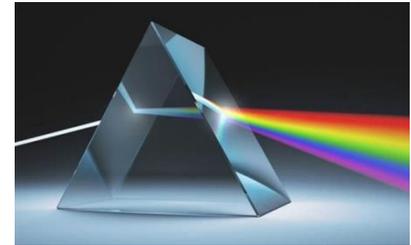


# The China Prism



Many global business leaders are following the U.S.-China trade war and the latest developments of the wider geopolitical and economic strategic rivalry on a day-to-day basis. Given the importance of China as a market, supplier and as a source of competition - and with reported scenarios including a decoupling of global supply chains and technology ecosystems - decision-makers and influencers need to carefully consider how current tensions affect their companies now and in the future.

As China moves ever closer to becoming the world's largest economy, further up the value chain and closer to the tech frontier in many areas, global business leaders and corporations require an increasingly sophisticated, nuanced and multi-faceted understanding of the country and its people. This understanding is vital - and needs to go well beyond keeping up with day-to-day developments - to effectively calibrate business strategies and the communications and public affairs that support them in the years and decades to come.

Global business leaders need to be able to get to grips with the many paradoxes that characterize modern China. They also need a sense of history and a long-term perspective as well as an appreciation for Chinese culture and how it shapes attitudes to myriad topics ranging from governance, to intellectual property, pricing and parenting.

Given the evolving geopolitical situation, they also need to grasp and balance both Chinese and international stakeholder expectations regarding their role in China's development.

So, while it can be tempting to try to simplify China or reduce it to single factors or the latest development, this is insufficient for leaders who seek to maximize the opportunities whilst still managing the risks presented by a China that is growing larger and ever more complex.

International business leaders more than ever require a sophisticated China prism that is capable of refracting the full spectrum of China's growth, illuminating all the potential areas of alignment for global enterprises, and the various instruments and impediments a company may be seen to pose - at a given point in time, and with an eye to the future. This prism needs to be able to refract the historical, cultural and political dimensions of doing business in and in relation to China, including international stakeholder views about China and the role of foreign companies in its development.

***Balancing Stakeholders***

Since the beginning of the “Opening and Reform” period, the key to success for global enterprises in China has always been alignment with China’s development agenda, and the ability to make a positive impact on China’s economy.

As that agenda has evolved and grown increasingly complex over time, global enterprises have needed to maintain an increasingly sophisticated understanding of China’s priorities and goals, so as to both mitigate risks and to capitalize on opportunities for mutual benefit. This includes an understanding of the way China’s strategy to utilize foreign investment and the presence of global enterprises is being continuously calibrated to serve wider strategic objectives. Historically and today, companies seen as instruments of or supportive of China’s development efforts and goals have stood to gain, while those viewed as impediments have found it difficult to achieve their goals.

In the evolving geopolitical environment global firms are however coming under increasing scrutiny and pressure from international stakeholders in relation to China – so these businesses now need to balance concerns about China from other stakeholders even more carefully.

The prism needs to be capable of refracting what appear to be contradictory elements or dimensions. In this article, we outline some of the key paradoxes that exist in China, while providing an indication of some of the core historical and cultural dimensions to be illuminated. As geopolitical tensions increase, understanding the nuances of the environment in China is more important than ever to minimize risks both in the country and with stakeholders abroad. To address this, we will also provide some recommendations for how global companies can navigate the future.

**Paradoxical Dimensions**

<p><b><i>Centralizing Power</i></b></p> <p>On the one hand, power in China has been recentralized in many aspects in recent years as the Communist Party plays a more assertive and central role and has leveraged technology to disseminate its message (e.g., Study the Great Nation app).</p>	<p><b><i>Network Effects</i></b></p> <p>On the other hand, information technologies have also enabled a wide range of stakeholders to participate in public affairs and enabled scrutiny that arguably leads to more responsive government.</p>
<p><b><i>Increasingly Global Outlook</i></b></p> <p>On the one hand, Chinese are increasingly looking beyond China for opportunities and experiences and have had much greater exposure to the world through travel, study,</p>	<p><b><i>Rising Patriotism</i></b></p> <p>On the other hand, Chinese are becoming more patriotic and confident in their achievements as a nation and as a people. This patriotism has arguably increased in response</p>

