

MACRO: Summary of Covid-19 exit strategies

In this summary table, we provide an overview of the lockdown exit strategies currently being planned by selected countries around the world and the surrounding politics. **Please click on 'View PDF' below to see the table.** Do not hesitate to contact us if you want to discuss any of the countries mentioned in more detail.

[Client Portal >>](#)

Covid-19 Exit Strategies

	Lockdown start date	Lockdown end date	Exit Strategy	Political consensus	Institutional capacity	Signposts
United States	16 March	30 April + Extensions likely	The federal government is encouraging states to begin to open up before 1 May, but timelines will vary.	Medium – There is consensus around some priorities, but progress will become difficult as the November election nears.	Medium – Beyond the initial response, prolonged economic steering and welfare maintenance will prove challenging.	Governors have begun to form regional coalitions to coordinate opening plans and are likely to provide clearer paths forward.
European Union	Varies by member state	Varies by member state	European Commission (EC) is trying to coordinate national exits, but different pandemic experiences and state competence will make this difficult to achieve.	Medium – Member states agree on the need to work together but follow national interests first.	Low – Meaningful EU-wide crisis-fighting tools would first have to be set up anew.	Financing the recovery via debt mutualization remains highly contested, but greater reliance on a propped-up EU budget could emerge as an (at least politically viable) way forward.
China	25 January	Already ended	Exit largely complete.	High – Critics of early failures in Wuhan have been largely silenced.	High – Pre-existing surveillance and social control mechanisms used to enforce lockdown measures.	Risk of secondary virus outbreaks remains high as country returns to normal.
Japan	7 April for greater Tokyo, greater Osaka & Fukuoka; 16 April for rest of country	6 May	Japan is only beginning to restrict business activity, and restrictions could continue until the number of new cases plateaus as a sustainable level.	Medium – Prime Minister Abe has been criticized for hesitancy to declare emergency; prefectural governors want tougher restrictions.	Medium – State of emergency depends on voluntary compliance, no provisions for penalties for individuals or businesses.	The medical system has weathered the second wave thus far, but if it is overstretched, shutdowns could continue for longer.
Germany	22 March	3 May	Approaches might differ by regional state. Smaller shops reopening as of 20 April, plan for reopening schools to be prepared by late April.	High – Grand coalition government, decentralized but consensual political system, strong public support.	High – ICU beds and testing capacity increased quickly; health system not overwhelmed during first wave.	As crisis fighting overlaps with the Merkel succession race, political competition between regional state leaders could complicate coordination.
Canada	No national lockdown. States of emergency in Ontario and Quebec since mid-March.	24 April (Quebec), 26 May (Ontario).	Indefinite timelines for businesses to re-enter the economy, bi-weekly reassessment of essential services remaining open during self-isolation.	High – Federal government in minority in parliament but working with opposition to pass legislation.	High – Authorities can rapidly pass measures even if provinces have jurisdiction in key policy areas.	Federal and provincial governments allude to presenting their economic reopening plans and some provinces, like Quebec, are likely to do so sooner than others.
India	24 March	3 May	The federal government reviewed on 20 April opening some sectors. However, there are few takers for diluting the lockdown and most governments have recommended its extension	High – Almost all state governments are supporting the federal regime despite deep political differences	Low – Testing kits have had to be imported from China, hotels and guesthouses have been converted into isolation centers	The government has reserved the option of extending the lockdown beyond 3 May.

