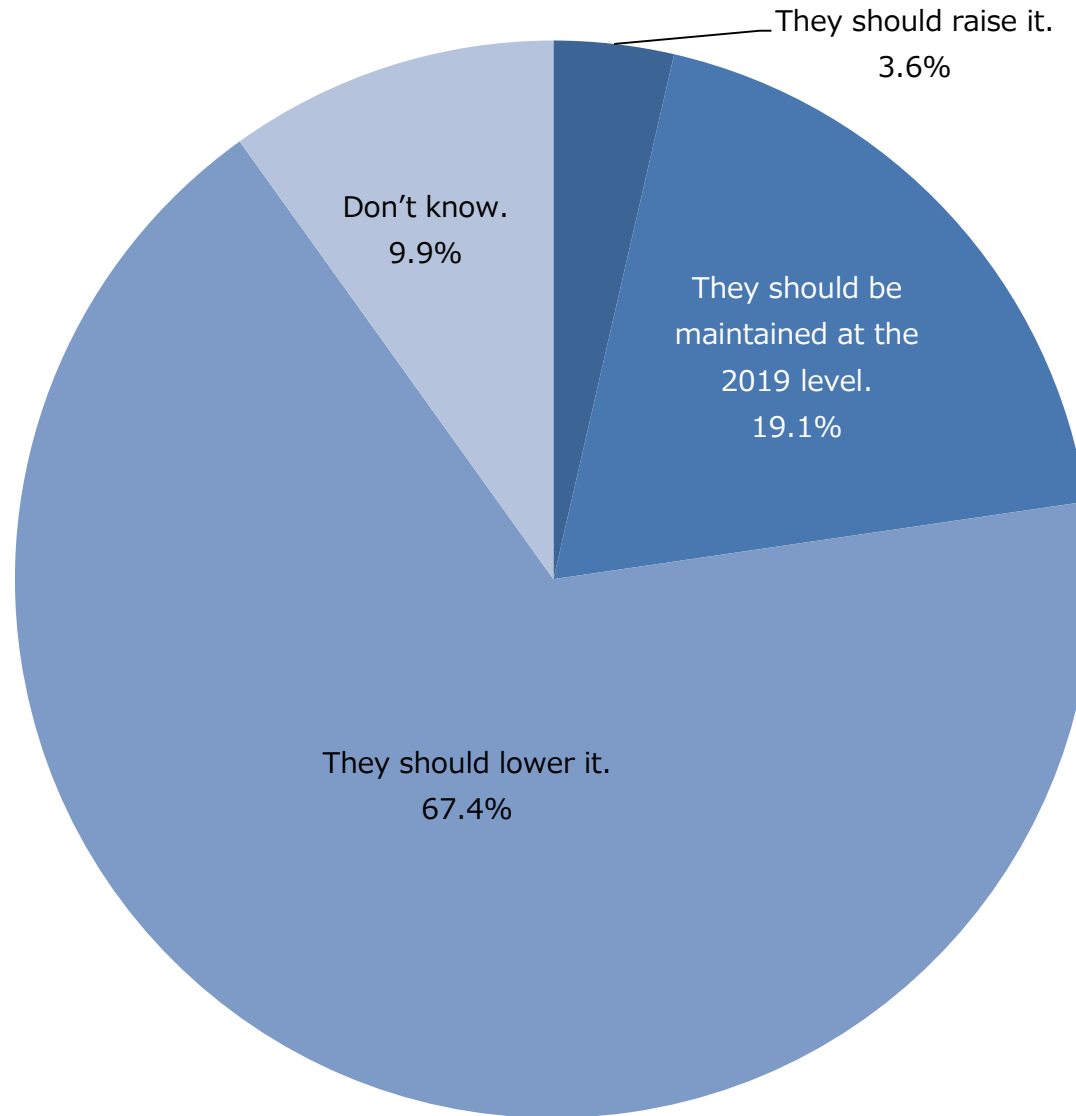
(Total number of respondents: 3,044)



Q7B. Some people are concerned about Japanese companies' high dependence on China. Compared to 2019 before the COVID-19 pandemic, what do you think Japanese companies should do with Chinese products and their market shares in China in the future in the following areas? Please select one item which is closest to your view.

[The percentage of Chinese products in the procurement of parts and products]

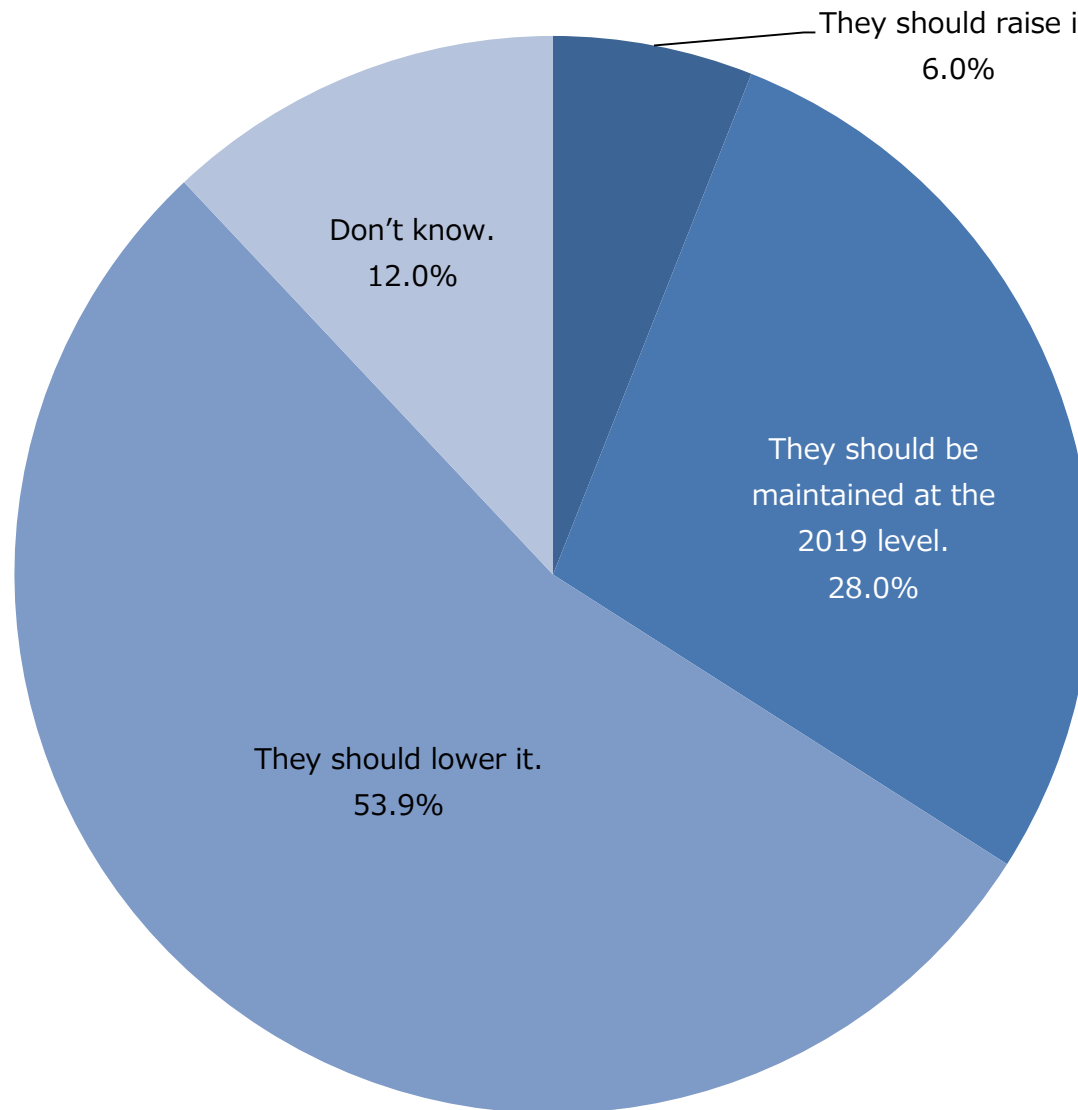
(Total number of respondents: 3,044)



Q7B. Some people are concerned about Japanese companies' high dependence on China. Compared to 2019 before the COVID-19 pandemic, what do you think Japanese companies should do with Chinese products and their market shares in China in the future in the following areas? Please select one item which is closest to your view.

[The percentage of sales in China in the overall sales]

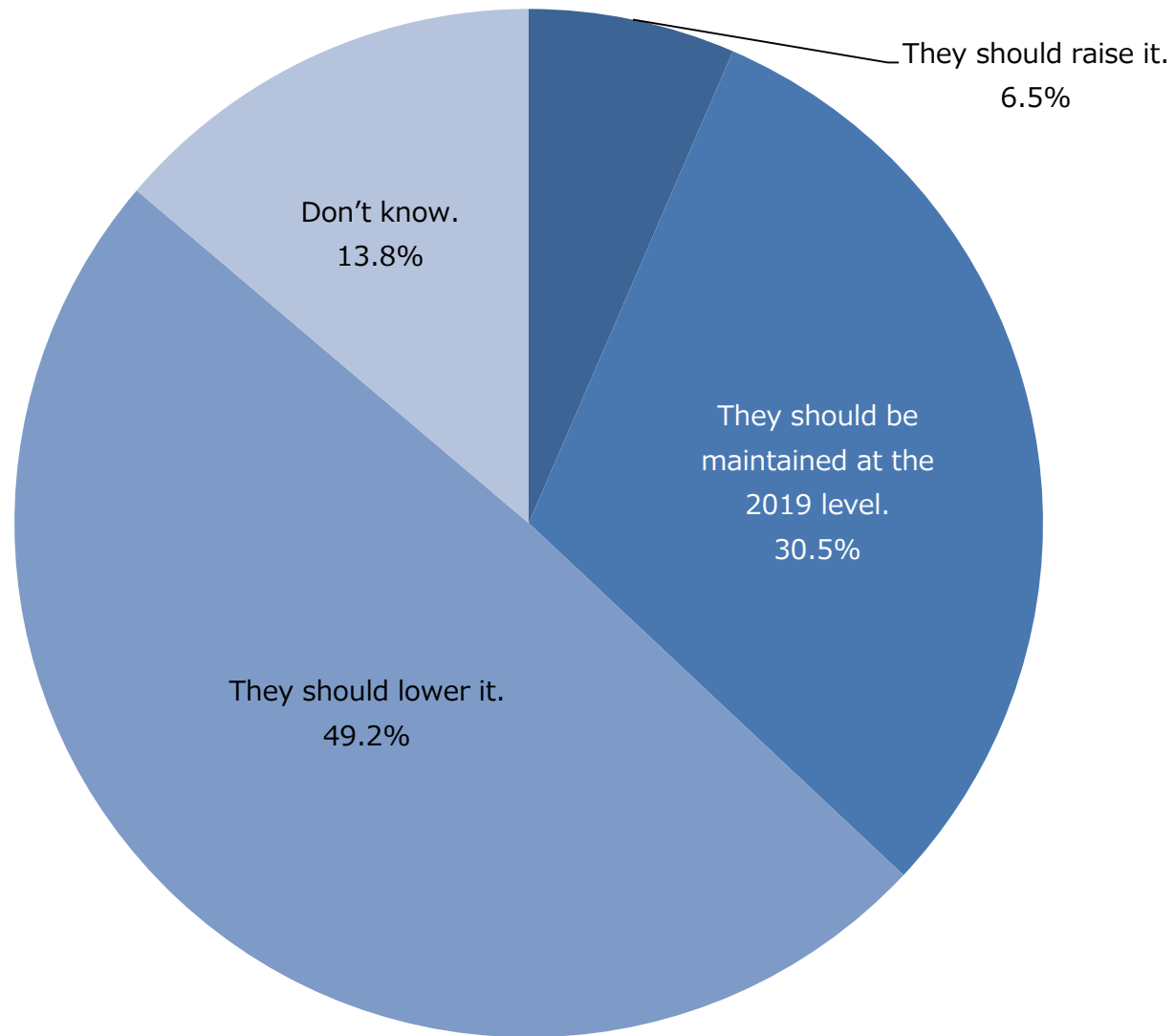
(Total number of respondents: 3,044)



Q7B. Some people are concerned about Japanese companies' high dependence on China. Compared to 2019 before the COVID-19 pandemic, what do you think Japanese companies should do with Chinese products and their market shares in China in the future in the following areas? Please select one item which is closest to your view.

[The percentage of visitors from China, including business travelers, in the overall visitors to Japan]

(Total number of respondents: 3,044)

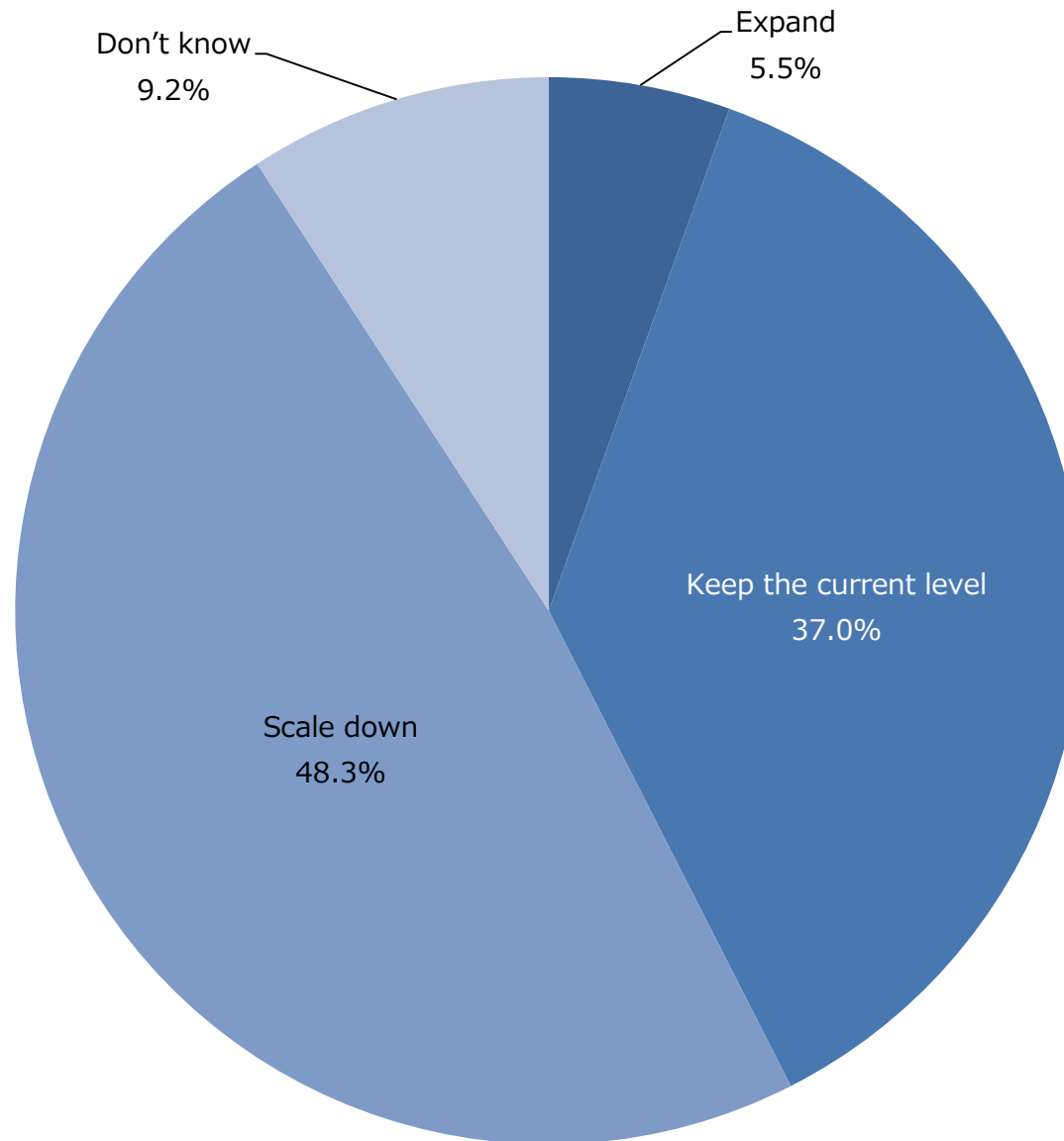


Q14. Keeping in mind the risk of rising political tensions between the U.S. and China, how do you think Japanese companies should pursue collaboration and cooperation with Chinese companies in the future?

Please select one that is closest to your view for each area.