<p>investment and consumption of media. Each year sees increases in the number of Chinese choosing to study abroad: In 2018, 662,100 Chinese students were studying abroad, up 8.83% from 2017. A total of 5.86 million Chinese have studied abroad from 1978 to the end of 2018.</p>	<p>to actions taken against China by the U.S. as manifest for example in “patriotic purchasing behavior”. It is important to understand rising patriotism can present both challenges and opportunities for China’s leaders – who may for example face greater pressure to take a hard position defending China’s interests.</p>
<p><b><i>Innovation</i></b></p> <p>On the one hand, China is investing and making progress in innovation in myriad fields from e-commerce, transportation, and manufacturing to 5G. This is evident in the numbers of patents and engineers generated in China, and in long-term strategies to move China up the value chain. China is particularly strong at second phase innovation and this has certainly enabled it to take a larger share of global markets in many areas. Science policy experts from the European Commission and others have concluded China has already become a research and innovation powerhouse and is on track to compete with the E.U. and U.S. for industrial and technological leadership by 2049. China is meanwhile calling for more “indigenous innovation” and preparing a “plan B” in case tech “decoupling” accelerates amid ongoing U.S.-China conflicts, although the pace, extent, and cost of this “decoupling” are very uncertain.</p>	<p><b><i>Technology Dependency</i></b></p> <p>On the other hand, China is not as strong in novel technology innovation and still highly dependent on imported technologies in many areas, especially in the most challenging fields of science and technology. This is evident in the relatively low number of triadic patents (patents registered in United States, Europe and Japan simultaneously) and in data points such as the fact that it still spends more each year on imported semiconductors than on imported oil. China’s success is also uneven with strengths in ICT unmatched in other priority areas such as pharmaceuticals, for example. “Tech decoupling” would bring short-term pain and present major challenges to China – while spurring China to become much less reliant on foreign technologies.</p>
<p><b><i>Pragmatism</i></b></p> <p>On the one hand Chinese are very pragmatic, and the success of the last 40 years of opening and reform lifting almost a billion people out of poverty can largely be attributed to a pragmatic and adaptive approach to development and meeting challenges. This was communicated in the early phase of opening and reform through slogans such as “it does not matter if the cat is black or white” and “crossing the river by feeling the stones” – and is still very much in evidence in China’s</p>	<p><b><i>Ideology</i></b></p> <p>On the other hand, ideology is arguably making a comeback, as the Party under President Xi seeks to maintain its control and legitimacy and manage issues such as corruption. At the just held 4th Plenum meeting President Xi Jinping delivered a communique explaining the Communist Party Central Committee’s decision on some major issues concerning how to uphold and improve the system of socialism with Chinese characteristics. That said, it can be argued</p>

approach to the myriad of challenges it faces, including the trade war. China’s calibration of the approach to One Belt One Road and Made in China 2025 in response to international concerns as well as China’s engagement with foreign companies – particularly at present – to counter overseas China hawks continue to be examples of China’s pragmatism.

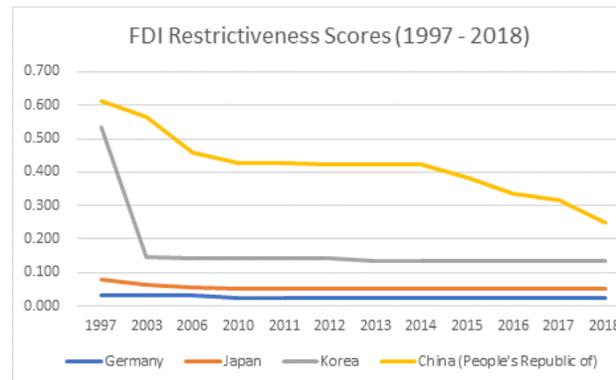
that by referencing “Chinese characteristics” (as leaders since Mao have done) there is a streak of pragmatism in China’s governing ideology and the emphasis on ideology is itself pragmatic from the perspective of what needs to be done to maintain legitimacy.

