

The Tokyo Conference 2019

Expert Opinion Poll ~The U.S.-China Confrontation and the Future of the International Order~

March 2019



The Genron NPO



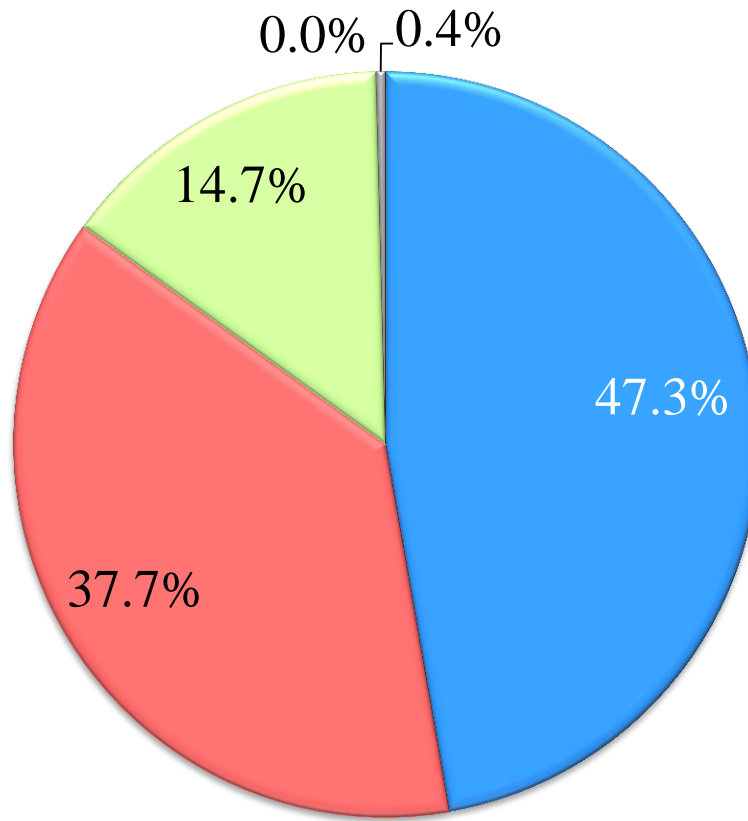
About the Survey

Area	Japan
Subjects	2000 experts who took part in the Genron NPO's program in the past among the database (10,000 people) the Genron NPO owns which is consisted of Diet members, government officials, businessman, Media, NPO/NGO related, academia/researchers and students
Method	The Internet
Period	February 21, 2019 to March 1, 2019
Respondents	273
Respondents attribute	Male : 88.6% Female : 11.4%
	19 and below : 0.7% 20~29 : 4.8% 30~39 : 3.0% 40~49 : 8.2% 50~59 : 21.9% 60~69 : 26.8% 70~79 : 26.4% 80 and over : 8.2%
	<div> Business Executives and Managers : 13.2% Businessman : 11.4% Executives in Media : 1.1% Media Related : 7.0% Government Officials : 2.9% Local Government Officials : 1.1% Diet Members : 0.7% Local Assemblymen : 0.4% </div> <div> Works of NPO/NGO : 9.2% Academia/Researchers : 13.9% Organizations : 10.6% Students : 4.0% Self-Employed : 10.6% Others : 13.9% </div>

【Is the U.S.-China relationship “New Cold War”?】

Do you think that the confrontation between the U.S. and China is a “New Cold War”? (Choose One)

2019 N=273



■ I think so.

■ I don't think so.

■ Neither

■ Don't know

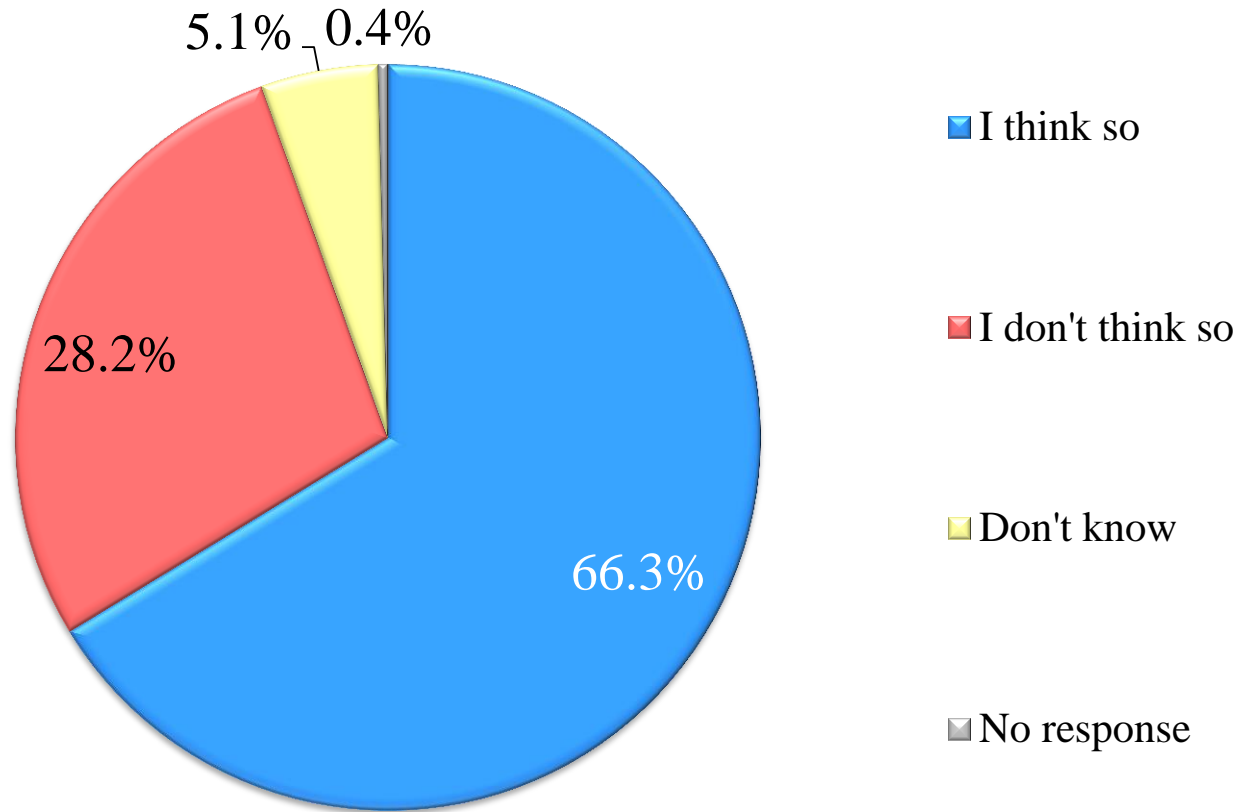
■ No response

	I think so	I don't think so	Neither	Don't know	No response
2019	47.3%	37.7%	14.7%	0.0%	0.4%

【Is the tough stance against China the U.S.'s consensus? 】

Do you agree or disagree that the U.S.'s tough stance against China is not just the Trump Administration, but there is the bipartisan consensus in the United States? (Choose one)