[Goods (supply/purchase of products, parts and materials)]

(Total number of respondents: 3,044)

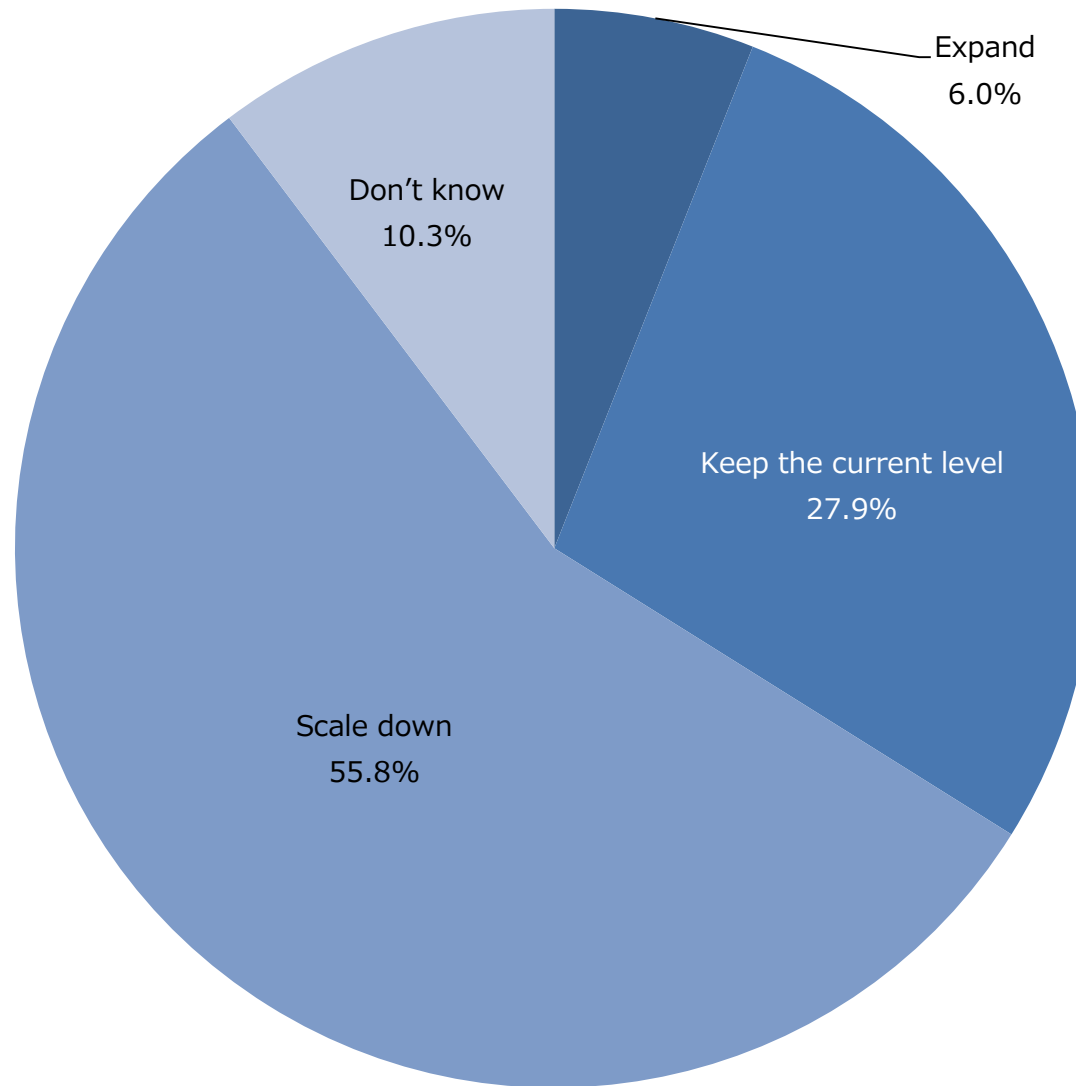


Q14. Keeping in mind the risk of rising political tensions between the U.S. and China, how do you think Japanese companies should pursue collaboration and cooperation with Chinese companies in the future?

Please select one that is closest to your view for each area.

Money (investment in Chinese companies and acceptance of investments from Chinese companies)

(Total number of respondents: 3,044)

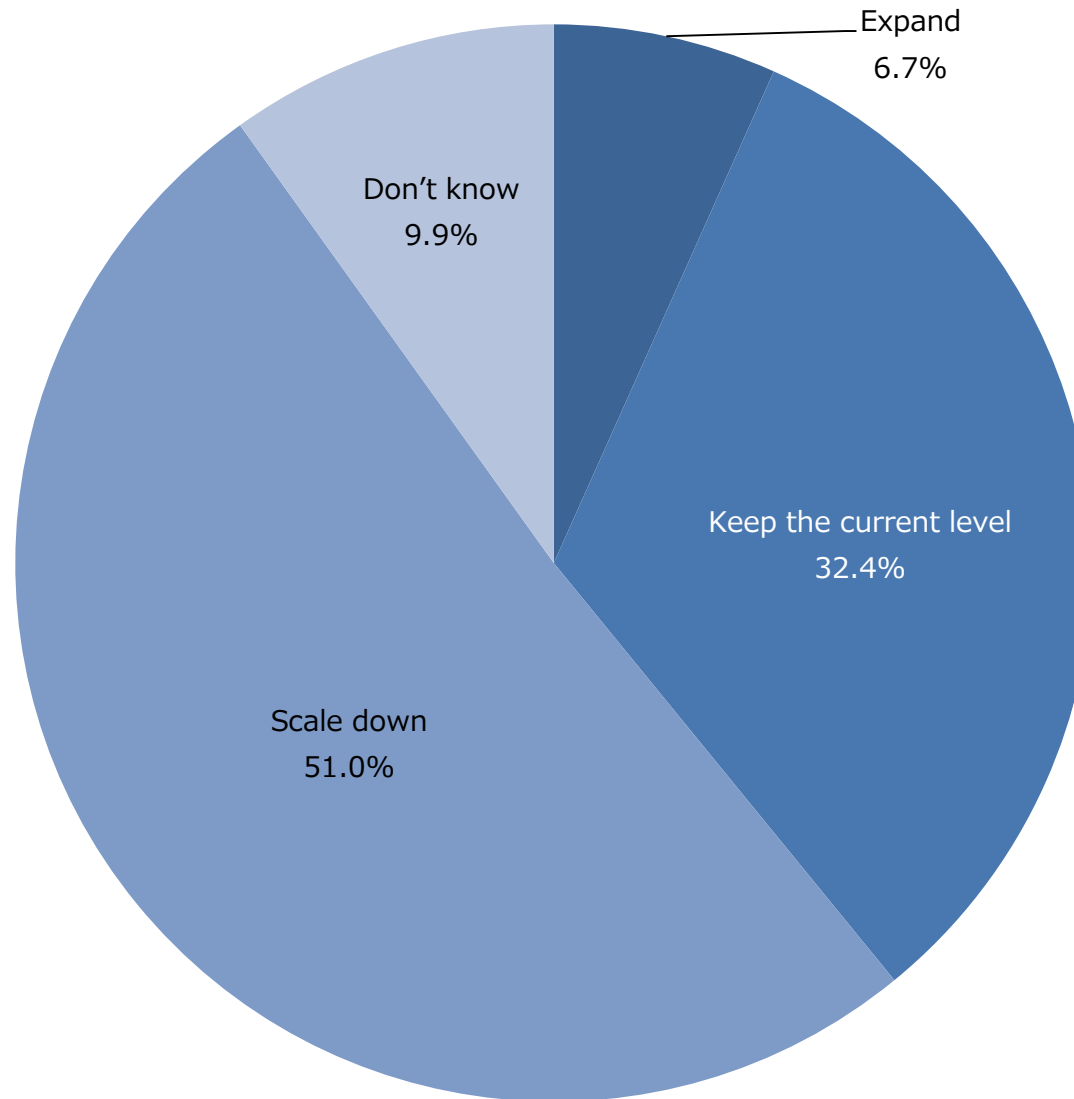


Q14. Keeping in mind the risk of rising political tensions between the U.S. and China, how do you think Japanese companies should pursue collaboration and cooperation with Chinese companies in the future?

Please select one that is closest to your view for each area.

[People (sending and acceptance of engineers, researchers and international students)]

(Total number of respondents: 3,044)

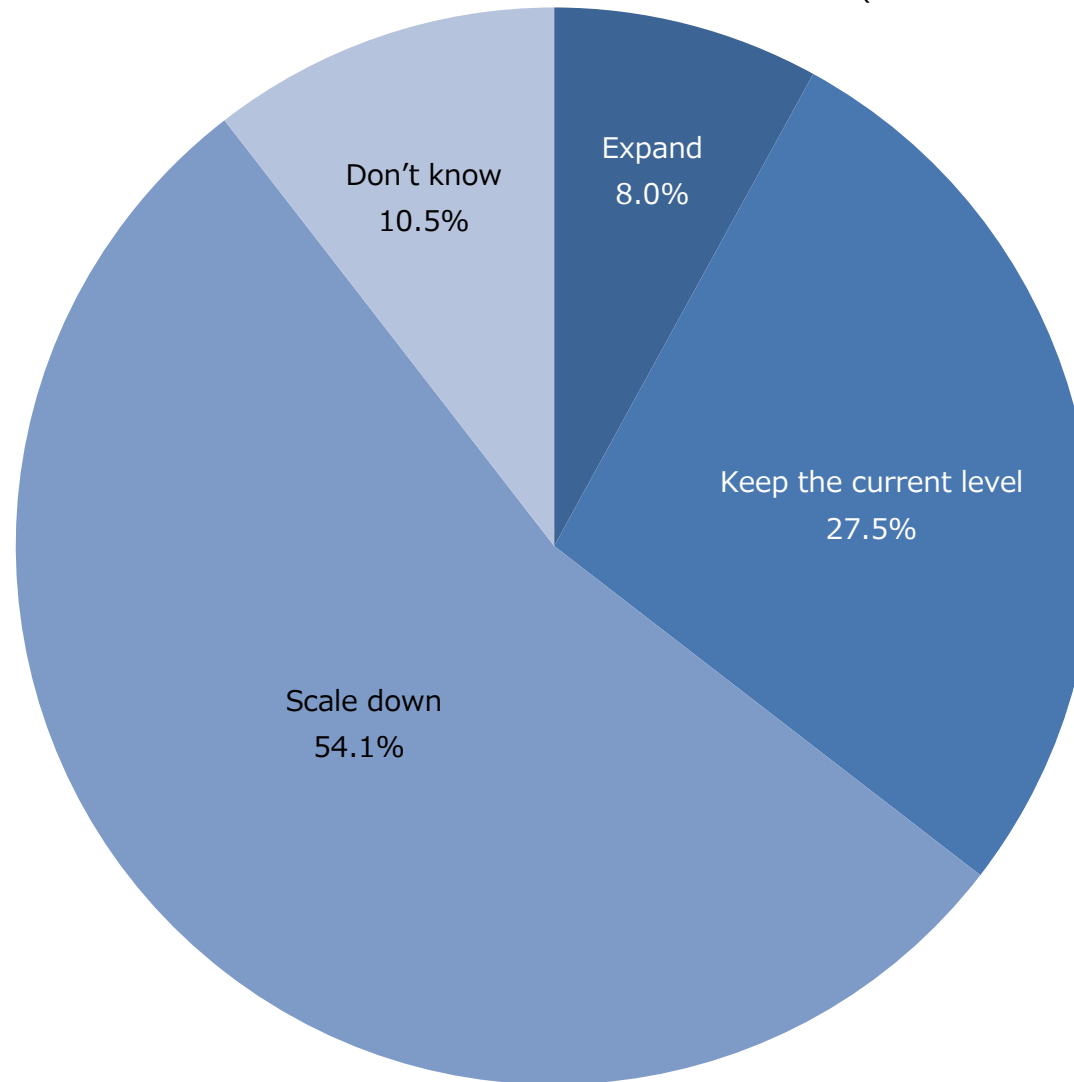


Q14. Keeping in mind the risk of rising political tensions between the U.S. and China, how do you think Japanese companies should pursue collaboration and cooperation with Chinese companies in the future?

Please select one that is closest to your view for each area.

[Provision, adoption and joint development of high technology (next-generation communications, semiconductors, artificial intelligence, biological technology, and space-related technology applicable for military use)]

(Total number of respondents: 3,044)

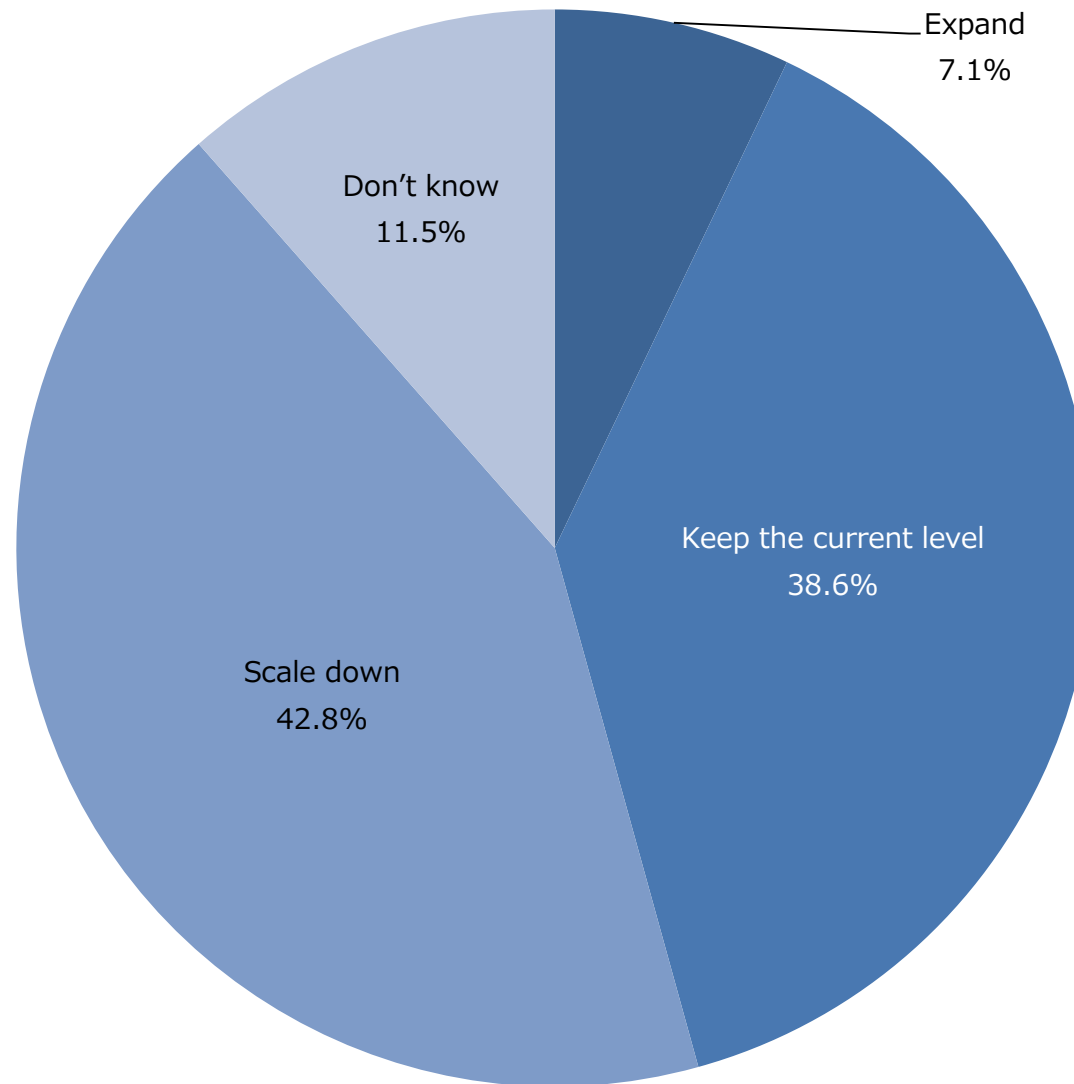


Q14. Keeping in mind the risk of rising political tensions between the U.S. and China, how do you think Japanese companies should pursue collaboration and cooperation with Chinese companies in the future?

Please select one that is closest to your view for each area.

[Provision, adoption and joint development of low technology (general-purpose technology that is not very elaborate)]

(Total number of respondents: 3,044)

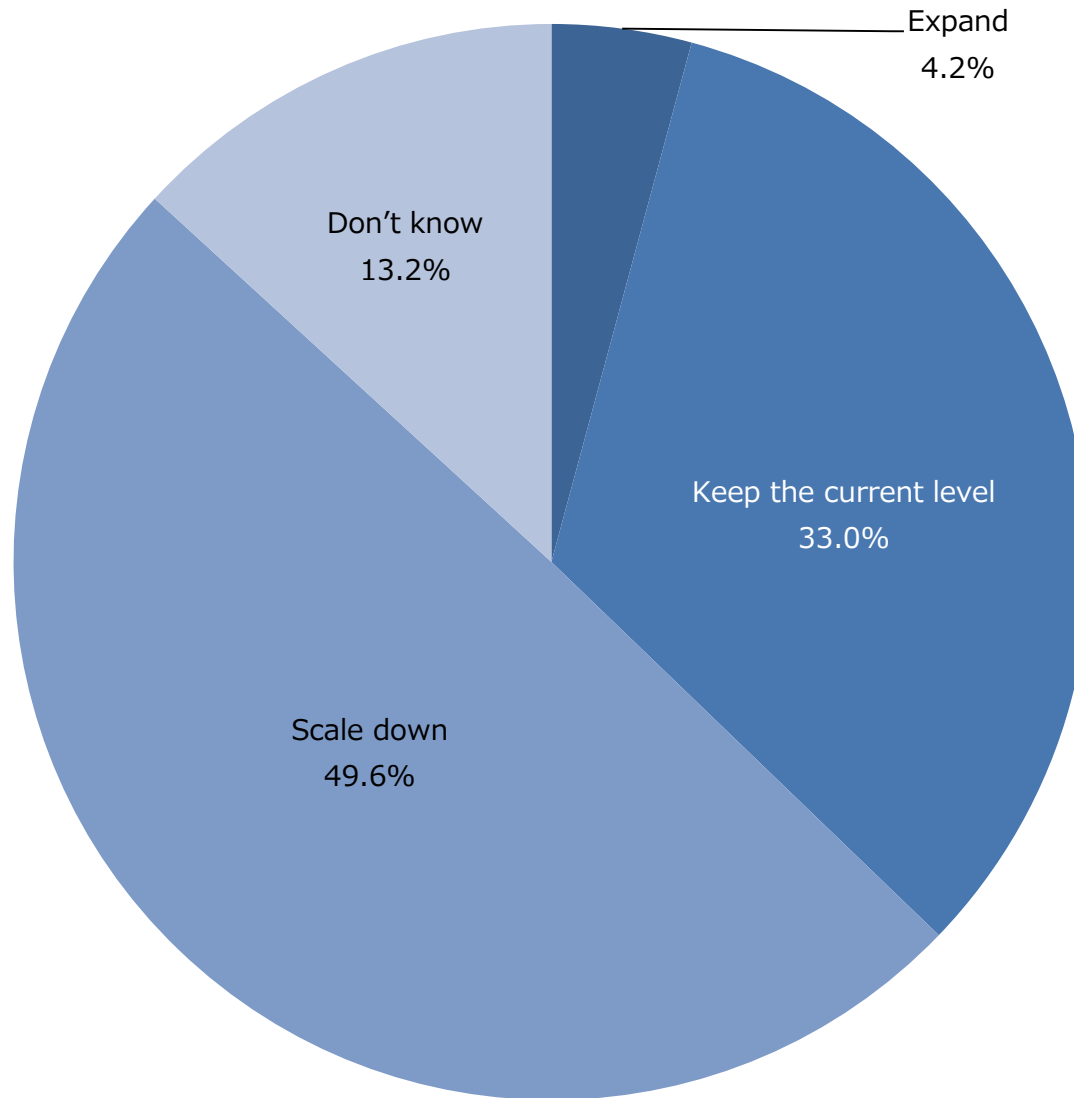


Q14. Keeping in mind the risk of rising political tensions between the U.S. and China, how do you think Japanese companies should pursue collaboration and cooperation with Chinese companies in the future?

