

Horizon Research Group

Chinese Residents' Perception of Environment & Energy

Speaker: Victor Yuan

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Energy, becomes a burning point in China

中石油“愚蠢”？

【本報北京11日電】中國石油集團董事長陳德仁日前在一個內部會議上表示，中石油在國際市場上一直處於被動地位，這與中國石油工業的發展水平不相稱。他呼籲中石油在國際市場上應採取更積極的姿態，爭取主動權。

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21世纪产经

(9-12) 2003.11.27 21世纪经济报道

西气东输源头嬗变 地方与两石油巨头的三方博弈

【本報記者 李曉 魏志勇 北京報導】西氣東輸工程已進入全面施工階段，但氣源問題卻成為各方爭論的焦點。在阿拉善地區，地方、中石油和中石化正展開一場激烈的三方博弈。

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在最近的研討會上，中石油和中石化都發布了各自的氣源方案。中石油主張在阿拉善地區建設大型天然氣田，而中石化則主張在塔里木盆地進行勘探。

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30.16 億元的阿拉善天然氣項目正式宣佈開工。該項目預計可為當地帶來巨大的經濟效益，並為西氣東輸工程提供穩定的氣源。

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國家在作產業布局時，應該如何取得資源產地和市場所在地之間的平衡，兼顧資源地的发展，以實現資源利用的最大化，并謀求东西部产业同步协调发展，恐怕不仅仅是新疆阿克苏的困惑。

东海油气争夺:日本对华日趋强硬

本報記者 李曉 魏志勇

【本報北京11日電】日本政府在最近的一份報告中，明確表示將加強在東海地區的石油和天然氣勘探與開發，這被視為日本對中國在東海地區利益挑戰的回應。

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6月22日，中日兩國外長在東京舉行了第二次中日全面戰略經濟合作對話，雙方就東海地區的石油和天然氣問題交換了意見。

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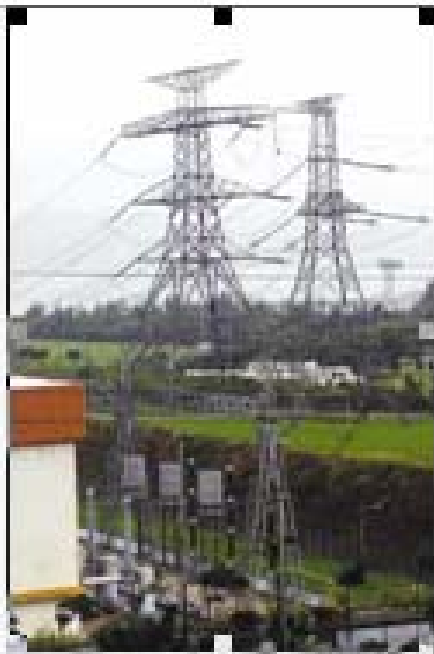
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Energy, becomes a burning point in China

China to Build a Large Nuclear Power Plant Each Year

中国每年要建一个“大亚湾”



“新京报”2004年1月14日报道，中国国家发展和改革委员会核准了核电“远景规划”，到2020年，中国核电装机容量将达到3600万千瓦。这个规划意味着，从2004年起中国每年将至少批准建设两个百万千瓦级核电机组。这意味着中国今后16年每年都要建一座“大亚湾”。

- China's State Development & Reform Commission defined the nation's long-term planning on nuclear power: By 2020, China's installed capacity of nuclear power will hit 36 million kilowatts. That means from 2004 on the country will approve at least two nuclear power generating units of one million kilowatts each year. That means in the next 16 years China will build a nuclear power plant like Dayawan Nuclear Power Plant each year.

Energy, becomes a burning point in China

PetroChina to Undertake the West-East Gas Transmission Project Single-Handedly



- Following the withdrawal of foreign partners - Exxon Mobil, Shell and Russia Natural Gas Industry Inc., PetroChina will undertake the West-East Natural Gas Transmission Project single-handedly. The project involves a total investment of more than R M B 1 4 0 billion .

Environment issue (and also energy issue) ranks at top point

Chinese public pay attention to

Rank	1999	2000	2001	2002	2003
1	Unemployment (21.6%)	Environmental issue (49.2%)	Unemployment (45.2%)	Unemployment (53.5%)	Unemployment (52.9%)
2	Corruption (14.7%)	Unemployment (43.7%)	Environmental issue (41.3%)	Social security (34.5%)	Social security (32.1%)
3	Economy development (11.1%)	Children education (34.7%)	Social security (32.6%)	Environmental issue (29.5%)	Housing reformation (31.6%)
4	Environmental issue (5.6%)	Social security (33.4%)	Economic development (25.8%)	Medicare reformation (26.3%)	Environmental issue (24.3%)
5	Crime-control (5.4%)	Corruption (29.0%)	Housing reformation (25.8%)	Economy reformation (25.7%)	Economy development (22.7%)
6	Job opportunities (3.6%)	Economy development (20.2%)	Corruption (15.4%)	Housing reformation (23.1%)	Medicare reformation (21.4%)
7	Growth of population (3.3%)	Aged problem (19.3%)	Social security (15.2%)	Children education (20.6%)	Corruption (20.7%)

