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2023

A collection of survey and analytics materials
on developments in the Republic of Belarus in 2022

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EDITORIAL FOREWORD

Belarusian Yearbook 2023 presents a comprehensive analysis of developments in the key segments of the state and society in the year 2022, which served as a transition from the political crisis of 2020 in Belarus toward the global security crisis in the region. The large-scale invasion of Ukraine by Russian troops in February 2022, which developed into a protracted war, became a key factor affecting almost all spheres of life in Belarus.

The status of Belarus in this war is still disputed by various actors: from the accomplice of aggression to the occupied territory, and official Minsk insists on the status of the peacekeeper and the negotiating platform, although it does not deny the use of Belarusian territory by Russian troops to attack Ukraine. All these contradictions and their consequences are reflected in the texts of the authors of the Yearbook.

Main trends of the year:

- Regression of political institutions, including through constitutional changes aimed at shaping a new configuration of the political system, allowing the rights and privileges of the ruling class to be cemented, bypassing the risky procedure of elections, and completely isolating any opponents of the ruling regime from the political process.
- Strengthening the position of the Presidential Administration as a political and information-propaganda center, responsible for reformatting the political system through the adoption of a new version of the Constitution. Continued growth of influence of security agencies at all levels of the political system.

- Acceleration of integration of Russia and Belarus in the military sphere. The subordination of the defense capabilities, infrastructure, and industry of Belarus to the needs of the Russian army, consequently – the loss of military and strategic neutrality.
- The intensification of confrontation with the Western countries against the background of war in Ukraine started by Russia. The build-up of reciprocal sanctions and significant adjustments to the NATO strategy. The growing international isolation of Belarus, as a consequence – the depressing dependence on Russia in almost all spheres.
- Tireless, though mostly unsuccessful, attempts of Belarusian diplomacy to intensify bargaining with the West on several basic topics: non-participation of the Belarusian army in the war, peacemaking, political prisoners, food security.
- Increased pace of total elimination of Belarusian civil society organizations (CSOs). Successful cooperation and increased political representation of emigrant CSOs. Establishment by the authorities of a hierarchy of controlled pseudo-public organizations, the most verified of which were able to enter the All-Belarus National Assembly.
- The big logistic turn: the reorientation of export flows to Russia as a result of the loss of Ukrainian and Western markets, as well as access to EU transit arteries. Recovery of oil rents.
- Deep economic recession and man-made default, high inflation, and endemic financial destabilization. But countervailing effects and economic policies have allowed shocks to be reduced and reversed.

Since 2003, the *Belarusian Yearbook* project has evolved as a joint endeavor of the Belarusian expert community to compile, conceptualize, and deliver a chronicle of Belarus's contemporary history.

The Belarusian Yearbook 2023 was developed with the participation of independent analysts, scientists and experts from various research centers and universities, including: Chatham House, GLOBSEC, Belarusian Institute for Public Administration Reform and Transformation (BIPART), The Center for New Ideas (CNI), Center for Strategic and Foreign Policy Studies (CSFPS), Belarusian Economic Research and Outreach Center (BEROC), School Of Young Managers In Public Administration (SYMPA), Polish Institute of International Affairs (PISM, Poland), iSANS, Belarusian Council for Culture (BCC), European Humanities University (EHU, Lithuania), Manchester Metropolitan University (MMU, UK), National Technical University of Ukraine “Igor Sikorsky Kyiv Polytechnic Institute” (NTUU KPI, Ukraine), projects MediaIQ and “Kosht Urada” and Belarusian expert network “Our opinion”.

Some of the authors of the *Belarusian Yearbook 2023* used pseudonyms, as they remain in Belarus and for other security reasons.

A few authors of previous Yearbooks did not have the possibility to take part in work on the Belarusian Yearbook 2023 due to be sentenced as political prisoners: **Valeria Kostyugova** (was included into the state list of terrorists; sentenced to 10 years for political analytics deemed a conspiracy with the aim of seizing power), **Andrei Porotnikov** (charged with espionage for his analytics), **Yahor Lebiadok** (sentenced to 5 years for analytical interviews in independent media, later recognized as extremist). The authorities also recognized the analytics of the “Kosht Urada” project as extremist materials.

Analytics is not a crime! Freedom for authors of the *Belarusian Yearbook* and all political prisoners!

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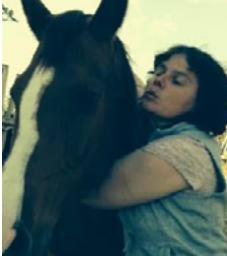
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PROJECT KOSHT URADA

A project that helps you understand where the money comes from and how it is spent in the budget of Belarus, and what services you receive by contributing to the common pool.



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STATE AUTHORITIES

PRESIDENT'S ADMINISTRATION: SEEKING A NEW FORMAT FOR THE POLITICAL SYSTEM

Nikolai Burov

Summary

Throughout 2022, the Presidential Administration (PA) created a new configuration of the political system, which would provide guarantees to the incumbent regime, win over those on the fence, and completely isolate any opponents of the ruling regime from the political process. This strategy took roots in the latest version of the Constitution, and was further nourished by the development of a pro-government civil society under the PA's supervision, including through the development of a party system.

By early 2023, the general framework of the prospective political system had been put in place. However, the concurrent parallel escalation of repression made it impossible to speak of any genuine resumption of the political dynamics in the country.

Trends:

- A gradual return and strengthening of the PA's role as a political and propaganda device responsible for overhauling the political landscape through the adoption of the new constitution;
- Formation of a pro-government civil society and an accelerated party-building process;
- Difficulties in recruiting administrative personnel in the wake of sweeping purges;
- The erosion of numerous PA initiatives due to continued repression and the deteriorating regional security climate.

Outlining the New Political Landscape

Throughout 2022, the Presidential Administration (PA) focused on building a new political system to align with the realities of a post-August 2020 Belarus: Lukashenko's low approval ratings, the delegitimization of the principal state institutions, the exodus of a significant portion of the populace abroad, the persistence of widespread repression and escalating societal rifts, a growing dependence on Russia, economic challenges, and endorsement of the Russian invasion of Ukraine.

For the political system created by the AP to be considered successful, it must satisfy at least two principal conditions: (1) ensure the perpetuation of Aleksandr Lukashenko's personal authority, potentially paving the way for a succession by one of his sons, and (2) curtail the risk of election upheavals, even if it means eschewing direct elections or mass electoral movements. The key milestones within this restructuring of the Belarusian political system include adopting the revamped constitution and the set of laws on the All-Belarusian People's Assembly, systematically disenfranchising civil society, and revising strategies for party establishment.

However, the realization of these goals was hampered by Lukashenko's apparent vacillation on key issues of the new political arrangement: the roles and composition of the All-Belarusian People's Assembly (ABPA), the modalities of the presidential elections, the distribution of powers between the President and the head of the ABPA, and the envisioned roles of state-sanctioned parties and quasi-social organizations (often referred to as GoNGOs) within this new structure.

Turning the Page, but Not Quite There Yet

The endeavors of the Presidential Administration (PA) to resolve the political crisis of 2020 were significantly hindered by the

tangible shift in the balance of power from the civil administration towards the security bloc. The latter's influence was further strengthened in the context of the Russian-Ukrainian war. Repressive measures intensified throughout 2022, thereby undermining the administration's occasional efforts to "turn the page" and move beyond the crisis, the security forces' stance and actions often stymieing progress.

