

## China Prepares the Way out of the Zero Covid Impasse

### *Introductory comment and documentation*

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This is a rare and real-time insight into the domestic Chinese debate on Covid-policies. It comes a few weeks before the great political reshuffle, the date of which is not publicized. This is the time to prepare society for the new directions of policies that are expected to be springing from the Party Congress and spread messages of optimism.

Here, a Classic strategy is employed, that includes: testing the waters for the new narrative. To start with limited but significant target group outlets, initially behind a paywall<sup>1</sup>. New aspects and levels of argument are entering the discussion. Criticism is softened by being presented as observations and suggestions for a learning process. In particular the comparative data that indicate a very low medical risk of Covid-19 (omicron) is prone to become a quotable source of reference in support of a drastic revision of course. The timing is significant, in that patience is dwindling on all social and political levels.

The authors argue that the numbers of other infectious diseases under prevention policies are much higher than that of Covid. They express confidence of China's cultural ability to adjust prevention and control policies according to reason.

It also points at a semantic distinction that should be seen for its strategic import. „社会面清零“政策，即在政府划定的疫情监控范围之外，要实现“零感染”目标， implies that the purpose of a „clean social zero“ is targeted „outside the scope of epidemic surveillance defined by the government“. This disconnect of health from policy introduces new leeways and leverage for policy discussions that aim to continuity and change, helping the proponent of the outdated policies keep „face“. The course can change towards basic Public Health, health literacy, health behaviour and preventive strategies.

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## It is time for China to adjust its epidemic prevention and control policies<sup>2</sup>

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Due to special considerations, China's current epidemic prevention and control measures may be the most stringent in the world. Domestically, China is currently adopting a "clean social zero" policy, that is, to achieve the goal of **"zero infection" outside the scope of epidemic surveillance** defined by the government. For a country of 1.4 billion people, achieving this goal is extremely difficult. In addition to the need for the Chinese government to have strong social mobilization and governance capabilities, it also requires the Chinese people to highly cooperate with the government's requirements.

Objectively speaking, in the early days of the COVID-19 outbreak in 2020, when the world knew little about the epidemic and lacked vaccines and therapeutic drugs, China relied on strong social management methods (for example, static management measures such as lockdowns) to cut off the channels for large-scale spread of the epidemic. Relying on the central government's strong resource mobilization and allocation capabilities (such as the national medical staff rushing to Wuhan), the focus on rescue of the outbreak areas has curbed the social impact of the outbreak that has led to a large number of deaths. This model achieved remarkable results in 2020, during the "Golden Week" in early October of that year, Tourism in China almost completely resumed, and the tourist attractions were full, which was a great contrast with the other countries and regions in the world at that time, which was deeply trapped in the epidemic situation.

The success and effectiveness of epidemic prevention and control in 2020 has also made the Chinese government more and more convinced that strict social management methods are very effective for epidemic prevention and control. Therefore, **this model has been adopted as a principle and has been adhered to** in the prevention and control of the epidemic since then, until today in 2022.

With the continuous mutation of the new crown virus, the characteristics of the virus have changed a lot. Compared with the Highly Pathogenic and High Mortality Delta strains of the early stage of the outbreak, the Omicron strain, which has now become the "mainstream" of the NEW CROWN epidemic, has mutated, with high infectivity, low severe illness rate, extremely low mortality rate, and low hospitalization rate. Given the characteristics of the Omicron strain, which has not led to a run on medical resources in many countries (but there are also a few counterexamples, such as the recent high incidence of the epidemic in Japan, which has caused a run on medical resources), many countries outside China have begun to gradually liberalize

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<sup>2</sup> This text is taken from a machine translation of the Chinese original publication, with only provisional editorial checks. Passages are highlighted, to indicate main lines of the argument. Timely access to this important document for a large international readership was given priority over minute details. Revision is encouraged, accordingly. See the full Chinese text, below, and [http://www.anbound.info/TitleView/Viewarticle.php?Rnumber=146143&ProductID=13&ProductTable=Pro\\_MeiRiJingJi&ProductName=](http://www.anbound.info/TitleView/Viewarticle.php?Rnumber=146143&ProductID=13&ProductTable=Pro_MeiRiJingJi&ProductName=)

epidemic prevention and control measures. By August this year, most of the world's countries had been released from the epidemic and entered a relatively stable recovery stage.