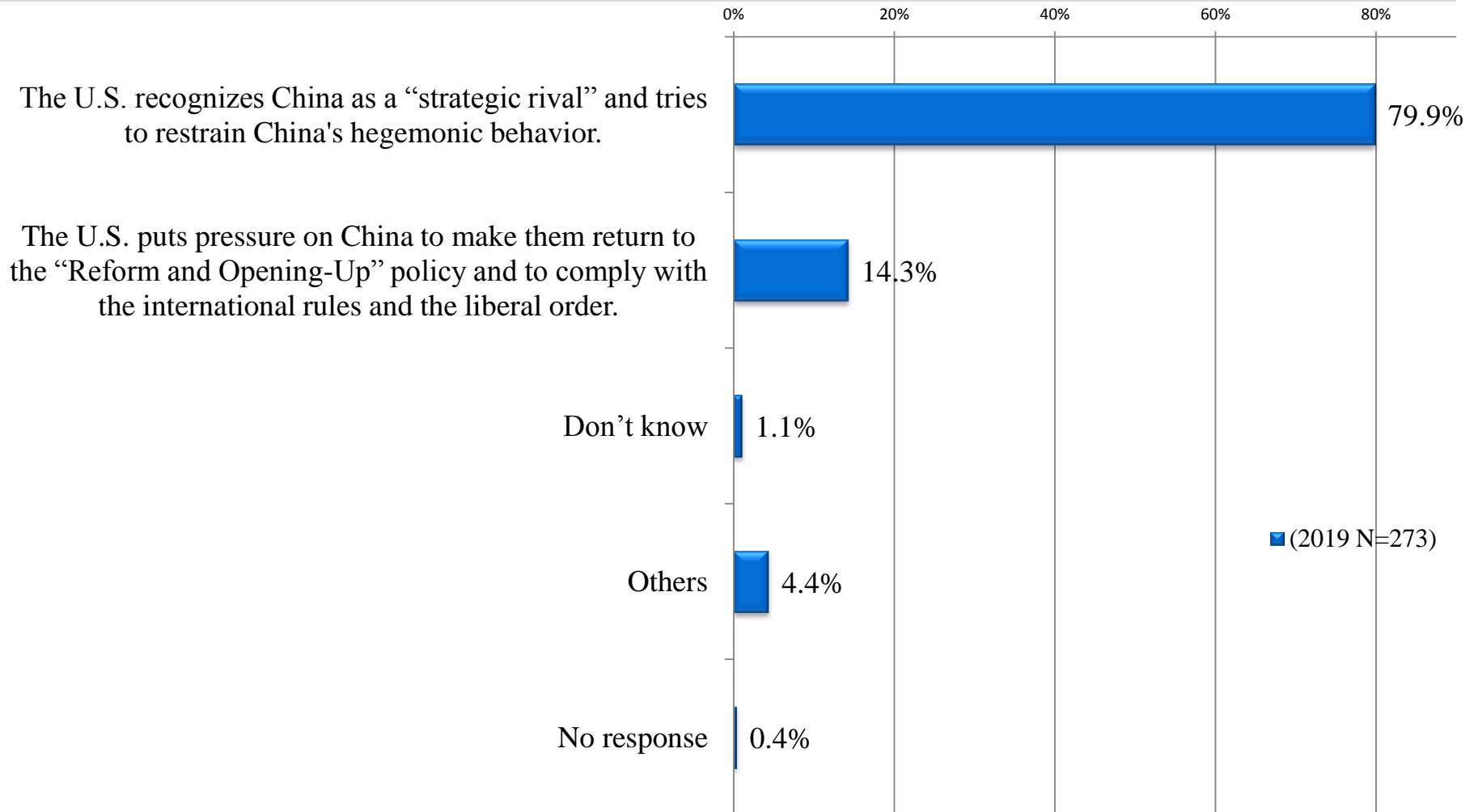
2019 N=273



	I think so	I don't think so	Don't know	No response
2019	66.3%	28.2%	5.1%	0.4%

【How do you see the U.S.'s stance against China?】

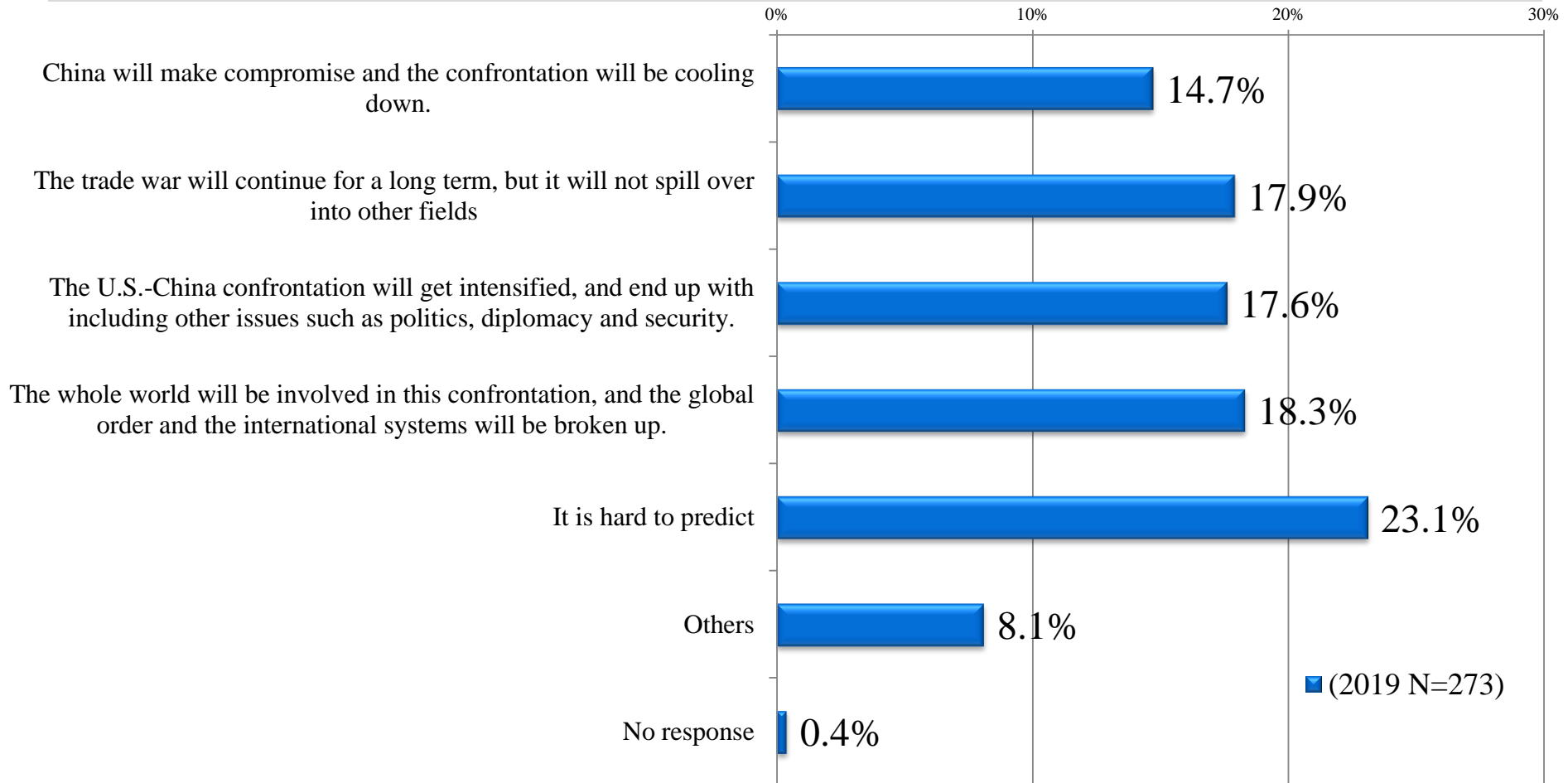
Which statement is closer to your view with regards to the current U.S. stance against China?
(Choose one)



	The U.S. recognizes China as a “strategic rival” and tries to restrain China’s hegemonic behavior.	The U.S. puts pressure on China to make them return to the “Reform and Opening-Up” policy and to comply with the international rules and the liberal order.	Don't know	Others	No response
2019	79.9%	14.3%	1.1%	4.4%	0.4%

【The future of the U.S.-China confrontation】

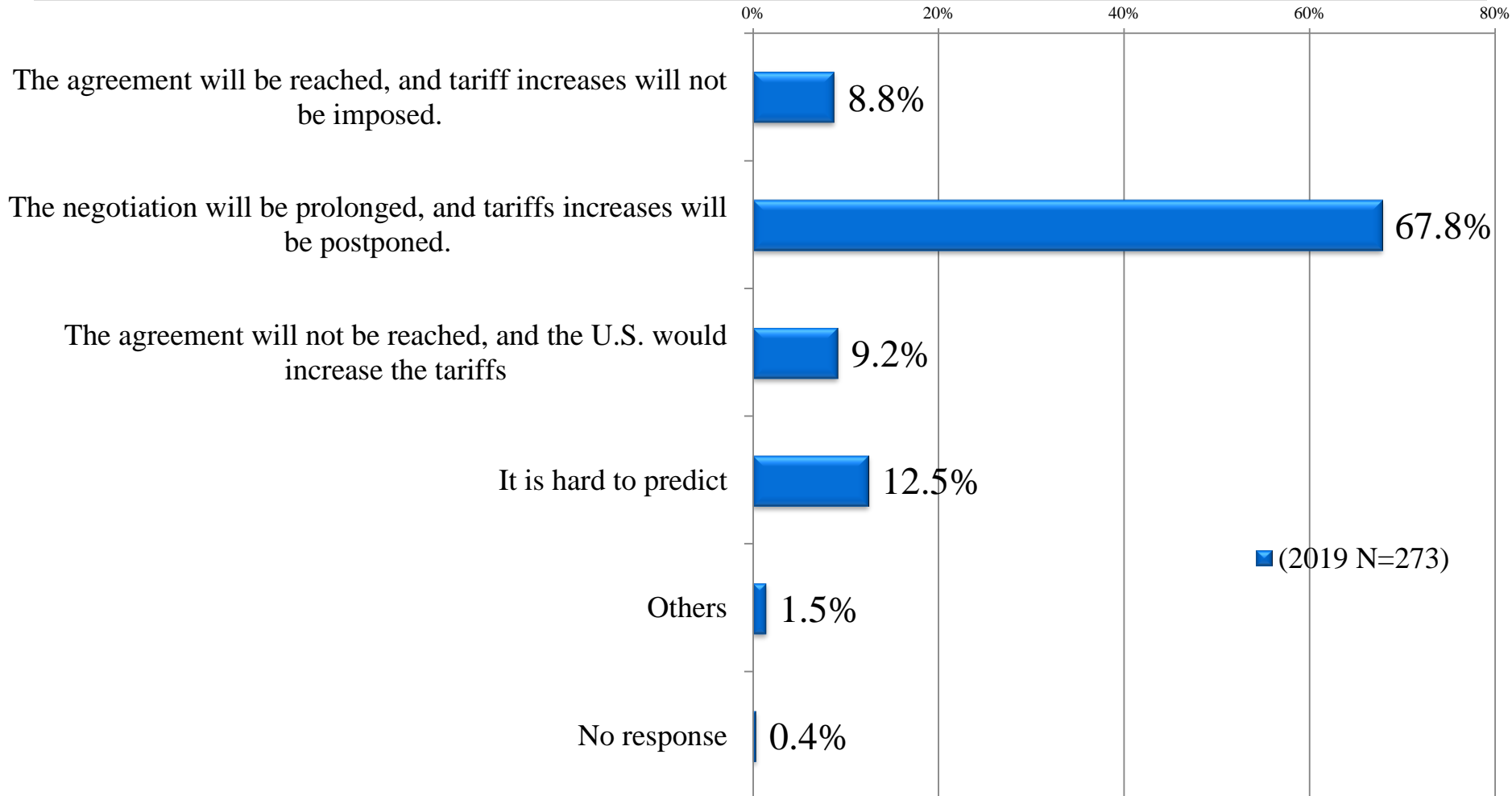
How do you predict the outcome of the U.S.-China confrontation? (Choose one)



	China will make compromise and the confrontation will be cooling down.	The trade war will continue for a long term, but it will not spill over into other fields.	The U.S.-China confrontation will get intensified, and end up with including other issues such as politics, diplomacy and security.	The whole world will be involved in this confrontation, and the global order and the international systems will be broken up.	It is hard to predict	Others	No response
2019	14.7%	17.9%	17.6%	18.3%	23.1%	8.1%	0.4%

