

#8 China's Soft Power in Europe

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Key Takeaways

- Chinese soft power in Europe is weakening overall; across 17 countries and EU institutions, China's ability to attract or persuade European publics has declined significantly, despite soft power remaining a stated priority in its foreign policy.
- China uses three main soft power tools in Europe: these include promoting language and culture, shaping its image through media, and leveraging economic influence. Increasingly, economic ties are the most powerful—but also the most controversial—component.
- Economic influence is both China's strongest appeal and a coercive tool: market access, trade, and investment remain central to China's attractiveness in Europe, but practices such as sanctions, export controls, and "unreliable entity lists" are increasingly seen as coercive, blurring soft power and hard power.
- European perceptions of China are increasingly negative or cautious: attitudes vary by country group: from low engagement (e.g., Austria, Hungary) to image management (Italy, Greece), to declining perceptions (e.g., Germany, UK), and outright "free fall" (e.g., France, Sweden). EU institutions show rising vigilance overall.
- China is shifting from attraction to influence management and control of narratives: In response to worsening perceptions, Beijing has become more assertive and sometimes aggressive in messaging (including social media and sanctions), suggesting a shift away from building appeal toward shaping discourse and limiting criticism—even if it reduces "soft power" effectiveness.

Executive Summary

This report, produced by the European Think-tank Network on China (ETNC), assesses whether China still cares about soft power in Europe and maps the diversity of its approaches across 17 countries and EU institutions. Soft power is defined as the ability to influence preferences through attraction or persuasion rather than coercion or payment. While developing soft power remains a stated pillar of Chinese foreign policy, European perceptions of China have deteriorated significantly in recent years, raising questions about the effectiveness of Beijing's strategy.

A first key finding is that Chinese soft power in Europe has fallen on hard times. Across most of the countries analysed, respondents report significantly more negative than positive views of China, with unfavourable opinions reaching historic highs. These trends are driven less by China's

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traditional soft-power tools and more by broader structural factors, including COVID-19, escalating Sino–US rivalry, and concerns over developments in Xinjiang and Hong Kong, all of which have had a stronger impact on perceptions than cultural or diplomatic outreach.

Second, the report identifies three main Chinese approaches to soft power in Europe: promoting Chinese language and culture; shaping China’s image through traditional and social media; and leveraging the secondary soft-power effects of economic strength. Cultural diplomacy, especially through Confucius Institutes, cultural centres, and educational exchanges, remains the foundation of China’s approach. At the same time, economic cooperation is a central driver of China’s appeal, but it is increasingly blurred with coercive elements such as restricted market access, sanctions tools, export controls, and “unreliable entity lists”, making it both a source of attraction and concern.

Third, China has become more assertive in shaping its image, particularly over the past year, by expanding its political messaging toolkit and increasing its use of social media and traditional media channels. This includes systematic outreach via digital platforms and more proactive diplomatic communication. In many cases, this shift reflects not only engagement with European audiences but also messaging aimed at domestic Chinese audiences and global geopolitical competition. Increasingly, these efforts appear designed to manage criticism and prevent negative publicity rather than simply enhance China’s attractiveness.

Fourth, European perceptions of China vary significantly across four country groupings. In Austria, Hungary, Poland, Portugal, and Slovakia, China is largely not a prominent topic of public debate, and soft-power efforts are limited or focused on elite engagement. In Italy and Greece, China’s approach is oriented toward damage control as previously positive perceptions begin to deteriorate. In Germany, Latvia, the Netherlands, Romania, Spain, and the UK, perceptions are becoming more negative and increasingly vigilant, with China’s economic presence still relevant but more politicised. Finally, in Czechia, Denmark, France, and Sweden, China’s soft power is assessed as being in a state of “free fall”, with increasingly critical public and political debate. EU institutions broadly reflect the same trajectory of growing vigilance.

Finally, the report concludes that China’s soft-power ambitions in Europe are increasingly constrained by external factors and domestic developments, including its political system, COVID-19, and geopolitical competition with the United States. These factors now play a more decisive role in shaping European attitudes than traditional soft-power instruments. In response, China’s messaging has become more proactive and, at times, aggressive, including through “wolf warrior diplomacy” and the use of sanctions. Overall, the findings raise an open question within the ETNC community: whether China is becoming less focused on growing its appeal in Europe and more concerned with exercising influence and shaping discourse.