Please select one that is closest to your view for each area.

[Provision and adoption of business models and management techniques]

(Total number of respondents: 3,044)

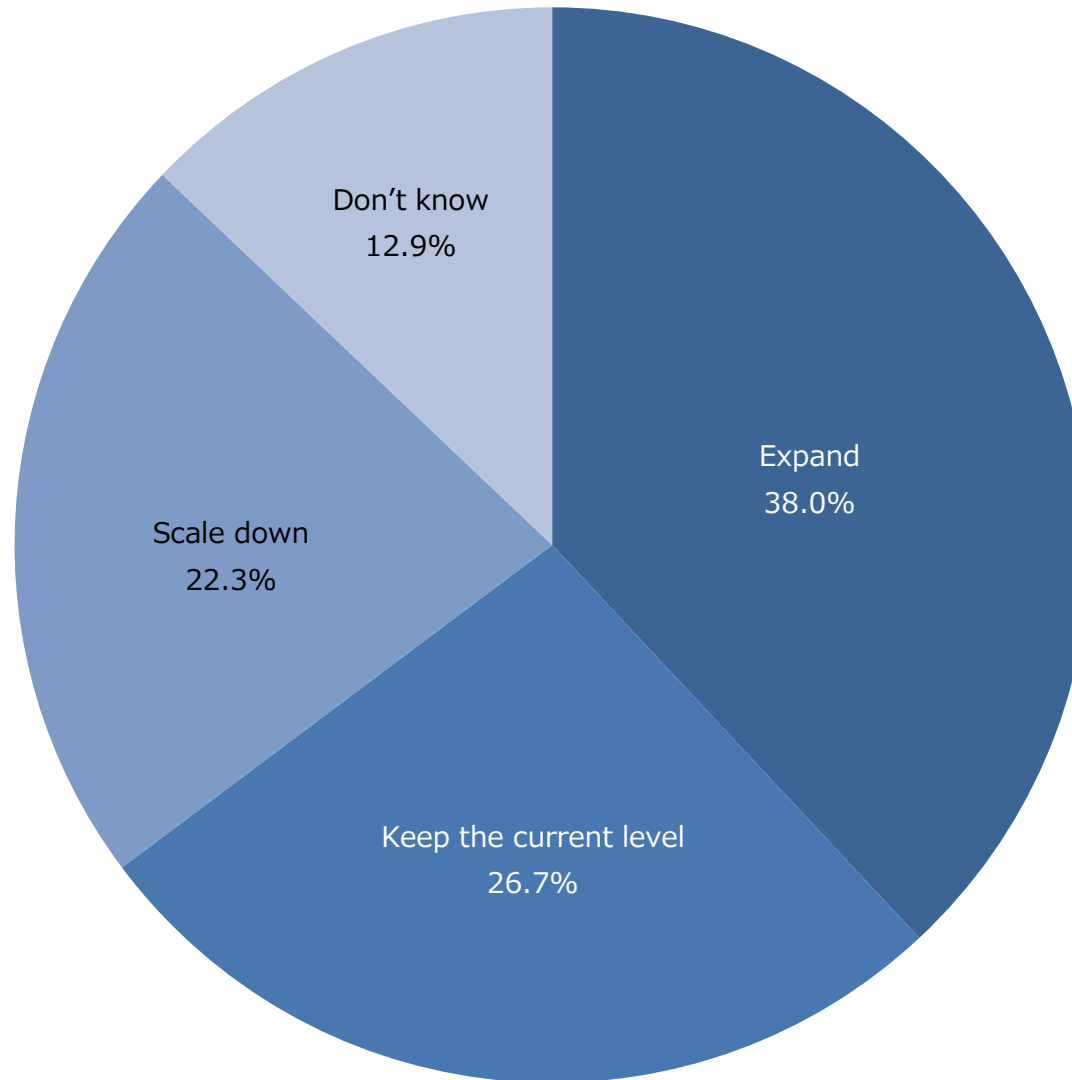


Q14. Keeping in mind the risk of rising political tensions between the U.S. and China, how do you think Japanese companies should pursue collaboration and cooperation with Chinese companies in the future?

Please select one that is closest to your view for each area.

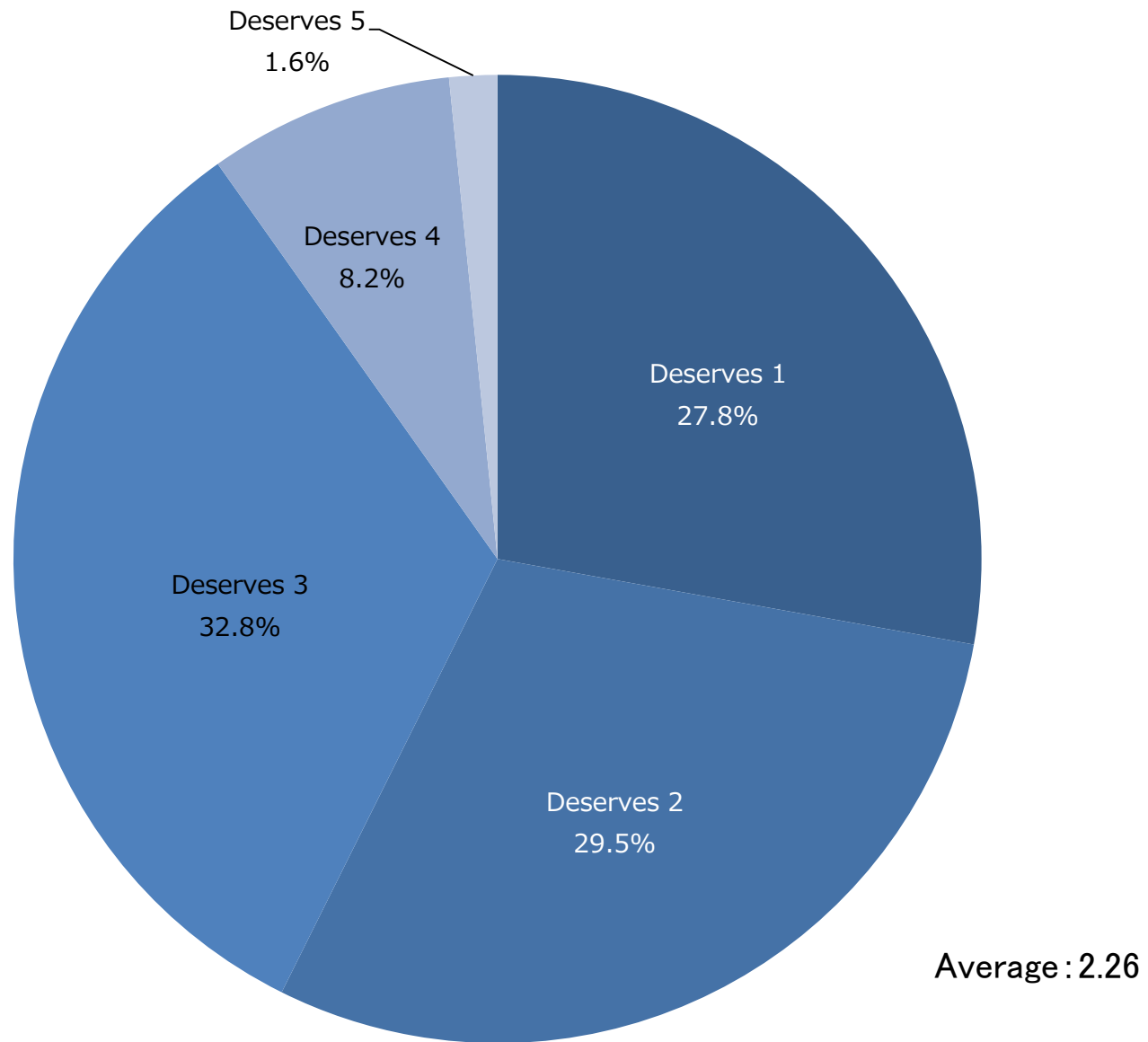
[Cooperation in third countries other than Japan and China]

(Total number of respondents: 3,044)



Q8B. Please evaluate President Xi Jinping's job performance. What grade does he deserve as a country leader?
(5-point scale: Higher numbers indicate better performance.)

(Total number of respondents: 3,044)

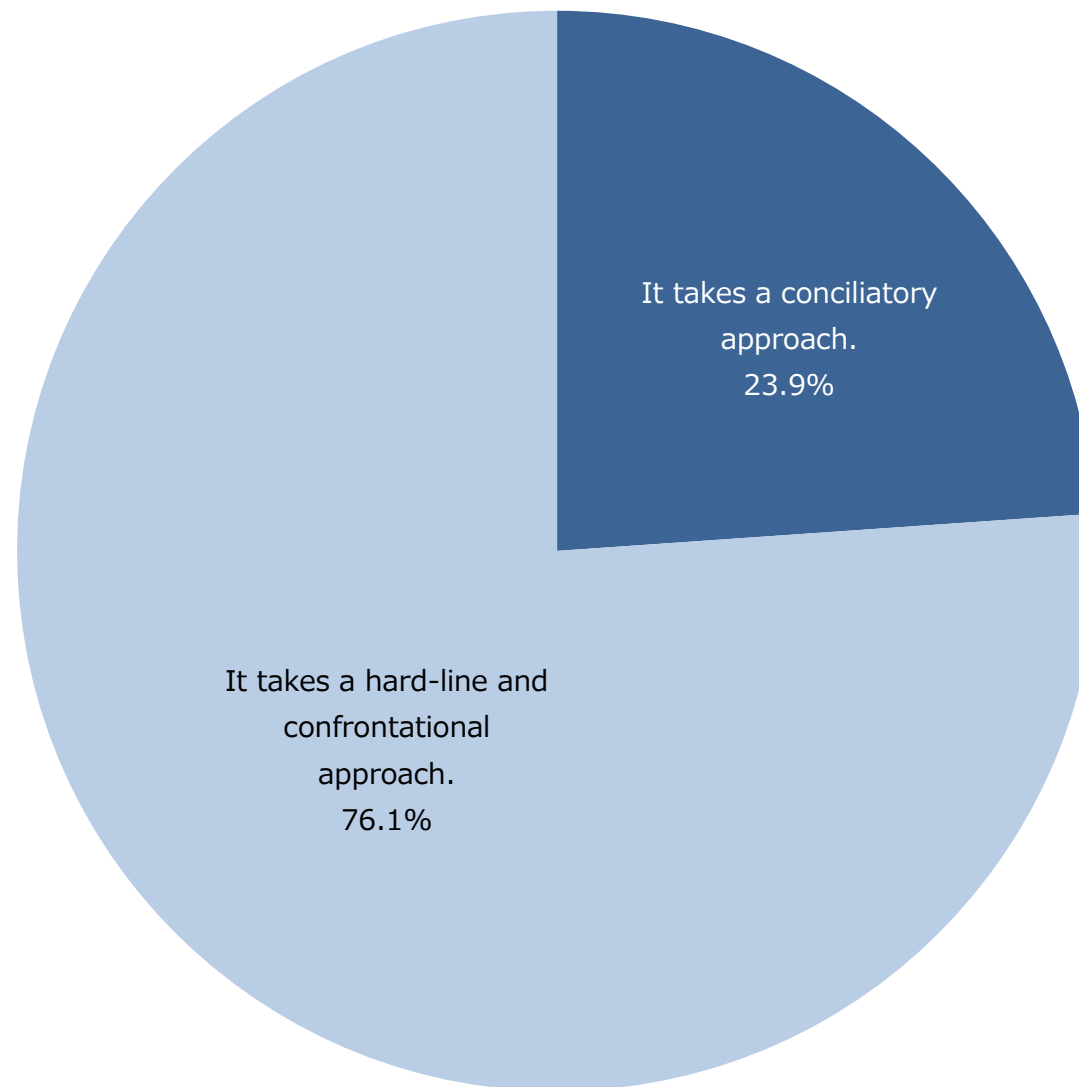


Q7. How do you assess Xi Jinping administration's policy towards Japan in economic and political aspects?

Please select one item that you think is the best description of the administration's approach.

[in political aspect]

(Total number of respondents: 3,044)

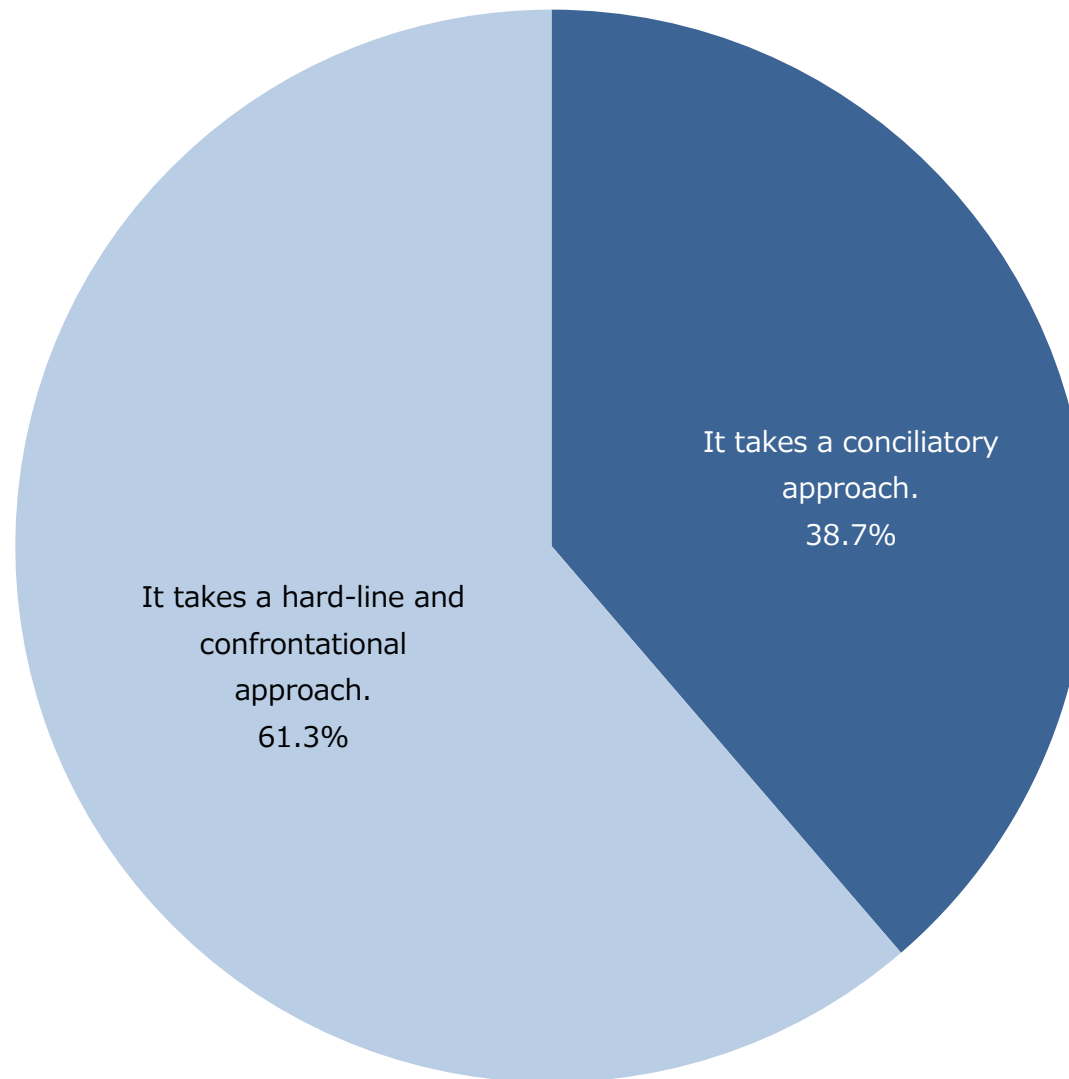


Q7. How do you assess Xi Jinping administration's policy towards Japan in economic and political aspects?

Please select one item that you think is the best description of the administration's approach.