**Unlike other countries, China still uses the strict prevention and control measures of two years ago.** The meeting of the Standing Committee of the Political Bureau of the CPC Central Committee held in May 2022 pointed out: China is a country with a large population, a large elderly population, unbalanced regional development, insufficient total medical resources, and relaxed prevention and control is bound to cause large-scale population infections, a large number of serious diseases and deaths, and economic and social development and people's life safety and physical health will be seriously affected. It can be seen that an important consideration for China's current epidemic prevention and control is that with the characteristics of China's national conditions, it is impossible to withstand large-scale epidemic deaths.

China's anti-epidemic strategies and measures have formed a great contrast with most countries and regions in the world. Objectively speaking, in the "Omicron stage" of the novel Corona epidemic, China's prevention and control policies have paid a high socio-economic cost. In the first half of 2022, first-tier cities such as Shenzhen, Shanghai, and Beijing all suffered lockdowns or partial lockdowns to varying degrees, and the "freezing" effect on economic activities, urban operations and the flow of people was significantly higher than in 2021, or even higher than when the epidemic began to break out in early 2020. In the first half of 2022, China's economy grew by only 2.5% year-on-year, of which only 0.7% in the second quarter. In the first half of this year, among the major developed countries, the US economy increased by 3.2% year-on-year, the United Kingdom increased by 5.8%, France increased by 4.5%, Germany increased by 2.7%, and Japan increased by 0.9%. Among ASEAN countries, in the first half of this year, the economy of the Philippines increased by 7.8% year-on-year, Malaysia by 6.9%, Vietnam by 6.42%, Indonesia by 5.23%, and Singapore by 4.1%.

It is not difficult to see that China, which has been known for its strong economic growth for many years, has significantly slowed down its economic growth in the first half of 2022, and there is even a risk of economic stalling. In the second half of the year, there are two major signs of risk in China's economy that deserve high vigilance: First, China's economic recovery in the second half of the year did not continue to heat up with the relaxation of lockdowns, and multiple data in July showed that economic growth was still weak. **What is worrying is that if the epidemic prevention and control policy is not relaxed, the spread of the epidemic one after another means that the domestic economy will continue to slam on the brakes locally.** Second, due to the continuous downturn in the economy, **the long-standing structural problems of the domestic economy continue to become prominent, and the risks in the fields of real estate, local debt, and financial institutions continue to deteriorate and are developing towards systemic risks.**

In light of this, several institutions have lowered their forecasts for the Chinese economy. Goldman Sachs cut its forecast for China's economic growth this year from 3.3 percent to 3 percent. Goldman Sachs said China's GDP growth was likely to be only 3.5 percent in the third quarter and 3.3 percent in the fourth quarter. Nomura Holdings has worse expectations for

China's economy than other institutions, lowering china's full-year economic growth forecast from 3.3% to 2.8%; Cut the growth forecast for the third quarter from 4 percent to 2.9 percent and the fourth quarter economic growth from 4 percent to 3.3 percent. If China's economic growth rate is below 4% this year, it may exacerbate many economic and social problems.

China's economy is at risk of stalling, and the biggest influencing factor is the impact of the epidemic. Compared with the current situation of the epidemic and economic development in the international community, the so-called "epidemic impact" is not in the epidemic itself, but in the impact of epidemic prevention and control policies. Due to the differentiated prevention and control policy, as researchers at an Anbang think tank (ANBOUND) have previously analyzed, in the face of the high infection rate, low severe disease rate and extremely low case fatality rate of the Omicron virus, China has set itself a very high anti-epidemic standard. As a result, while the outside world is during the onslaught of the war in Ukraine, China is caught in another "war" – the "war against the epidemic" under a strict policy of containment. From the perspective of the global political and economic situation, in the context of the war in Ukraine, China is facing a "window period" in the sense of geopolitics and geoeconomics. Unfortunately, the drag of the epidemic is causing China to miss this development opportunity, the war in Ukraine has dragged down Europe, and the "war against the epidemic" has dragged down China.