【The future of the U.S.-China negotiation】

The deadline of 90-day extension for the tariff increases is approaching at the end of February. How do you predict the outcome of the U.S.-China trade negotiation? (Choose one)

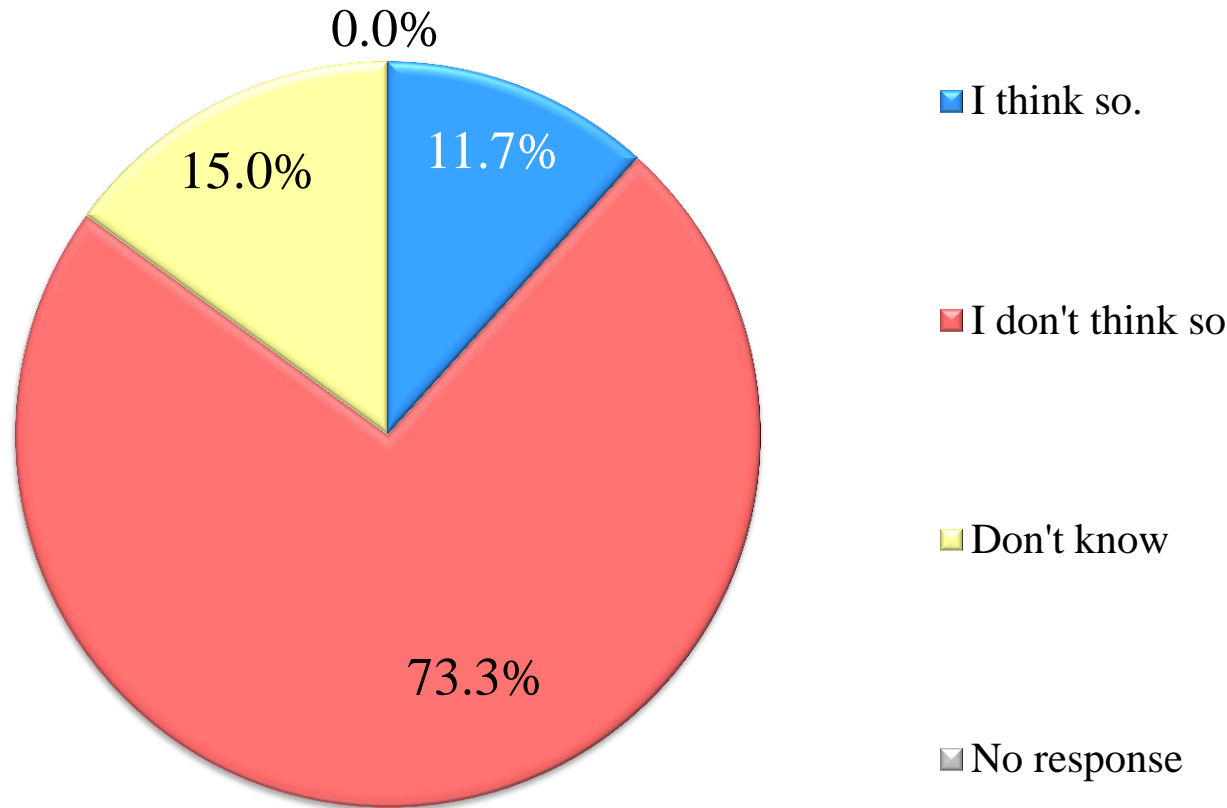


	The agreement will be reached, and tariff increases will not be imposed.	The negotiation will be prolonged, and tariffs increases will be postponed.	The agreement will not be reached, and the U.S. would increase the tariffs.	It is hard to predict	Others	No response
2019	8.8%	67.8%	9.2%	12.5%	1.5%	0.4%

【Will WTO reform which the U.S. and China can accept be achieved?】

Japan, Europe and the U.S. began talks on WTO reforms. Do you think that WTO reforms which the U.S. and China can accept will be achieved? (Choose one)

2019 N=273

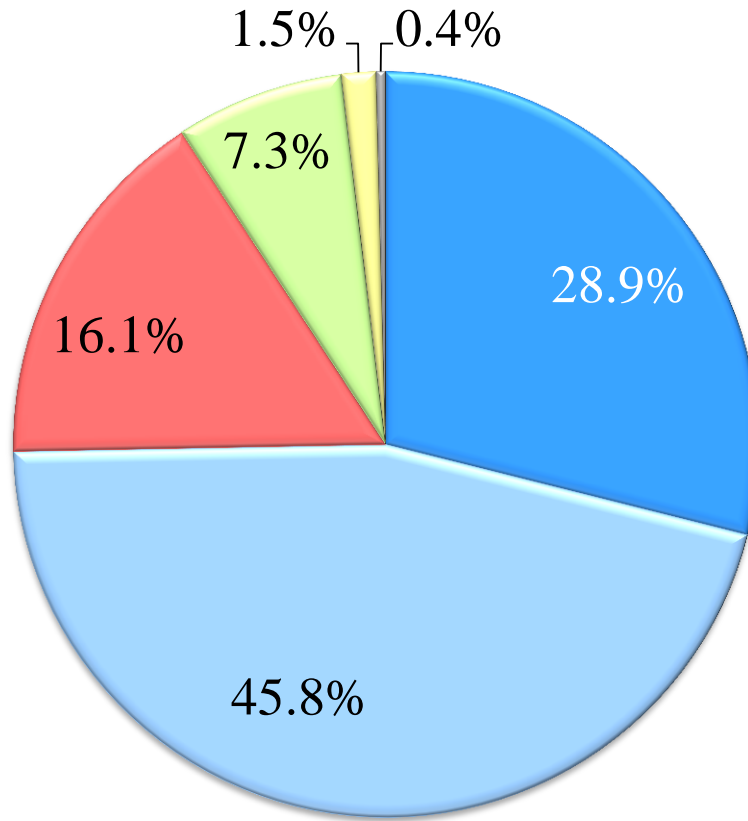


	I think so.	I don't think so.	Don't know	No response
2019	11.7%	73.3%	15.0%	0.0%

【Is the exclusion of Chinese products right?】

The U.S. is taking a tough policy and excluding HUAWEI products from the government procurement. More of the U.S. Allies are also taking the same measures. What do you think of those actions? (Choose one)

2019 N=273

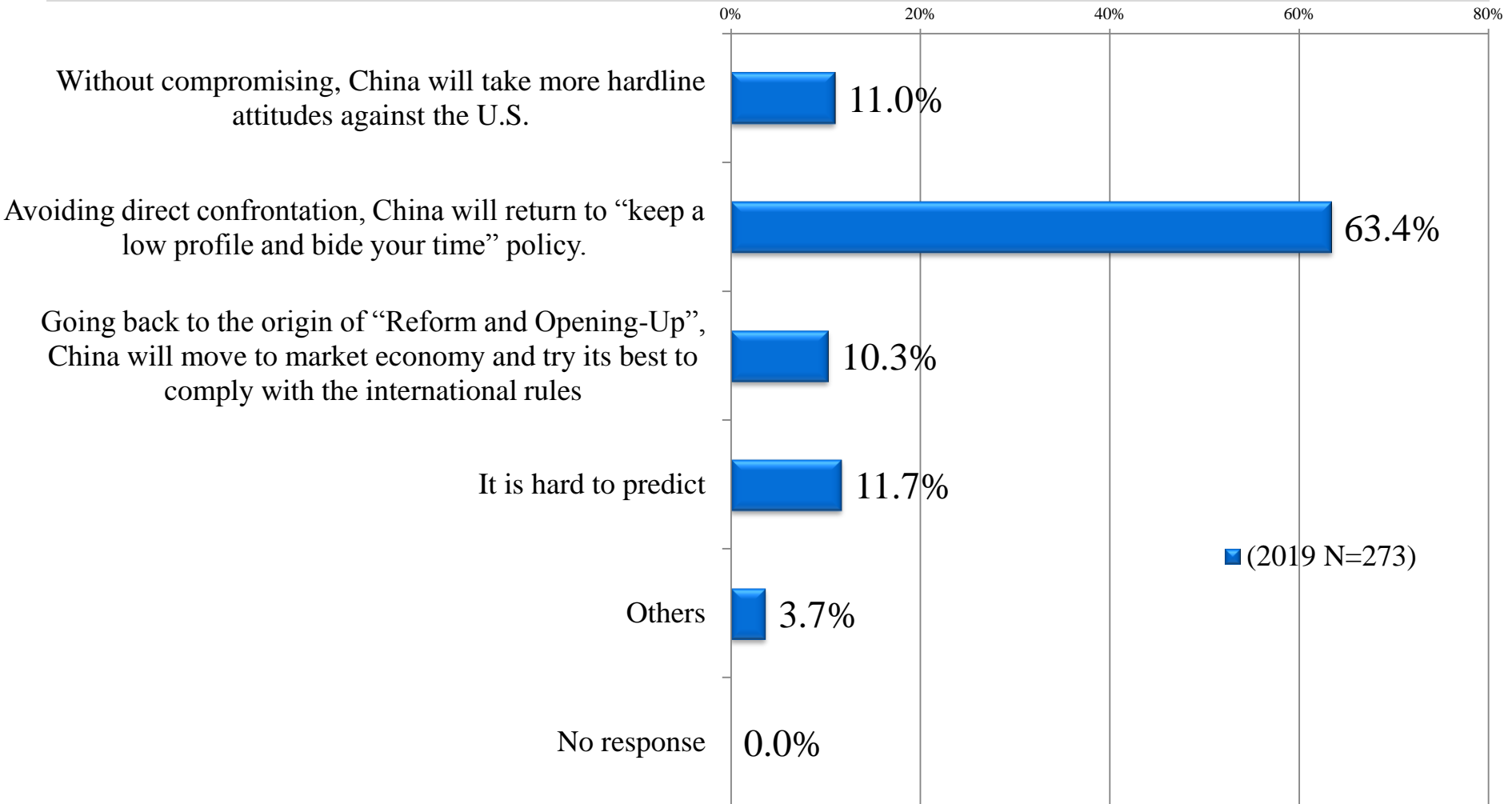


- ☒ I think they are making a right decision.
- ☒ I don't think they are right, but there is no other way.
- ☒ I think they are taking wrong action.
- ☒ Neither
- ☒ Don't know
- ☒ No response