***Globalization and Opening***

On the one hand, China’s core strategy to accelerate development has been opening to foreign investment and integration with global industry and innovation ecosystems. Foreign investment in China continues to grow and China is expanding market access for foreign companies in a range of areas, recently extending to financial sectors. China just took the 31st spot on the World Bank’s ease of doing business rankings, up from 46th a year earlier and overtaking France. China is emphasizing a commitment to openness despite rising trade protectionism globally, with the China International Import Expo – which opened this week in Shanghai – providing an opportunity to demonstrate this. China is also advancing its China Going Global strategy (e.g., through overseas M&A) and initiatives such as One Belt One Road which increase its role and influence on the global stage. China is meanwhile contending with increased restrictions on Chinese investment (e.g., in the U.S. and the E.U.) and other measures that limit China’s global influence and expansion.

***Barriers and Self-sufficiency***

On the other hand, China still limits participation for foreign investors in many areas. The OECD FDI Regulatory Restrictiveness Index shows that in 2018 - despite huge improvements from its score in 1997 - China still scored 0.251, compared to Germany at 0.023 and Japan’s 0.052 – meaning it is still much more restrictive when it comes to foreign investment. The regulatory playing field for foreign and local companies remains uneven and the international business community continues to call for greater reciprocity.



Recently, there has also been a revival of calls in China for self-sufficiency in areas including foods, energy and technology driven in part by geopolitical concerns. Foreign investors also continue to have concerns about China’s intellectual property and technology transfer situation – some driven by misunderstanding, which could be clarified via a direct and targeted communication effort.

	<p><i>(Note: calls for reciprocity in terms of current market access sometimes ignore or are ignorant of the fact that other countries were also comparatively restrictive with foreign investment at comparable stages of development while they sought to nurture local champions and industries)</i></p>
<p><b>Public Sector</b></p> <p>One the one hand, the state-owned sector of the economy is very large and, in some ways, growing; SOEs (state-owned-enterprises) are being consolidated and subsidized in various forms as part of China’s “socialist market economy”. SOEs in China are not just businesses, they are often the vehicles of the Party / state used to achieve broader policy objectives, such as financial and social stability. Notably, China halted a dispute at the WTO in June over its claim to be “a market economy”. In addition, “civil-military fusion” continues to be a hotly debated and scrutinized area as many in the international community have concerns about investment by the Chinese government in growing capacity and innovation that is applicable in both these domains.</p>	<p><b>Private Sector</b></p> <p>On the other hand, China emphasizes reliance on market forces and China’s private sector is developing fast and is often underestimated by outside observers. A recent World Economic Forum working paper stated that “China’s private sector is now serving as the main driver of China’s economic growth.” The same paper noted that the private sector provides 90% of new jobs and that private wealth is responsible for 70% of investment and 90% of exports. Nevertheless, government interventions with private companies still widely exist. The Chinese government has indicated however it is responding to calls from the private sector for greater property rights protection, rule of law, and less external intervention to better level the playing field. “Competitive neutrality” (between state and private sectors) - if more fully realized - would benefit the private sector in China, including foreign companies.</p>
<p><b>Confucianism</b></p> <p>On the one hand, Confucianism, which has also made a comeback in the past decade, is based on the understanding the people are inherently good but unequal. People need to be cultivated and developed and there needs to be a well-functioning hierarchy with benevolent leaders at the top for society to be harmonious.</p>	<p><b>Legalism</b></p> <p>On the other hand, elements of Legalism, another ancient governance philosophy which assumes people have bad tendencies and need to be ruled with sticks and carrots (in that order), can also arguably be seen in governance methods today (combined with elements of Confucianism to make it more palatable as has arguably been the case since at least the Han dynasty). China’s developing social credit system is arguably one such example.</p>

#### **Rich**

On the one hand, home to 1/5th of the world's population and with an amazing record of sustained economic growth – China has generated many billionaires and millionaires – and as a nation has accumulated wealth through decades of 10%+ GDP growth. Certain regions have reached levels of development comparable to western Europe.