About this survey

Period of survey



May 20-23, 2004

Areas of survey



Beijing, Shanghai, Guangzhou, Wuhan, Chengdu, Shenyang and Xi'an

Sampling method



multistage random sampling

Survey mode



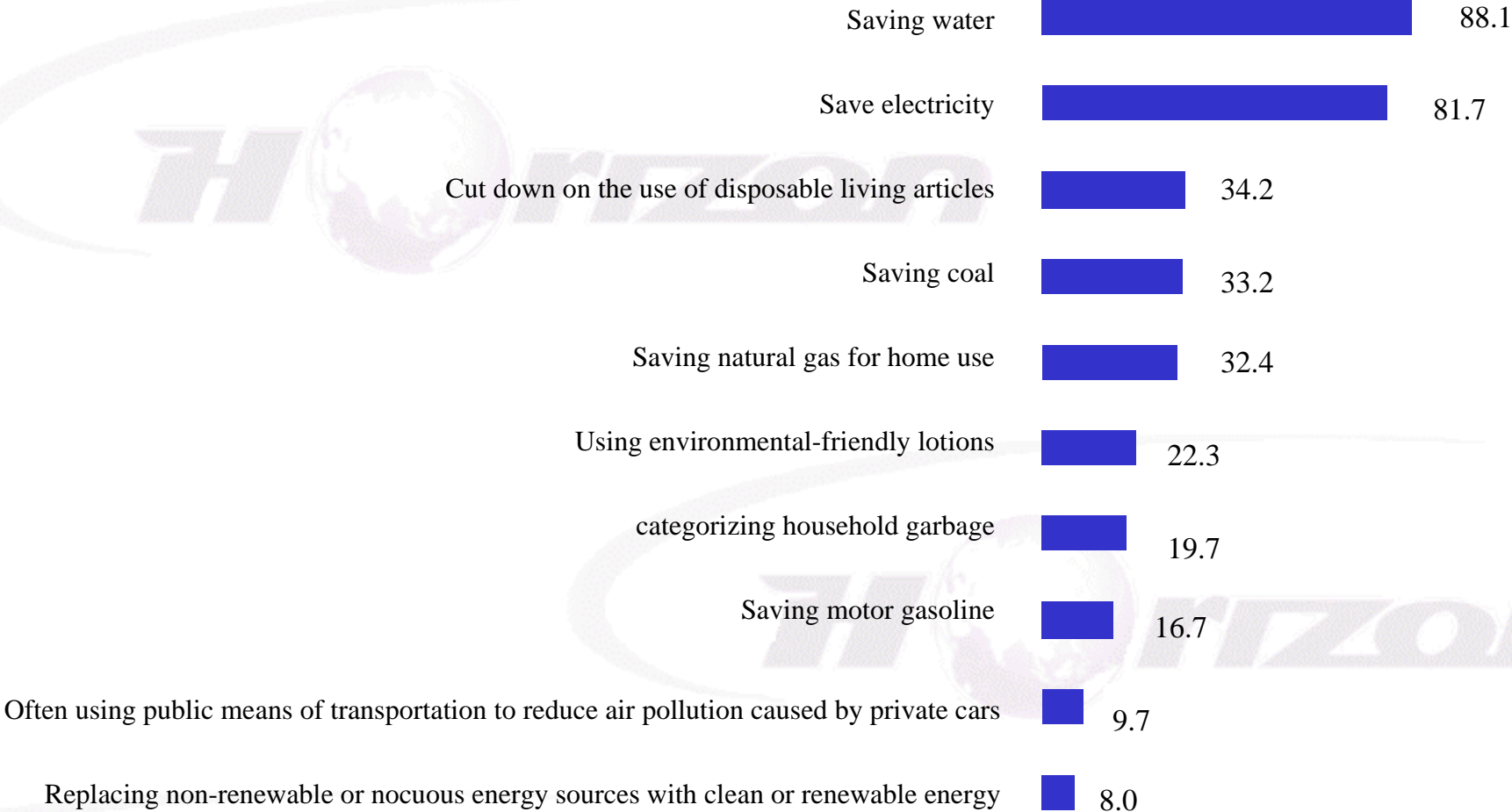
door-to-door interview based on questionnaire