Although the war in Ukraine is still dragging down the global economy, Europe is the first to bear the brunt of the severe energy crisis, but it needs to be acknowledged that the vast majority of countries are recovering from the impact of the epidemic, and economic and trade activities, business exchanges, cross-border education, tourism needs, etc., have become the common needs of most countries. At this time, if China still maintains high standards of epidemic prevention requirements, it is equivalent to setting up a high threshold for epidemic prevention between China and the world. If this situation continues, it will undoubtedly be very unfavorable to China's stable economic market. China's current goal is to "prevent the epidemic, stabilize the economy, and develop safely", and in the view of Anbang researchers, the biggest "insecurity" currently facing is that the economy may stall.

*(Source: China Municipal Bureau of Disease Control and Prevention. Draft: Anbang Think Tank.)*

Judging from the number of infections and deaths of infectious diseases in China, **the novel Corona epidemic is also at a low level compared with ordinary infectious diseases.** According to the data released by the Chinese Bureau of Disease Control and Prevention, in June 2022, the number of new crown pneumonia infections in China was 1541, far lower than influenza (747038 cases), hand-foot-and-mouth disease (140661 cases), viral hepatitis (131857), other infectious diarrheal diseases (95012 cases), tuberculosis (67901 cases), and AIDS (5626 cases). In terms of the number of deaths, there were 1647 cases of AIDS, 345 cases of tuberculosis, 51 cases of viral hepatitis, 6 cases of epidemic hemorrhagic fever, 6 cases of rabies, 4 cases of influenza, 1 case of other infectious diarrheal disease, 1 case of hand-foot-and-mouth disease, and 0 cases of new crown pneumonia. The number of June shows that in

terms of both the number of infections and the number of deaths, the new crown pneumonia is far less than many infectious diseases, and even far lower than the flu. Is it possible to think that the harm of the novel Corona epidemic that we are strictly preventing and controlling now is at the same level as the flu? Some people may say that the low number of infections and deaths of Covid is the result of strict prevention and control. There seems to be some truth to this, but **other infectious diseases are also under prevention and control, and their number is still much higher than that of the Covid epidemic.** Therefore, it can be considered that the number of diseases and deaths of the Corona epidemic has been very different from two years ago.

We believe that with the governance capacity of the Chinese government and Chinese society, even if China adjusts the principles and standards of epidemic prevention, it is unlikely that there will be a phenomenon of epidemic prevention that is out of control, such as in Western countries, which is also because the national conditions are different. In the Chinese system, the culture that emphasizes collectivism, and the government's ability to mobilize and allocate resources will not fall into a bad situation. This characteristic is not only the confidence of China's epidemic prevention and control, but also the **confidence of China's adjustment of prevention and control policies.** What needs to be agreed at home is that as the epidemic prevention and control truly enters the normalization, China needs to integrate with the international market and the international community in more aspects, and let economic factors, personnel, information, materials, services and so on flow.

Final Analysis Conclusion:

The pathogenic harm of the COVID-19 pandemic has been greatly reduced and preventing the risk of economic stalling should become the number one task at home. If China wants to pursue advantages and avoid disadvantages in the complex international geopolitical and economic situation, it needs to scientifically adjust its epidemic prevention and control policies according to the latest changes in the epidemic, focus on restoring the economy, and gradually integrate with the world in the period of normalized prevention and control. ( AHJ )

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中国到了调整疫情防控政策的时候

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由于特殊的考虑，中国目前采取的疫情防控措施可能是世界上是最严格的。在国内，中国目前采取的是“社会面清零”政策，即在政府划定的疫情监控范围之外，要实现“零感染”目标。对于一个 14 亿人口的大国来说，实现这个目标的难度极大。除了需要中国政府有极强的社会动员能力和治理能力，还需要中国的老百姓高度配合政府的要求。