	I think they are making a right decision.	I don't think they are right, but there is no other way.	I think they are taking wrong action.	Neither	Don't know	No response
2019	28.9%	45.8%	16.1%	7.3%	1.5%	0.4%

【How will China deal with the U.S.?】

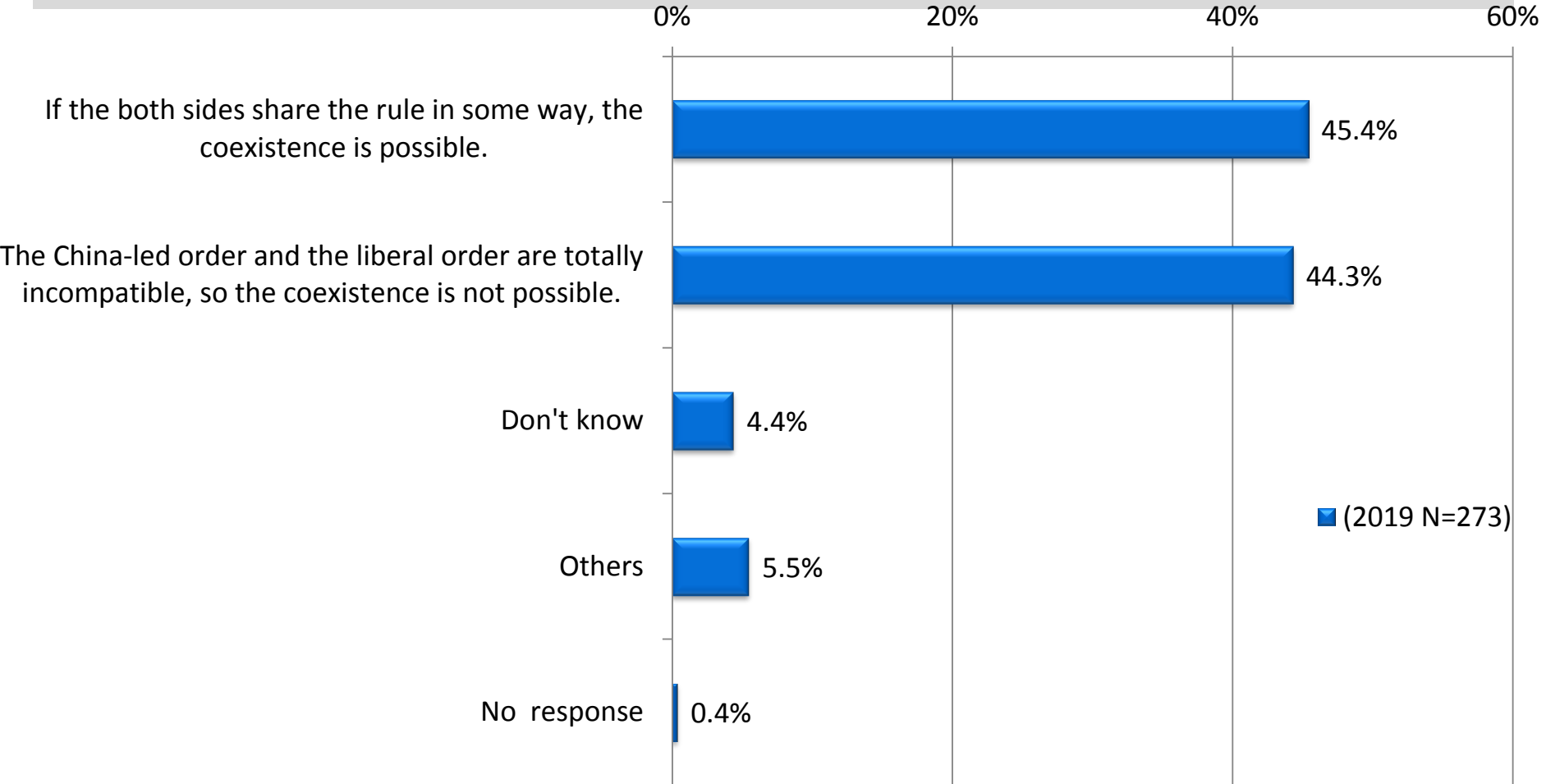
How do you think China will deal with the U.S.-China confrontation? (Choose one)



	Without compromising, China will take more hardline attitudes against the U.S.	Avoiding direct confrontation, China will return to “keep a low profile and bide your time” policy.	Going back to the origin of “Reform and Opening-Up”, China will move to market economy and try its best to comply with the international rules.	It is hard to predict	Others	No response
2019	11.0%	63.4%	10.3%	11.7%	3.7%	0.0%

【Can China-led order and the liberal order coexist?】

China is intending to play a certain leading role in the world with their foreign policy based on their version of socialistic ideology. Do you think that Chinese party-led order and the liberal order can coexist? (Choose one)



	If the both sides share the rule in some way, the coexistence is possible.	The China-led order and the liberal order are totally incompatible, so the coexistence is not possible.	Don't know	Others	No response
2019	45.4%	44.3%	4.4%	5.5%	0.4%

【Did the “Reform and Opening-up” really aim to make China a market economy? 】

How do you see the “Reform and Opening-Up” policy? (Choose one)

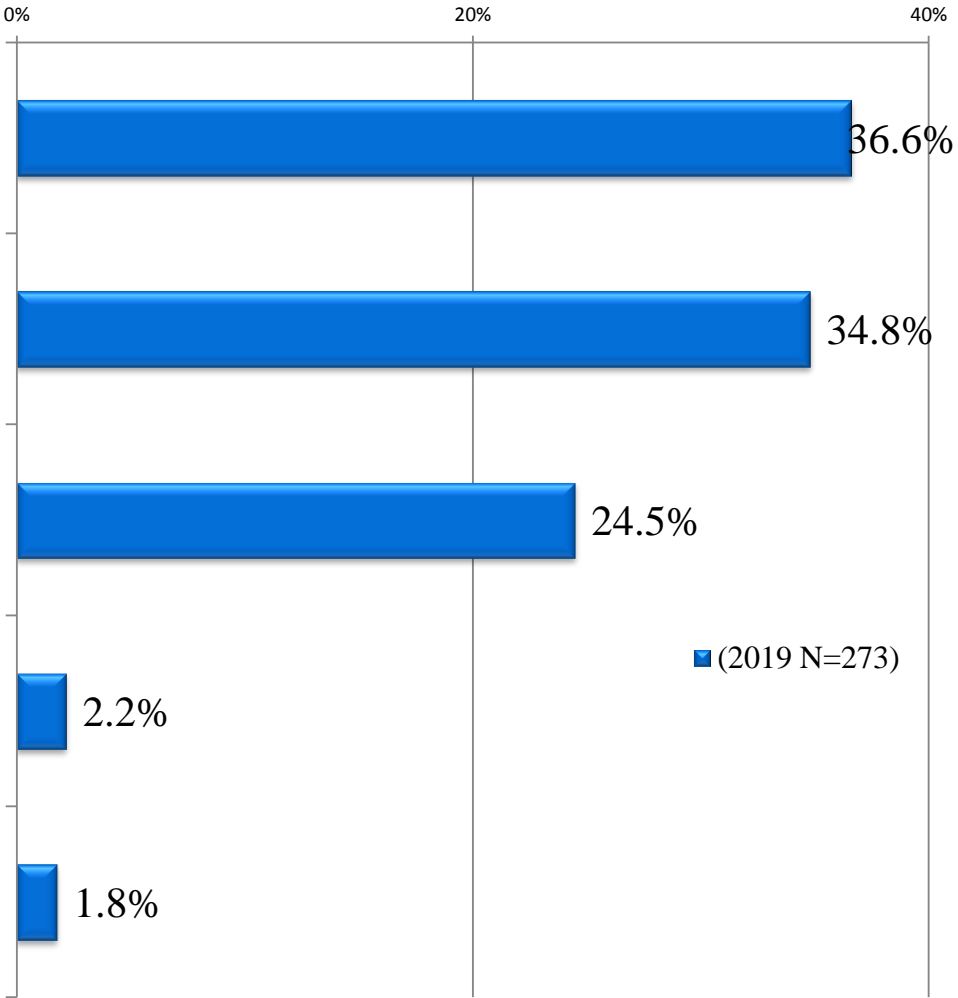
In order to develop the economy, there was a will to become a market economy at first. However, the result ended up as a half-baked and the government again strengthened the state-led economy.

The ‘Reform and Opening-Up’ was only the means for the economic growth and China did not intend to become the market economy in the first place.

China is still on a path to reform and open-up to become a market economy.