Samples

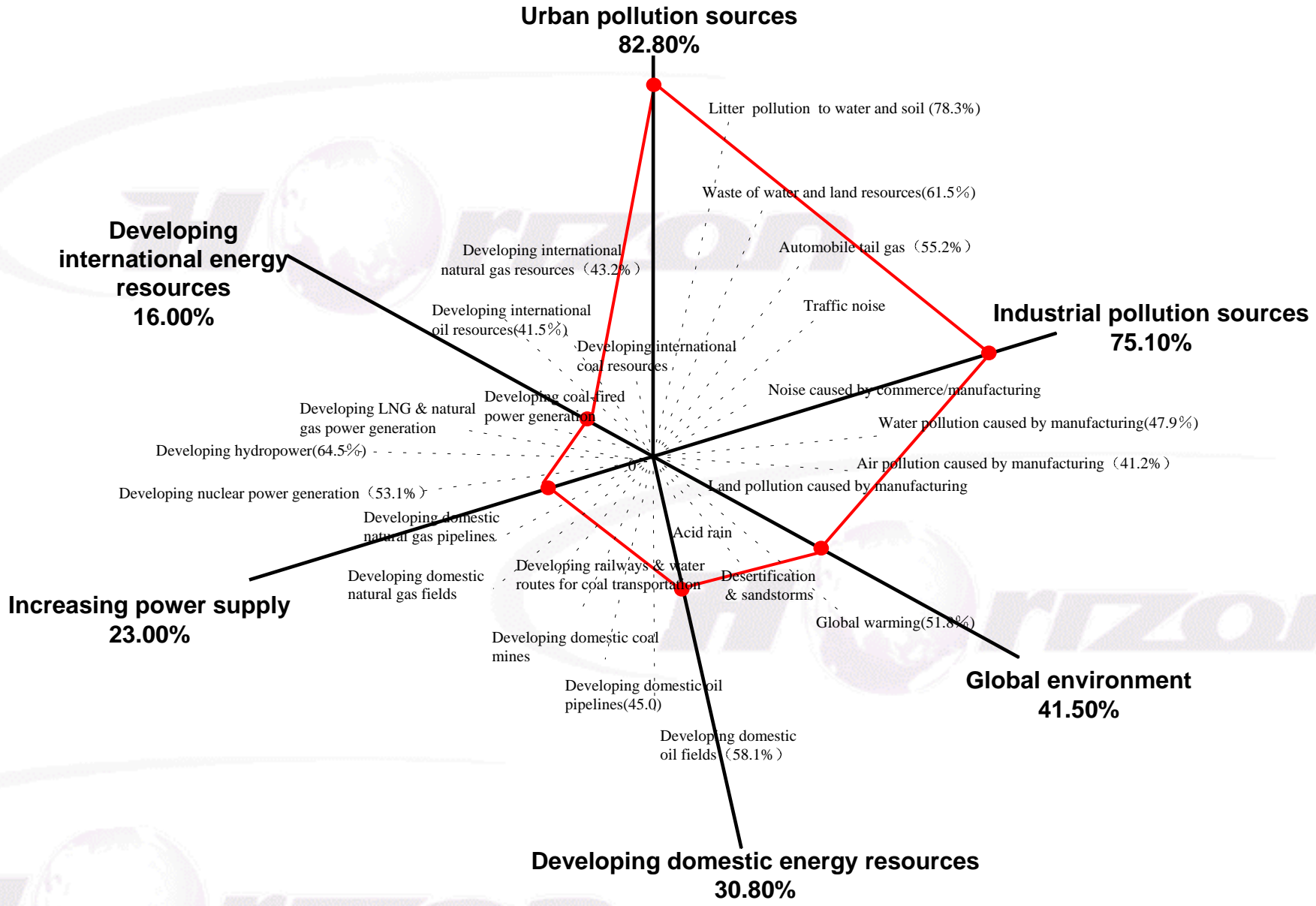


2, 204 local permanent residents aged 14-60

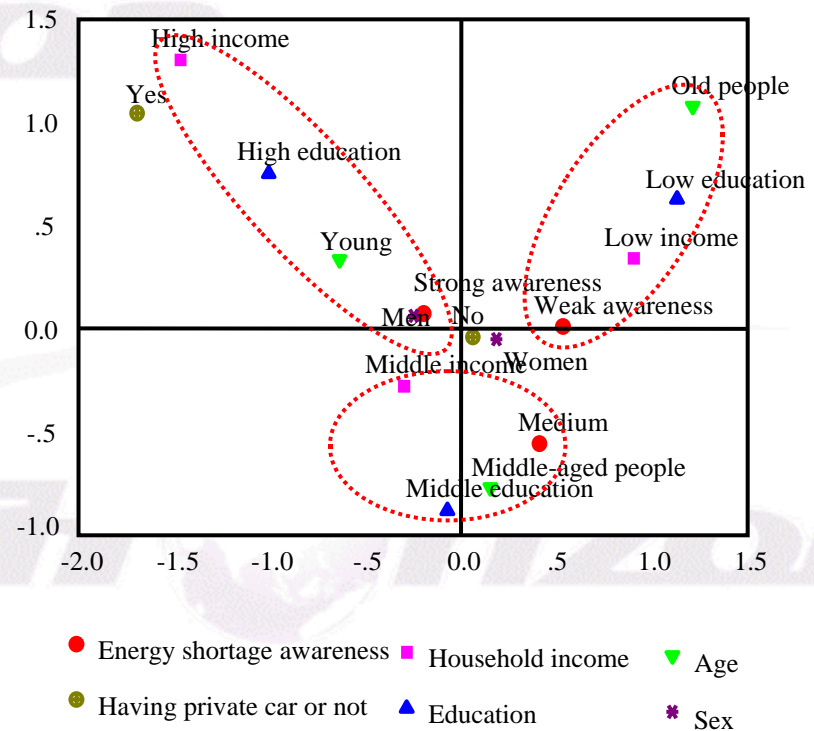
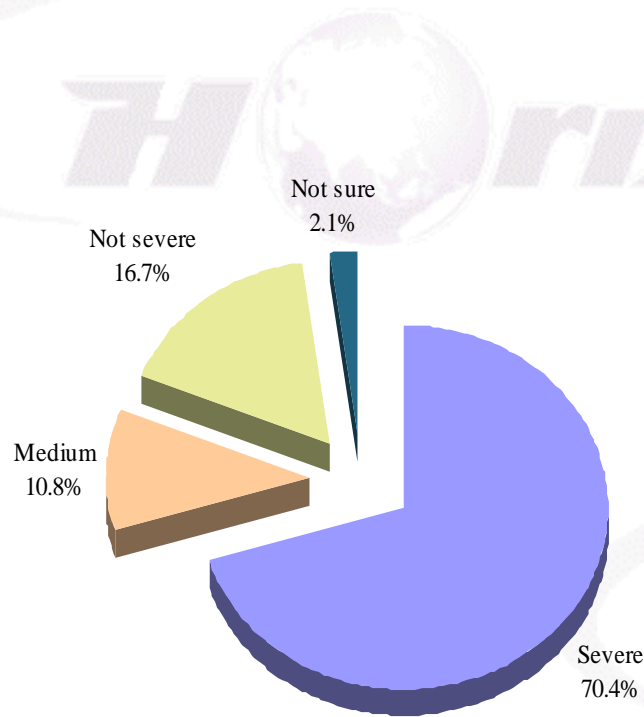
Chinese Residents' Environmental Protection & Energy-Saving Habits



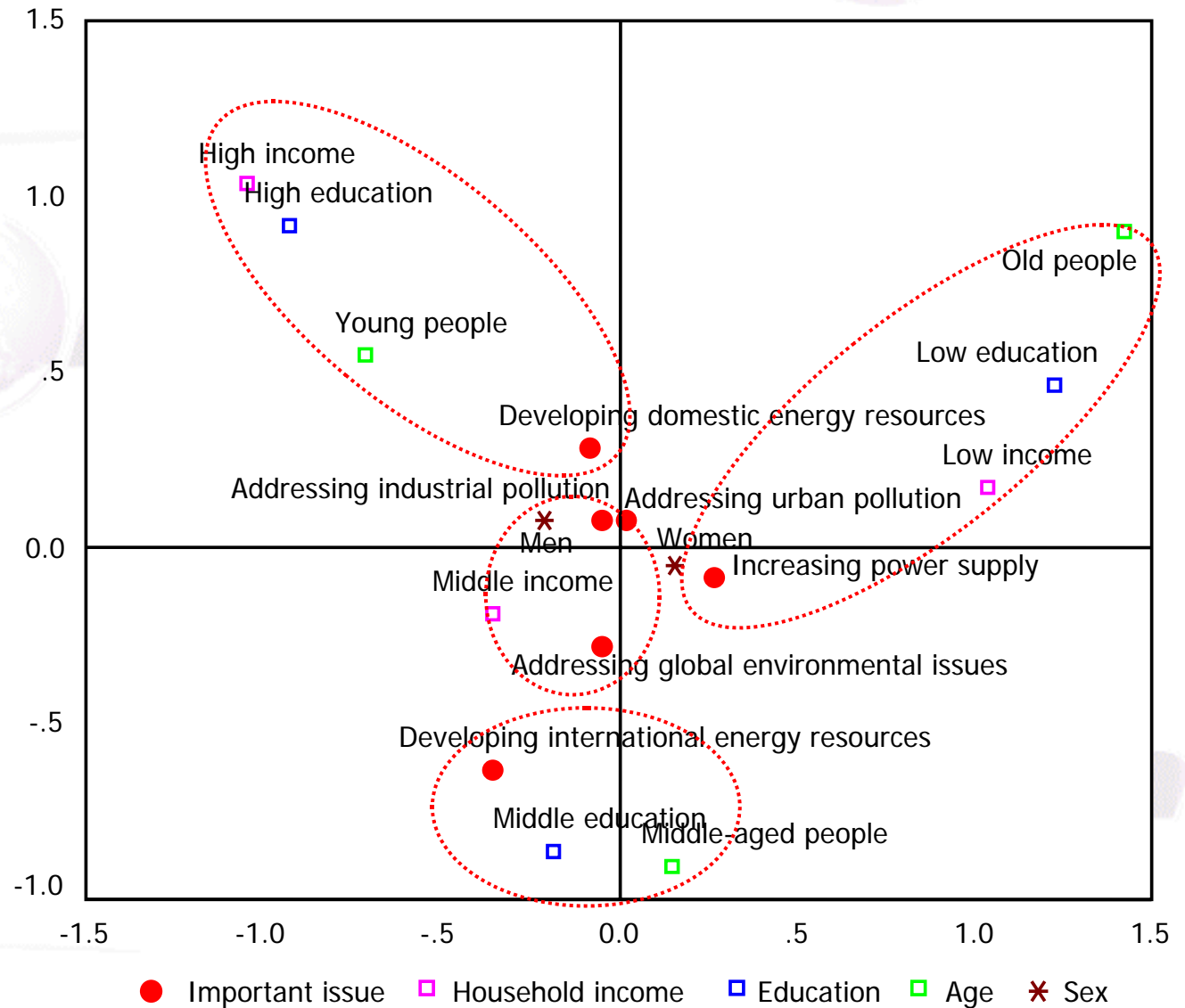
Chinese residents do not pay as much attention to energy issues as they do to environmental protection.



Seventy percent of urban residents think China suffers from severe energy shortage. Highly-educated young men with high income have strong awareness of energy crisis, while old women with low education and low income do not have strong awareness of energy crisis.