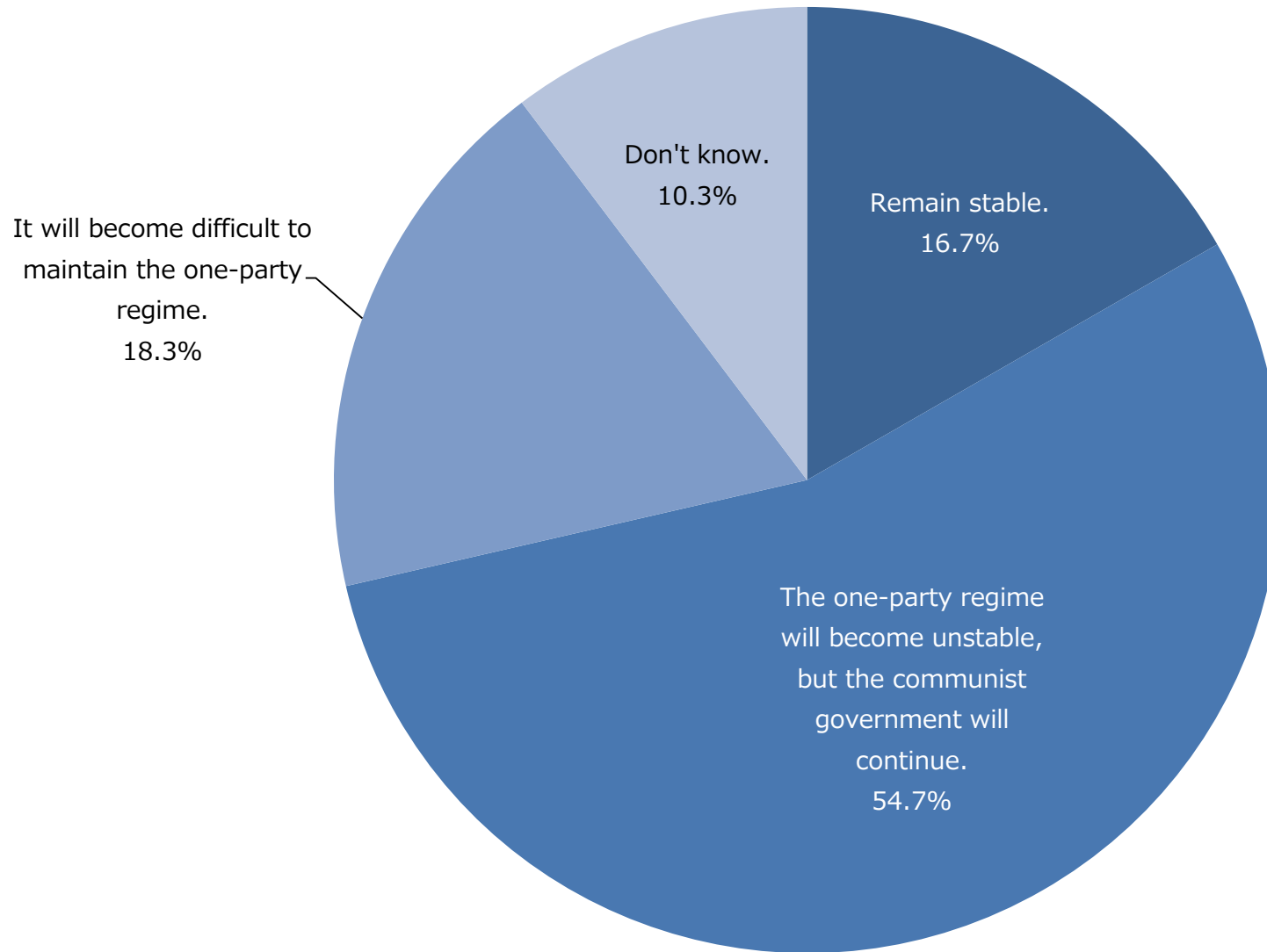
[in economic aspect]

(Total number of respondents: 3,044)



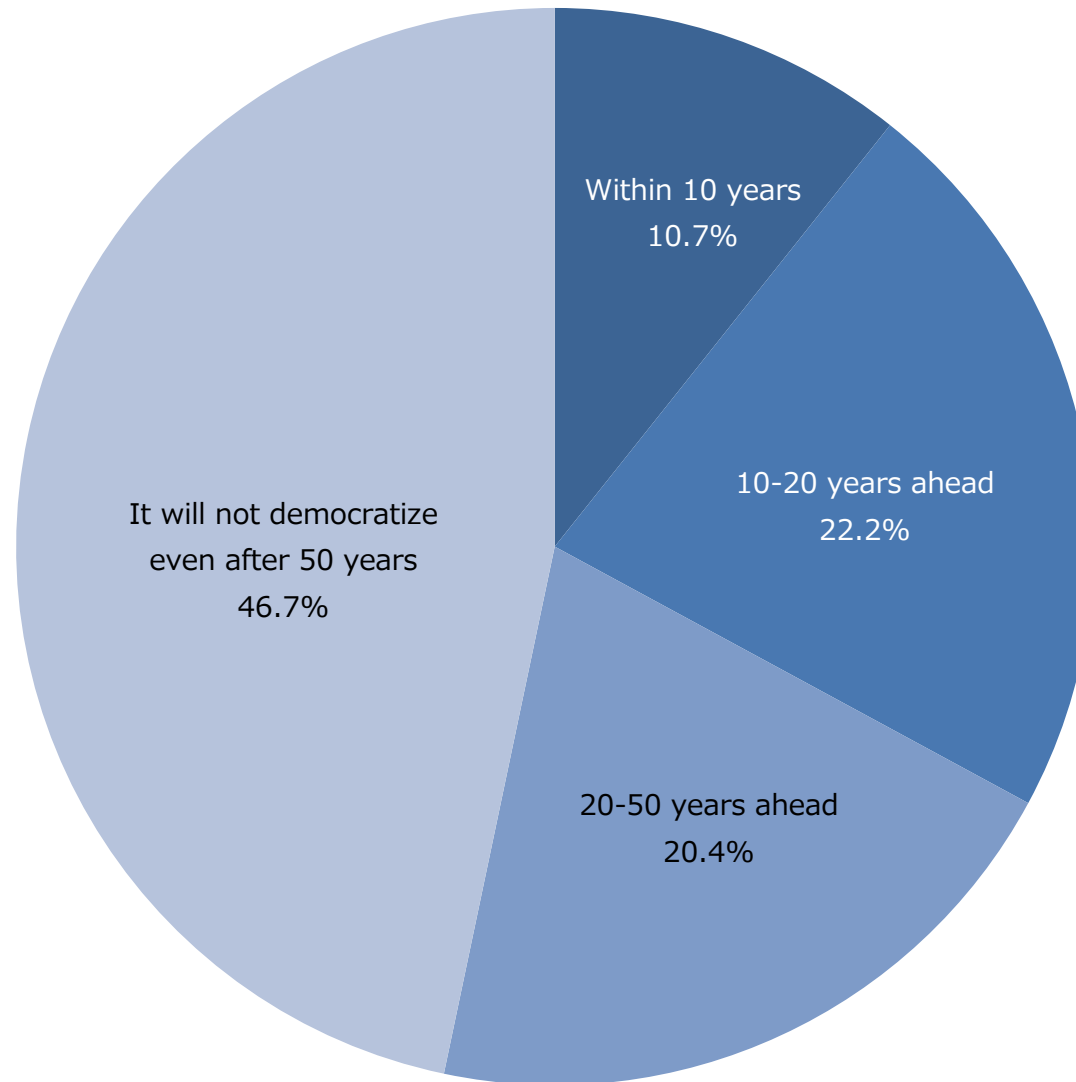
Q8. What kind of change do you expect in the Communist one-party regime embraced by Xi Jinping administration?
Please select one item that you think is the best description of the direction.

(Total number of respondents: 3,044)



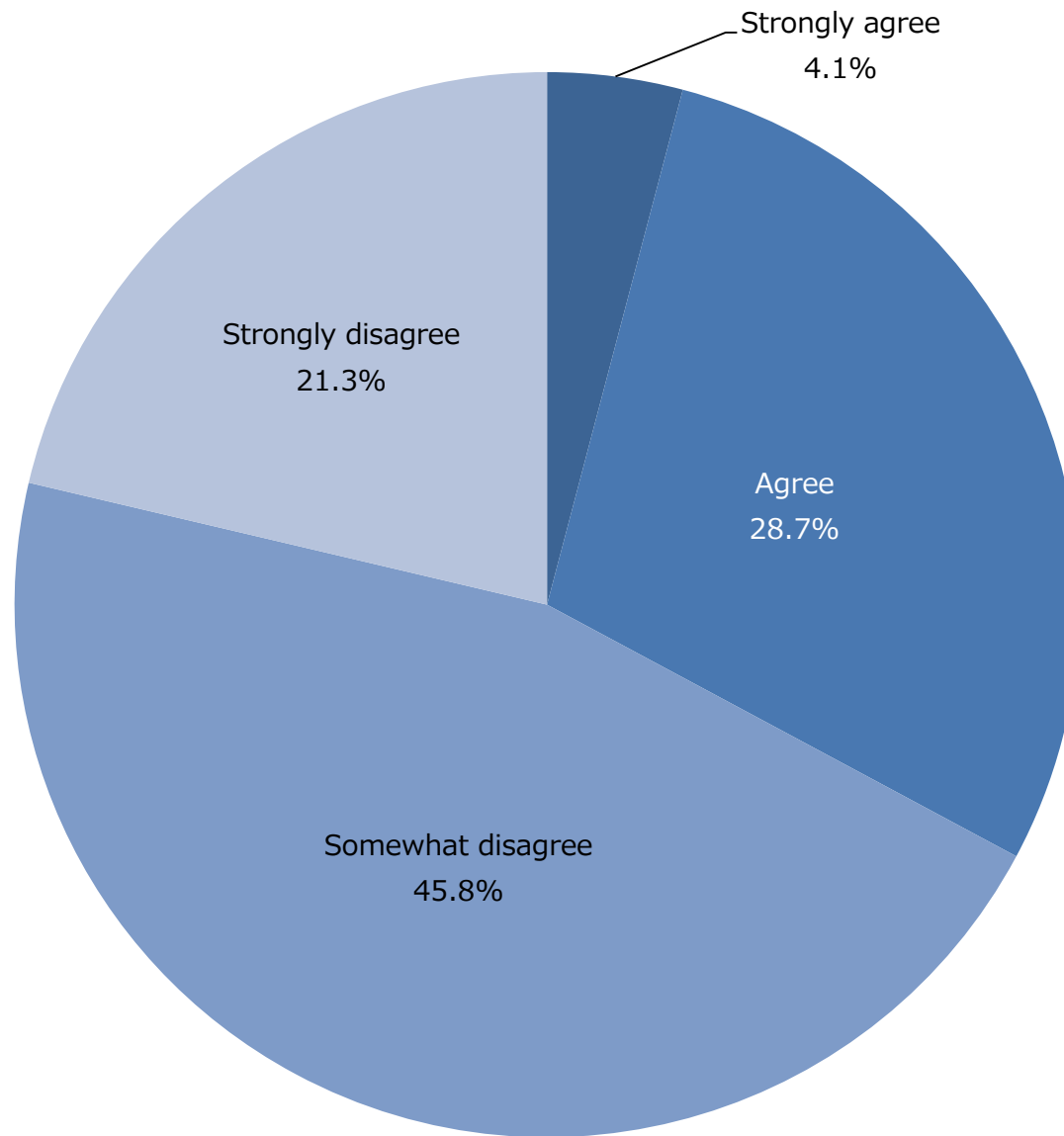
Q9. How long will it take to democratize China? Please select one item from the followings.

(Total number of respondents: 3,044)



Q10A. Will China become a leader of the international community? Please select one item which is closest to your view.

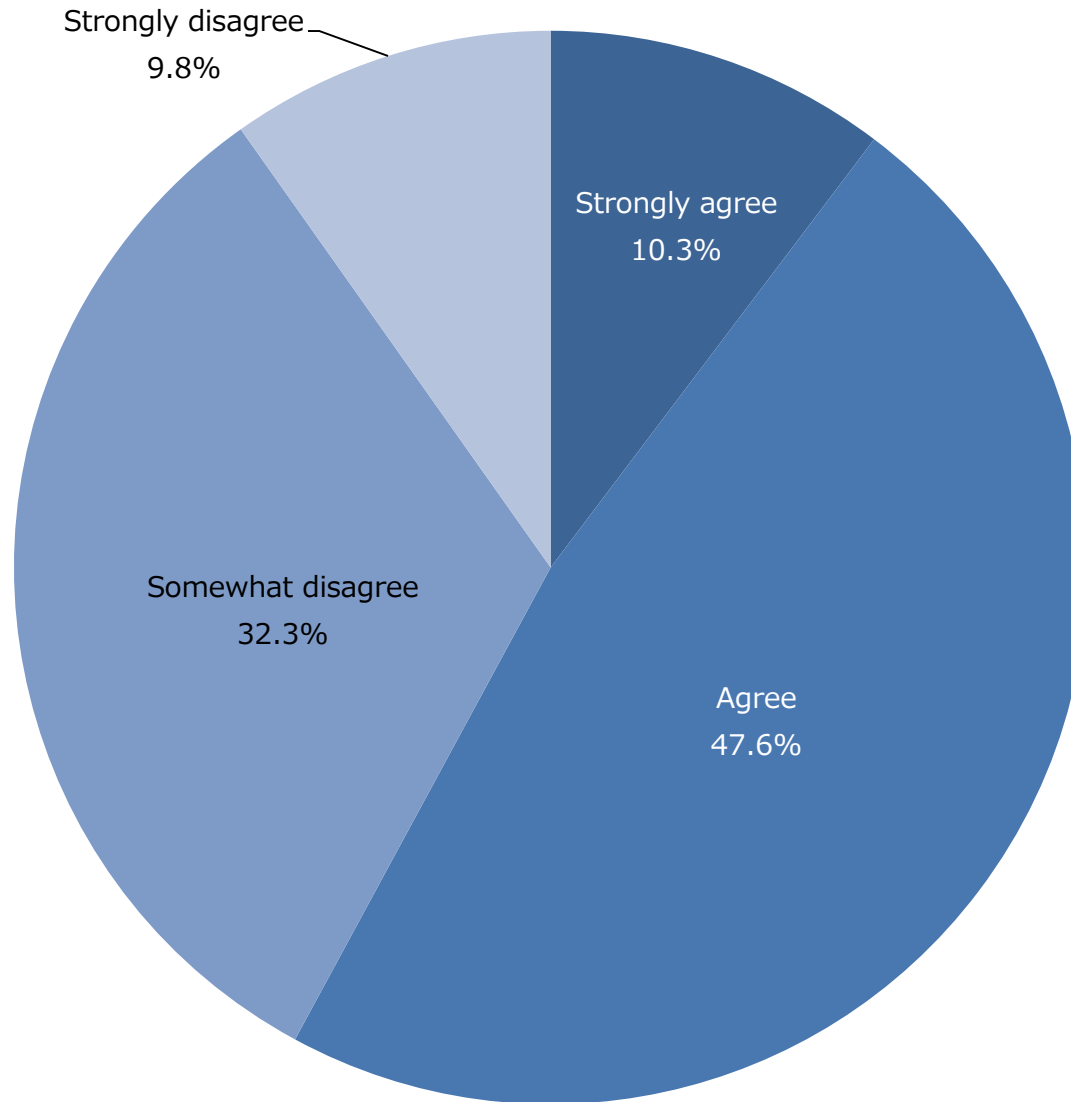
(Total number of respondents: 3,044)



Q10B. In what way do you think China will likely lead the international community in the future? Please select one item which is closest to your view.