客观来看，在 2020 年新冠疫情爆发初期，在全世界对疫情都知之甚少、缺乏疫苗和治疗药物的情况下，中国依靠强有力的社会管理方式（如封城等静态管理措施），截断了疫情大规模传播的渠道；依靠中央政府强大的资源调动和配置能力（如全国医护人员驰援武汉），集中力量救援疫情爆发地区，扼制了疫情爆发导致大量人员死亡的社会冲击。这种模式在 2020 年取得了显著成效，当年 10 月初的“黄金周”期间，中国境内旅游几乎完全恢复，景点游客爆满，与当时世界其他国家和地区深陷疫情困局形成极大的反差。

2020 年疫情防控的成功和有效性，也使得中国政府越发相信，严格的社会管理方式对于疫情防控是非常有效的。因此，这种模式被作为原则，在此后的疫情防控中被坚持下来，直至 2022 年的今天。

随着新冠病毒的不断变异，病毒特性发生了很大变化。与疫情早期的高致病性、较高死亡率的德尔塔变异毒株相比，目前已成为新冠疫情“主流”的奥密克戎毒株出现了变异，其具有高传染性、低重症率、死亡率极低的特点，而且住院率很低。鉴于奥密克戎毒株的特点，且在多个国家并未导致医疗资源挤兑（但也有少数反例，如近期疫情高发的日本，造成医疗资源挤兑），中国以外的多个国家开始逐步放开疫情防控措施。到今年 8 月，世界上绝大部分国家已经从疫情中放开，进入较为稳定的恢复阶段。

与其他国家不同，中国仍然沿用了两年前的严格防控措施。2022 年 5 月份召开的中共中央政治局常务委员会会议指出：我国是人口大国，老龄人口多，地区发展不平衡，医疗资源总量不足，放松防控势必造成大规模人群感染、出现大量重症和病亡，经济社会发展和人民生命安全、身体健康将受到严重影响。可见，中国现行疫情防控的一个重要考虑是，以中国的国情特点，无法承受较大规模的疫情死亡病例。

中国的抗疫策略和举措，与世界上绝大多数国家和地区形成了极大的反差。客观来看，在新冠疫情的“奥密克戎阶段”，中国的防控政策付出了很高的社会经济成本。2022 年上半年，深圳、上海、北京等一线城市都不同程度地遭遇了封城或局部封区，对经济活动、城市运行和人员流动造成的“冻结”效果，要显著高于 2021 年，甚至要高于 2020 年初疫情开始爆发时。2022 年上半年，中国经济同比增长只有 2.5%，其中二季度只有 0.7%。今年上半年，主要发达国家中，美国经济同比增长 3.2%，英国增长 5.8%，法国增长 4.5%，德国增长 2.7%，日本增长 0.9%。在东盟国家中，今年上半年，菲律宾经济同比增长 7.8%，马来西亚增长 6.9%，越南增长 6.42%，印度尼西亚增长 5.23%，新加坡增长 4.1%。

不难看到，过去多年以强劲经济增长见长的中国，在 2022 年上半年的经济增长已经显著放缓，甚至有经济失速的风险。在下半年，中国经济有两大风险迹象值得高度警惕：一是下半年中国经济恢复并未随着放松封控而持续升温，7 月多个数据显示出经济增长仍然乏力。让人担心的是，如果疫情防控政策仍未放松，此起彼伏的疫情散发就意味着，国内经济还会不断局部猛踩刹车。二是由

于经济持续低迷，国内经济长期存在的结构性问题不断凸显，房地产、地方债务、金融机构等领域的风险不断恶化，正在向系统性风险发展。

鉴于此，多家机构下调了对中国经济的预测。高盛将今年中国经济增长的预测从 3.3% 下调至 3%。高盛表示，第三季度中国 GDP 增长可能只有 3.5%，第四季度增长为 3.3%。野村控股对中国经济的预期比其他机构更差，将中国全年经济增长预测由 3.3% 下调至 2.8%；将第三季度经济增长预测由 4% 下调至 2.9%，第四季度经济增长由 4% 下调至 3.3%。要指出的是，如果今年中国经济增长低于 4% 的速度，可能会加剧不少经济问题和社会问题。