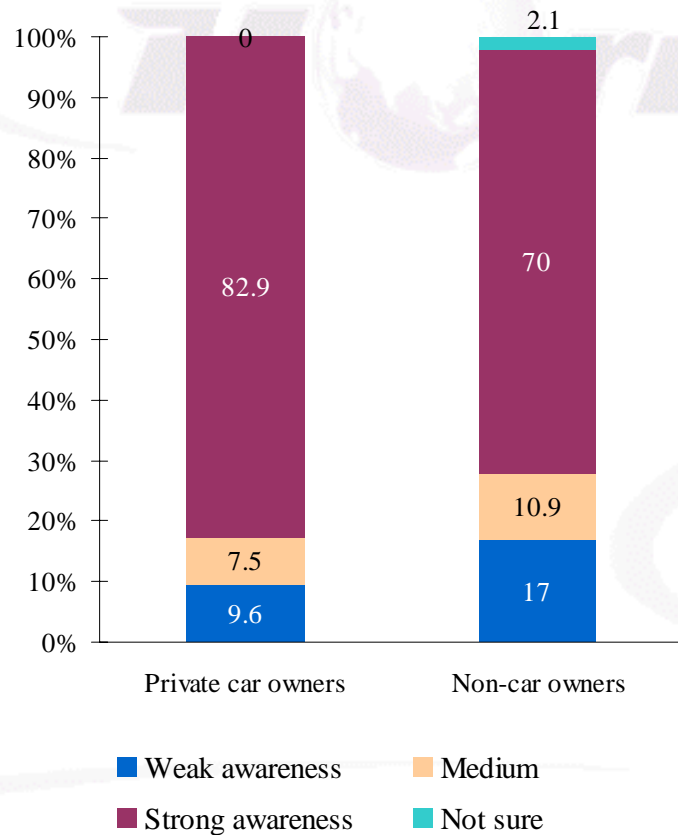


Middle-aged people with middle education lay store by the development of international energy resources; those with low income and low education look to increased power supply; highly-educated young people with high income attach great importance to the development of domestic energy resources. Those with middle income pay more attention to environmental issues than to energy issues.

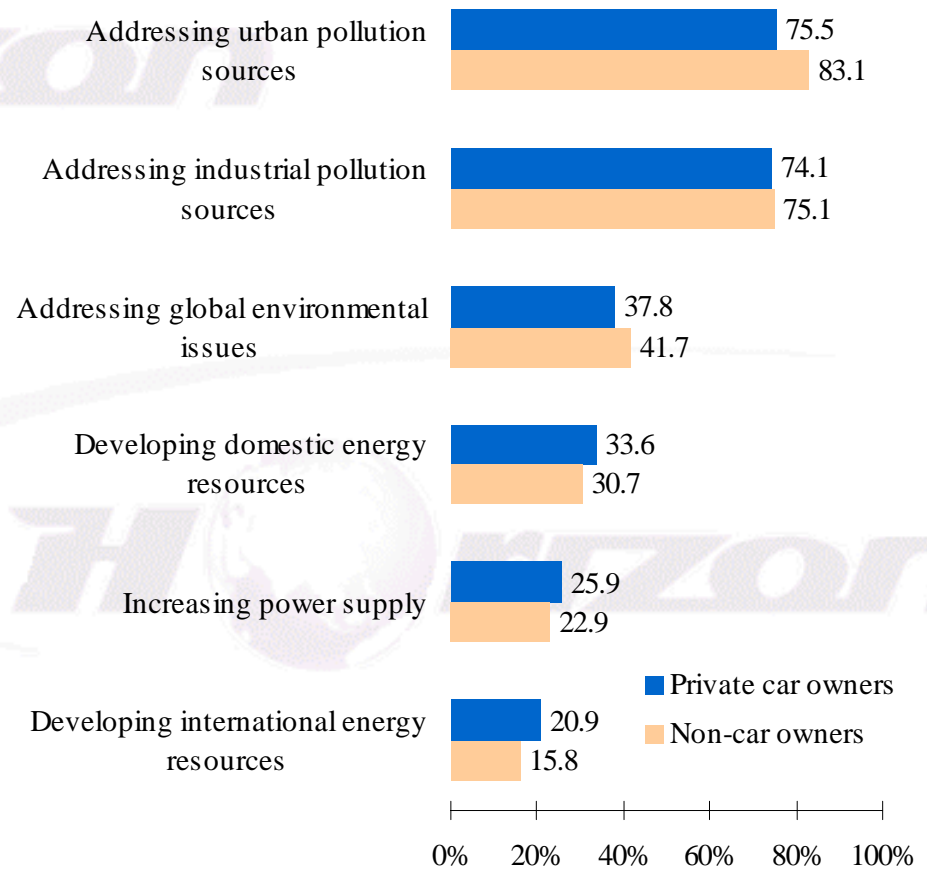


Private car owners are more concerned with energy issues, while those without a car are more concerned environmental protection.