*(Note: growth has moderated in recent years to levels which most countries would be very happy with (6%+) and arguably reflect China's higher level of development. It is important to consider this growth is on a massively expanded economic base).*

#### **Inequality**

On the other hand, China's still suffers from major income and developmental inequalities with some regions still very underdeveloped and experiencing poverty. China is far from rich when we consider the nominal per capita gross domestic product of China was just a sixth of America's in 2018. In 2015, China scored 50 points on the Net Gini Index<sup>1</sup>, compared to LatAm – which averaged a slightly more equitable 41, while elsewhere in Asia, the ASEAN5 scored 38. A 2016 study from Peking University found that the top one percent of Chinese controlled over one-third of the country's wealth.

The share of wealth in the hands of individuals as opposed to government and companies is also very limited compared to advanced economies.

There is a risk that rapid technological progress and China's increasing technology competency may only further expand the divide through labor saving technologies that eliminate jobs and generate high profits for a few.

Meanwhile, decreased social mobility (which is lower than in many European countries, Japan and Canada) is becoming an issue in an avowedly socialist country.

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<sup>1</sup> The Gini coefficient is the most widely recognized measure of income inequality globally.

#### Historical, Long-term Perspective

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Chinese are among the most historically minded and literate people in the world. They see patterns and cycles in history which are highly relevant to the present and future. They are also very oriented towards the long-term (on a key measure of long-term orientation Chinese scored 87/100 compared to 24/100 for Americans and 35/100 for Danes, for example) arguably reflecting a less optimistic view of the future in certain respects.

The Chinese sense of history and vision for the future is reflected in the “Chinese Dream” - one of the signature ideas of China’s President Xi Jinping.

The core narrative is that China, for long-periods of human history the world’s most advanced civilization, became weak and fell behind in the past two centuries in large part due to foreign invasions and imperialism, but will be restored to greatness and rejuvenated under the leadership of the Communist Party. It is indeed sometimes referred to as “the Chinese Dream of the great rejuvenation of the Chinese nation” (and could also perhaps be referred to as “Make China Great Again” or “MCGA”).

The two historically-minded “centenary goals” for China’s renewal - set at the 18th National Congress of the Communist Party of China in 2012 – are an attempt to define what the Chinese Dream is, galvanize support among key internal stakeholders and the public, and illustrate a long-term view of development. They are:

1. Building a “moderately prosperous society in all respects” by 2021, before the 100th anniversary of the founding of the Chinese Communist Party
2. Building a developed nation (“rich, strong, democratic, civilized and harmonious socialist modern country”) by 2050, around the 100th anniversary of the founding of “New China” (Communist China)

And today, when it is perceived that attempts are being made to block or contain China’s development or progress towards these goals (e.g., placing constraints on Chinese companies doing business with American firms) or when companies are perceived to have crossed one of China’s political-historical “redlines” (e.g., referring to Taiwan as a separate country on the company website) it provokes an adverse reaction that is shaped by historical grievance and a sense of national humiliation, generated by events such as the Opium Wars and the unequal treaties China was forced to accept (e.g., resulting in the handover of Hong Kong to the British, for example).

This long-term view also impacts China’s stance and patience in the trade war. The following from the *People’s Daily*, one of China’s three most important Party media outlets, gives an indication of this:

*“The U.S. has ulterior motives in starting the trade war. Its purpose is to curb China’s implementation of the strategy of “Made in China 2025” and its development of high-tech industries.*

*Nevertheless, the trick will not succeed after all, as the development of China’s emerging sectors, also China’s competitive industries involved in the strategy, will not be contained by these tariffs.”*

When China’s leaders look out into the future they are of course aware of the country’s growth trajectory including predictions that China will become largest economy in the world by 2030.

They are however also acutely aware of a host of challenges China faces in achieving the centenary goals – including a declining labour force, an aging population, diminishing returns on investment, lagging productivity, resource scarcity and environmental risks.