[By expanding its influence at existing international organizations, such as the United Nations and the World Trade Organization (WTO) (especially by increasing financial contributions, sending more staff members, and occupying top positions)]

(Total number of respondents: 3,044)

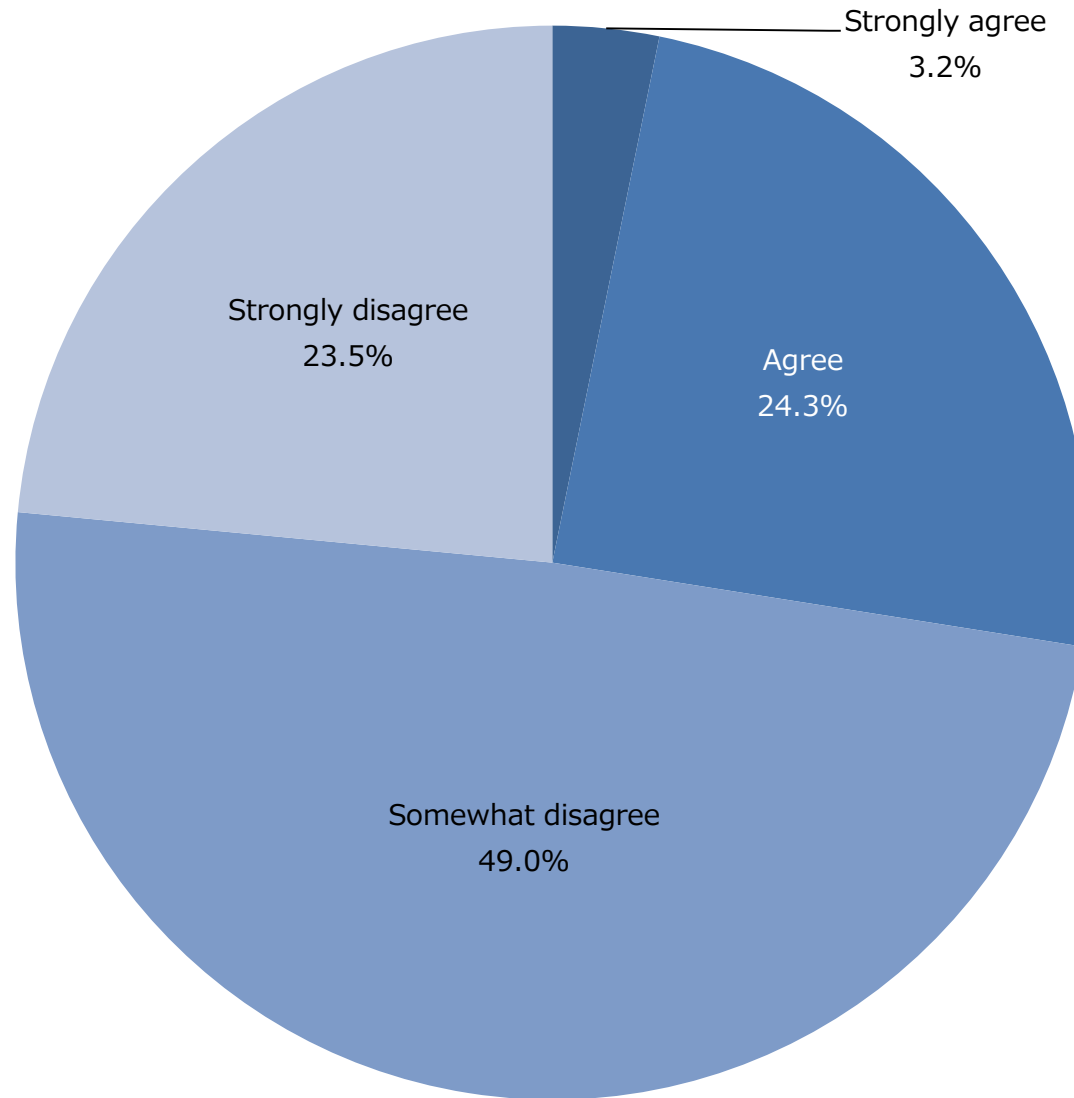


Q10B. In what way do you think China will likely lead the international community in the future?

Please select one that is closest to your view.

**[By resolving global social challenges and making contributions to sustainable development such as achieving SDGs
(e.g. measures against infectious diseases and global warming)]**

(Total number of respondents: 3,044)

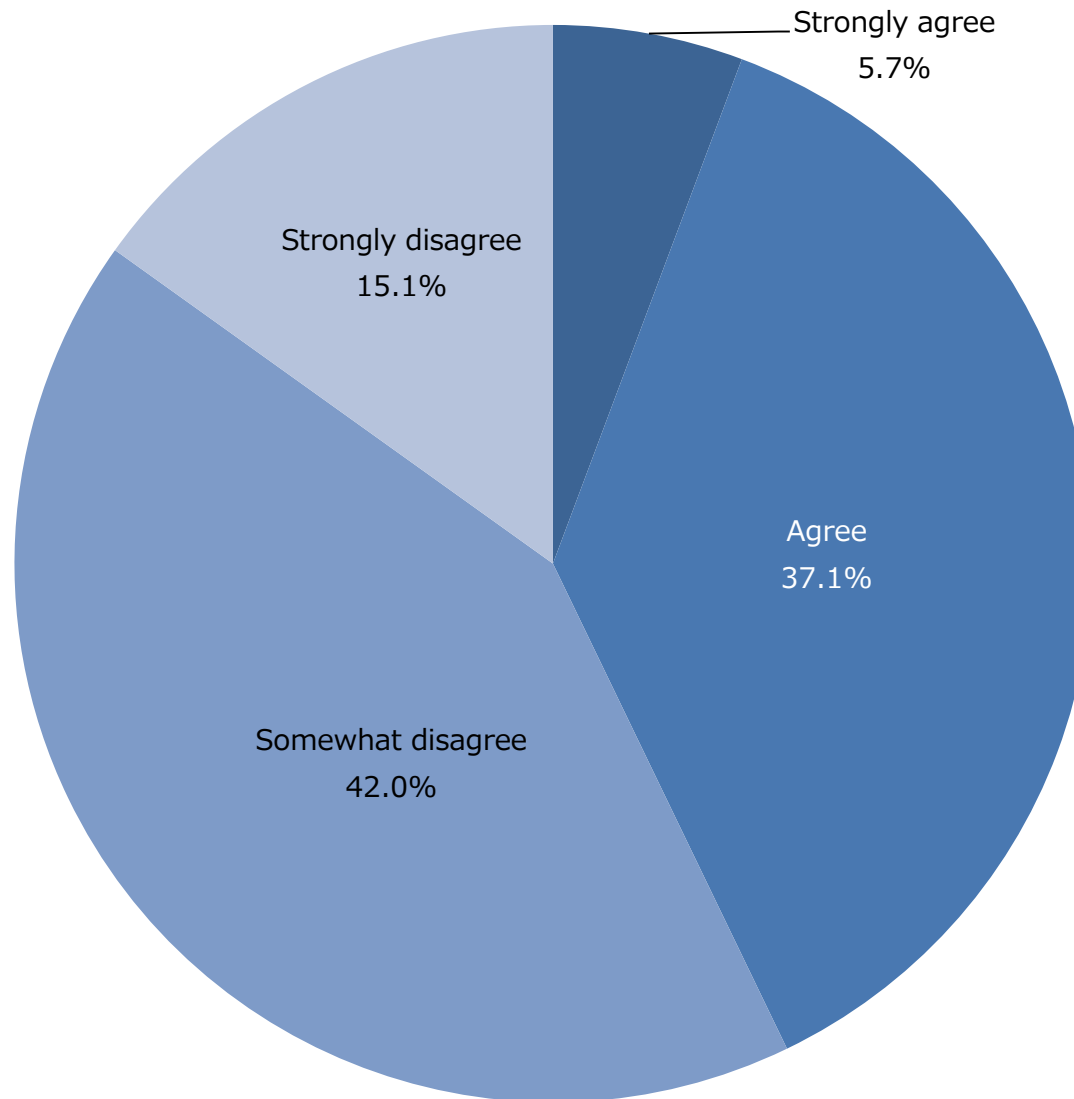


Q10B. In what way do you think China will likely lead the international community in the future?

Please select one that is closest to your view.

[By expanding its influence in the global monetary order through the internationalization of RMB]

(Total number of respondents: 3,044)

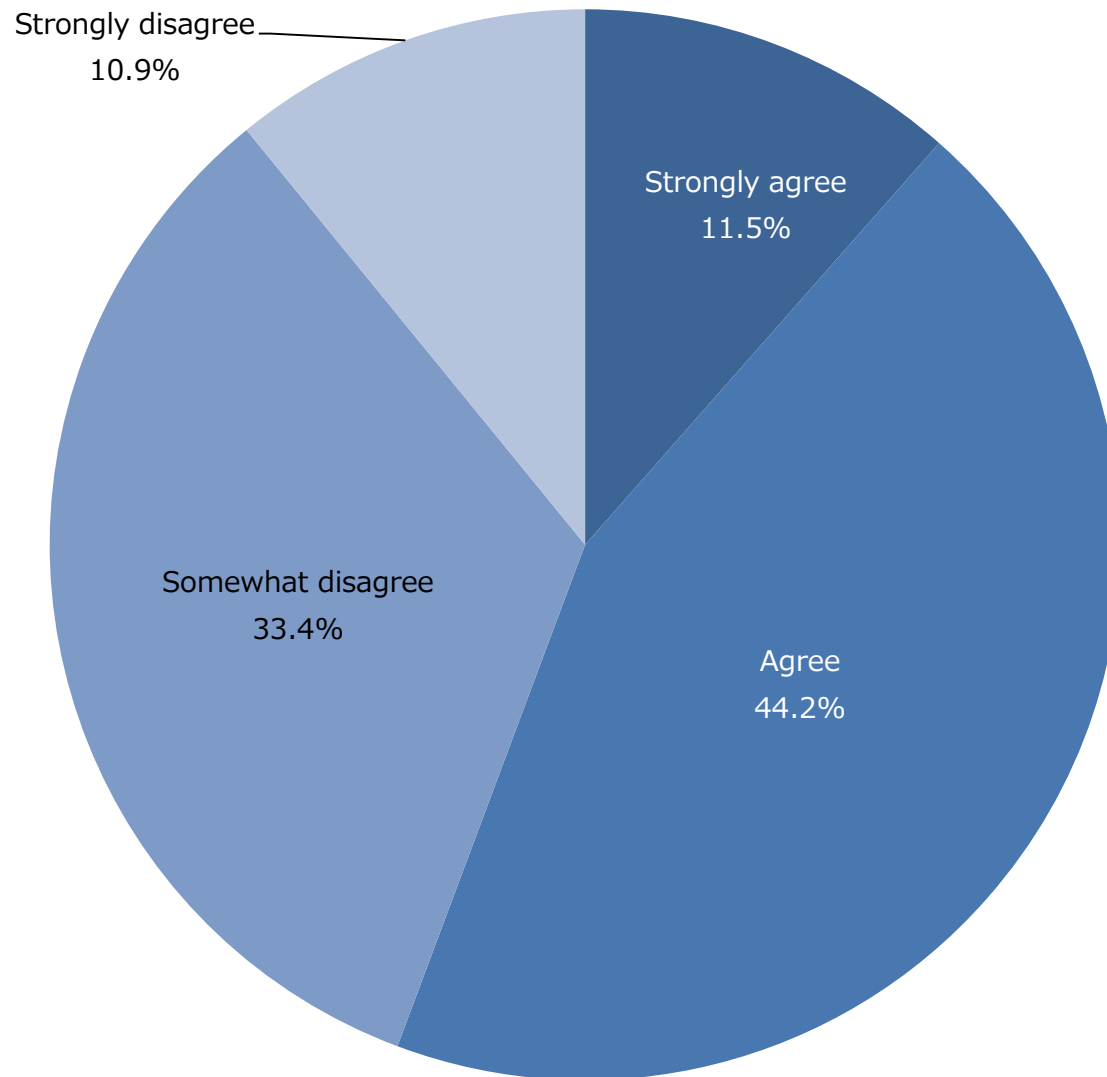


Q10B. In what way do you think China will likely lead the international community in the future?

Please select one that is closest to your view.

[By expanding a new sphere of influence or exercising its influence in the international community (e.g. "One Belt, One Road Initiative" and the Asian Infrastructure Investment Bank (AIIB))]

(Total number of respondents: 3,044)

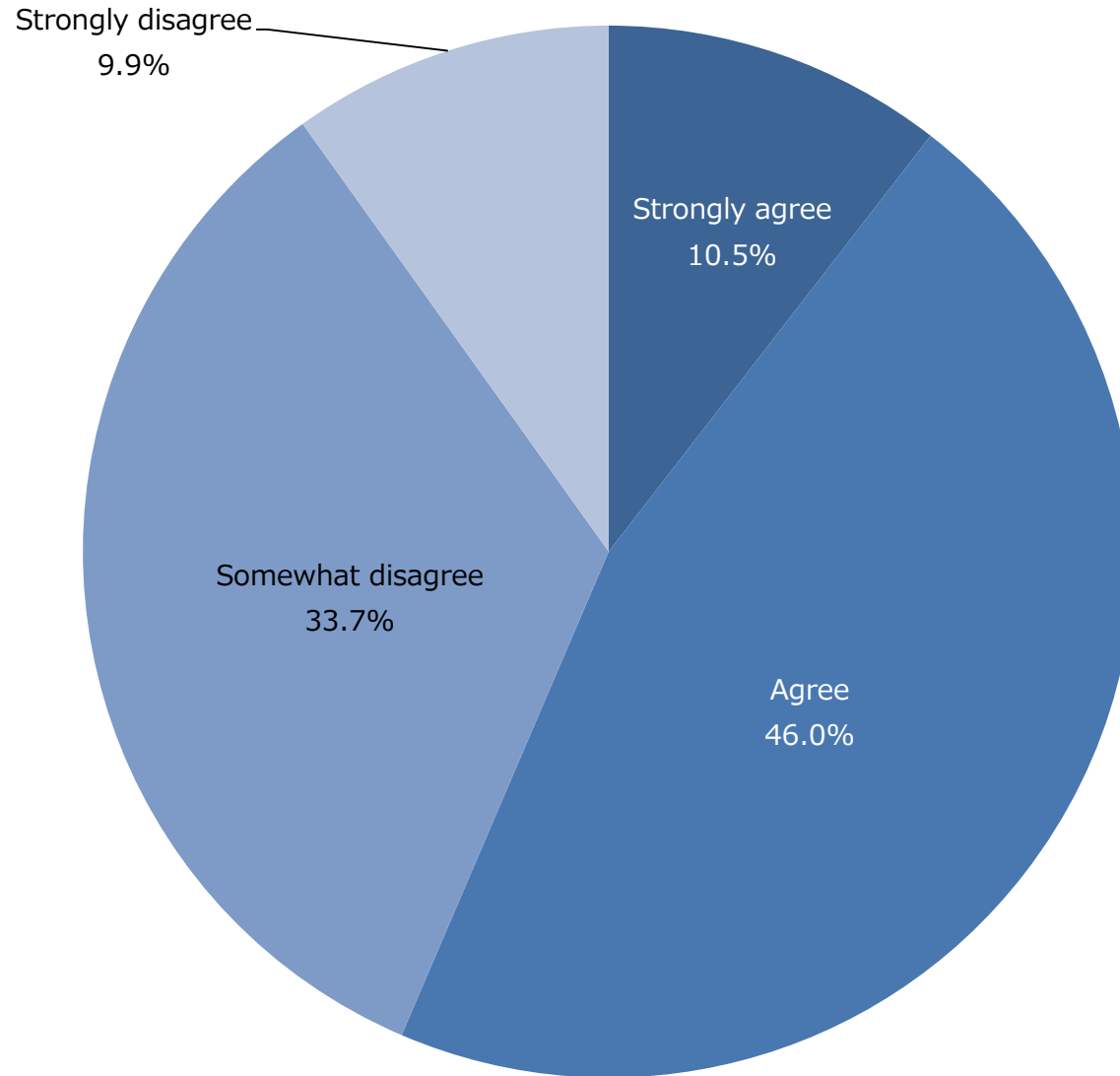


Q10B. In what way do you think China will likely lead the international community in the future?

Please select one that is closest to your view.

【Through the development and advancement of high technology (e.g. next-generation communications, semiconductors, artificial intelligence, biological technology, quantum computers, and space-related technologies)**】**

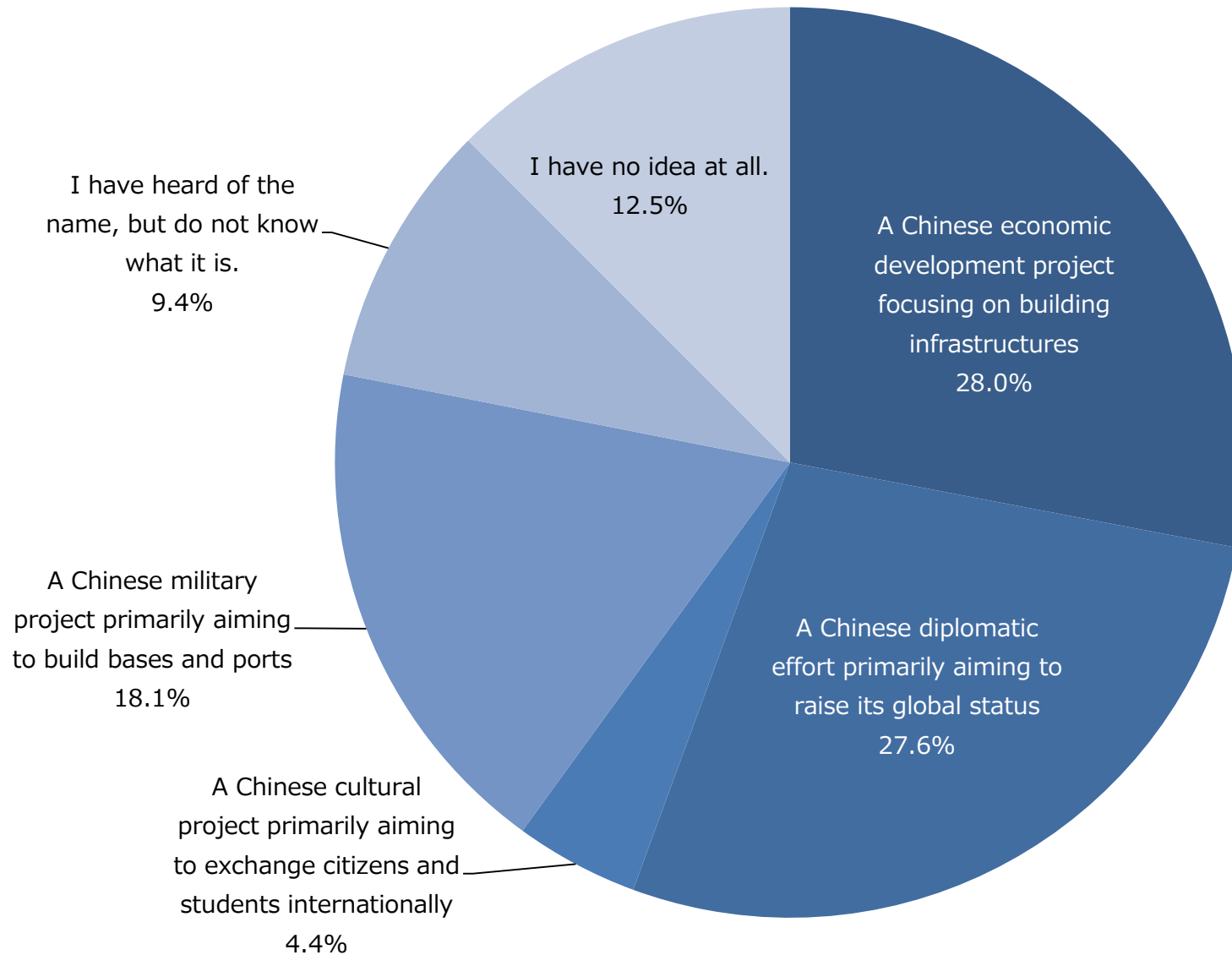
(Total number of respondents: 3,044)



Q22A. Chinese government has launched so called the "Belt and Road Initiative".