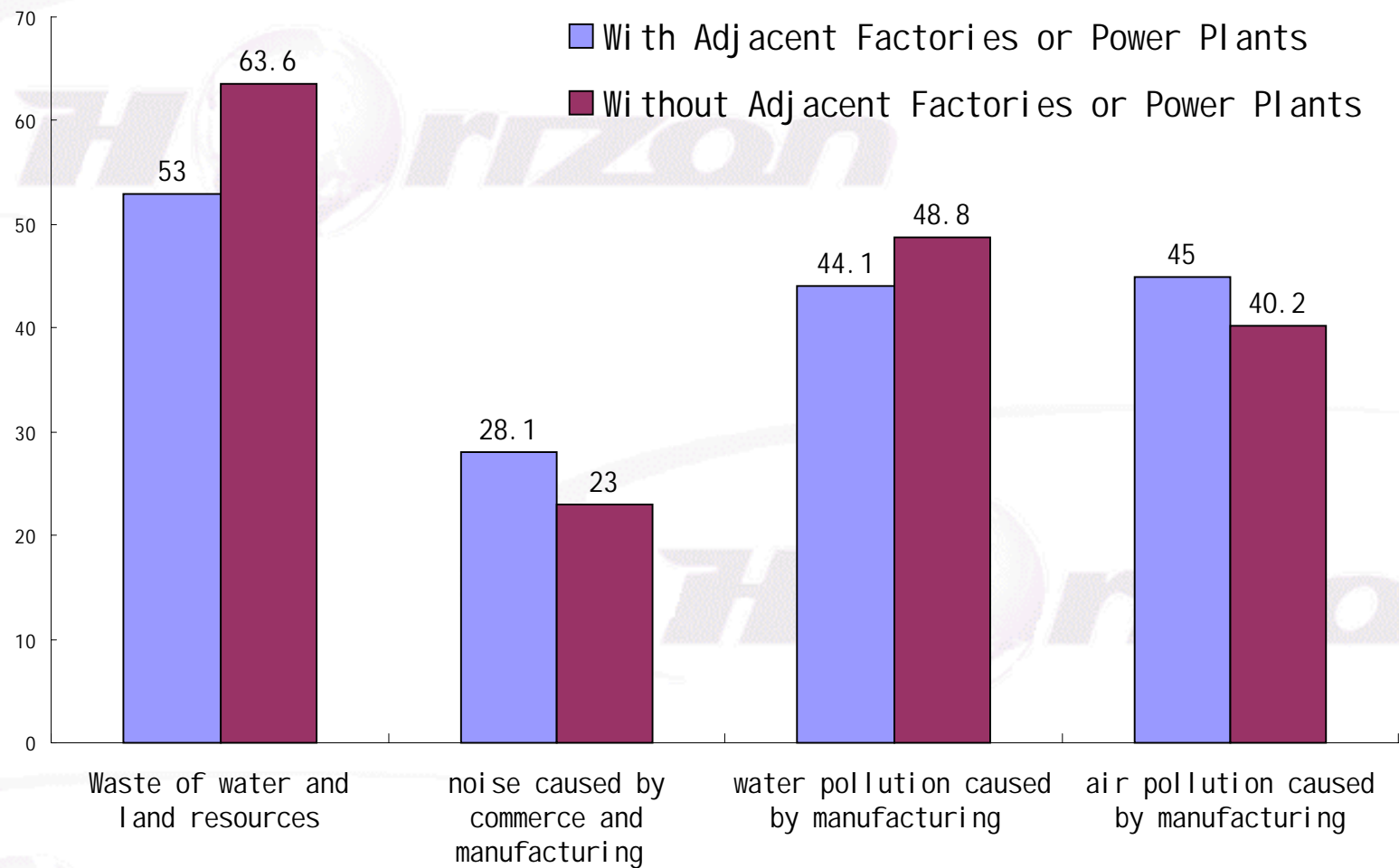
Energy shortage awareness



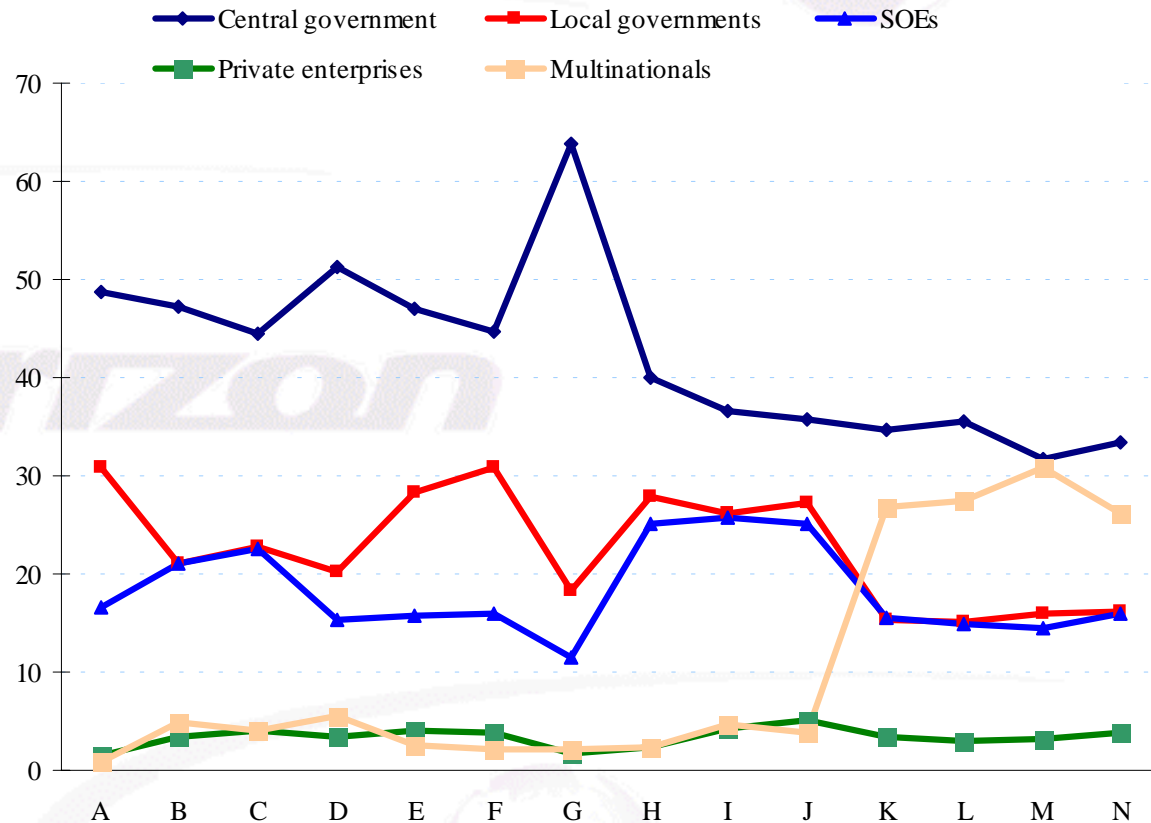
Energy and environmental issues of concern to the residents



Urban residents live near factories or plants pay much attentions to air pollution and noise caused by manufacturing but less attention to the waste of water and land resources



The central government is perceived as the party mainly responsible for energy development and equipment maintenance, especially energy development, multinationals are deemed to play an important role in the development of transportation pipelines for energy sources and shipping, private enterprises do not have high confidence in energy development or equipment maintenance.



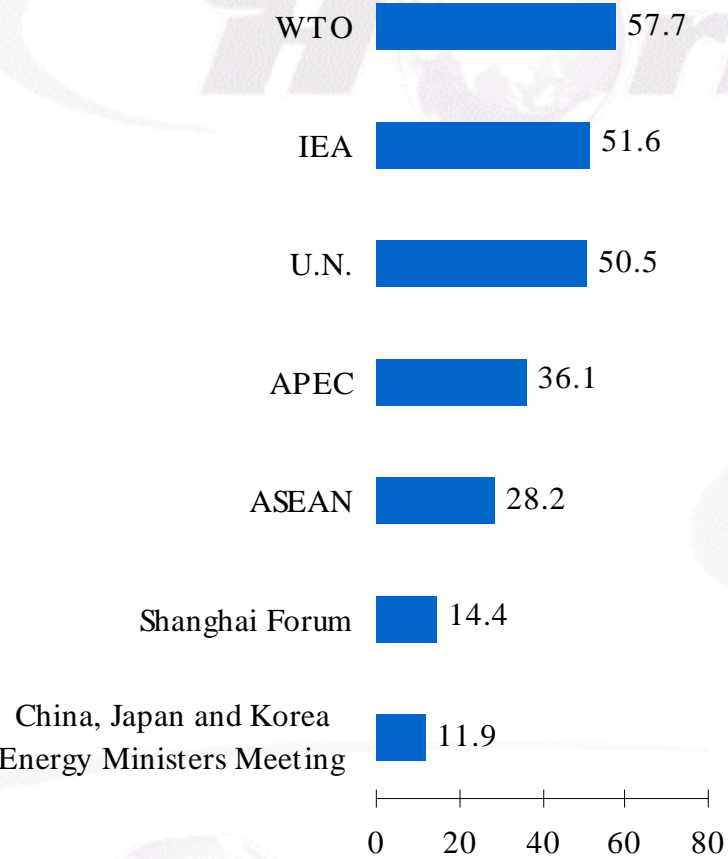
A: Developing domestic coal resources
 B: Developing domestic oil fields
 C: Developing domestic natural gas fields
 D: Strategic reserves of crude oil and raw materials
 E: Building hydropower stations