A case in point was the proposed amnesty aligned with National Unity Day on September 17th. Despite active discussions regarding the potential release of a significant number of political prisoners – and even lists of potential amnesties prepared by Yury Voskresensky, a figure from the so-called "pro-government opposition", the amnesty did not extend to these individuals. Moreover, Olga Chupris, PA Deputy Head who supervised the preparation of the amnesty, advocated not just for curtailing the scope of the amnesty, but also for the revocation of citizenship for political emigrants.

A similar dynamic was evident in the relationship between the state and the business community. On January 28, during the annual address to the people and parliament, Lukashenko supported the proposal of Andrey Kopytka – the head of the "Republican Confederation of Entrepreneurship" – to hold a meeting with business leaders and entrusted the PA with the task. Yet, as the year unfolded, the meeting was never organized. The rationale was apparent: there was no constructive dialogue to be had, and entrepreneurs were largely perceived as a politically hostile social group.

A Partially Satisfactory Referendum

The Presidential Administration (PA) perceived the adoption of the new version of the Constitution as an opportunity to return, at least symbolically, to some imitation of the electoral

process. However, judging from Igor Sergeenko's speech at the country's Security Council meeting on February 8, it was evident that the authorities had security concerns about the referendum and doubts about its ultimate feasibility. This became especially clear on February 27, when polling stations became mustering points for protesters, though the dissent was not in relation to the constitutional amendments, but was rather a reaction to Russia's invasion of Ukraine three days earlier. While the referendum did take place and seemed to align with the authorities' objectives (with over half of the participants supposedly voting early), Lukashenko's fear of participating in electoral campaigns remained. Throughout the year, he frequently expressed regret that the presidential role wasn't exempt from direct public elections.

Party of Power

With the adoption of the new constitution, the process of establishing the party of power accelerated. There has been a long-standing demand within the bureaucracy for a robust party-centric system. Surprisingly, Lukashenko himself had been the main opponent of this idea. His deviation from the long-standing practice of verbal engagement without substantial action symbolizes a profound political crisis at the top of the government.

On April 15, Lukashenko met with the head of PA Igor Sergeenko, and the chairman of the republican association "Belaya Rus" Oleg Romanov. On April 21, Lukashenko discussed the issue of party building and legal formalization of the new political system with the Justice Minister Sergey Khomenko and Deputy Head of PA Olga Chupris.

Yet in June, during a seminar "Updating methods and forms of work with the population at the local level", Lukashenko asserted that while party development was impending, it was not

a universal remedy. . He underscored the importance of fostering an “appropriate” civil society and enacting corresponding legislation. He continued to express his skepticism about party building, believing that in this matter “there is absolutely no need to rush”. Lukashenko’s hesitancy about the rapidly establishing party of power was evident, with concerns about societal discord, even at the December 13 meeting, a few months before “Belaya Rus” was transformed into a political party.

Community Outreach: Media Cleanup and Simulated Dialogue with GoNGO

Assessing the efficacy of Igor Lutrky’s endeavors to dominate the information landscape is challenging. Throughout 2022, repression of independent media continued, with many outlets branded as “extremists” and several journalists detained. “Belarus Change Tracker” noted the “obvious intensification of repression against media, journalists and opinion leaders”¹. According to the results of the May meeting on information policy, the head of PA, Igor Sergeenko, characterized the situation as an “information war”.

In March, Lukashenko signed Decree 131 “On the Development of Mass Media”, which introduced a separate fee for advertisers to support state media. The efficacy of this decree in enhancing public trust in state narratives remains ambiguous.

The strengthening of ideological-propagandist initiatives primarily flowed through GoNGO (“State-organized non-governmental organizations”). Security agencies were deeply involved in supervising various military-patriotic clubs. The onus

1 “Беларусский трекер перемен (июнь-август 2022)”. БТП, Aug. 2022, <https://library.fes.de/pdf-files/bueros/belarus/19564.pdf>.

of amplifying the influence of youth organizations like BRSM fell upon the PA.

During the June the republican seminar “Actualization of methods and forms of work with the population at the local level”, officials voiced concerns about GoNGOs (“Belaya Rus”, BRSM, veterans’ organizations, trade unions, etc.) inability to gauge societal sentiments. Yet, they simultaneously reiterated that the “society should be purged from rogue elements”.

The purported “dialogue platforms”, lauded for their effectiveness, were showcased as ideal interaction models. These “venues” were organized en masse following the events of August 2020 at the PA’s initiative as a sign of the authorities’ readiness to have a dialogue with protesters. However, these were largely one-sided conversations dominated by officials and pro-government activists. One of the incidents that illustrates this fact took place in February when teachers at the Rechitsky district gymnasium received a prank-letter demanding to organize a “dialogue platform” at their institution. The completion report was sent just three hours after the letter requesting to organize the event was received.²

At the meeting on August 30, the authorities identified specific pillars of the Belarusian civil society, including the Communist Party, the BRSM, the Belarusian Union of Women, the Veterans’ Association, the Pioneers, and the trade unions. The roster of potential ABPA participants incorporated all the aforementioned organizations, excluding the Pioneers, but did highlight “Belaya Rus”, which is a political party now. Notably, the LDPB was overlooked once more.

2 “Пранк пошёл в народ: ещё одна школа провела “диалоговую площадку” после фейкового письма — теперь в Речице”. *Зеркало*, 04 Feb. 2022, <https://news.zerkalo.io/life/9562.html>.

From Personnel Purges to Serfdom

In 2022, it became increasingly difficult for the PA to manage its personnel policy. Lukashenko's statements on October 3, during the appointment of the heads of district executive committees and other officials, served as the clearest indication of the human resource scarcity.³ Lukashenko instructed Igor Sergeenko, in collaboration with Prime Minister Roman Golovchenko and local government leaders to streamline personnel operations and to set rules for the staff movement of civil servants at the level of regional executive committees by January 1, 2023.

Lukashenko emphasized three times that they shouldn't resort to "serfdom", yet, paradoxically, he seemed to advocate for it. He referred to the resignation of civil servants of their own volition and their subsequent employment in the private sector – a legal right in a free labor market – as a "humpty-dumpty turnover". The "iron order" he demanded appears to be a ban on the transfer of civil servants (and possibly other state organization employees) without the approval of the chairman of the executive committee. To date, no regulation containing these provisions, which blatantly contradict labor law, has been made public.

Personnel purges continued to target employees perceived or suspected of disloyalty. Individuals convicted on political charges, or those suspected of disloyalty to the regime for other reasons, faced employment restrictions.

Following February, the effect of Russia's invasion of Ukraine became evident. On March 15, in a meeting with security forces (which also included I. Sergeenko) Lukashenko claimed that under the aegis of the special services of the United States and Western Europe in Vilnius, Warsaw and Kyiv, a "new elite" was

3 "Рассмотрение кадровых вопросов". *Пресс-служба А. Лукашенко*, 03 Oct. 2022, <https://president.gov.by/ru/events/rassmotrenie-kadrovyyh-vo-prosov-1664789649>.

being trained for Belarus, similar to the Abwehr schools during the Great Patriotic War era. This new elite is allegedly being prepared to infiltrate state administration bodies, security agencies, public organizations, and mass media.⁴

In August, the PA was tasked with a comprehensive review of the roster to identify underperformers. However, the outcomes of the subsequent purges were not disclosed to the public.

The challenge for the PA lies in sourcing loyal and “patriotic” personnel, especially when surrounded by perceived “enemies”. The influence of the power bloc increases significantly, and the candidate pool diminishes. Furthermore, even though she no longer serves within the PA, Natalia Kochanova continues to exert a significant influence on personnel policies.