Please select one item that describes best your understanding on this strategy.

(Total number of respondents: 3,044)

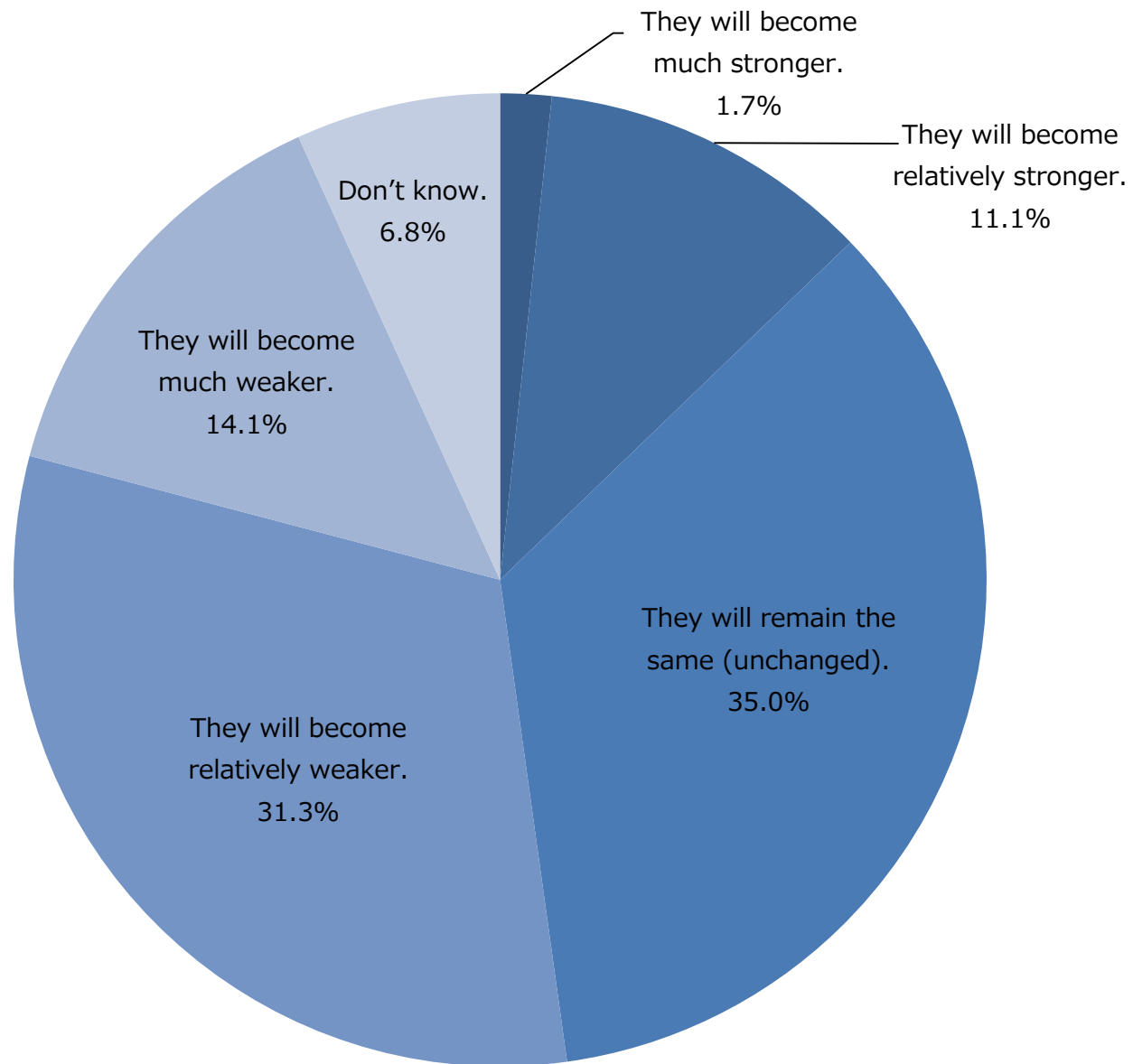


Q22B. How do you think the COVID-19 pandemic will change China's relations with developed and developing countries?

Please select one that is closest to your view.

[China's political relations with developed countries]

(Total number of respondents: 3,044)

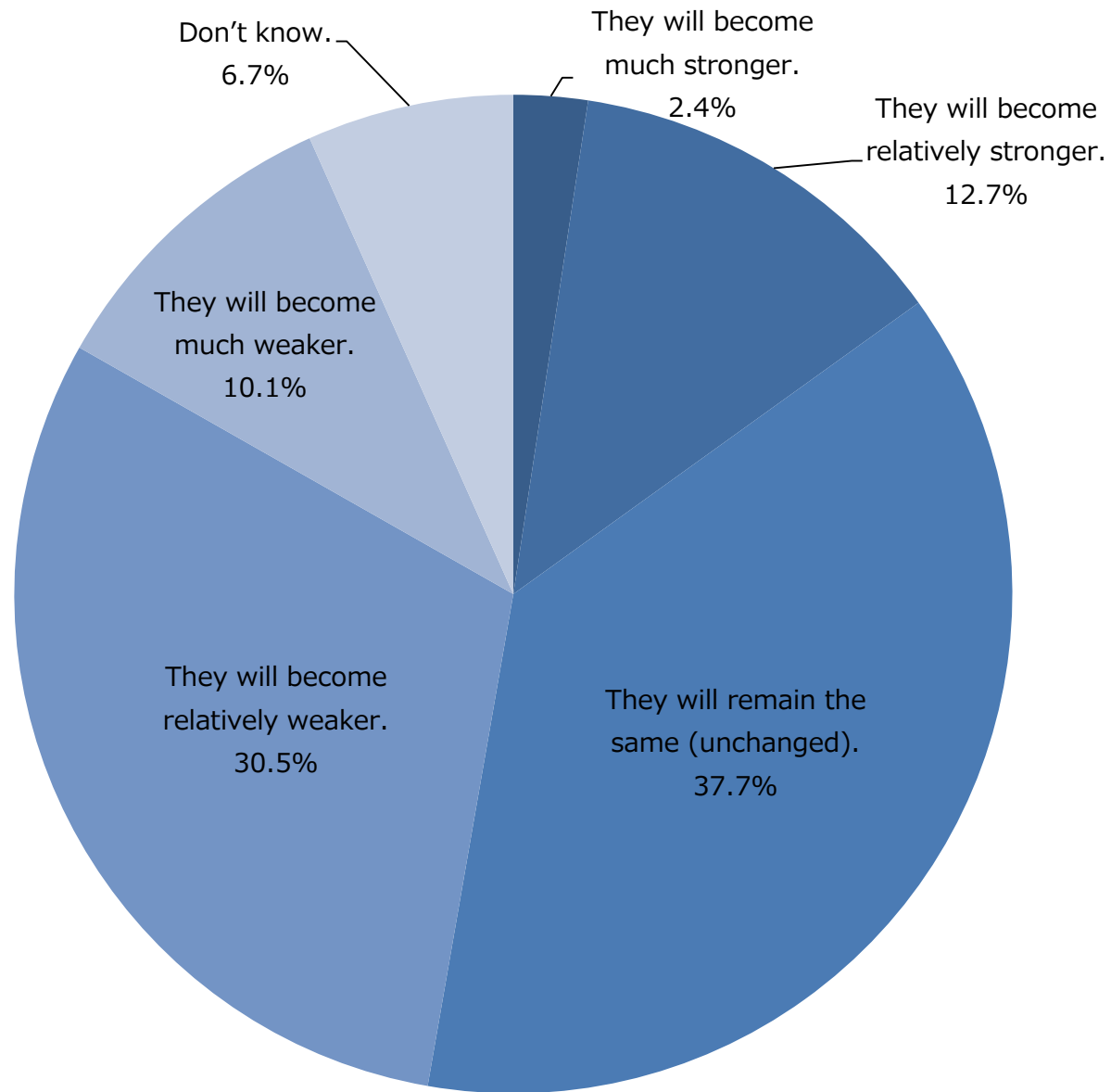


Q22B. How do you think the COVID-19 pandemic will change China's relations with developed and developing countries?

Please select one that is closest to your view.

[China's economic relations with developed countries]

(Total number of respondents: 3,044)

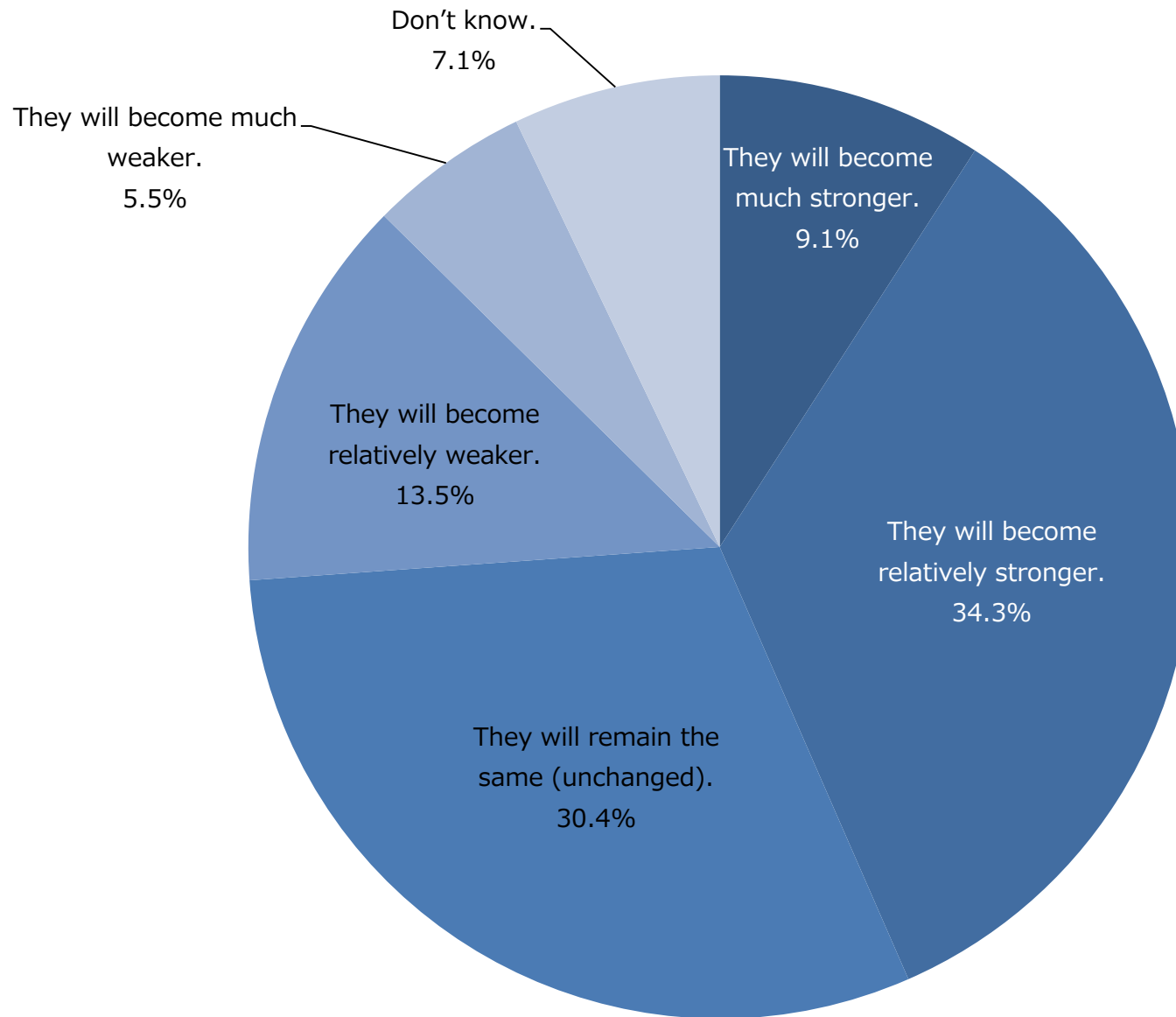


Q22B. How do you think the COVID-19 pandemic will change China's relations with developed and developing countries?

Please select one that is closest to your view.

[China's political relations with developing countries]

(Total number of respondents: 3,044)

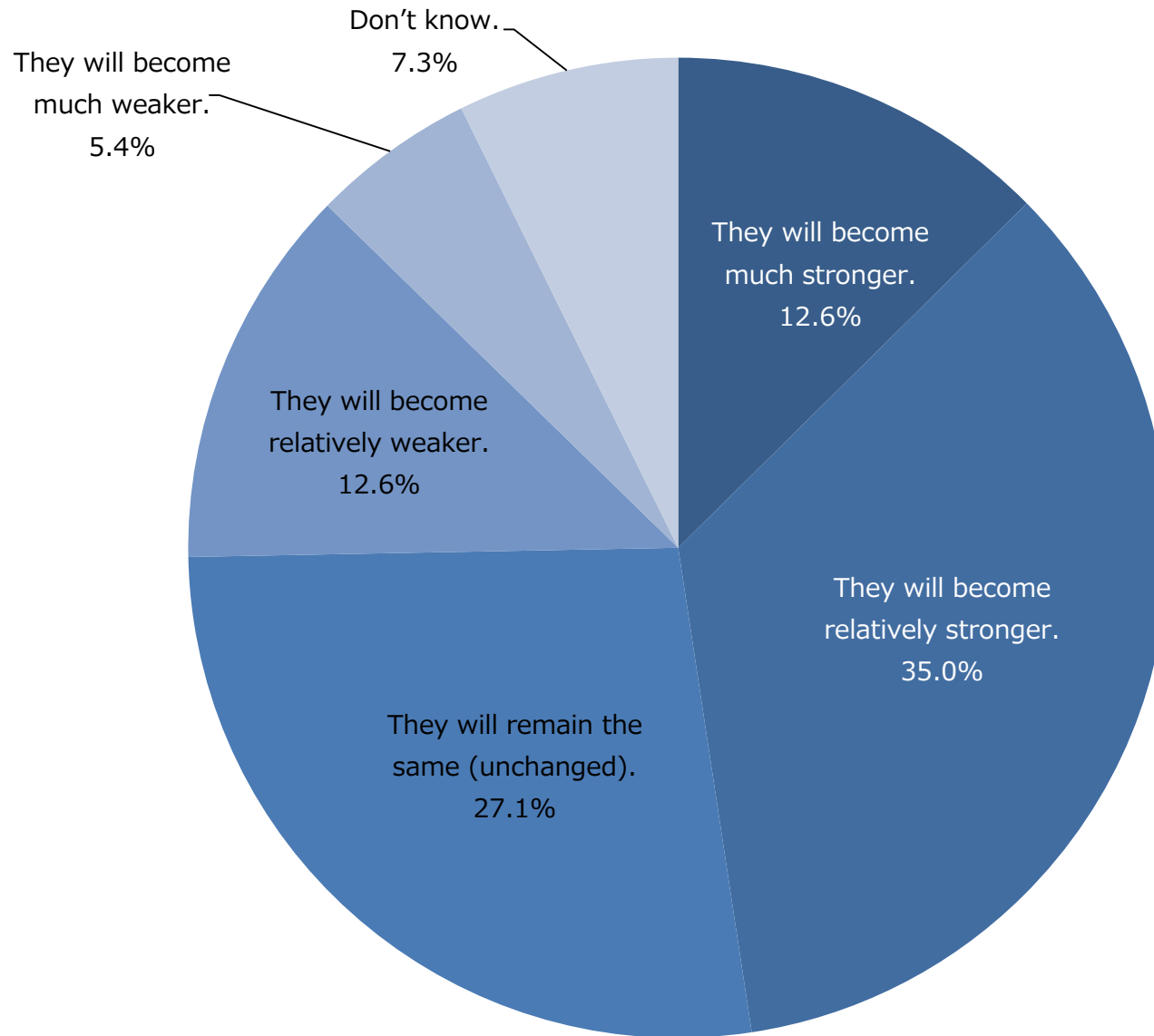


Q22B. How do you think the COVID-19 pandemic will change China's relations with developed and developing countries?

Please select one that is closest to your view.