F: Building wind power stations
 G: Building nuclear power stations
 H: Transportation of domestic coal
 I: Building of domestic oil pipelines
 J: Building of domestic natural gas pipelines

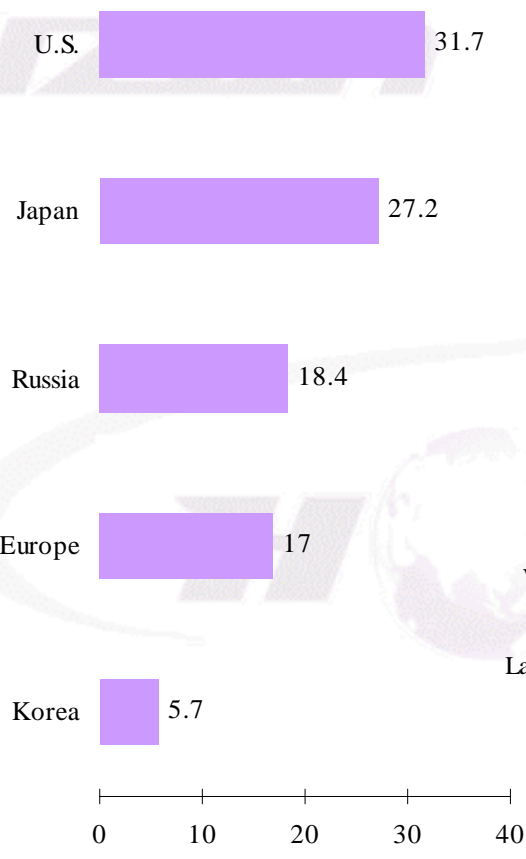
K: Shipping of coal from coal-exporting countries to China
 L: Building of oil pipelines from oil-exporting countries to China
 M: Building of gas pipelines from natural gas-exporting countries to China
 N: Gasification treatment of natural gas and shipping of natural gas from exporting countries to China
 O: Developing foreign oil fields

Organizations & Countries Playing an Important Role for China on Energy Issues

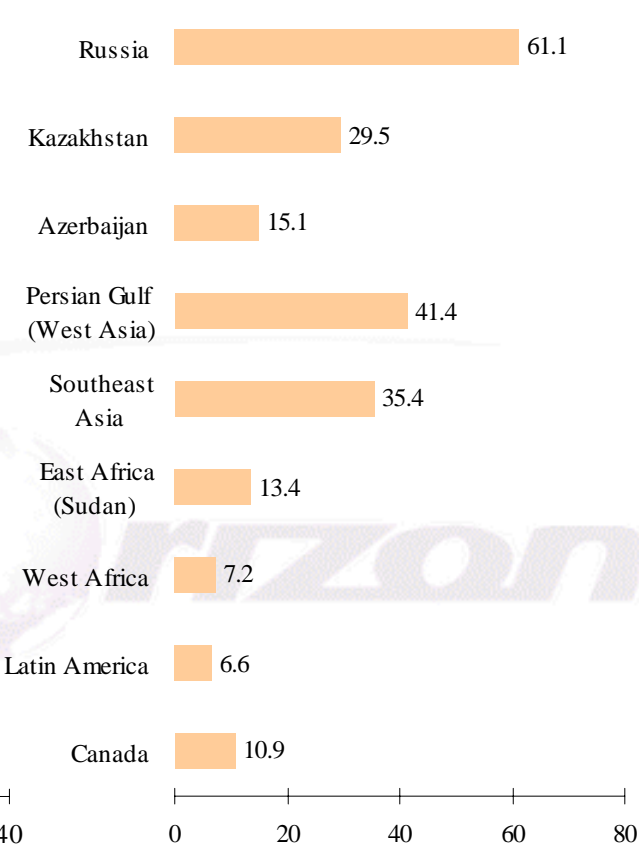
Chinese residents endorse international organizations more than they do regional organizations



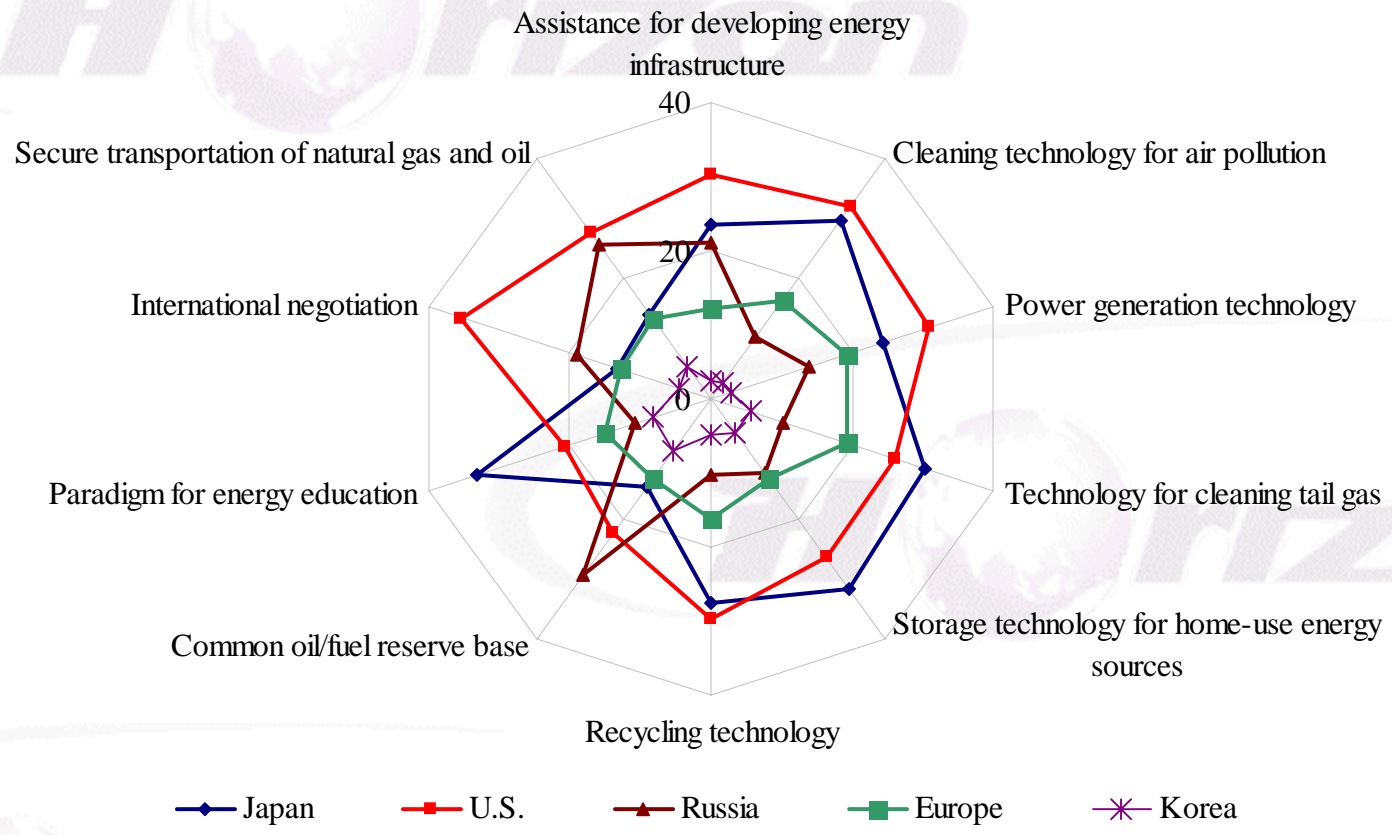
Countries playing an important role for China on energy issues