They are also cognizant that the next stage of China's development will be more challenging as the situation for China grows more complex. A recently published report by the Bloomberg New Economy Forum ("The New Economy Drivers and Disrupters Report"), which introduces a new benchmark that for the first time measures competitiveness against the new disruptive forces sweeping the global economy (automation, digitization, climate change, protectionism, and populism), concluded the following:

*On the traditional drivers of development, China outperforms most economies. With rapid modernization of infrastructure, advances in education, and investment in research and development, it's the fourth ranked overall and the highest ranked emerging market. On the disruptive forces reshaping the world economy, from protectionism to climate change, it's much less well positioned, ranking 50th.*

Arguably the most important challenges facing China from the perspective of its leaders have been framed from an explicitly historical, long-term point of view. These are known collectively as the "three traps":

1. **Tacitus Trap** – a concept inspired by the thinking of the ancient Roman historian and statesmen – focusing on what can happen if the government loses political legitimacy and is corrupted by power.
2. **Middle Income Trap** – what happens when countries fail to make a transition from playing catch-up by absorbing technology to generating their own innovation and brands to move up the industrial value chain and become high income economies (as Japan and South Korea notably did in the later-half of the 20<sup>th</sup> century, while many others failed).
3. **Thucydides Trap** – a concept that references the writings of the ancient Greek historian and general writing about the war between Athens and Sparta - examining the dynamics and risk of confrontation between a rising power (e.g. China) and the established power (e.g. U.S.).

China's plans and strategies, including longer term directives such as that which emanated from the 3<sup>rd</sup> Plenum of the 18<sup>th</sup> Party Congress and the Five-Year Plans that frame how China will achieve nearer term objectives, are all geared towards overcoming these longer-term challenges.

### **Growth Trajectories**

While some have raised doubts about China’s economy surpassing the U.S. in size due to factors such as an ageing population and declining workforce, most experts predict China and possibly India will have overtaken the U.S. in size by 2030. Below are two indicative rankings, one from a leading bank and another from the OECD, anticipating an almost identical selection of top 10 economies in 2030, albeit in a different order and using different units of comparison. Both anticipate a similar picture, whereby the Chinese economy has either reached double the size of the United States, or has come very close to doing so.

#### TOP 10 ECONOMIES BY THE YEAR 2030

##### **Standard Chartered**

Country	Nominal GDP (in trillions)
1. China	\$64.2
2. India	\$46.3
3. United States	\$31
4. Indonesia	\$10.1
5. Turkey	\$9.1
6. Brazil	\$8.6
7. Egypt	\$8.2
8. Russia	\$7.9
9. Japan	\$7.2
10. Germany	\$6.9

##### **OECD**

Country	(Constant 2010 PPP) GDP (in trillions)
1. China	\$36.7
2. United States	\$21.9
3. India	\$18.2
4. Japan	\$5.5
5. Indonesia	\$5.2
6. Germany	\$4.3
7. Brazil	\$4.1
8. Russia	\$3.7
9. Turkey	\$3.5
10. United Kingdom	\$3.2

*(Note: OECD outlook does not include figures for Egypt)*

### **Cultural and Generational Dimensions**

Meanwhile, as China potentially grows in importance for many companies – based on the size of the market alone, but also on factors such as supply chains - international business leaders also need to have a better grasp of how Chinese culture shapes behaviours and attitudes that can be very different to the cultures they are most familiar with.

Cultural factors are indeed part of the explanation for the way Chinese view the role of government, business and leaders in society, the attitudes to risks and uncertainty, the interests of the collective versus the individual and the willingness to accept sacrifices for long-term gain. Culture impacts behaviours that can assist or impede collaboration and innovation, that can influence the way Chinese prefer to do deals and what they value most in a relationship – as well as the linkages they perceive between various factors. Leaders that can appreciate these dimensions stand a much better chance of succeeding in

relation to China. Leaders however also need to grasp the difference across generations shaped by the very different life experiences of those born in different decades.

Contrast someone who experienced the deprivations and shocks of the Cultural Revolution and was sent to the Chinese countryside to “learn from the peasants” with a Chinese in their early twenties who has grown up experienced a world of relative freedom and abundance and was sent to the U.S. to learn from American teachers in a prestigious university.

Yet while preferences and attitudes can be quite different as a result – it is important to recognize that deep-rooted culture does not change quickly because of the way it is transmitted from parents to children – and one should not overestimate the differences between one generation and another when it comes to core cultural values in China. It is also important to consider other demographic and regional differences. For example, as third and fourth-tier Chinese cities have emerged as significant pillars of consumption and international enterprises increasingly aspire to access consumers in these locations, understanding the specific dimensions of this target audience, who have likely had much less exposure to the world than those in first and second-tier cities, will be more vital to success than ever.