Don't know

No response



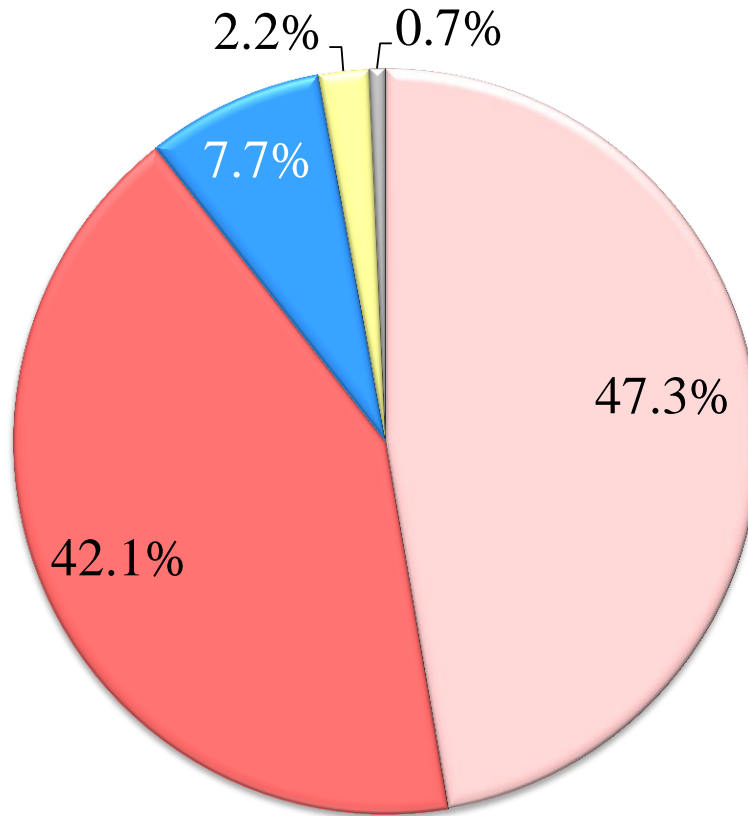
	In order to develop the economy, there was a will to become a market economy at first. However, the result ended up as a half-baked and the government again strengthened the state-led economy.	The ‘Reform and Opening-Up’ was only the means for the economic growth and China did not intend to become the market economy in the first place.	China is still on a path to reform and open-up to become a market economy.	Don't know	No response
2019	36.6%	34.8%	24.5%	2.2%	1.8%

【Will China become a threat to the U.S. security?】

Do you think that China will be a threat to the U.S. security?

(Choose one)

2019 N=273



China will be a threat in the future.

China is already a threat.

China won't be a threat.

Don't know

No response

	China will be a threat in the future.	China is already a threat.	China won't be a threat.	Don't know	No response
2019	47.3%	42.1%	7.7%	2.2%	0.7%

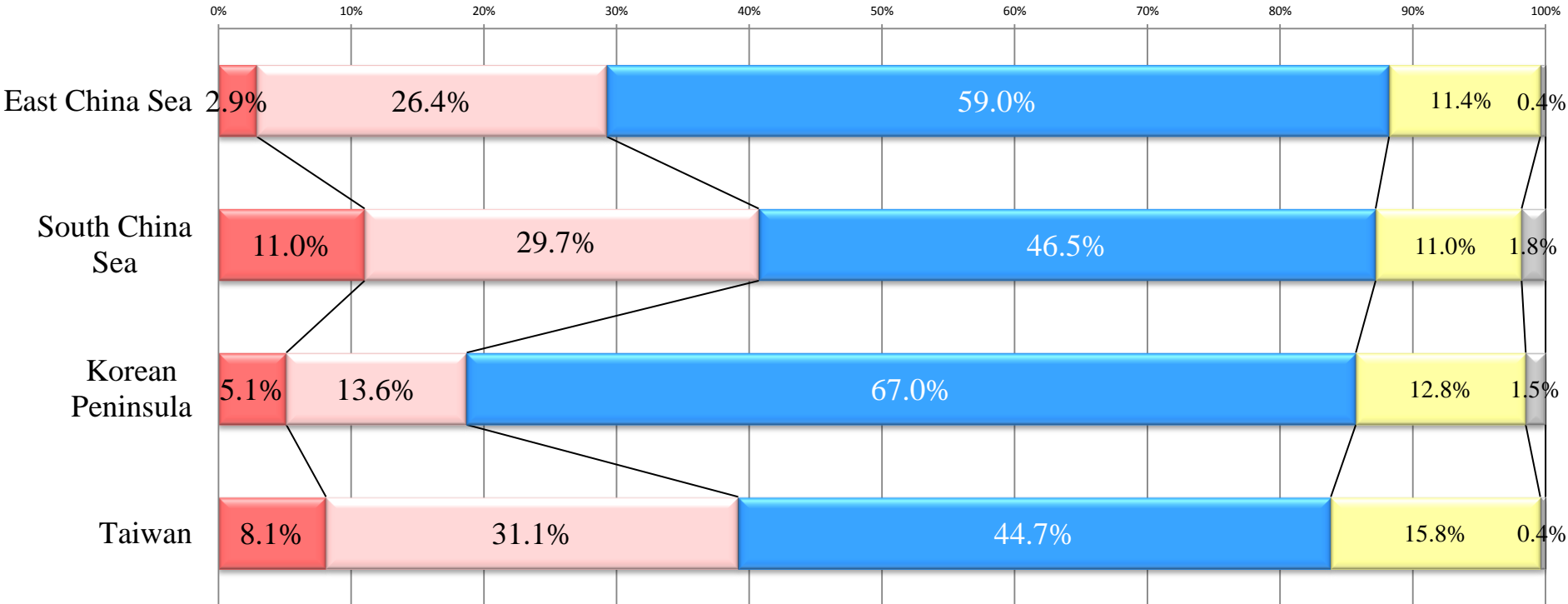
【Issues around which the U.S.-China military conflicts could happen】

Do you think that the U.S.-China military conflicts will happen over following issues below?

(Choose one for each)

2019 N=273

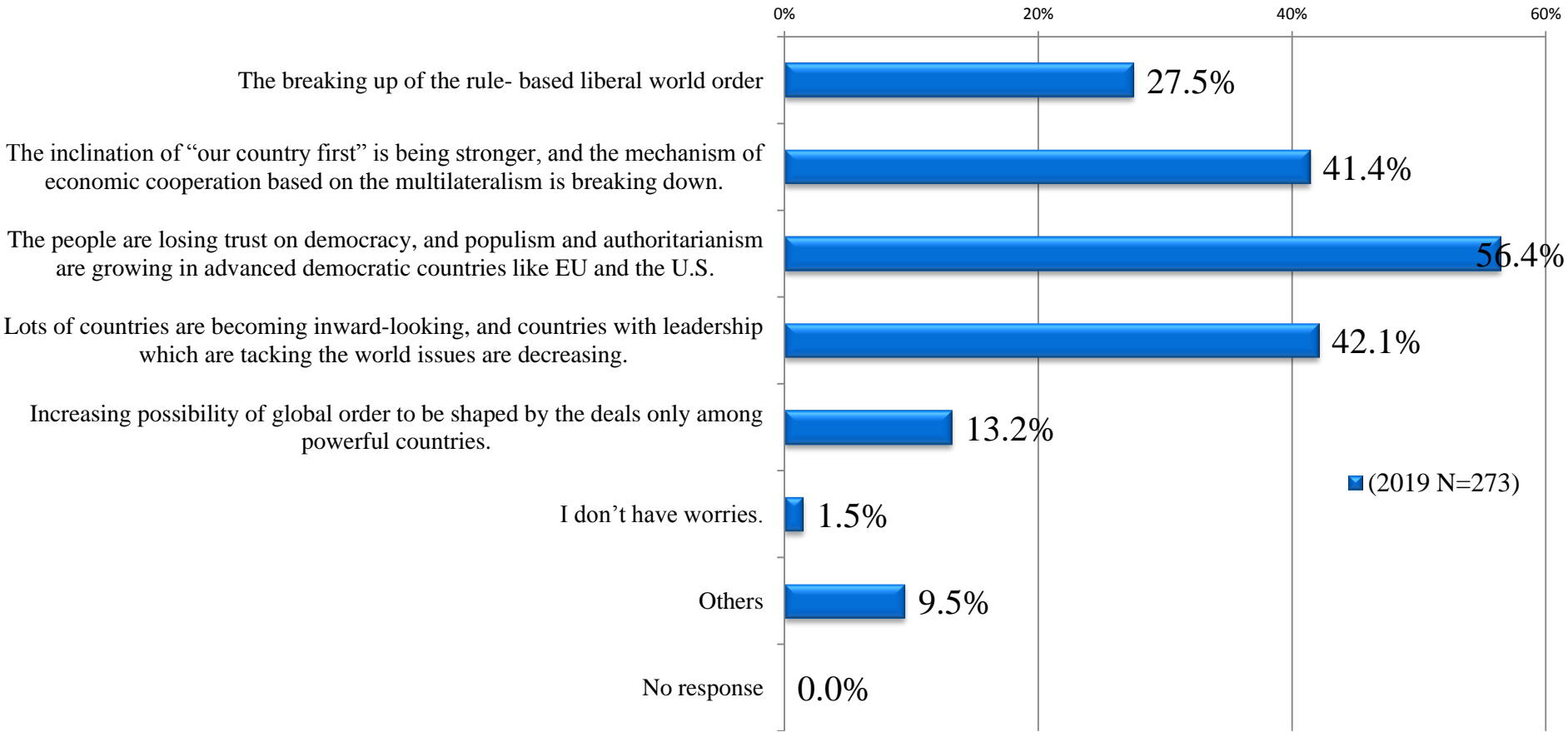
■ It will happen in a few years. ■ It will happen in the future. ■ It won't happen. ■ Don't know ■ No response



		It will happen in a few years.	It will happen in the future.	It won't happen.	Don't know	No response
2019	East China Sea	2.9%	26.4%	59.0%	11.4%	0.4%
	South China Sea	11.0%	29.7%	46.5%	11.0%	1.8%
	Korean Peninsula	5.1%	13.6%	67.0%	12.8%	1.5%
	Taiwan	8.1%	31.1%	44.7%	15.8%	0.4%