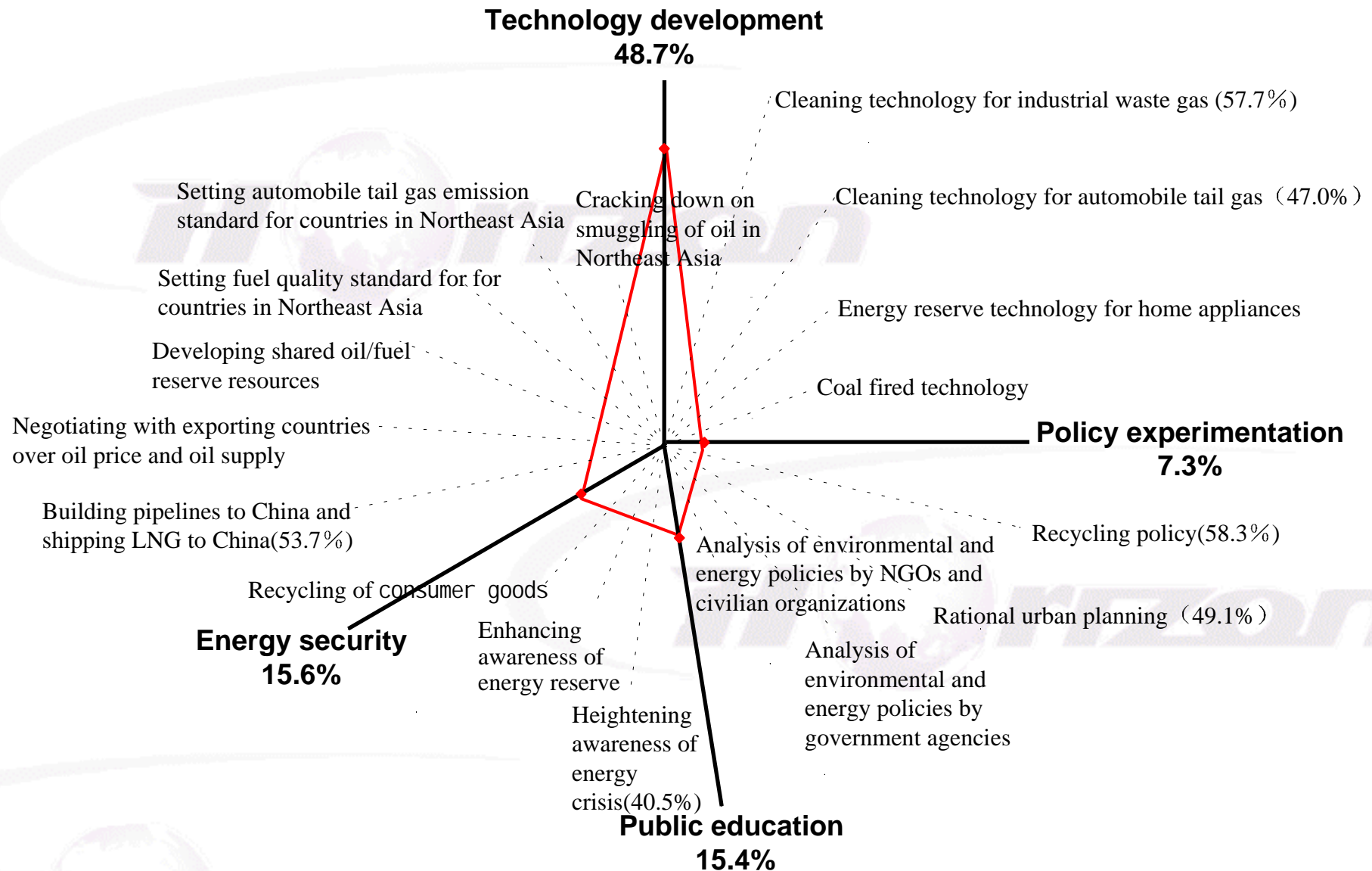
Important oil suppliers for China



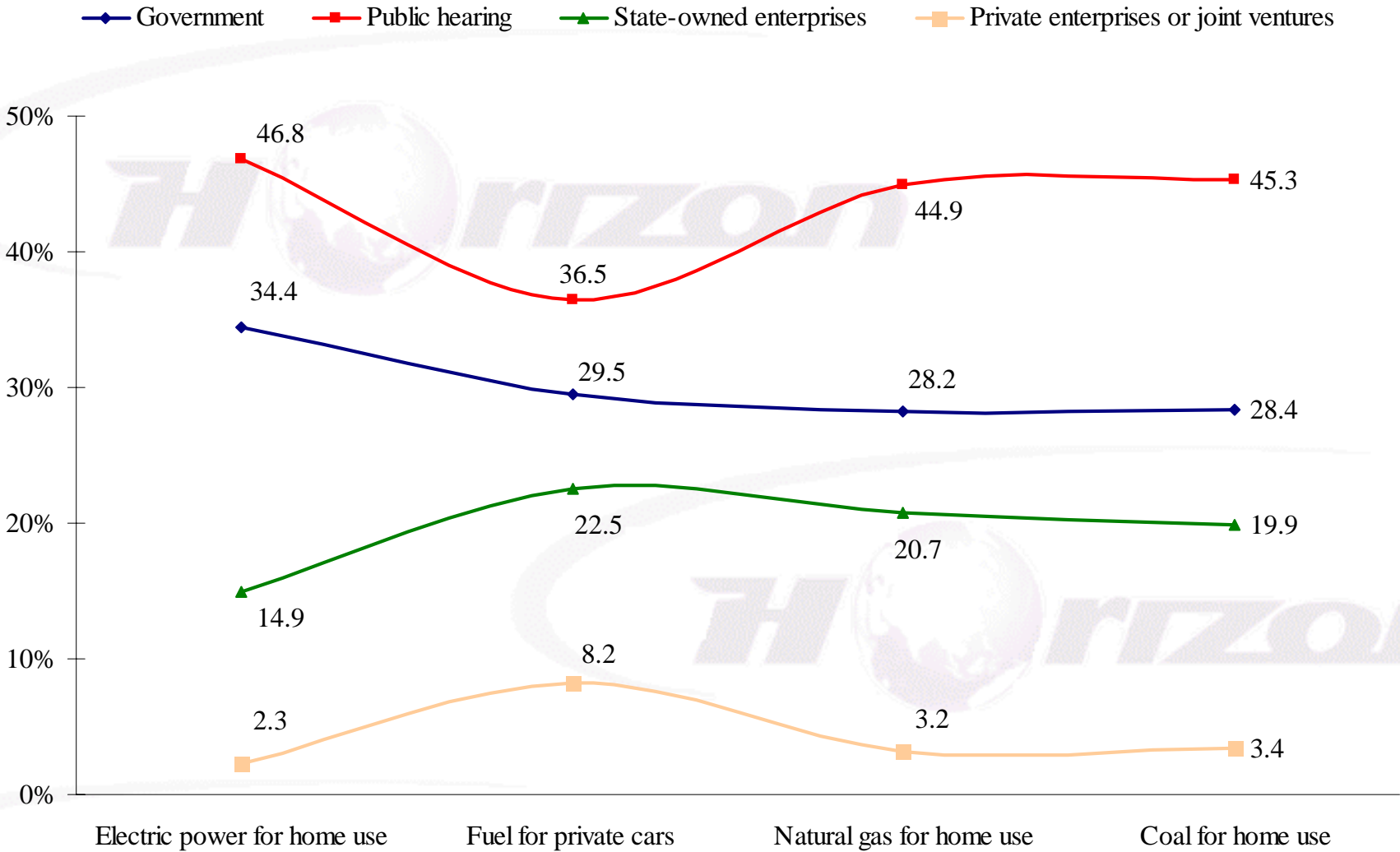
The U.S. is deemed to play the most important role in providing assistance for China in the development of energy infrastructure, power generation technology and international negotiations; Japan is deemed to play the most important role for China in tail gas treatment, storing home-use energy sources and energy education; Russia is deemed to be the most important common oil/fuel reserve base for China.