Russification of History Policies

On January 6, at a meeting on the implementation of history policy, Lukashenko characterized the establishment of the Polish-Lithuanian Commonwealth on the territory of modern day Belarus as the Polish occupation of Belarusian lands and the ethnocide of the Belarusian people. The PA was mandated with developing a concept of historical policy. The “correct views” on the historic issue held by Vadim Gigin, the head of the “Knowledge” Society, the rector of the Management Academy Vyacheslav Danilovich, and MP Igor Marzalyuk, deserved special praise.

In February 2022, Lukashenko signed a decree on the establishment of the Council for History Policy under the presidential

4 “Встреча с руководящим и оперативным составом органов госбезопасности”. *Пресс-служба А. Лукашенко*, 15 Mar. 2022, <https://president.gov.by/ru/events/vstrecha-s-rukovodyashchim-i-operativnym-sostavom-organov-gosbezopasnosti>.

administration, led by I. Sergeenko.⁵ Sergeenko was also responsible for selecting the board members. Central to their agenda was the revision of the teaching of social and humanitarian disciplines, as well as the intensification of ideological-propaganda work under the guise of patriotic education.

The events of 2020 prompted the authorities to pay closer, albeit selective, attention to the topic of historical memory. Simultaneously, the PA focuses primarily on one aspect – discrediting Lukashenko opponents, including EU countries, by associating them with the Nazis responsible for what the official narrative describes as the “genocide of the Belarusian people”.⁶ The proponents of this new narrative are not at all confused by the fact that France, the United Kingdom, and the United States fought against Nazi Germany, not to mention the countries in Europe that were occupied by the Nazis.

Central to the formation of this revised historical memory is the tragedy of Khatyn, which, authorities’ perspective, serves as an effective tool to promote anti-Western, anti-opposition, and potentially anti-Ukrainian narratives. Lukashenko granted the “Khatyn” memorial complex a significant upgrade, dubbing its repair and reconstruction as the “All-Belarus youth construction”.⁷

5 “Республиканский совет по исторической политике создаётся при Администрации Президента Беларуси”. *Пресс-служба А. Лукашенко*, 04 Feb. 2022, <https://president.gov.by/ru/events/respublikanskiy-sovet-po-istoricheskoy-politike-sozdaetsya-pri-administracii-prezidenta-belarusi>.

6 “Лукашенко: Ветераны Великой Отечественной войны – хранители правды и противовес тем, кто отрицает геноцид белорусского народа и обеляет нацизм”. *БТ*, 05 May 2023, https://www.tvr.by/news/prezident/lukashenko_veterany_velikoy_otechestvennoy_voyny_khraniteli_pravdy_i_protivoves_tem_kto_otritsaet_ge/.

7 “О Всебелорусской молодёжной стройке”. *Пресс-служба А. Лукашенко*, 13 May 2022, <https://president.gov.by/ru/documents/ukaz-no-176-ot-13-maya-2022-g>.

Collectively, these efforts align the Belarusian historical narrative more closely with the Russian perspective on the history of Eastern Europe.

Conclusion

Throughout the year, the PA has consistently pursued an agenda of reshaping the country's political system. The transformation had several distinct objectives: bolstering the legitimacy of Lukashenko and fortifying societal support of the regime in general returning to semblances of public political processes (including electoral campaigns), refining existing power preservation mechanisms, and creating new ones amidst escalating social divisions, a deteriorating economic landscape, and heightened regional security tensions. Though some of these challenges had been, in part, addressed, the ongoing repression and the overall decline in Belarus' political autonomy rendered many efforts much less effective. The term "simulacrum" aptly captures the essence of many elements of the newly configured political landscape in Belarus.

In 2023, the PA's primary focus will pivot towards preparations for the electoral campaign slated for February 2024. It seems implausible that a pro-government party system will be fully operational by then. Nonetheless, semblances of activity in this area will provide the PA with tactical flexibility both domestically and, crucially, in dialogues with Russia and the West. A potential pitfall that could undermine these endeavors is the escalating involvement of Belarus in the Russian-Ukrainian war.

GOLOVCHENKO'S CABINET: THE ERA OF REACTIONS

Polina Makarova

Summary

In 2022, the government's primary responsibility was to address the challenges arising from Lukashenko's own policies, such as sanctions and labor outflow, as well as the actions of its closest ally, Russia (particularly the co-aggression against Ukraine). The government of Roman Golovchenko, heavily influenced by the security bloc, did not focus on strategic objectives. The emergency mode of operation, which became the norm for the state apparatus, suggests that even if conditions turn favorable – like ending the war in Ukraine or lifting certain sanctions – it will require time to rebuild the eroded export infrastructure and regain the trust of lost partners. This trend extends to other government sectors such as education, social services, and sports. High-ranking officials have adapted to an environment where long-term planning is both non-existent and impossible.

Trends

- A profound orientation towards Russia not just economically but also in education and social sectors.
- A diminishing public role of the government, reduced to sessions of optimism where key officials, including prime ministers, aim to convince the public and Lukashenko that the national situation is either improving or on the verge of improvement.
- A growing emphasis on short-term solutions to boost state revenue through measures like introducing new taxes, fees, and expanding the scope of the “parasites law”.

War and Isolation

At the start of 2022, the Belarusian government had relatively unambitious plans. PM Roman Golovchenko vaguely mentioned priorities like “enhancing economic competitiveness” and “increasing population incomes” without offering specific targets.¹ However, these plans were jeopardized in February 2022 when Russia initiated its “special military operation” in Ukraine. The shock of Putin’s decision likely resonated more profoundly within the Belarusian government.

The onset of the war has severely tainted the reputation of the Belarusian Foreign Ministry, previously perceived as liberal and somewhat independent. The ministry’s credibility eroded further due to then Foreign Minister Vladimir Makei’s² assurances about Russian troops vacating Belarus, which went unfulfilled. Efforts to rejuvenate the Minsk format of Russia-Ukraine negotiations quickly fizzled out, underscoring Belarus’ inability to secure international guarantees. Increasingly, international partners recognized the futility of discussing Belarus’ foreign policy with its Foreign Ministry.

With Belarus implicated in Russian aggression, a deeper alignment with Russia became inevitable, including sport and education ministries. One significant repercussion of the country’s international isolation was the barring of Belarusian athletes from the Beijing Paralympic Games in March 2022 — a decision announced as the athletes were en route to China.

As the year progressed, more international sports federations either banned Belarusian athletes from participating in competitions or faced boycott threats from Ukraine and its

1 “Головченко рассказал, как на практике воплотили идею Года народного единства”. *Зеркало*, 27 Dec. 2021, <https://news.zerkalo.io/economics/7769.html>.

2 Vladimir Makei suddenly died on November 26, 2022. His place was taken by the first deputy minister of foreign affairs Sergey Aleynik.

western allies if participation was allowed. The Ministry of Sport's response was largely to celebrate Belarusian successes in regional Russian competitions. Similarly, the Ministry of Education saw its international collaborations restricted to Russia, China, and Central Asian nations. Partnerships with Western universities, already strained after 2020's repressive measures, were terminated following the co-aggression against Ukraine. However, the Ministry itself actively gets rid – and purges educational institutions – of “wrong” partners.³

Sanctions: Emergency Countermeasures Unveiled

Following the war, the Belarusian government's response to the cascade of sanctions was marked by unwarranted optimism. Plans that were established prior to the war, including the Social and Economic Development Program for 2021–2025 (adopted mid-2021), seemed forgotten, with no government official referencing them publicly throughout the year.

