

Eurasia in Crisis

by George Friedman - November 29, 2022

Demonstrations against Beijing's zero-COVID policy have surged in the past week, with people voicing their frustration at not only the lockdown measures but also the government and President Xi Jinping himself. This kind of unrest is nearly unprecedented in the modern Chinese era and certainly cause for concern among the ruling elite.

Since the pandemic began, Beijing has consistently sought to contain COVID-19 by imposing city-wide lockdowns in which entry and exit were limited, if not forbidden, and in which activities were severely constrained. Why the government adopted such strict measures is unclear. No other countries imposed this degree of containment, largely because the costs of doing so were so high. Shanghai, the country's most important financial hub, was shut down for weeks, while similar shutdowns occurred in smaller cities. And this is to say nothing of the impossibility of hermetically sealing large, densely populated and otherwise bustling Chinese cities.

We are left, then, with two possible explanations. One is that the government is trying to contain a mutation that the outside world is unaware of. This is self-evidently dubious, and in any case there hasn't been the kind of body count one would expect from a new, deadlier strain. The second and more reasonable explanation is that Beijing instituted draconian policies to assert control of places that were already restive or unstable. COVID-19 was, in this scenario, merely a pretext.

Hong Kong is instructive in this regard. It wasn't that long ago that China experienced a rebellion there. Authorities clamped down on the city, but not before the world saw the deep anger felt by many against Beijing. Indeed, Hong Kong taught the mainland three things: that open unrest was possible; that uprisings could spread and should thus be hidden or downplayed at all costs; and that a country dependent on international trade and investment could not afford a trial in the court of public opinion. If a city like Shanghai had to be slammed shut, so be it. Financial operations had to take a backseat to widespread unrest, or so the thinking went.

If this was indeed the strategy, then the strategy has broken down over the past few days. The precipitating event was a fire in an apartment building that went untended. Public sentiment morphed, as it often does, into a broader anti-government movement. The slogans of the dissidents centered on the loss of freedom imposed by lockdowns before escalating into condemnations of the

president and the Communist Party, calling on both to step down.

By no means does this suggest there were demonstrations everywhere, nor does any of this mean the regime is in danger of falling. So far, it's unclear if this is predominately a youth movement; if it is, it is far less consequential than one led by older, middle-class professionals. Nor is it clear exactly how widespread and intense the protests are – how many cities are involved, how many are calling for a new government, how organized they are, how much the police and the army have had to intervene, etc.

Bear in mind these protests did not erupt overnight. The Chinese economy has performed very poorly in recent years. As exports met resistance, the economy came to depend increasingly on domestic consumption – and on domestic investment. The transition has been rough, as it usually is for countries in this situation. It inevitably raises the question, particularly among the young, of what sort of life lies ahead. After decades of explosive growth, the reversal of expectations can be wrenching.

But banking protests in Henan province are one thing; open, generalized political anger is another. Calling for an end to Communist leadership is extraordinary, and frankly it's hard to take seriously, especially if it is coming from anyone aside from disaffected youths. Or, put differently, I'll believe it when I see it. The government almost certainly has the ability to crush this would-be rebellion if it deems it necessary. It's entirely possible that the government believes the movement will die out on its own accord.

From a broader geopolitical standpoint, if this is in any way the beginning of something more, the power of China becomes questionable. To have this happen at the same time the power of Russia has become perishable, and at the same time the EU is more and more uncertain about its unified direction, suggests the whole of Eurasia is in crisis. In turn, that means the relative power of the United States is rising dramatically. The usual caveats apply, but it's important to note that if Russia doesn't stabilize its position in Ukraine, if the EU doesn't cohere as it needs to, and if Chinese demonstrations are more than a flash in the pan, then a very new world could emerge.

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