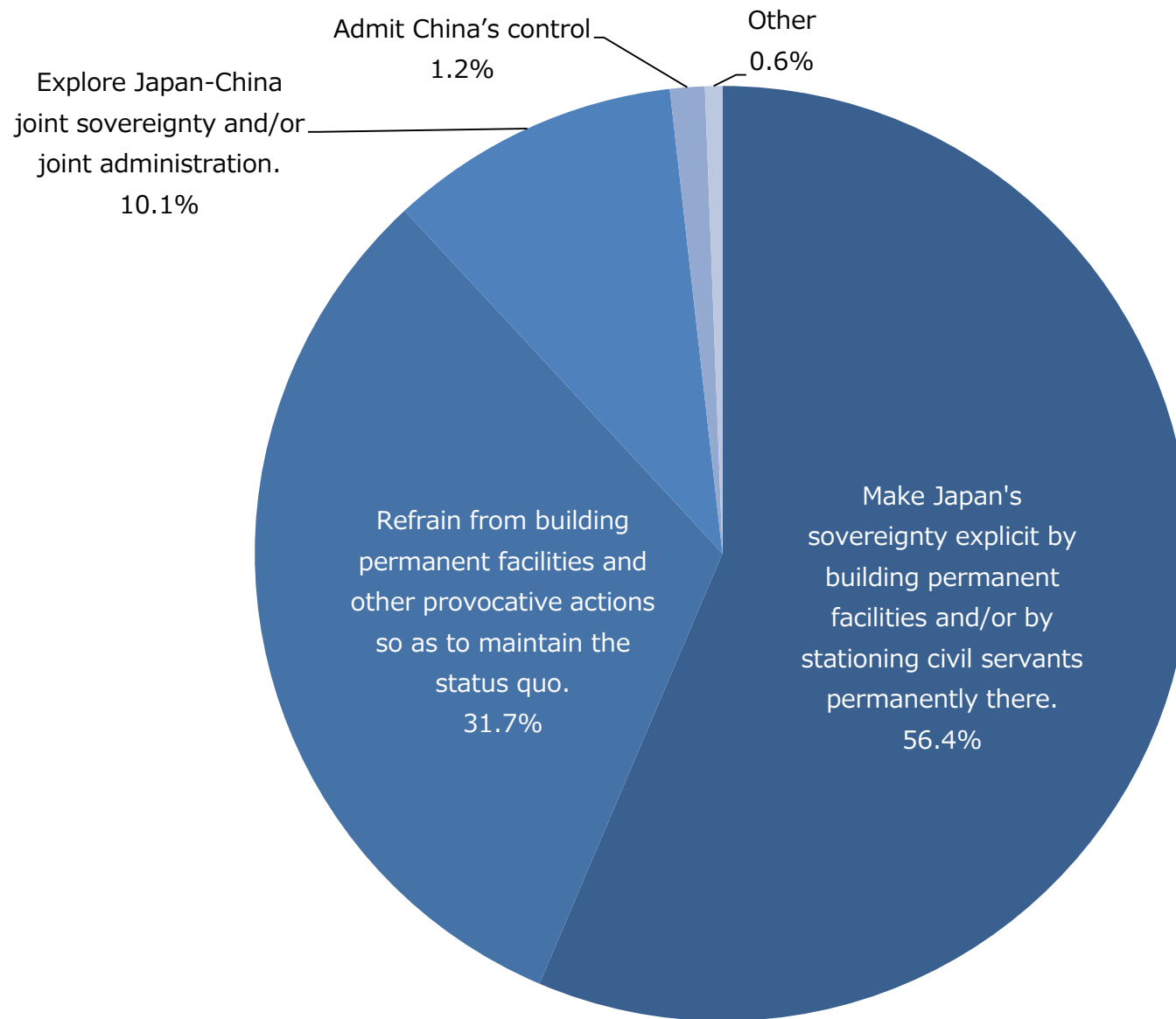
[China's economic relations with developing countries]

(Total number of respondents: 3,044)



Q12. What kind of policy is desirable toward the Senkaku Islands? Please select one item from the followings.

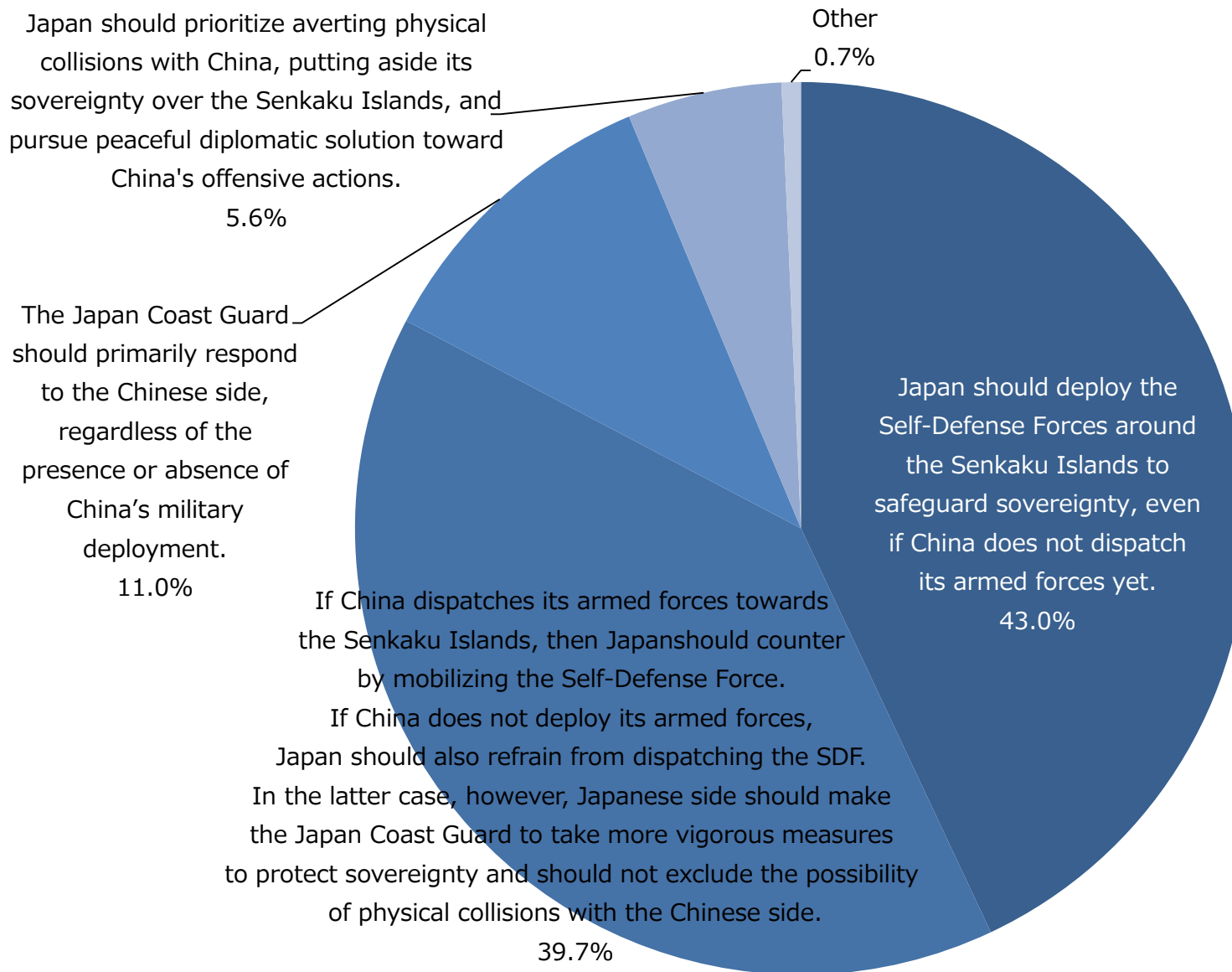
(Total number of respondents: 3,044)



Q13. What kind of response should Japanese government take to counter China's offence toward the Senkaku Islands?

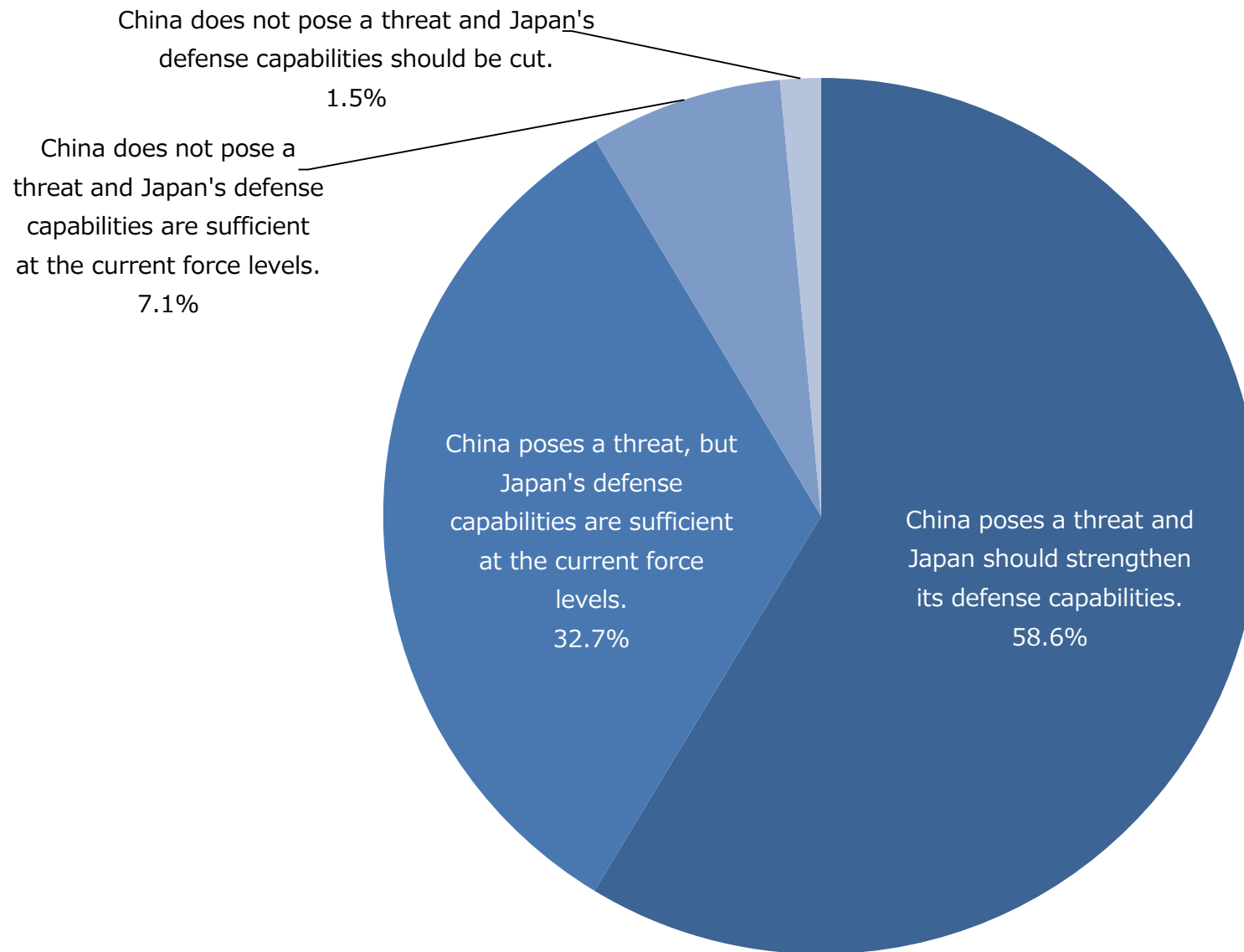
Please select one item from the followings.

(Total number of respondents: 3,044)



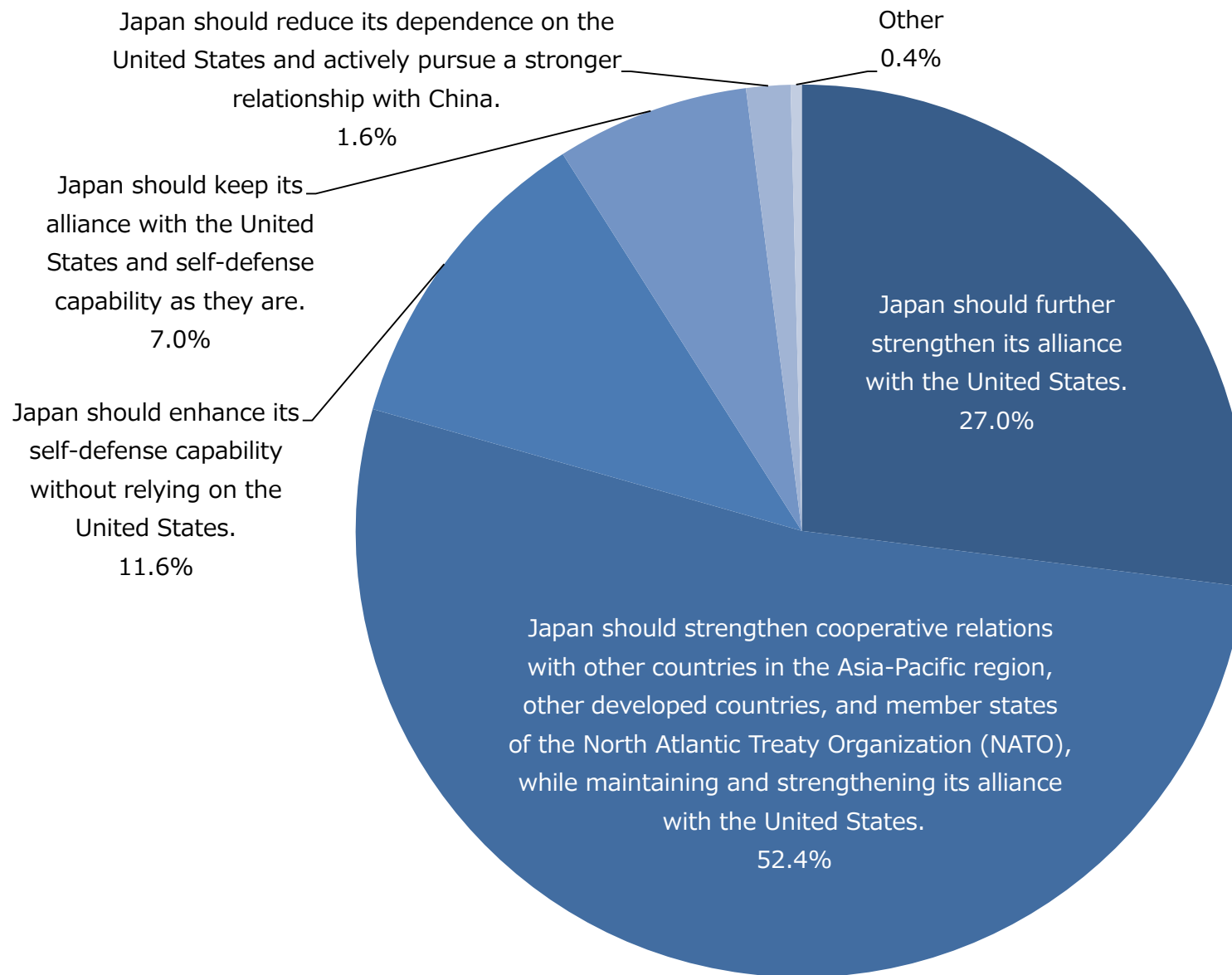
Q16. Does China pose a military threat to Japan? Are the Japan's defense capabilities robust enough?
Assessing the current situation, please select one item that you think is the most desirable policy direction.

(Total number of respondents: 3,044)



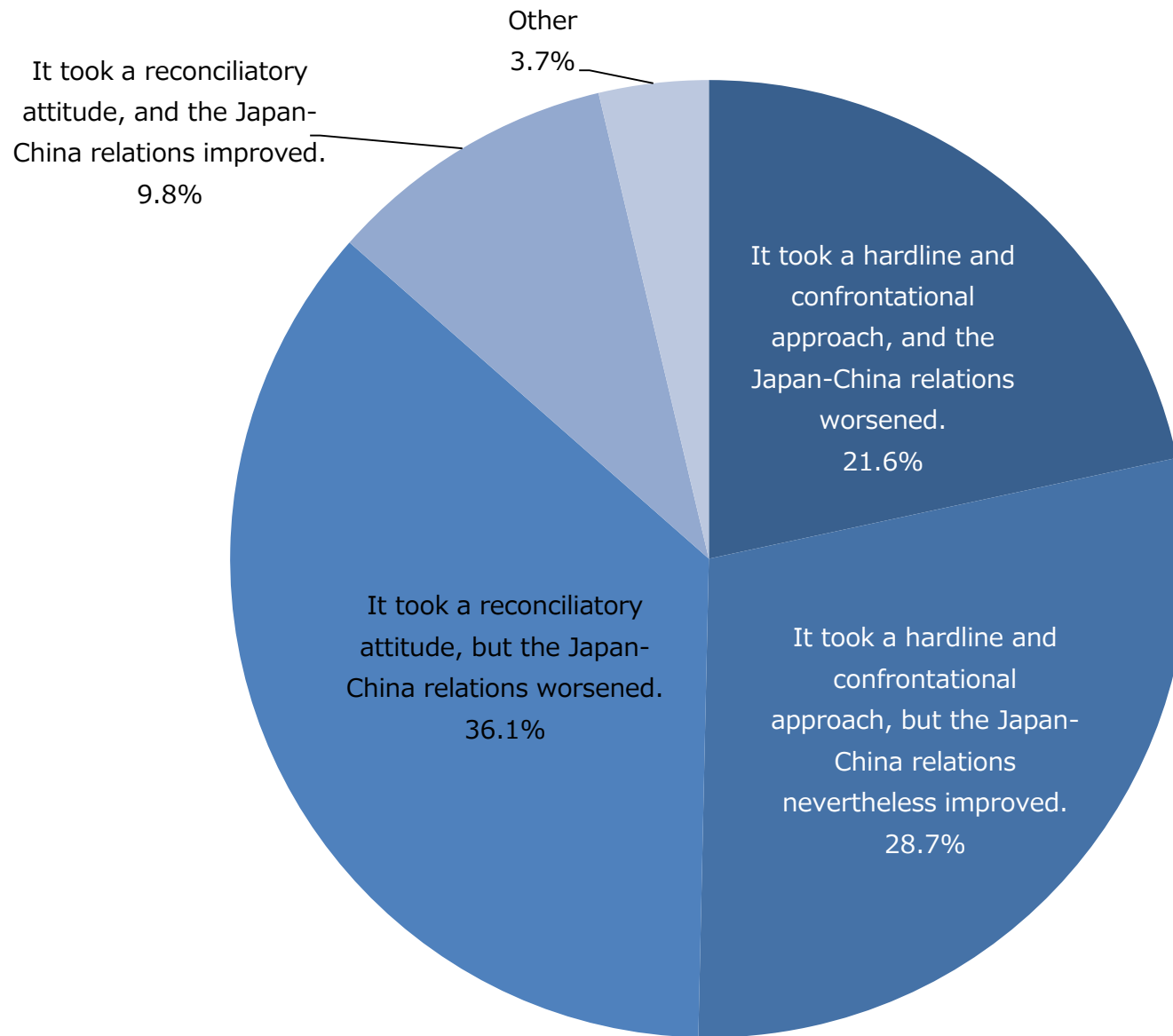
Q17. When considering Japan's policy on China, how do you think Japan's alliance with the United States should be developed?
Please select one item.

