Scott Kennedy: Andrew I think you’ve got a couple things that are emerging that are generating these protests. We’ve got long term dissatisfied action with zero COVID policy, which has basically made life extremely unpredictable for just about every Chinese, because you’ve got to test and scan and wear a mask. There are occasional lockdowns, interrupts your travel, and this is at a minimum annoying for people.

And in some places you have had very significant lockdowns, like in Shanghai 2 to 3 months, which really was traumatic for people there and all their family members and others. And then you’ve just got you know, you had a few weeks ago the 20th Party Congress, which we talked about and a statement by the Chinese a week or two after saying they were going to adopt some measures which they called to improve zero COVID, but which most people interpreted as the first steps out of zero COVID.

That’s the first wave of stuff that’s happening. The second is a fire in Xinjiang, in far western China, where at least ten people are appeared to have died. And although it wasn’t directly COVID related, it appears possibly that zero COVID measures made it more difficult for fire rescue teams to get there. And then you’ve just got these protests at in Yongzhou, in central China, where iPhones are mostly made by Foxconn, you know, the main assembler of iPhones.

Protests about zero COVID there. And then and then you’ve just seen this other, you know, outpouring of anger at Chinese universities and cities. And people are just tired of this and they want zero COVID to end. They want to get to a post-pandemic era. And that’s normal. Three years in. This is a long time for anyone to put up with.

Mr. Schwartz: And so Scott, people are out in the streets all over China and Beijing and Shanghai and elsewhere. They’re doing this at great risk, aren’t they?
Dr. Kennedy: They certainly are. It's unclear how large these protests are in any individual site. You know, it seems maybe a few hundred people. But what is really impressive is that this is occurring in multiple cities simultaneously about the exact same issue about ending zero COVID. It appears the protesters central demands are around ending zero COVID and moving to a post-pandemic era as fast as possible.

That seems to be what everyone is demanding. But, as your question implies, and as we're seeing in some of these places, folks are calling on demands for the party to step down or Xi Jinping to step down for freedom, like give me freedom or give me death. You see things like that. Now, it's unclear, you know, how widespread those types of demands are, but it's certainly quite visible and should give the leadership pause that it's going to be really challenging to really satisfy these protesters, particularly any time soon.

Mr. Schwartz: Scott, do these protests and this you know, I guess we can call it an uprising at this point to some degree. Do they present a real threat to Xi Jinping?

Dr. Kennedy: Not yet. I still think we're far short of anything that threatens his hold on power or the Communist Party's hold on power. We're nowhere near where they were in 1989. The demands are primarily really around this specific policy set, which could be addressable. The protesters have couched this to some extent around norms about freedom, but really what they want is just their normal lives back.

And then I think that would be sufficient for the vast majority of them. The big challenge for Xi Jinping is he could end zero COVID fast or he could end it safely, but he can't do both. If you do it fast, if you just eliminated the restrictions, you'd have a big rise in cases and serious illness and death if you do it safely.

That's going to take many months to do it properly because you've got to vaccinate a lot larger percentage of the population, prepare ICUs and hospitals to deal with more sick people, etc. It's going to take longer. So what the challenge is, the risk is that the pace at which they deal with the demands goes more slowly than the pace of the demands increasing.

So this is going to be a competition about whether they can address the protesters demands more quickly than the protesters increase their demands. And so that's a real challenge because as we've talked before, Xi Jinping does not like to back up and people also don't like to give Xi Jinping bad news and they don't like him to tell things he doesn't want to do.

So they're really pushing on Xi Jinping's hot buttons on things he doesn't want to do. And so really, we may see some modification in policies, but
we’re more likely to see some harsher tactics by the regime if these folks don’t go back home and get off the streets. And then really, you could have a more combustible situation, particularly if there’s any significant loss of life in those kinds of conflicts

But I still think we’re far short of that is an inevitable outcome.

Mr. Schwartz: Do you see the protesters going home anytime soon? Is this like a one, two day thing and then they’re done or is this a weeks long thing or a months long thing?

Dr. Kennedy: I think in some places we could see folks back off and things quiet down for students. They’re going to get pressure from their university administrators, from their parents. We’re going to see people who get threatened by their employers. Certainly some are going to be carted off by police to try and scare everyone else to go home. So, we might see a drop down on, in the streets to some extent, but some people aren’t going to be satisfied unless they’re really faced with significant retribution online.

China can do a lot more to restrict use of social media, to spread the word and to protest. But these folks are really creative and coming up with interesting ways to signal their disaffection. So, I think we will see a cat and mouse game for a while, perhaps in the streets, certainly online. And so this could go at a low burn for quite some time.

Really, the question is, when will the leadership get the message that they need to more clearly articulate a roadmap out of zero COVID to a post-pandemic era? That’s the way to solve this problem.

Mr. Schwartz: Is part of the issue that, you know, 90% or so are vaccinated in China. It’s that they’re not boosted. And in addition to them not being boosted, the vaccines they have are much less effective than what we have here in the United States.