	Lockdown start date	Lockdown end date	Exit Strategy	Political consensus	Institutional capacity	Signposts
United Kingdom	23 March	7 May	Restrictive measures implemented later than elsewhere, pandemic still on the rise. Speculation, but no specific debate about exit strategies yet.	Medium – Conservative government with large majority, but crisis management record is being publicly contested.	Medium – National Health Service notoriously strained, limited laboratory infrastructure complicates rapid increase in testing capacity.	If the government's target of 100k daily tests cannot be met by end-April, this might dampen the outlook for a quick exit from current restrictions.
France	17 March	11 May	Schools will be gradually reopened after 11 May, where gradual measures will likely be put in place	Medium – Decision to reopen schools has generated criticism but most of the population supports the measures announced by Macron.	High – But, coordination between Paris and municipalities could be a challenge.	Precise exit strategy to be announced before the end of April.
Italy	10 March (nationwide)	4 May	Not formulated yet. Export-oriented economic sectors likely to be first. Gradual process.	Medium – Consensus on lockdown, toxic debate about exit strategy.	Low – Testing capacity inadequate, coordination between central government and regions a growing problem.	Cabinet meeting on 23 or 24 April could ease some restrictions for a few economic sectors.
Brazil	Varied by state, starting with Rio de Janeiro on 17 March and São Paulo on 24 March	São Paulo: 10 May Rio: 30 April	President Bolsonaro is fighting state governors who almost unanimously (27 states) have been extending quarantines.	Medium – The Supreme Court has confirmed the president cannot declare the end of state-level quarantines; all 27 states closed schools and at least 23 also religious locations, beaches and non-essential commerce.	Medium – Public Health Service (SUS) has great penetration across the country, evenly divided number of beds with the private system. Infrastructure very strained, overseas sourcing and importing hampering testing capacity.	Replacement on 16 April of competent and popular health minister who confronted Bolsonaro's denialist attitude towards Covid-19. New Minister is technically competent but has little political or public sector experience; favors social distancing but is under pressure to provide exit strategy. Clashes with the president may be unavoidable.
Russia	30 March in Moscow and many other regions	30 April. Extensions likely	Not formulated yet. Restrictions likely to be lifted at different times across the country.	Medium – Decision-making at the federal level is highly centralized, but there is limited coordination with the regional authorities.	Low – Limited health care capacity to handle disease outbreaks in regions, while bureaucratic inefficiencies may slow down economic recovery.	Watch the spread of Covid-19 outside Moscow, which may be delayed.
South Korea	22 March (nationwide social distancing campaign, not lockdown)	Extended to 5 May, with relaxation for churches, gyms, bars, outdoor sports	Debating transition to "routine distancing," return to economic and social activities with continued use of prophylactic measures.	High – Centralized state, ruling party now wields supermajority in National Assembly.	High – South Korea has learned from past and current outbreak, introduced wide-scale testing, is exporting tests and other equipment.	Government now focused on mitigating economic impact. Once social distancing relaxed, focus will be on early detection of new clusters.
Spain	14 March	10 May	Construction & industrial sector already resumed activities + PM Sanchez has suggested gradual lifting of confinement measures based on geographic criteria.	Low – Management of the outbreak is highly politicized.	Medium – Testing capacity has been ramped up but coordination between different government levels remains a challenge.	The lower chamber is expected to approve the latest extension of the lockdown in a plenary session on 22 April.
Mexico	23 March (some states took containment measures earlier)	30 May	None yet; will depend on evolution of cases. Peak of cases currently expected around 10 May.	Low – President Lopez Obrador has consistently made light of the Covid-19 threat; opposition parties are highly critical of his approach.	Low – The health system has been undergoing a chaotic reform process, while testing capacities are limited.	AMLO's own stance and personal example remain hugely important to government strategy.

	Lockdown start date	Lockdown end date	Exit Strategy	Political consensus	Institutional capacity	Signposts
Indonesia	10 April; no national lockdown; strategy by province	None	Calibrated tightening or loosening depending on data.	Medium – some provinces pushing for more aggressive measures, but President Widodo reluctant due to economic effect.	Low - Testing capacity among lowest globally, only starting to be built up; limited hospital capacity.	No specific or identified benchmarks, but as long as a gradual decline in cases and fatalities is achieved, restrictions may be loosened.
Saudi Arabia	17 March	None	With much of the population already on the government payroll, economic effects of lockdowns are not as significant as elsewhere. Economic plan is to sustain banking liquidity until infections subside, and then boost government spending.	High – Questioning of government actions toward COVID-19 is not permitted.	Medium – MERS spurred investment in capacity. General institutional capacity is mixed, and expatriate population is extensive and lives in close quarters.	Sufficiency of curfews and social distancing remains unclear, since so much of Saudi life is conducted behind closed doors.
Turkey	No nationwide lockdown in place. Limited restrictions based on age.	None	None yet; restrictions still being tightened.	Medium – Consensus on measures taken, opposition and scientists calling for lockdown, government resisting.	Medium – Health system relatively high in ICUs, low in overall beds/numbers of doctors.	Sustained substantial fall in number of new cases likely to reverse trend of tightening restrictions to easing them.
Thailand	3 April; national curfew, but no daytime lockdown; other regulations set by province	30 April possible	Removal of the curfew, but social distancing will continue to apply.	Medium – Policy is accepted but government seen as ineffective in other areas such as economy.	Medium – Gradually building up testing capabilities and moderate national healthcare capacity.	Growing confidence in its ability to limit and track new cases could cause government to lift restrictions if daily case numbers are in low 10s.
Nigeria	No nationwide lockdown. 30 March: Abuja, Lagos and Ogun State; other regulations set by several states	27 April (Abuja, Lagos, Ogun State)	Not formulated yet. Partial lifting likely.	Medium – Initial lockdown enjoyed support, which is quickly evaporating due to economic grievances. Calls for more stimulus	Low – The government's public health and economic response capacity are both extremely weak.	Vote on amended 2020 budget in parliament; Response from IMF, WB and AfDB to request for USD 6.9bn in financing.
Argentina	20 March	26 April: Partial lifting likely	Partial lifting of restrictions under consideration, with loosening focused on areas with no Covid-19 cases.	Medium – President widely credited for early application of quarantine and has opposition backing but faces challenges from within his own Peronist movement.	Low – Health system will struggle to handle surges and testing and tracing capability limited.	How the government intends to lift restrictions will become clearer ahead of 26 April.
South Africa	26 March	30 April + Gradual lifting likely	Following medical experts' advice and with Covid-19 peak expected in September, the government will pursue a tightly controlled, phased restart.	Medium – The initial lockdown enjoyed unusually widespread support, but this risks evaporating quickly as economic hardship bites and policing excesses antagonize the public.	Medium – The government's public health response has been strong (including ramped-up testing), but the government's economic response capacity is extremely weak.	Latest infection curve will guide decision-making on timing and manner of restart. Industry-specific exemptions and restarts (e.g. mining). Economic response and revised budget.