(Total number of respondents: 3,044)



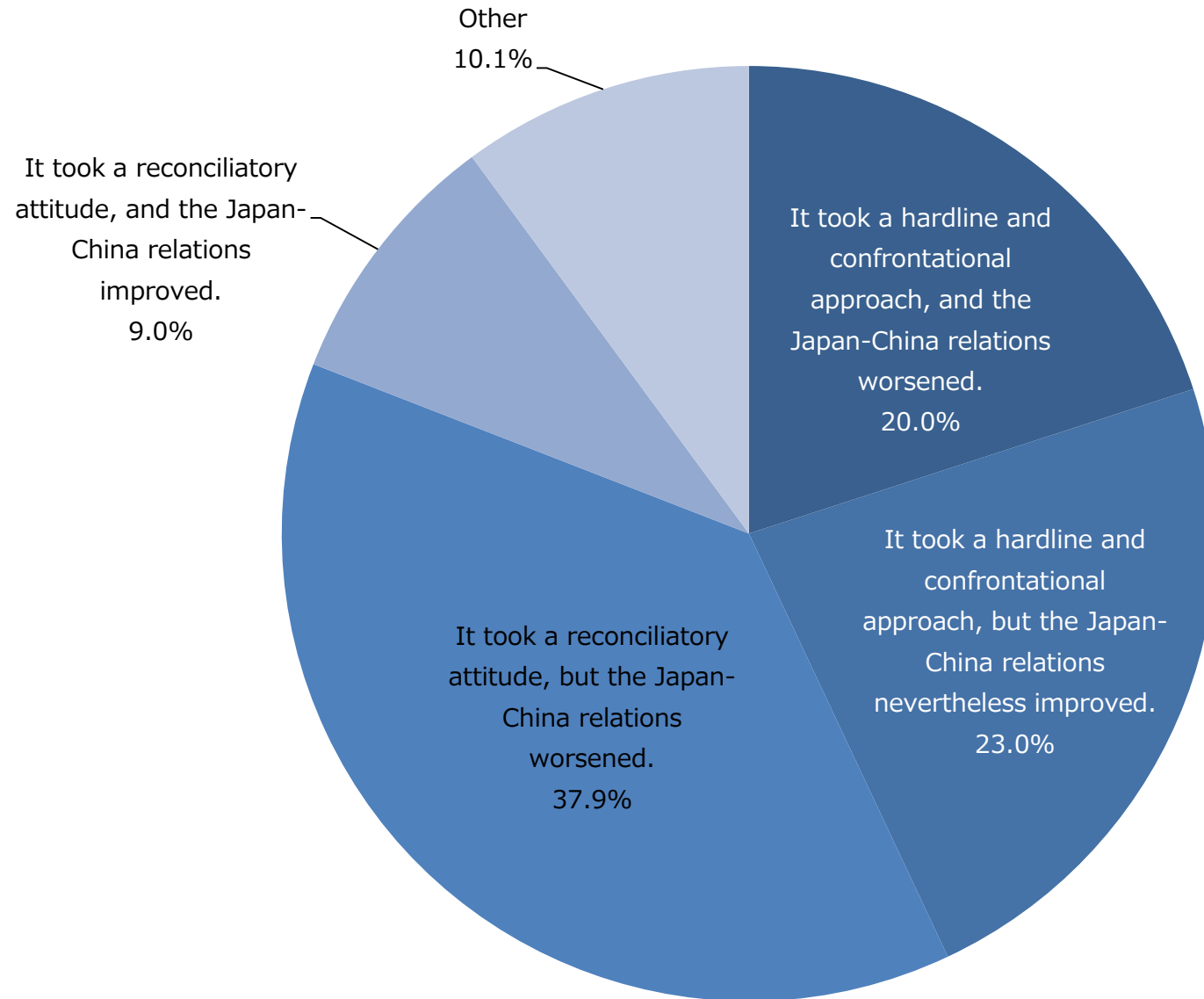
Q23. How do you evaluate the second Abe administration's foreign policy toward China and the Japan-China relations?
Please select one that you think is most appropriate.

(Total number of respondents: 3,044)



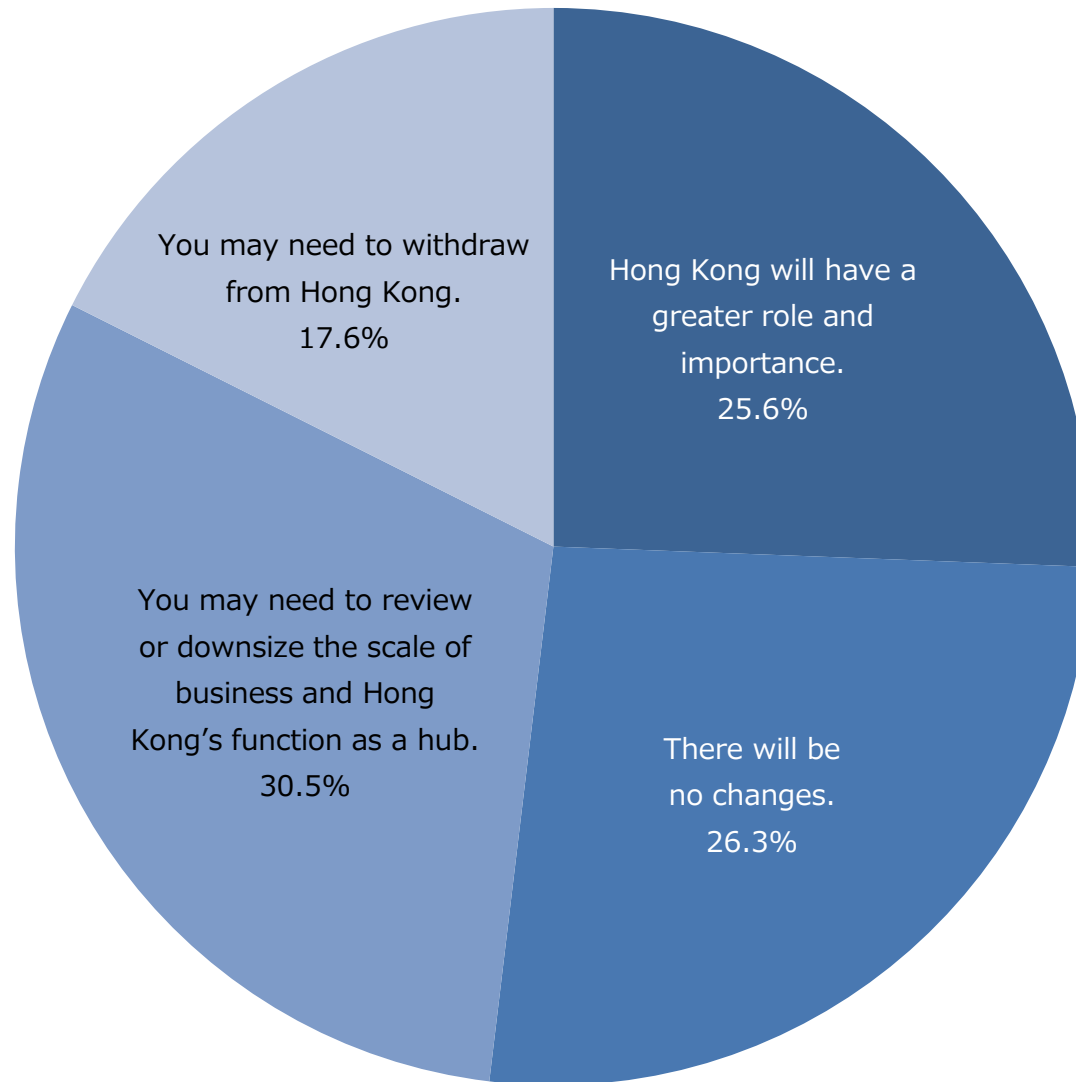
Q23A. How do you evaluate Japan's policy on China under the current administration and the present status of the Japan-China relations? Please select one that you think is most appropriate.

(Total number of respondents: 3,044)



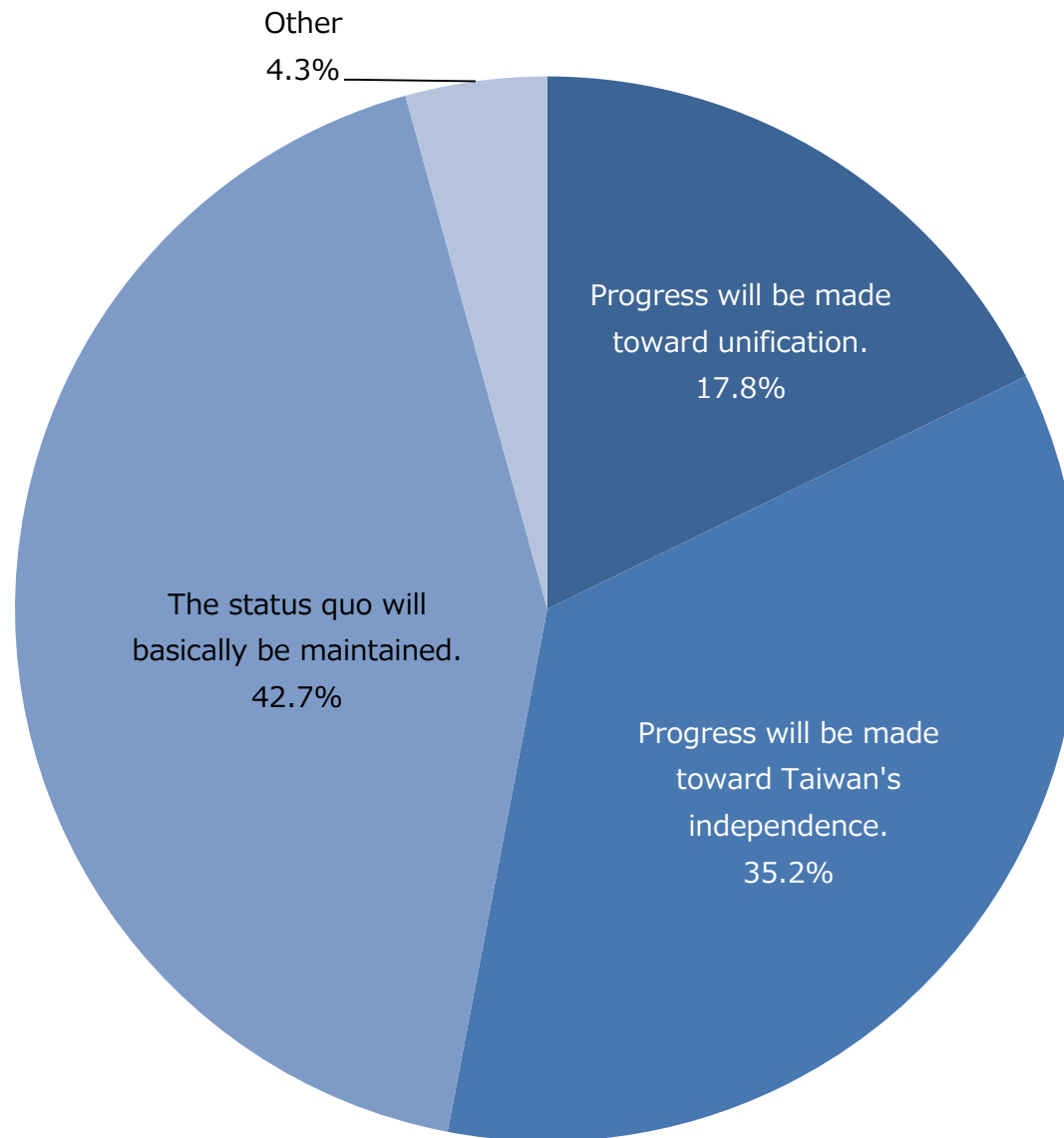
Q25A. As China intensifies its involvement in Hong Kong by passing the Hong Kong National Security Law, what do you think Hong Kong's role and importance will likely become in the future? Please select one item.

(Total number of respondents: 3,044)



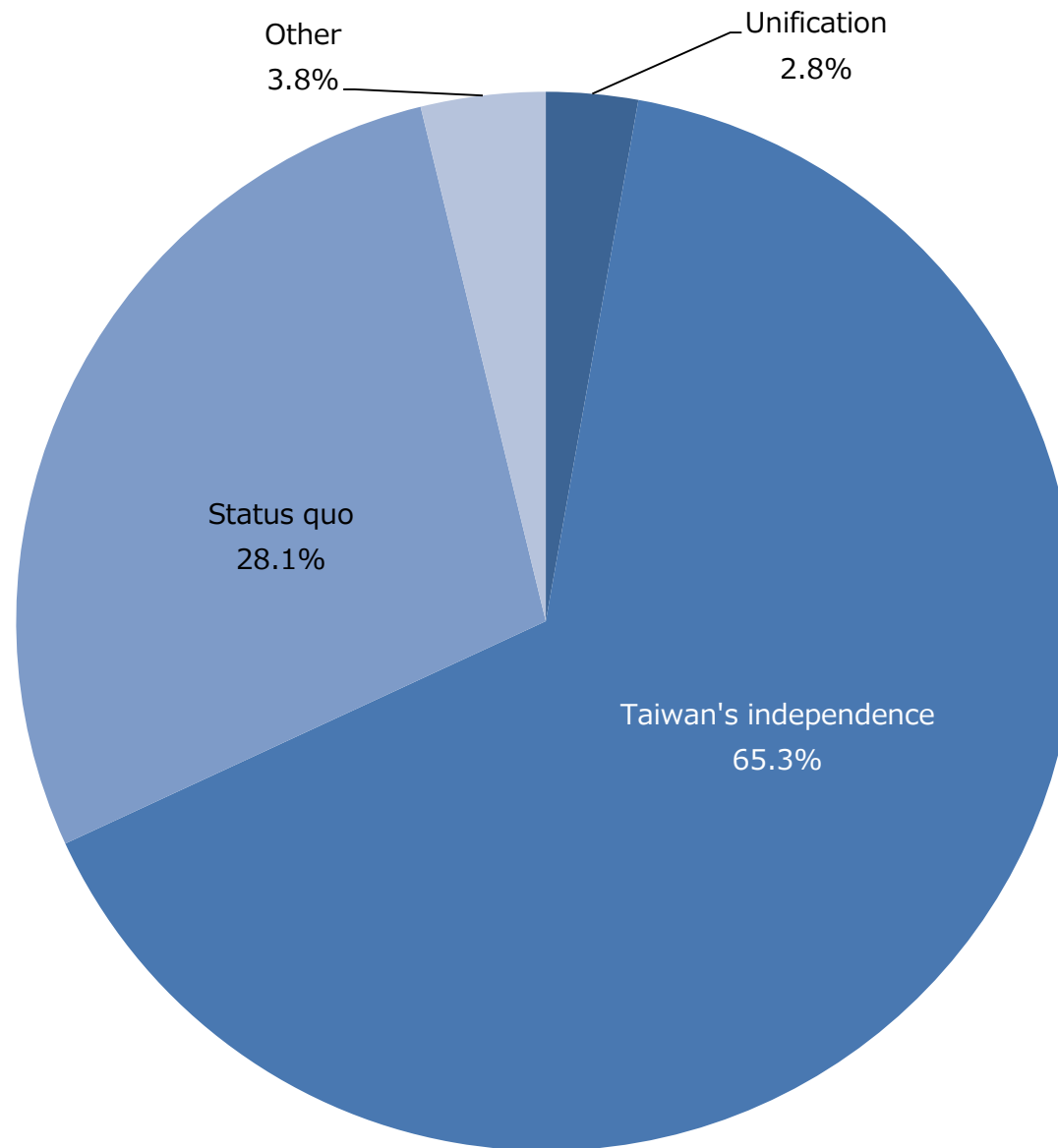
Q25. How do you foresee the relationship between China and Taiwan in the coming years?
Please select one item from the followings.

(Total number of respondents: 3,044)



Q26. Which future course of China-Taiwan relations will be desirable for Japan?
Please select one item from the followings.

(Total number of respondents: 3,044)



Q27. What kind of policy approach should Japan take toward Taiwan?
Please select one item from the followings.

(Total number of respondents: 3,044)

Weaken ties with Taiwan in economic and cultural areas, and scale down or forgo cooperation in military and security affairs.

3.0%

Weaken ties with Taiwan in economic and cultural areas, but strengthen cooperation in military and security affairs.

7.2%

Strengthen ties with Taiwan in economic and cultural areas, but scale down or forgo cooperation in military and security affairs.

36.2%

Strengthen ties with Taiwan not only in economic and cultural areas, but also in military and security affairs.

53.6%