【The concerns in today’s unstable world】

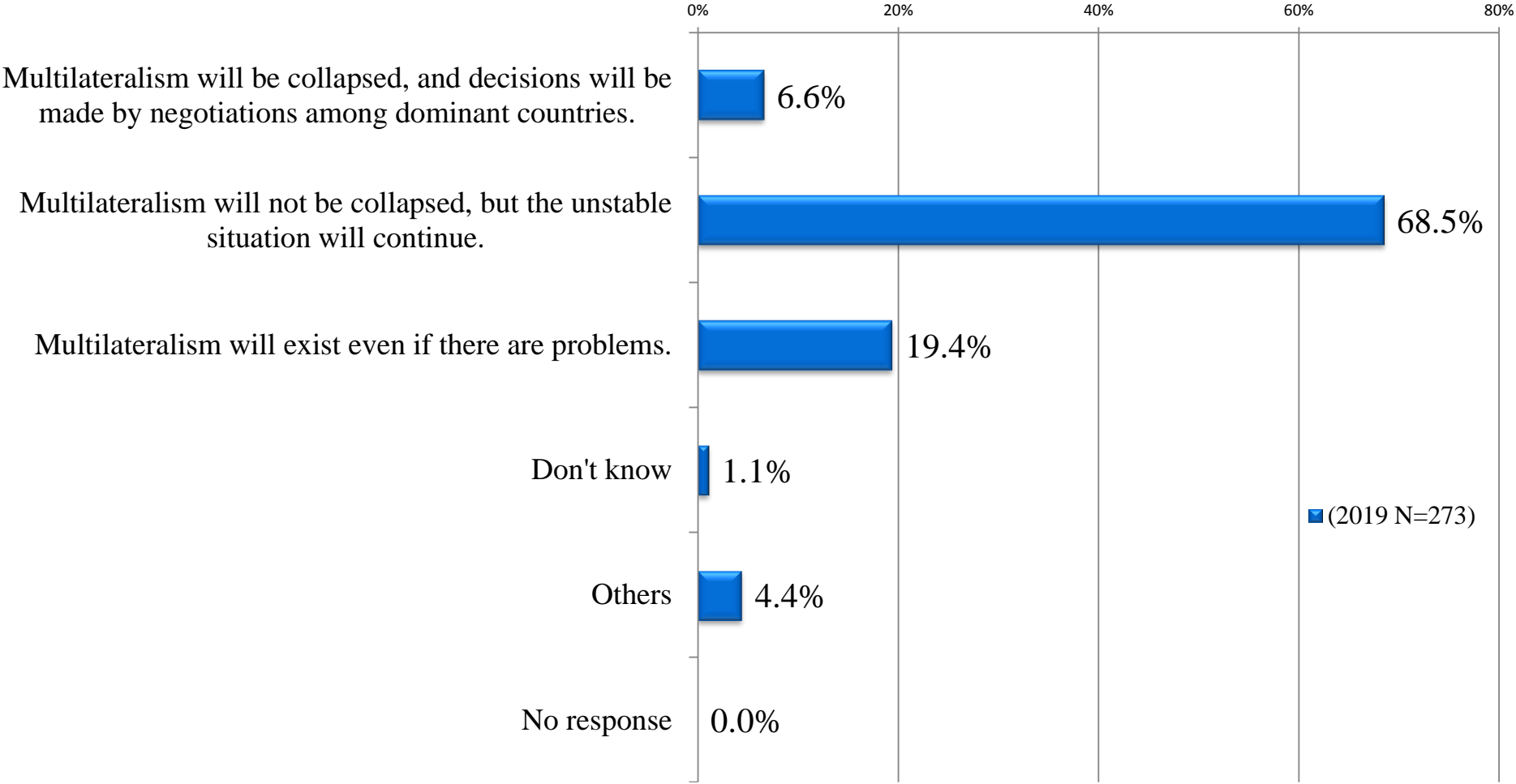
The current state of the world continues to be unstable. Which issues do you worry the most?
(Choose two)



	The breaking up of the rule-based liberal world order	The inclination of “our country first” is being stronger, and the mechanism of economic cooperation based on the multilateralism is breaking down.	The people are losing trust on democracy, and populism and authoritarianism are growing in advanced democratic countries like EU and the U.S.	Lots of countries are becoming inward-looking, and countries with leadership which are tackling the world issues are decreasing.	Increasing possibility of global order to be shaped by the deals only among powerful countries.	I don’t have worries.	Others	No response
2019	27.5%	41.4%	56.4%	42.1%	13.2%	1.5%	9.5%	0.0%

【The future of multilateralism】

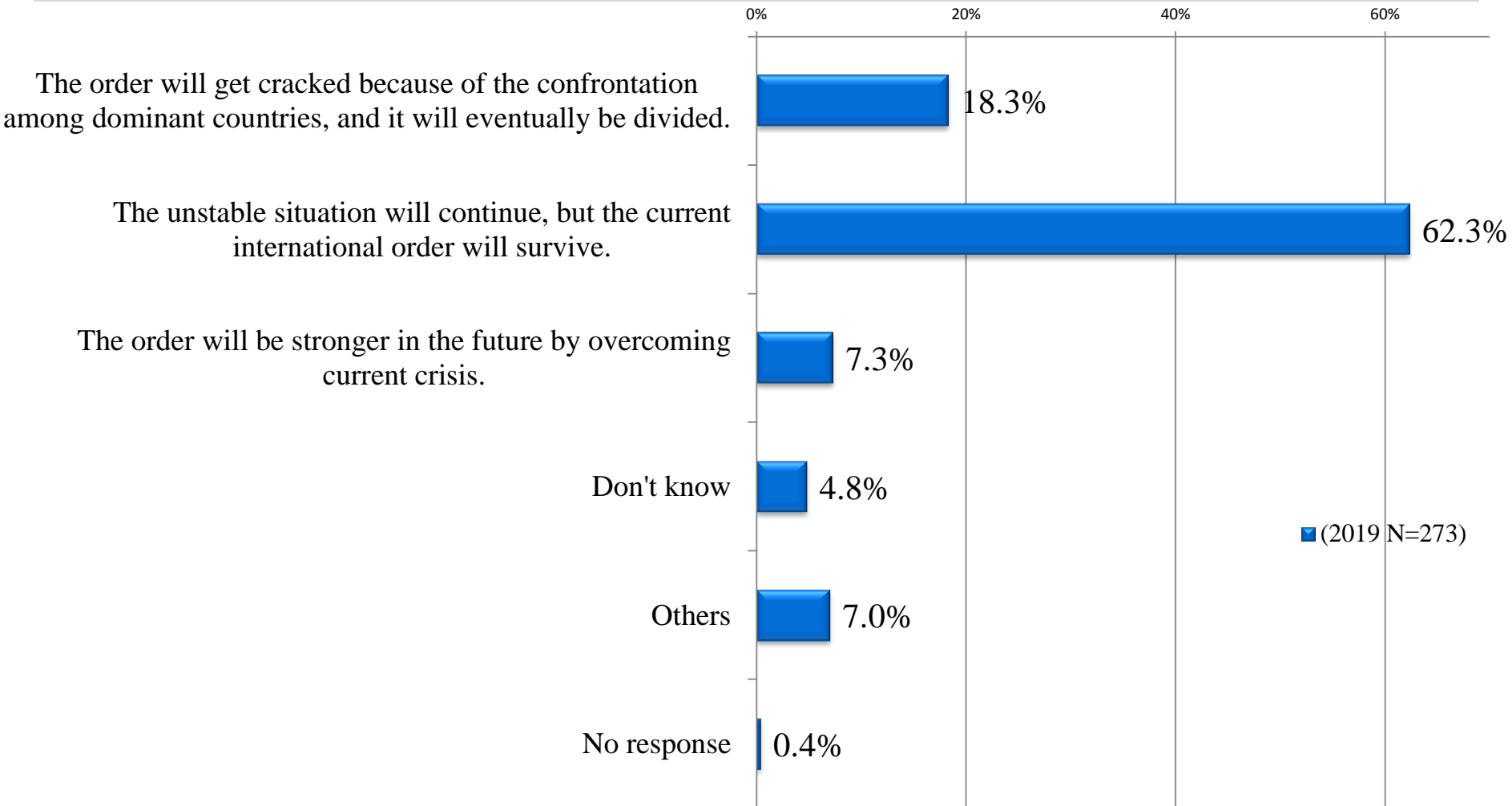
Since the President Trump has advocated the “America-first” policy, the function of the international cooperation based on multilateralism is getting weaker. How do you see the future of multilateralism? (Choose one)



	Multilateralism will be collapsed, and decisions will be made by negotiations among dominant countries.	Multilateralism will not be collapsed, but the unstable situation will continue.	Multilateralism will exist even if there are problems.	Don't know	Others	No response
2019	6.6%	68.5%	19.4%	1.1%	4.4%	0.0%