Dr. Kennedy: Yeah, I think that’s largely right. 91% of Chinese have had one shot. 86% have had two shots. Only 68% have had three doses of the vaccine. And as you said, just about it’s all the Chinese vaccines from Sinopharm or Sinovac, traditional vaccines that are not as efficacious as the mRNAs. And the Chinese haven’t allowed the mRNAs because they don’t want to depend on the US and the West for these vaccines.

It’s a loss of face. They’re also worried at some point the US and the others might pull these vaccines or their patents because you know of the conflicts that we have with each other. And so, in addition, it’s hard to get people to persuade people to get more vaccinated if they don’t see the risk around them of getting sick.
You're willing to wear masks, you're willing to scan phones, but are you willing to get vaccinated with a vaccine you don't necessarily trust if the risk of getting sick from the illness is so low. So they've really had a difficult time persuading people, particularly older Chinese, to get vaccinated. Only 40% of Chinese over 80 years old have been vaccinated, and only two thirds of Chinese over 60 years old have been vaccinated, with even a single dose.

Those are the folks who are most at risk. And so there's both sort of a top down sort of political reason why they haven't emphasized vaccines as much, but also a social reason why folks haven't run out to get vaccines, which has put them in a bind.

Mr. Schwartz: So, Scott, if you're a US government official in the Biden administration, what are you looking for here? Are you concerned that China is going to start blaming these protests on the United States? Are you concerned that China is going to say this is a ploy by the West to sell us vaccines? You know, what are some of the other geopolitical implications for us as we're monitoring this situation?

If you're someone in government who's watching this closely.

Dr. Kennedy: That's a great question because this could go a variety of different ways. And we'd like to be able to get out ahead of that to figure out what's likely. So far, we have not seen that Chinese authorities, propaganda authorities or others explicitly blame foreign hostile forces for causing these protests. And, in fact, some of the protesters have anticipated that type of argument and said, you know, we're locals.

We are not trying to do anything but help and get these problems solved. But if you start to see that type of blame, then that's a bad sign because that's really what happened in Hong Kong. You saw them blame the US and others, and then you saw them really ratchet up the pressure, you know, to push through the national security law and protests and significant arrests.

And Hong Kong is much worse off for it. So that's something you could see. on the positive side, you might look to see for the Chinese, too, to again, really start to encourage with much greater effort vaccinations and even potentially allowing foreign mRNA vaccines, access to the Chinese market. In July of 2021, BNT signed a deal with a Chinese pharmaceutical company,

Fosun, to give Fosun the rights to you to manufacture and sell BNT's vaccine in China, although they signed that deal.

Chinese government has never approved that vaccine's use in China. But a couple of weeks ago, when the German Chancellor Scholz visited China, part of the outcome of his visit was China's agreement to allow the BNT vaccine to be used by foreigners who live in China, and
they could expand that to other groups in China as well. So, there's some signs to look for things that things might get worse, and there's also some signs to see if things might get better.

Mr. Schwartz: Scott, you were recently in China for the 20th Party Congress. And as we spoke about on an earlier podcast a couple of weeks ago, when you returned, you did sense some real frustration regarding the COVID strategy and the lockdowns while you were there. Can you explain what that frustration consisted of and what you heard from? You know, you had well over 100 meetings while you were there.

Dr. Kennedy: The pandemic has been ongoing for three years. The first two years of this pandemic, most Chinese gave the Chinese government high marks for how they handled the pandemic and were willing to put up with the kinds of restrictions that have been imposed, blockages to international travel inward and outward, significant testing, isolation centers, etc. But they're willing to put up with it because, essentially, it looked like China was doing a much better job than the rest of the world at limiting deaths.

And China's economy was actually doing reasonably well. Omicron changed all of that in the beginning of 2022, when the rest of the world realized you couldn't really just stop Omicron with a zero COVID strategy and you had to adapt and prepare for illness, the rest of the world shifted. China did not have, dug in its heels, and we saw these massive lockdowns and the wave of a much more infectious version of COVID, hence Shanghai, which roiled global supply chains in China and the rest of the world, and then lockdowns in other Chinese cities subsequently, but then the rest of the world getting to a post-pandemic era.

They had, you know, the curves went up, you know, they spike in cases. And then they went down. But China's still stuck where it was before. It's that contrast that has gotten people so upset in China and where they have been, you know, privately unhappy. They outwardly comply, but privately really complaining. And that's what I found in talking to all sorts of people.

Some people, you know, originally politically aware and interested, just your average folks really just kind of tired of this. And they thought at the beginning of November the Chinese leadership was going to take the first steps to get to a post-pandemic. They issued this document with 20 guidelines for changes in policy, which they interpreted the average Chinese as the first steps out of zero COVID, and then cases rose in some places and lockdowns were reimposed.

And then there was the fire in Urumqi in Xinjiang, the protests at the plant in Zhengzhou. I think things just boiled over. I also should emphasize part of the reason why students have been able to organize is that they’ve been locked in their dorms with each other for a damn long time. And when you're locked in a room with other people who are also disaffected for
the exact same reason, area creative minds are going to come up with ways to express themselves, and that’s what we’re seeing.

Mr. Schwartz: Scott This has been extremely helpful, and I know that we’ll be talking in the days and weeks to come about this issue and others surrounding China. Thanks so much for your time.

Dr. Kennedy: Happy to talk to you.

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