Amid the plummeting exports to Western countries and Ukraine after 2020, the Belarusian government pinned its hopes on Russia (as its main ally) to compensate for both the moral and financial setbacks experienced by Belarus⁴. The challenge, however, was that the Belarusian budget largely depended on exports to Western nations or the production of goods that were now sanctioned. Consequently, immediate measures were employed to redirect exports towards Russia and the Eurasian

3 Гаргалык, Татьяна. “Монополия на знания. Почему в РБ закрывают частные школы?” DW, 29 Sep. 2022, <https://www.dw.com/ru/monopolia-na-znania-rossemu-v-belarusi-zakryvaut-castnye-skoly/a-63286630>.

4 “Головченко призвал Мишустина на фоне санкций ускорить меры поддержки Беларуси”. *Зеркало*, 14 Mar. 2022, <https://news.zerkalo.io/economics/11224.html>.

Economic Area. This involved rapid infrastructure development and legal adjustments.

To stabilize the economy, the government was granted additional powers, such as the ability to alter tax rates (including for the Belarus Hi-Tech Park), modify terms for foreign loans, and impose restrictions on foreign business divestments in Belarus⁵. Interestingly, many details of this decree were labeled “for official use” indicating a growing trend of secrecy in the operations of the Golovchenko – led Cabinet both in terms of the powers of the government and in the availability of official statistics. This obscurity rendered long-term planning for businesses impossible.

Despite these measures, A. Lukashenko dismissed government proposals aimed at alleviating private business burdens through tax cuts or deferrals. Conversely, a seemingly populist approach – price freezing backed by the threat of legal consequences – was endorsed by the government, even if such a move was economically counterproductive. This policy led to a surge of reports and subsequent detentions nationwide.

In light of a diminishing workforce, the government nevertheless saw an opportunity to strengthen its revenue sources by increasing fees for notary services and apostille registrations, essential procedures for many⁶. Those employed overseas were now deemed “parasites”, and from March onwards, they had to cover full (as opposed to subsidized) utility bills for any real estate they owned in Belarus. Additionally, threats to dismantle double taxation agreements with sanction-imposing countries

5 “Указ Президента № 93 ‘О дополнительных мерах по обеспечению стабильного функционирования экономики.’” *Pravo.by*, 14 Mar. 2022, <https://pravo.by/document/?guid=12551&p0=P32200093&p1=1&p5=0>.

6 “‘Подрывается потенциал экономики’. Сколько белорусов могло выехать из страны после выборов 2020 года и чем это грозит нашей стране”. *Зеркало*, 02 Feb. 2023, <https://news.zerkalo.io/economics/31763.html>.

hinted at a potential new revenue stream via taxes on Belarusians working abroad.

Lacking any substantial influence over Western countries imposing sanctions, Belarusian representatives voiced their opposition exclusively at the United Nations, conveniently sidestepping the causes for these sanctions. Instead, the narrative focused on portraying sanctions as punitive measures against nations that defy hegemony, alluding to a looming unipolar world order⁷.

Domestically, however, the government orchestrated a different narrative throughout the year, suggesting sanctions were beneficial for state-owned enterprises⁸. The decline of pivotal sectors like IT, oil processing, and wood processing, despite significant investment, was downplayed. Even as year-end economic data painted a grim picture, the government continued to enthusiastically plan for 2023.

Consolidation of the State Apparatus: Prioritizing Loyalty Over Competence

In the initial stages of the war, top Belarusian officials displayed remarkable composure, continuing with their regular tasks, from holding grand openings of new clinics to participating in events like the “Minsk Ski” and preparing for sowing campaigns. It wasn’t long, however, before propaganda campaigns became a part of their roster. As part of the monthly “Single Day

7 “МИД: введённые против Беларуси санкции не являются избирательными”. БелТА, 18 Nov. 2022, <https://www.belta.by/politics/view/mid-vvedennyye-protiv-belarusi-sanktsii-ne-javlajutsja-izbiratelnyimi-i-kasajutsja-vseh-sfer-535531-2022/>.

8 “Головченко: Санкции нам на руку, отдельные предприятия сработали лучше, чем до их введения”. Зеркало, 01 May 2022, <https://news.zerkalo.io/economics/13593.html>.

of Information”, officials visited working teams to boast about Belarusian accomplishments, following a standardized script⁹. Local authority websites documented these visits of ministers and their deputies, telling the school administration about the Belarus IT export successes.

As Belarus’ closest ally, Russia, deepened its involvement in the Ukrainian conflict, narratives began to incorporate themes of foreign policy threats. Officials spoke of sinister plots by Ukraine and NATO, and of external conspiracies against Belarus. Interestingly, these tales of Western threats were not linked to their area of expertise, but, traditionally, most persuasively delivered by security bloc representatives.

A new law on public service, introduced in the summer of 2022, resonated with this narrative of unifying the state apparatus against perceived external threats and instilling military discipline. This legislation no longer acknowledges the division of powers – legislative, executive, or judicial. Instead, the civil service is projected as a monolithic entity, expected to adhere unquestioningly to top-down orders. This alignment brings the working criteria for civil servants closer to those for military and paramilitary personnel, for which the notion of “service discipline” was introduced.

Remarkably, the new law says nothing about promoting the initiative, public accountability, or professionalism of civil servants. In a telling move, a cohort of potential civil servants – those belonging to the personnel reserve of the Head of State – no longer need to undergo professional tests. The method of selecting this reserve remains obscure, left entirely to Lukashenko’s discretion. Meanwhile, stringent measures ensure that officials ousted post-2020 find it challenging to re-enter public service. Those dismissed under “discrediting

9 “У идеологов новая методичка – о достижениях Беларуси, которыми надо гордиться”. *Зеркало*, 13 July 2022, <https://news.zerkalo.io/life/17763.html>.

circumstances” face a two-year ban from civil service roles, extending to five years for more critical positions.

Consequently, the longstanding informal practice of favoring loyalty over professionalism in civil service, especially at senior levels, has now gained legal backing.

During the relatively peaceful interlude between the 2010 and 2020 elections, the government occasionally championed progressive economic policy decisions. However, the period under review reveals a state apparatus operating under a militaristic logic that stifles initiative. While professionals remain within government circles, especially in economic sectors, their primary function now revolves around crafting short-term emergency solutions, often at the expense of Belarus’ long-term economic progression.

Conclusion

Since Belarus’ gained sovereignty, the government’s capacity for initiative and the advocacy of long-term national interests, particularly in the economic realm, has been markedly curtailed. The primary objectives of the Golovchenko-led Cabinet have been twofold: to secure maximal export preferences from its sole remaining ally and to legitimize its policies in the public eye.

The government’s shift to an entirely reactive mode reflects a broader trend in Belarusian state administration. This trend became especially pronounced after the initiation of Russia’s full-scale aggression in Ukraine, wherein the political regime lost its foreign policy autonomy. It’s plausible to predict this diminished autonomy will persist, given the ongoing exodus of skilled professionals from the administrative apparatus, the suppression of innovative thinking, and the imposition of stringent military discipline. This includes using threats like the death penalty for treason amongst officials as a tool of intimidation.

In essence, the government's reactive strategies in economic and social policy are part and parcel of a broader effort to maintain a semblance of stability in Belarus, even as the repressive apparatus plays a dominant role in this endeavor. This precariously maintained stability is likely to plateau at a modest benchmark, especially considering the potential waning of Russia's support for Belarus in the foreseeable future.