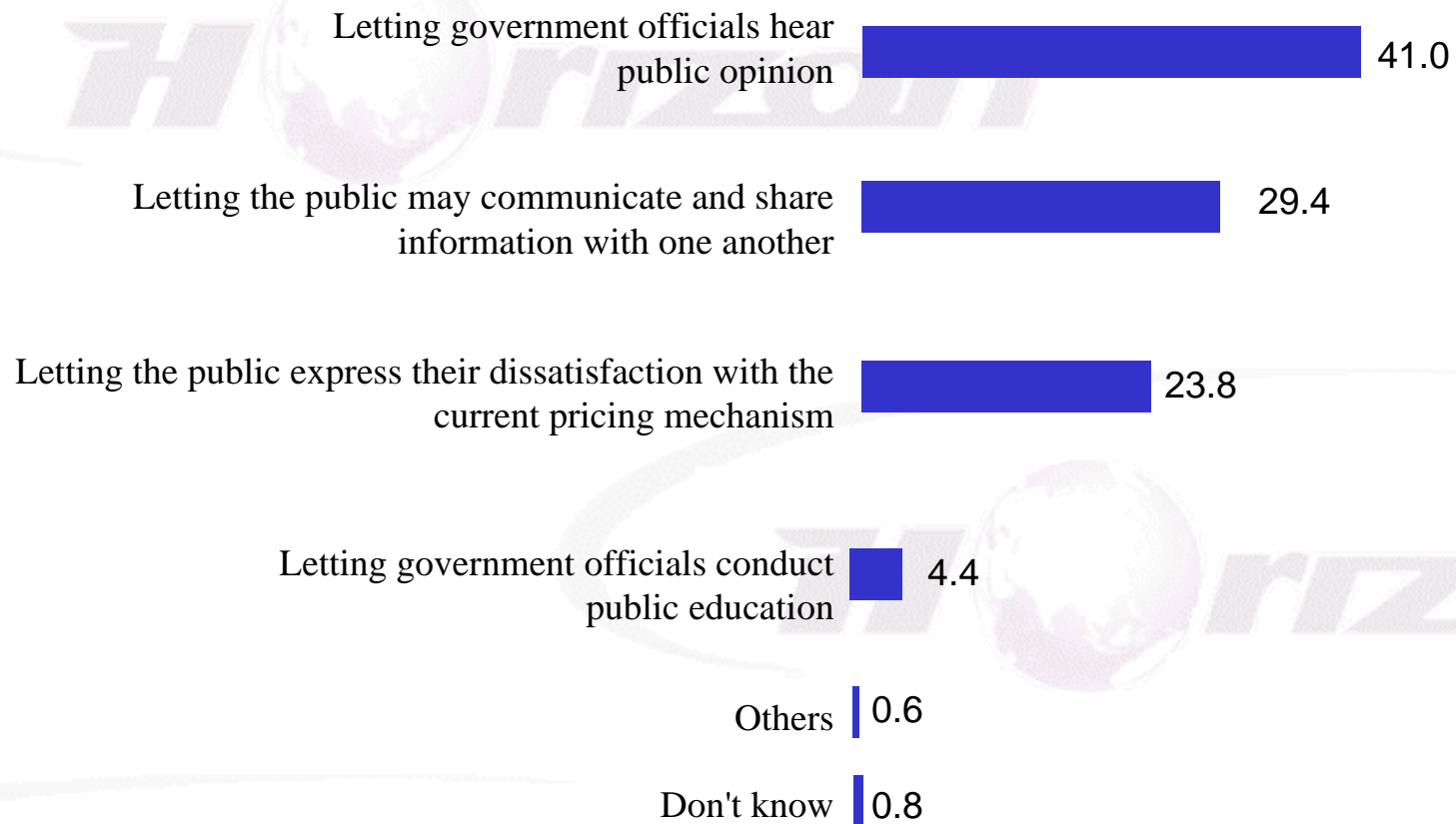
China and Japan should strengthen cooperation in energy technology, esp. the treatment of industrial waste gas and automobile tail gas.



Chinese residents expect a public hearing mechanism with high participation will be established for energy pricing, especially energy sources for home use.



Letting government officials hear public opinion is the main reason for Advocating Energy Pricing through Public Hearings



Conclusions

- Chinese urban residents' awareness of energy crisis is not as strong as their awareness of environmental protection. Those with strong awareness of energy crisis are mostly highly-educated young men with high income, while old women with low education and low income do not have strong awareness of energy crisis.
- Chinese urban residents perceive the central government as the party mainly responsible for energy development and equipment maintenance, especially energy development, while multinationals are deemed to play an important role in the development of transportation pipelines for energy sources and shipping. The privatization of the energy industry is still in the embryonic stage in China. It is necessary to boost the public confidence in private enterprises in the area of energy development and equipment maintenance.
- When it comes to addressing energy issues, Chinese residents endorse international organizations instead of regional ones. The U.S. is deemed to be of the greatest importance to China on energy issues, esp. in international negotiation and provision of assistance for energy infrastructure; Japan is deemed to play the most important role for China in tail gas treatment, storage technology for home-use energy sources and energy education; Russia is deemed to an important common energy reserve base for China.
- At present, energy price is largely controlled by the government. The public hopes that energy management and price mechanism with higher participation by the public will be established.

THE END



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