#### ***Pride in China***

It is critical to understand the multiple dimensions of national pride and patriotism and how they play into decision-making. Don't assume, for example, that Chinese are increasingly choosing a local brand over a trendy global brand just because they want to express patriotism (and are prepared to accept lower quality or less glamour as a trade-off). They are increasingly proud to choose a local brand because they think it is in fact better, more innovative and more relevant to local needs than the global alternatives (while also presenting an opportunity to signal patriotism). The global popularity of a product is now less likely to overcome deep-rooted national sentiment – especially when geopolitical issues flare up – and having a “cut and paste” approach to market analysis and product launch strategies is now even less likely to succeed.

## **Navigating the Future**

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So, what should international business leaders do in view of this evolving context?

Here are some examples from a public affairs and communications perspective:

- Consider how the company can align with China's evolving development needs and objectives (e.g., addressing health needs resulting from aging population) and where the company might also be viewed as an impediment to China's goals (e.g., too dominant or non-compliant)
- Consider China strategy at a global level – thinking through opportunities and challenges in China and around the world – to partner with Chinese stakeholders for shared success
- Build trust and goodwill by communicating a value proposition that aligns with China's priorities and is commensurate with the perceived benefits the company gets from accessing the China

market – while also considering expectations of stakeholders in other key markets and the risk of criticism for being too aligned with China

- Craft narratives that highlight common interests, shared benefits and real impacts – while emphasizing complementary partnerships with Chinese stakeholders (rather than implying superior-subordinate relationships)
- Engage government appropriately to build trust and understanding – while being cognizant of the pros and cons of taking up matters at an industry or company-level and involving home-country governments
- Increase China context understanding at a global level and across the organization
- Consider potential macro scenarios including increased tension between China and other powers, cycles of confrontation and rebalancing and increasing challenges to simultaneously address competing stakeholder expectations
- Plan for potential scenarios directly impacting the company such as being included on China’s “unreliable entity list” or being alleged to have made a political mistake in product marketing
- Build up the capacity of the organization for engaging in public affairs and managing public affairs and geopolitical risks – with effective coordination at a global level
- Map and understand China’s political redlines and taboos
- Map risks from both near, mid and longer-term perspectives – thinking about how the situation may evolve (e.g., a more assertive China, expecting more in return to access to an even larger market)
- Map out and understand key stakeholders and their roles, including thought leaders and policy makers. Cognizant that decisions in China are often top-down along a strict decision-making hierarchy, understand how they are increasingly influenced by networks of stakeholders that can extend beyond China in an internet-enabled public affairs ecosystem
- Map and understand the China watchers and influencers in key markets and their main priorities and how they intersect (e.g. trade, security)
- Review Chinese public policy and think through the opportunities and challenges e.g. to comply with policies around data security, cybersecurity, corporate social credit system
- Anticipate potential impacts as China strives to increasingly become a ‘rule-maker’ as opposed to a ‘rule-taker’ in global governance (e.g., setting global tech standards)
- Increase crisis preparedness by developing tailored crisis systems that are appropriate for the China context (e.g., China’s social media landscape, China’s governance system, company’s risks and operations in China). Train teams to use crisis systems so they are ready to handle challenging situations if they do arise
- Conduct a public affairs risks assessment and develop public affairs and communications plan for major business decisions or new initiatives regarding China (e.g., business restructuring, new R&D or JV investments).

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### About BCW

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BCW (Burson Cohn & Wolfe), one of the world's largest full-service global communications agencies, is in the business of moving people on behalf of clients. Founded by the merger of Burson-Marsteller and Cohn & Wolfe, BCW delivers digitally and data-driven creative content and integrated communications programs grounded in earned media and scaled across all channels for clients in the B2B, consumer, corporate, crisis management, CSR, healthcare, public affairs and technology sectors. BCW is a part of WPP (NYSE: WPP), a creative transformation company. For more information, visit [www.bcw-global.com](http://www.bcw-global.com).

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