PARLIAMENT: FAILED CONSTITUTIONAL BARGAINING, INCREASED SUBSERVIENCE

Tatsiana Chulitskaya

Summary

Although the newly adopted version of the Constitution of the Republic of Belarus (referendum in February 2022) formally broadens the powers of the Parliament, in reality, its influence and operations remain largely unchanged. Only a few MPs, like Natalia Kochanova, Chairman of the Upper House of Parliament, have a noticeable public presence.

In its international endeavors, the Parliament is still oriented towards Russia as well as other non-democratic countries. The war in Ukraine has further demonstrated the tendency of MPs to echo Russian propaganda.

Trends:

- The new version of the Constitution extends parliamentary powers in name only, without affecting its actual functionality;
- the Parliament exists to mainly to rubber-stamp repressive initiatives by the authorities, solidifying its subservient role;
- An evident lack of legislative initiatives originating from the Parliament;
- Public addresses by deputies are increasingly characterized by propaganda-filled rhetoric, often mirroring Russian propaganda;
- Despite minimal interactions with Western democracies, there is an evident push to diversify inter-parliamentary relations and explore new platforms for dialogue.

The New Constitution and Old Modality in Law-making

Since the beginning of 2022, the Belarusian Parliament has put on a show of public discussions concerning the new

constitution. They have organized dialogue platforms and public receptions, reminiscent of the traditions of the Soviet era. The proposed referendum to amend the Constitution was pitched by the authorities as a remedy to the political crisis — a solution that seemed far-fetched from the start. The war, initiated by Russia, including from Belarusian territory, during the early voting, utterly dashed any hopes tied to the referendum. Nonetheless, the referendum proceeded, and the revised constitution was adopted. For MPs known for their strong subordination to the political leadership of the country, this indicated a shift in focus: aligning existing laws with the adopted changes. By their own accounts, MPs believe that over a hundred legislative items require revisions within two years. This includes laws regarding the existing government divisions, as well as the drafting of new laws, like the one on the All-Belarusian People's Assembly (ABPA).¹

There have been notable, though largely symbolic, changes to laws that govern the functions of MPs. Now the President of the country can opt to be a member of the upper house for life. Additionally, the power to convene extraordinary parliamentary sessions has shifted to the Heads of the House.

In turn, some of the Parliament's powers have been passed to the ABPA.² In a move reflecting a repressive logic, the mandate of MPs can be terminated if they hold foreign citizenship, a residence permit, or a Polish Card.

1 “Кочанова: для парламентариев наступает период активной, кропотливой законотворческой работы”. БелТА, 15 Mar 2022, <https://www.belta.by/society/view/kochanova-dlja-parlamentariev-nastupaet-period-aktivnoj-kropotljivoj-zakonotvorcheskoj-raboty-490397-2022/>.

2 “Лукашенко подписал законы о деятельности парламента. Что изменится в работе депутатов и сенаторов?”, БелТА, 30 Dec. 2022, <https://www.belta.by/president/view/lukashenko-podpisal-zakony-o-dejatelnosti-parlamenta-chto-izmenitsja-v-rabote-deputatov-i-senatorov-542636-2022/>.

Historically, MPs have scarcely spearheaded legislative proposals. In 2022, only four out of over fifty bills passed were introduced by MPs themselves. This list includes the ABPA Bill, which – similar to the legislation on a controlled civil society – was only adopted by parliamentarians after Lukashenko’s specific instructions.

Thus, although formally the Belarusian Parliament’s powers appear expanded, its *modus operandi* remains the same.

Deputies: in Service of Repression and Propaganda

Historically, members of both Houses actively worked to service the repressive apparatus, enacting legislation that either jeopardizes the wellbeing of citizens or ushers in new punitive measures. These include:

- Instituting special proceedings for the trials of accused individuals residing outside Belarus;
- Intensifying the penalties for alleged act of terrorism, up to and including death penalty;
- Stripping Belarusians living abroad of citizenship if found by the courts to be engaged in extremist activities. Additionally, introducing new stipulations for Belarusian nationals holding foreign documentation;
- Voting to withdraw from the International Covenant on Civil and Political Rights to prevent Belarusians from lodging complaints with the UN Human Rights Committee³

In the fall, the Parliament conducted what appeared to be a sham debate on the amnesty law. The MPs themselves, including the head of the lower house, Vladimir Andreychenko, trod

3 “Депутаты проголосовали за выход из договора по подаче жалоб в ООН о нарушении прав человека. Хотят сделать аналог в СНГ”. *Зеркало*, 13 Oct. 2022, <https://news.zerkalo.io/economics/23864.html>.

cautiously on the subject. They seemed to oscillate between the potential of amnesty of political prisoners and actual repressive practices. As further events have revealed – with the ratification of an amnesty devoid of provisions for political prisoners, such balancing was pragmatically driven.

Following Russia’s full-scale invasion of Ukraine, MPs adopted a rhetoric brimming with Cold War undertones and Russian propaganda. They spoke of a “collective West”, ostensibly seeking to destabilize the post-Soviet territories, and particularly singled out the United States, allegedly starting “an economic war”.⁴

MPs were also active participants in the propaganda campaign surrounding the migration crisis – orchestrated by Belarusian authorities along the EU borders. In collaboration with the Ministry of Foreign Affairs, they expressed concern about the death of forest mammals on Polish razor wire and sent “materials on the refugee genocide by Poland” to European structures.⁵

Furthermore, MPs contributed to further obscuring state statistics by sanctioning additional restrictions in the event of a national security threat. They refused to endorse standards for the treatment of rare genetic diseases using budget funds, as petitioned for by the public.⁶

4 “Коллективный запад не заинтересован в стабильности на постсоветском пространстве”. БелТА, 06 Jan. 2022, <https://www.belta.by/society/view/rachkov-kollektivnyj-zapad-ne-zainteresovan-v-stabilnosti-na-postsovetском-prostranstve-478351-2022/>.

5 “Беларусь направила в евроструктуры материалы о геноциде беженцев на белорусско-польской границе”. БелТА, 11 Mar. 2022, <https://www.belta.by/society/view/belarus-napravila-v-evrostruktury-materialy-o-genotside-bezhentsev-na-belorussko-polskoj-granitse-489561-2022/>.

6 “Лечение может обрушить экономику”. В парламенте ответили на просьбу людей с редкими заболеваниями выделить деньги на лекарства”. Зеркало, 08 Nov. 2022, <https://news.zerkalo.io/life/25685.html>.

International Engagements

With reduced interactions with democratic nations, Belarusian parliamentarians have been navigating available international avenues and bodies to advance their perspective on the situations in Belarus and the region. A notable figure in this endeavor is the Chairman of the Commission on International Affairs, Andrei Savinykh. Before the onset of the war, he made representations at the “Constitutional reform in Belarus” hearings during the winter session of the PACE Commission on Political Issues and Democracy. There, he reiterated the usual narrative of the “West’s double standards”.

Savinykh maintained a similar stance in the OSCE Parliamentary Assembly. Following the outbreak of the war, however, opportunities for Belarusian representatives to voice their views at these forums diminished. Savinykh accused PACE and OSCE PA for their perceived biases and their alleged disregard for “alternative opinions”. He emphasized their declining relevance for fostering an “open, equal, inclusive dialogue”⁷.