【The future of the rule-based liberal order】

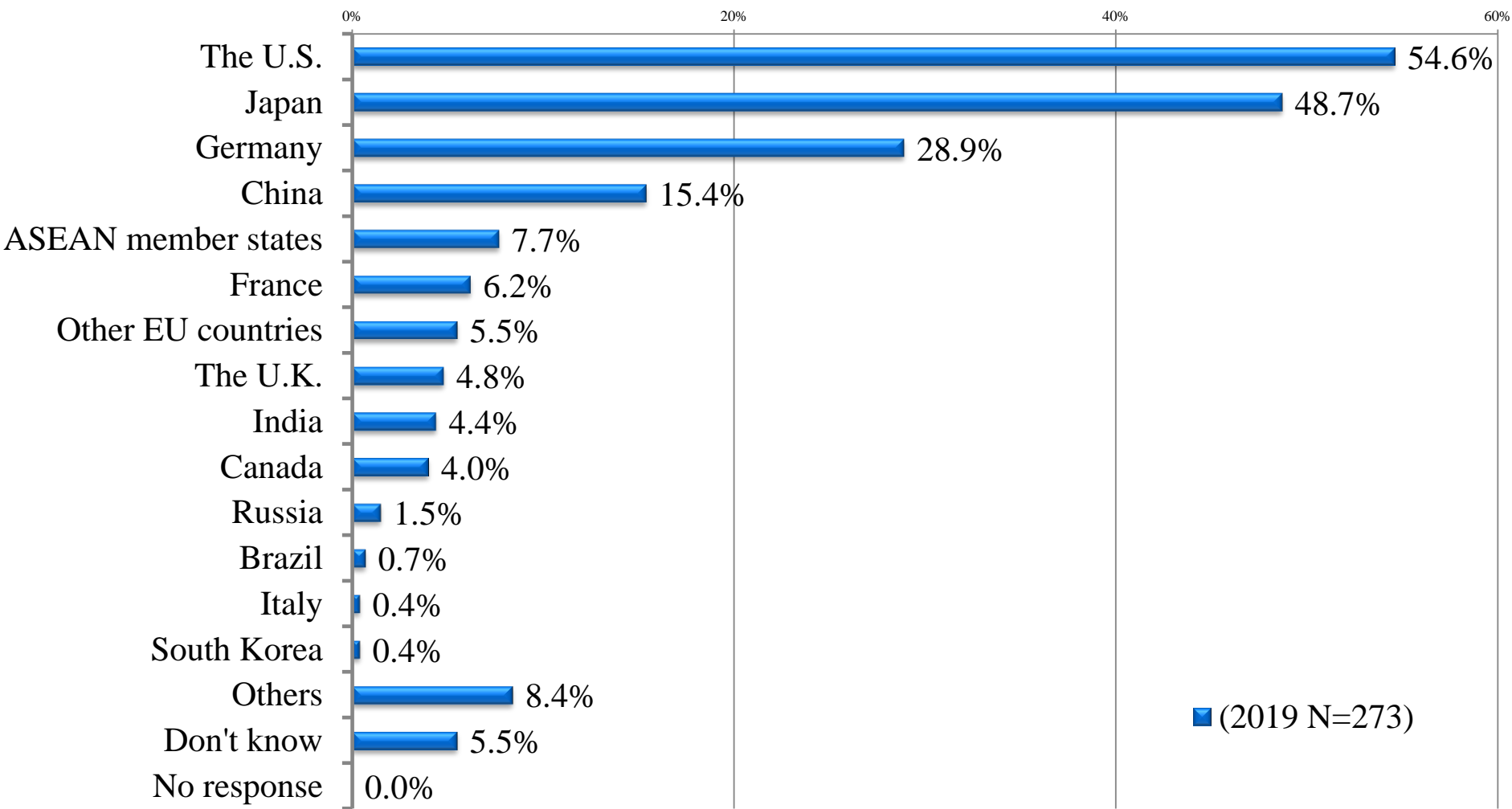
How do you see the future of the rule-based liberal order? (Choose one)



	The order will get cracked because of the confrontation among dominant countries, and it will eventually be divided.	The unstable situation will continue, but the current international order will survive.	The order will be stronger in the future by overcoming current crisis.	Don't know	Others	No response
2019	18.3%	62.3%	7.3%	4.8%	7.0%	0.4%

【Which countries should demonstrate leadership?】

Which countries do you think should play a leadership role in order to protect the liberal order and multilateralism? (Choose two)

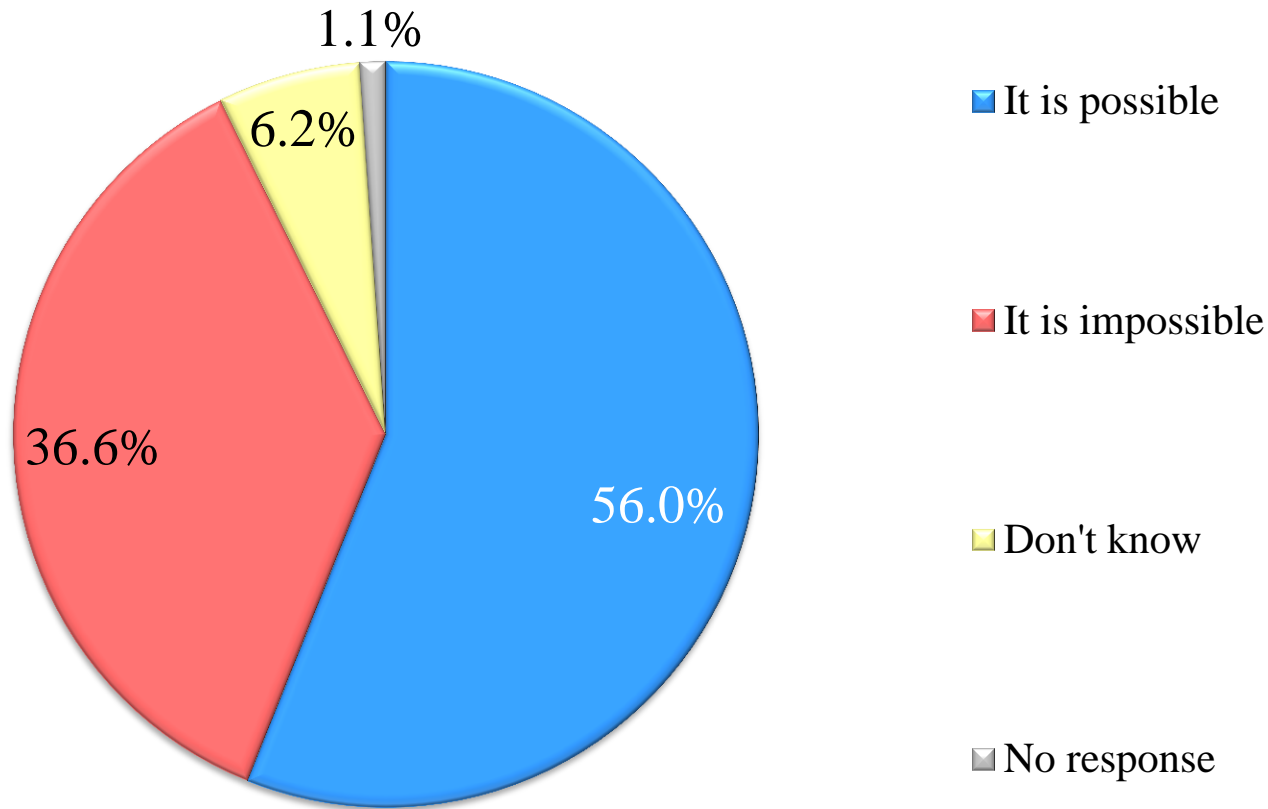


	Japan	China	The U.S.	Russia	The U.K.	Germany	France	Italy	Other EU countries	India	Brazil	Canada	ASEAN member states	South Korea	Don't know	Others	No response
2019	48.7%	15.4%	54.6%	1.5%	4.8%	28.9%	6.2%	0.4%	5.5%	4.4%	0.7%	4.0%	7.7%	0.4%	5.5%	8.4%	0.0%

【Can Japan demonstrate leadership?】

Do you think that it is possible for Japan to demonstrate leadership in rebuilding the liberal international order? (Choose one)

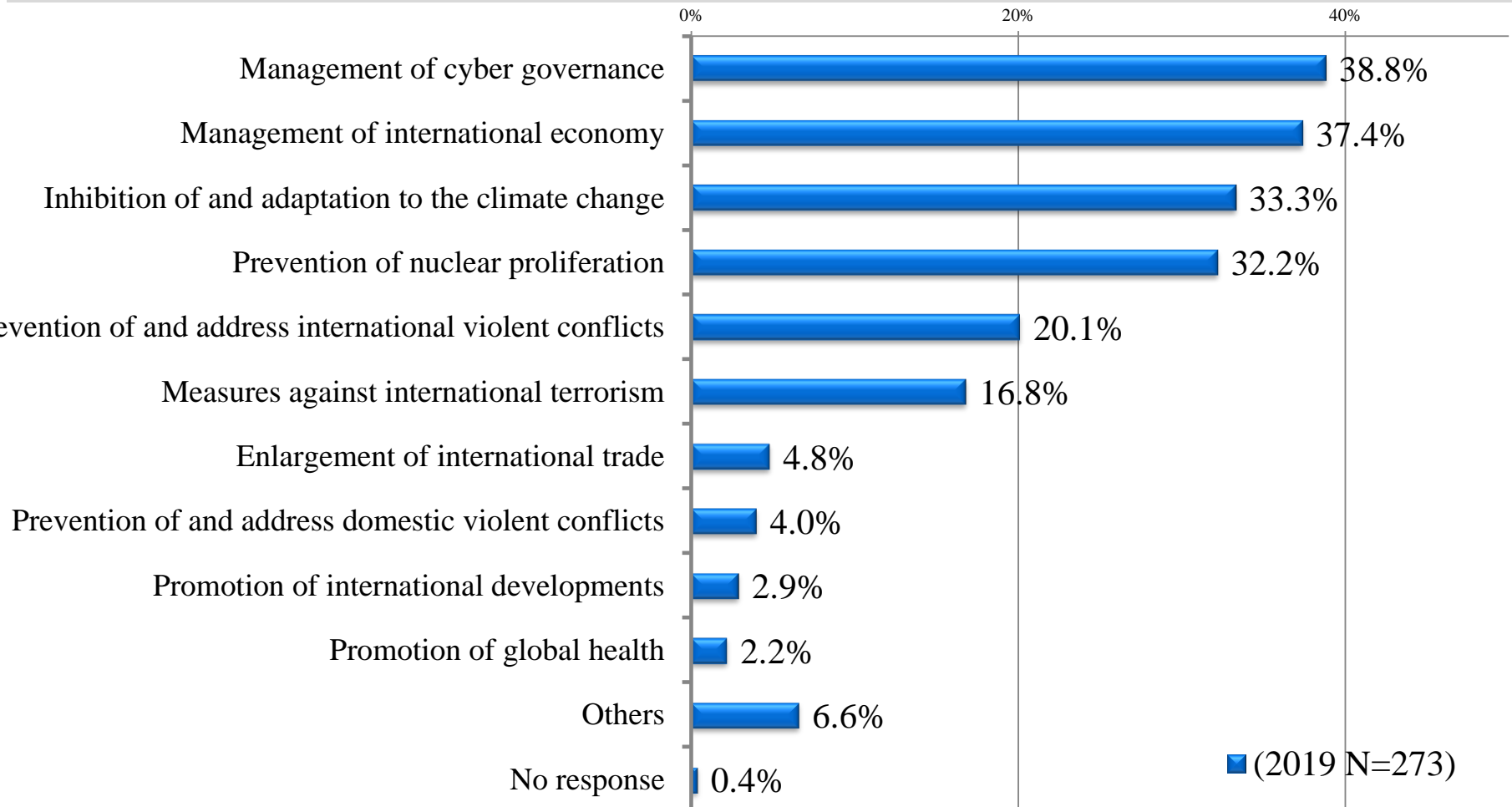
2019 N=273



	It is possible	It is impossible	Don't know	No response
2019	56.0%	36.6%	6.2%	1.1%