中国经济面临失速风险，最大的影响因素是疫情冲击。对比国际社会的疫情和经济发展现状，所谓的“疫情冲击”实际上不在于疫情本身，而在疫情防控政策的影响。由于差异化的防控政策，正如安邦智库（ANBOUND）的研究人员此前所分析，面对高传染率、低重症率、极低病死率的奥密克戎病毒，中国给自己设定了一个极高的抗疫标准。其结果是，当外部世界处于乌克兰战争的冲击之中时，中国却陷于另一场“战争”之中——在严格封控政策之下的“抗疫之战”。从全球政经形势来看，在乌克兰战争背景下，中国实际上面临一次地缘政治与地缘经济意义上的“窗口期”。但遗憾的是，疫情的拖累正在使中国错失这次发展机会，乌克兰战争拖住了欧洲，而“抗疫之战”拖住了中国。

虽然乌克兰战争仍在拖累全球经济，欧洲更是首当其冲，面对严峻的能源危机问题，但需要承认的是，绝大多数国家正从疫情冲击之下恢复，经济与贸易活动、商务往来、跨国教育、旅游的需求等等，都成为多数国家的普遍需求。这时候如果中国仍然一枝独秀地维持高标准防疫要求，相当于在中国与世界之间，树起了一道很高的防疫门槛。这种状况如果持续下去，对于中国稳经济大盘无疑非常不利。中国当前的目标是“疫情要防住，经济要稳住，发展要安全”，在安邦研究人员看来，当前面临的最大的“不安全”就是经济可能失速。

数据来源：中国疾病预防控制中心。制图：安邦智库。

从国内传染病的感染数和死亡数来看，新冠疫情与普通传染病相比，也处于较低的水平。据中国疾病预防控制中心公布的数据，2022 年 6 月，我国新冠肺炎感染数为 1541 例，远低于流感（747038 例）、手足口病（140661 例）、病毒性肝炎（131857）、其他感染性腹泻病（95012 例）、肺结核（67901 例）、艾滋病（5626 例）。在病死数量上，艾滋病为 1647 例，肺结核 345 例，病毒性肝炎 51 例，流行性出血热 6 例，狂犬病 6 例，流感 4 例，其他感染性腹泻病 1 例，手足口病 1 例，新冠肺炎 0 例。6 月份数量显示，无论从感染数还是从病死数来看，新冠肺炎远远不及多种传染病，甚至远低于流感。是否可以认为，我们现在严格防控的新冠疫情，其危害与流感在一个水平？有人可能会说，新冠的低感染数与病死数，正是严格防控的结果。这似乎有一定道理，但其他传染病同样在防控之下，其数量仍大大高于新冠疫情。因此，可以认为，新冠疫情的致病数、病死数已经与两年前有极大区别。

我们相信，以中国政府和中国人民的治理能力，即使中国调整了防疫原则和标准，也不太可能出现西方国家那样的防疫失控现象，这同样是因为国情不同——中国的体制、强调集体主义的文化、政府的资源动员与配置能力，都不会陷入糟糕的境地。这种特点，不仅是中国疫情防控的底气，也是中国调整防控政策的底气。国内需要达成共识的是，随着疫情防控真正进入常态化，中国需要在更多方面与国际市场、国际社会接轨，要让经济要素、人员、信息、物资、服务等等流动起来。

最终分析结论 ( Final Analysis Conclusion ) :

新冠疫情的致病危害已经大大降低，防止经济失速风险应成为国内的头号任务。中国如果要在复杂的国际地缘政治与经济形势下趋利避害，就需要根据疫情的最新变化，科学调整疫情防控政策，以恢复经济为重，在常态化防控的时期逐步与世界接轨。( AHJ )