Generally, Belarusian deputies displayed an ambivalent stance concerning inter-parliamentary engagements with democratic nations. While they voiced indifference, there was a palpable dissatisfaction about the lack of avenues available to them. For instance, in September, V. Andreychenko lamented the challenges faced by Belarusian delegations “in the parliamentary structure of the Central European initiative to implement contacts with PACE, the Parliamentary Conference of the Baltic Sea and the Nordic Council”. Yet, when presented with an

7 “Председатель Постоянной комиссии Палаты представителей по международным делам А.В. Савиных прокомментировал итоги 29-й сессии Парламентской ассамблеи ОБСЕ”. *Палата представителей Национального собрания Республики Беларусь*, 07 June 2022, <http://www.house.gov.by/ru/news-ru/view/predsedatel-postojannoij-komissii-palaty-predstavitelej-po-mezhdunarodnym-delam-savinyx-av-64486-2022/>.

opportunity, both house leaders were swift in meeting the Swiss Ambassador during his mission to facilitate the release of political detainee Natallia Hersche.

Belarusian deputies explored alternative foreign policy avenues, engaging with countries of the far East, the Non-Aligned Movement, and other non-Western parliamentary platforms. At the leadership level, this included interactions with ambassadors from India, Cuba, Iran, Syria, Mongolia, the Democratic People's Republic of Korea, UAE, Armenia, Sudan, and others. Significant importance was attributed to relations with Saudi Arabia. Furthermore, Belarusian MPs held meetings with parliamentarians from nations like the Kyrgyz Republic, Kazakhstan, Cuba, Colombia, Viet Nam, Tajikistan, with themselves visiting Tajikistan and Iran.

A consistent ally for Belarus in sculpting an alternative international relation vector has been Cuba. Active collaborations between the two countries were evident, including mutual visits between officials like the Deputy Speaker of the House of Representatives, Valery Mitskevich, and Cuban delegates. Additionally, in 2022, Belarusian parliamentarians liaised with the Latin American Parliament, the ASEAN Inter-Parliamentary Assembly, the Pan-African Parliament, and others.

Simultaneously, Belarusian MPs were consolidating their already robust ties with Russia and its affiliated entities. While definitive assessments of the depth and quality of these relationships are elusive, official outlets from both Chambers regularly featured events related to the Inter-Parliamentary Union (IPU), promoted by Russia as the “oldest international parliamentary organization” and the international parliamentary assembly of the CIS, the Parliament of the Union State. Within the framework of the last one, for example, topics like “spiritual security” were deliberated.⁸

8 “Союзные парламентарии инициировали разработку концепции обеспечения духовной безопасности”. БелТА, 15 Apr. 2022, <https://www.>

Bilateral meetings between the heads of the Belarusian Parliament and their Russian counterparts were frequent, culminating in an agreement on cooperation between the upper houses of both nations in November.⁹

Denying War Amidst Ideological Battles Against Perceived Threats

Belarusian parliamentarians explain the war in Ukraine through the lens of Russian propaganda. Dominant narratives include blaming it on the United States, the need to protect the people in eastern Ukraine, and claims about the existence of biological weapon production facilities in Ukraine. Various deputies, including Chamber heads Andreychenko and Kochanova, as well as Oleg Belokonev (the chairman of the lower house's National Security Commission) and Sergei Rachkov (Chairman of the Commission on International Affairs and National Security of the Upper House), have echoed the rhetoric of a “collective Western blame”. Furthermore, A. Savinykh promoted a discourse on the importance of the Minsk Agreements as a working tool for resolving the crisis in Ukraine.

Another narrative propagated by Belarusian MPs is that the war could have been prevented had Western countries denounced the war in Serbia. They also stressed that Belarus does not participate in the war; hence any attempts to hold it accountable are groundless.

belta.by/society/view/sojuznye-parlamentarii-initsiirovali-razrabotku-kontseptsii-obespechenija-duhovnoj-bezopasnosti-sg-496449-2022/.

9 “Совет республики и совет федерации подписали соглашение о сотрудничестве”. БелТА, 24 Nov. 2022, <https://www.belta.by/society/view/sovet-respubliki-i-sovet-federatsii-podpisali-soglashenie-o-sotrudnicestve-536724-2022/>.

At the same time, the Belarusian parliamentarians actively combat what they consider to be misrepresentations of events in Belarus and unwarranted actions against the authorities. The MPs have adopted statements denouncing the decisions like cutting ties (e.g., with PACE) or excluding the official Belarusian delegation (as seen during the OSCE PA session in Birmingham). They have also criticized the failure to allow memorial events in Europe, such as the 77th anniversary of the liberation of the Buchenwald and Mittelbau-Dora concentration camps, as well as the prohibition of Belarusian athletes from performing under their national flag in global events.

Thus, in 2022 – particularly after the outbreak of war in Ukraine – the rhetoric of the Belarusian parliamentarians consistently echoed the narratives decrying the “collective West”, which, under the negative influence of the United States, supposedly misreads the events in Belarus. With that said, the war in Ukraine and the actual position of the Belarusian administration on the matter remains conspicuously absent from their propagandist statements.

Conclusion

Historically, the role of Parliament within the political system of Belarus was minimal, even before the recent political upheavals. Its appointees have largely remained on the periphery of the nation’s political landscape, rarely taking the initiative.

The parliamentarians mainly supported top-down presidential directives, and their legislative endeavors have centered on formalizing political repression and its associated mechanisms. Regrettably, this trend became even more pronounced in 2022.

Russia’s war against Ukraine demonstrated the willingness of Belarusian parliamentarians to embrace and reproduce both domestic and Russian propaganda narratives.

Lawmaking seems almost ancillary for Belarusian MPs, with their international activity largely revolving around the expansion of contacts with undemocratic countries, as well as intensifying their association with Russia.

BELARUSIAN ARMY IN TIMES OF WAR

Alena Kudzko

Summary

In 2022, the security situation in Belarus deteriorated sharply in light of the war in Ukraine. Belarus' support for Russia during the conflict negated any semblance of its neutrality. Following the growth of military integration with Russia, both in action and legislation, Belarus' autonomy as a sovereign actor has dwindled significantly. By the year's end, the perception of Belarus as a subservient ally to Russia, especially for security and military objectives, became even more entrenched.

Trends:

- The pace of military integration between Russia and Belarus accelerated dramatically.
- Belarus' defense capabilities, infrastructure, and industrial capacities were largely subordinated to the requirements of the Russian army. It's result – the loss of the country's military and strategic neutrality.
- Increasing attempts to modernize the military-industrial complex and the army;
- Intensified confrontation with the West, including the reinforcement of NATO's Eastern European flank.

Role of Belarus in the War

In February 2022, Russia launched a full-scale war in Ukraine, with Belarus acting as a supporter of the aggressor. Belarus' participation in the Ukraine war served Russia's immediate and strategic needs, even if it ran counter to Belarus' national interests.

Belarus as an Enabler of Russian Operations

Masked as a joint military exercise named “Allied Resolve – 2022”, Russian forces amassed in Belarus weeks before using it as a springboard for their campaign against Kyiv. Inconsistent statements from Belarusian officials about the presence of Russian troops suggested they were likely in the dark about Moscow’s plans.

Throughout 2022, Belarus played an active military role in the conflict, providing land, air, and logistical support, infrastructure for troop stationing, refueling and repair facilities, medical aid to Russian forces, and, eventually, equipment and ammunition. Aerial strikes launched from Belarus were notably significant in the war’s early phases, but continued throughout the year.

Belarus as Equipment Provider

As the Russian industrial facilities were unable to meet the needs of their armed forces, Russia applied to Belarus for military supplies. Reports indicated that Belarus transferred a variety of weaponry and ammunition to Russia, including older T-72A tanks, infantry vehicles, and trucks.¹

Belarus as a Distracting Menace

Return of Russian troops to Belarus in autumn (probably to accommodate and train new recruits) , coupled with continued military drills near Ukraine, compelled Ukraine to disperse its forces across its northern frontier and bolster its defensive capabilities in the region, even if the probability of another attack launched from Belarus remained low. Ukraine had established

1 “Режим Лукашенко передаёт РФ танки?” Телеграм-канал “Беларуски Гаюн”, 09 Oct. 2022.

numerous defensive elements and engineering barriers, destroyed access roads, and reinforced military units in the area.