【Global issues which should be prioritized in 2019】

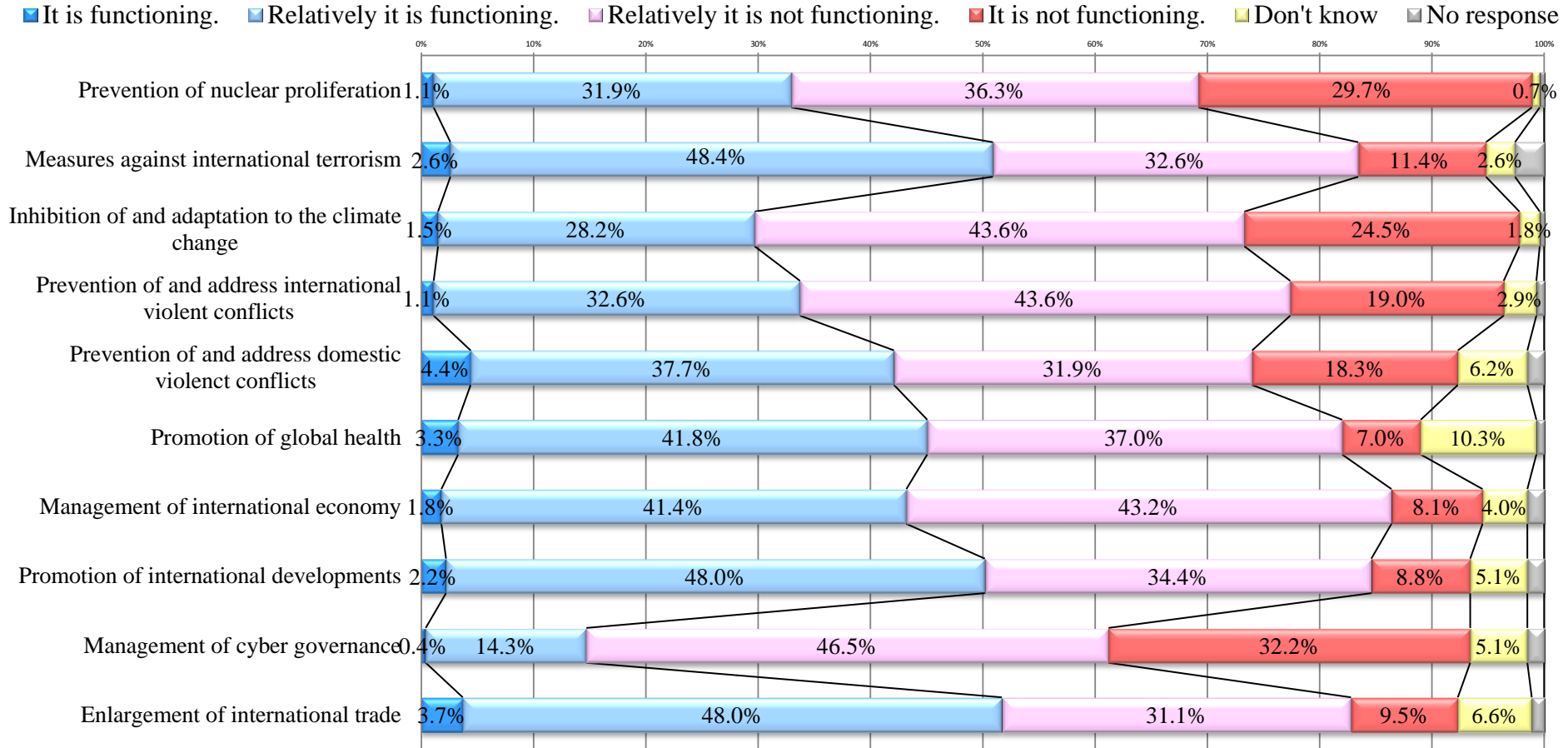
Which of the following global issues should be prioritized in 2019? (Choose two)



	Prevention of nuclear proliferation	Measures against international terrorism	Inhibition of and adaptation to the climate change	Prevention of and address international violent conflicts	Prevention of and address domestic violent conflicts	Promotion of global health	Management of international economy	Promotion of international developments	Management of cyber governance	Enlargement of international trade	Others	No response
2019	32.2%	16.8%	33.3%	20.1%	4.0%	2.2%	37.4%	2.9%	38.8%	4.8%	6.6%	0.4%

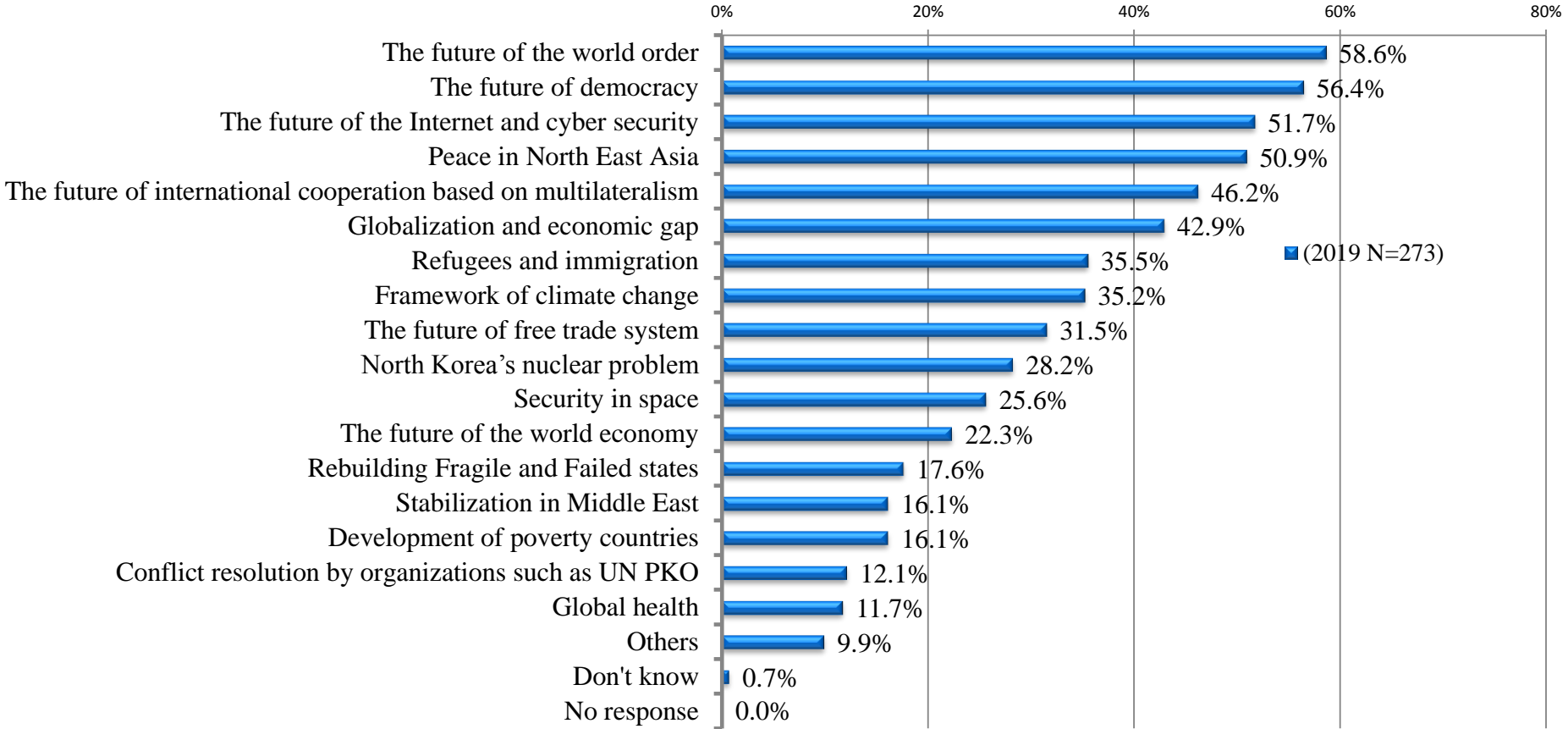
How do you evaluate the current state of global governance in each field? (Choose one for each)

2019
N=273



【Global issues the Genron NPO should take up on】

Which issues do you think that the Genron NPO should take as discussion topic?
(Choose as many answers as you think)



	The future of the world order	The future of democracy	Globalization and economic gap	The future of international cooperation based on multilateralism	The future of free trade system	The future of the world economy	Refugees and immigration	Framework of climate change	Stabilization in Middle East	North Korea's nuclear problem	Peace in North East Asia	Development of poverty countries	Global health	Conflict resolution by organizations such as UN PKO	Rebuilding Fragile and Failed states	The future of the Internet and cyber security	Security in space	Don't know	Others	No response
2019	58.6%	56.4%	42.9%	46.2%	31.5%	22.3%	35.5%	35.2%	16.1%	28.2%	50.9%	16.1%	11.7%	12.1%	17.6%	51.7%	25.6%	0.7%	9.9%	0.0%