Belarus as an Active Part of Nuclear Extortion

Throughout the year, Putin frequently invoked the specter of nuclear escalation to deter Western nations from supplying Ukraine with advanced arms. He also hinted at equipping Belarus with nuclear warheads, later clarifying that Belarus would not have control over them. Lukashenko backed these moves, citing the need to counter an “aggressive” West. The pathway for nuclear weapon stationing in Belarus was paved when the country amended its Constitution on 27 February 2022, abandoning its non-nuclear stance.

No Belarusian Troops in Ukraine

Despite its extensive support, Belarus did not dispatch troops to Ukraine. Given the Belarusian army’s lack of combat experience, outdated training, and insufficient equipment. Its effect on the course of the war would hardly be decisive. On the other hand, the army’s participation in the war could jeopardize the internal stability of the Lukashenko regime.

Accelerated Military Integration with Russia

Although the Belarusian army remains formally under the control of Lukashenko, the nation has effectively been transformed into a Russian military training ground and a logistics hub. Pre-war trends pointing in this direction were cemented through various agreements.

Days before the Allied Resolve-2022 exercise and the subsequent invasion of Ukraine, the new Union State Military Doctrine — signed in November 2021 — was disclosed. This doctrine

emphasizes shared threat perceptions between the two countries, particularly the escalation of external security threats, and how these perceptions guide their joint military and defense planning.

In October 2022, the establishment of a “regional military grouping” was proclaimed, which would include both Belarusian and Russian troops stationed within Belarus. This pact essentially served to rationalize a subsequent wave of Russian troop deployments in Belarus. Although these deployments were notably smaller than those leading up to the February invasion, the estimated 6,000–9,000 Russian troops stationed in Belarus could potentially be utilized to control Belarusian territory or as an initial platform for a future assault on Ukraine from the north.

Furthermore, in December 2022, an amendment to the 1997 agreement on jointly ensuring regional security in the military domain was signed. Putin’s visit to Belarus that month — the first in over three years — was primarily aimed at fostering military cooperation and publicly reinforcing the commitment to forge a “joint defense space”. Both nations are now geared towards enhancing troop preparation and boosting combat readiness, including through an increase in joint exercises.

A subsequent agreement² focusing on cooperation in the military-tech domain was signed in September 2022 and ratified in May 2023. This pact put into action a program that promotes research, standardization, industrial collaboration, and joint initiatives benefiting third-party countries.

Additionally, Belarus and Russia consented to extend the free use of two military facilities in Baranovichi and Vileika for an additional 25 years.

2 “Соглашение между Правительством Республики Беларусь и Правительством Российской Федерации о реализации Программы военно-технического сотрудничества”. *Pravo.by*, 23 Sep. 2022, <https://pravo.by/document/?guid=12551&p0=H12300266>.

These strategic moves imply that Russia harbors long-term intentions to intertwine the Belarusian military with its own military-industrial complex. Given this intimate alignment in standards, procedures, training, and production capabilities, it would be challenging for the Belarusian military to detach itself from its deepening integration with Russian frameworks or to swiftly adapt to Western standards, even if Belarus undergoes a sudden regime change. Furthermore, this close integration is likely to cultivate loyalty towards Russia within the Belarusian military, putting Lukashenko in a competition with the Kremlin over their loyalty. This dynamic reduces the probability that the military and security sectors would shift their allegiance to democratic entities should another wave of civil unrest erupt in Belarus.

Although Lukashenko cannot afford to publicly declare it, subjecting the country's military-strategic potential (including its territory) to the needs of the Russian army is not fully in line with his own desire to remain in power. At the moment, the goodwill of the Kremlin is all he can rely on.

Priorities:
Modernize the Belarusian Military
and Enhance Domestic Defense and Security

The Belarusian regime has likely made a serious assessment of the potential for the war to spill over into Belarusian territory. Ukraine has sufficient technical capabilities to defeat targets in the interior of Belarus. And in Minsk they might lack confidence that Kyiv would always avoid retaliation, under any circumstances. Also, Lukashenko's probable concern that Belarusian volunteers assisting the Ukrainian army could eventually set their sights on Minsk.

Belarusian democratic forces estimate³ that approximately 1,500 Belarusian volunteers are fighting in Ukraine, although the precise figure is hard to confirm and remains undisclosed by the Ukrainian Armed Forces. These groups have consistently expressed their intent to topple Lukashenko after achieving victory in Ukraine.

Given the Belarusian army's current limitations, it is ill-equipped to either engage in external conflicts or robustly defend national territory. Thus, military reform took center stage in 2022.

That year saw the Belarusian army engaging in surprise combat readiness checks⁴ and efforts to update its equipment. There have also been attempts to modernize its equipment. Lukashenko notably sought the modernization of Su-25 fighter jets at Russian facilities, aiming to equip them for nuclear capability. Later, Belarusian pilots commenced training on these upgraded jets.

Sanctions restricted Belarus' ability to procure military equipment, solidifying Russia as its primary supplier. Notably, 2022 witnessed the delivery of S400 and Iskander missile systems to Belarus (it is unclear whether Minsk paid for them, and if so – how).

A key focus for the Belarusian authorities has been the potential mobilization of additional soldiers. Several waves of mobilization in the country raised concerns about whether Belarus was preparing to send troops to Ukraine. Despite these concerns, 2022 mobilization events largely conformed to standard conscript recruitment. However, the swift and unexpected rounds of readiness checks for the reserves highlighted preparations

3 “Тихановская рассказала, сколько белорусов воюют за Украину”. *Belsat*, 06 June 2022, <https://belsat.eu/ru/news/06-06-2022-tihanovskaya-rasskazala-skolko-belorusov-voyuet-za-ukrainu>.

4 “Проверка боеготовности”. *Пресс-служба Министерства обороны Республики Беларусь*, 03 Apr. 2022, <https://t.me/modmilby/25107>.

for a potential wartime transition. The exercises were organized uncharacteristically quickly and without advance notice of their duration.

Emphasis on updating reserve and recruit lists suggests preparation for a full-scale mobilization if one is ever required. Throughout Belarus, territorial defense forces underwent readiness assessments. Lukashenko's longstanding vision of territorial defense saw further progression with his order to establish a "people's militia". Yet, the actualization of this initiative remains nebulous, lacking clear direction or structure.

Military-Industrial Complex: Sent Into Overdrive

Ukraine's use of western satellites for communications and intelligence gathering had forced Russia to accelerate the development of its own satellite systems. The Belarusian defense industry has been tailored to support the Russian military's needs. Lukashenko confirmed that the military integration package, which Belarus fully implemented in 2022, included defense industrial projects. These projects covered the production of semiconductors (a heavily sanctioned vital component for modern weapons), trucks, and aviation components.

Belarus' expertise in microelectronics has been invaluable in this venture. Belarus possesses specialized capabilities, cultivated since the collapse of the Soviet Union. Efforts have been made since 2020 to foster joint ventures and initiatives to boost cooperation in the space sector.

Peleng, a Belarusian optoelectronics firm, has been pivotal in developing sight solutions for Russian armored vehicles and software for its missile systems. Belarusian companies Planar and Integral have become increasingly crucial in aiding Russia's efforts to compensate for its restricted access to Western

microelectronic technologies⁵. In return, Russia has agreed to co-finance the industry's development with Belarus.⁶

Minsk continued to supply specialized equipment, including wheel chassis, used in a number of Russian missile and launch systems. Demand for these products is anticipated to rise.

The prominence of drones (Unmanned Aerial Vehicles) in the war in Ukraine has spotlighted Belarus' production capabilities in this domain. However, attempts to launch the production failed: the Belarusian models were not competitive enough in a combat setting and couldn't attract significant buyers. This could change, given the ongoing interest and foundational work already in place, which includes collaborations with notable producers like Iran.

Official reports indicate that, despite Western sanctions, Belarus continued to export military products to 57 countries. Only 11 nations have dropped off the list in recent years.⁷

Cooperation with a number of these countries is likely to deepen further in order to meet growing defense needs and allow import substitution of Western components.

Heavily sanctioned, Belarusian economy will continue to seek new export opportunities. The Russian military, on the other hand, has few partners willing to provide essential military components and resources.

5 Alesin, Aliaksandr. "Priorities of Military and Technical Cooperation between Belarus and Russia". *Minsk Dialogue*, 15 Feb. 2023, <https://minskdialogue.by/en/research/opinions/priorities-of-military-and-technical-cooperation-between-belarus-and-russia>.

6 "Первый Евразийский экономический форум". *Президент России*, 26 May 2022, <http://kremlin.ru/events/president/news/68484>.

7 "Belarus' State Authority for Military Industry sells to 57 countries in 2022". *Belarus.by*, 10 Feb. 2023, https://www.belarus.by/en/business/business-news/belarus-state-authority-for-military-industry-sells-to-57-countries-in-2022_i_0000152779.html.

Further Straining of Relations With the West: Belarus as a Regional Source of Instability

Belarus' participation in the war has entailed a legitimate response from Western countries — new sets of sanctions, including against the country's defense sector, associated enterprises, and individuals.

Since the war's commencement, NATO countries have reevaluated their defense postures and bolstered the Alliance's Eastern flank, which included stationing additional troops closer to the Belarusian and Russian borders. Should Russian troops establish a permanent presence in Belarus and if nuclear weapons are stationed there, NATO plans will be further strengthened.

Conclusion

Belarus' military integration with Russia has forged long-term dependencies that will prove challenging to disentangle. The enduring presence of Russian military forces, including nuclear weapons under Moscow's control, severely constrains Belarus' sovereignty and its potential pathways to mend relations with Western nations. This situation also heightens Lukashenko's personal vulnerabilities.

Deployment of Russian nuclear weapons in Belarus has further tarnished his regime's image. Moreover, the presence of nuclear weapons in Belarus does not make its political regime stronger, since control over it is likely to remain with the Kremlin and will only serve as an additional justification for the continued Russian military presence in Belarus. Finally, in case of realization of the worst scenario — the use of nuclear weapons deployed in Belarus against Ukraine or other enemy. If Putin opts to deploy nuclear weapons against Ukraine or any other

enemy from the territory of Belarus, such an action would designate the launch site as a legitimate retaliation target.

The security landscape of Belarus hinges on the way the Ukrainian war progresses. Absent a clear victory for either side, 2023 will probably witness the intensifying integration of Belarusian and Russian military and security forces.

That said, should Ukraine achieve notable successes, Lukashenko might explore escape routes from an unfavorable alliance. Even then, with Russia's established presence in Belarus, Lukashenko's ability to act independently will be substantially curtailed. Even if Russia retreats from parts of Ukraine, it doesn't mean a similar withdrawal from Belarus. The stability of Putin's regime, which will be influenced by the outcome in Ukraine, will be the determining factor in the matter.

FOREIGN POLICY

BELARUS – EU: FROZEN SANCTIONS AND A FAILED REBOOT

Arseny Sivitsky

Summary

At the start of the year, Minsk tried to revert to “business as usual” in its relations with the West and on its own terms. However, its complicity in Russia’s aggression against Ukraine marked another point of no return, especially after the unprecedented crisis in relations following 2020. The EU vehemently condemned the unprovoked invasion of Ukraine and Belarusian regime’s involvement, imposing sanctions on both Moscow and Minsk. Yet, in an attempt to prevent the direct involvement of the Belarusian army in the Russian-Ukrainian conflict, the EU allowed some leeway for official Minsk. The EU opted not to synchronize its anti-Russian and anti-Belarusian sanctions, excluding Belarus from the new sanctions packages in the latter half of 2022. By the end of the year, Belarus tried to position itself as a peacemaker, hoping to barter its non-participation in the war and a few other initiatives for a relaxation or even removal of EU sanctions. However, the only concession Minsk was able to get was a halt in the increase of sanctions pressure following the sixth round of sanctions.

Trends:

- Escalation of EU sanctions pressure during the first half of the year, with subsequent retaliatory actions by Belarus;
- Minsk’s efforts to resume regular business relations with the EU on its own terms, marked by intensified bargaining on key issues (non-involvement in the war, political prisoners, peace initiatives);
- An absence of consensus within the EU regarding the synchronization of anti-Russian and anti-Belarusian sanction strategies;
- The EU remains Minsk’s second major trading partner, even though imports from Belarus have decreased by 43%.

Trying to Turn Back Time: Negotiating Sanctions Removal

The onset of 2022 saw the full implementation of EU sanctions, introduced in response to the events of 2021. These included the forced diversion of the Ryanair flight, the migration crisis, and ongoing repression. These sanctions affected various sectors of the Belarusian economy, including oil, potassium, tobacco, the banking and logistics sectors. On February 1, Lithuania prohibited the rail transportation of Belarusian mineral fertilizers, a ban that Ukraine followed on February 16.

In spite of these measures, the Belarusian government remained hopeful about rebooting EU relations on its terms. Belarusian diplomats attempted to negotiate the lifting of EU sanctions in exchange for “a constitutional referendum”¹. Foreign Minister Vladimir Makei announced Minsk’s willingness to engage in dialogue with European nations, but on the regime’s own terms, which included the EU abandoning dialogue with opponents of the regime. Minsk ramped up its efforts to identify potential intermediaries for dealings with Western countries and held discussions with past such partners, such as the Vatican, the Order of Malta, and Italy. However, the efforts of Belarusian diplomacy fell short, largely due to Lukashenko’s anti-Ukrainian and anti-Western rhetoric and Belarus’ evident involvement in the war.

After failing to engage the EU and other Western nations, Minsk intensified its efforts to showcase its military and political allegiance to the Kremlin. Meanwhile, the EU started contemplating new restrictive measures to address gaps in the current sanctions against Belarus. They also initiated preparations

1 “О рабочей встрече с руководителями аккредитованного в Беларуси дипломатического корпуса”. МИД Беларуси, 13 Jan. 2023, https://www.mfa.gov.by/press/news_mfa/b4930f8363d2fc84.html

for sanctions, should the Belarusian army participate in Russia's invasion of Ukraine².

Complicity in War: EU Sanctions and Belarus' Reactions

After Russia's invasion of Ukraine, executed in part from Belarusian territory, a strong response from the West was inevitable. Although the Belarusian armed forces did not directly engage in the conflict, the Belarusian regime's decision to grant Russian troops access to its land and airspace became a primary reason for the EU to intensify sanctions. The European Union not only extended the previous sanctions packages, imposed due to the political crisis, for another year but also began formulating new restrictive measures.

Kyiv eventually accepted Minsk's proposal for negotiations between the Ukrainian and Russian delegations on the Belarusian-Ukrainian border in the Homyel region on 28 February. This time, however, Minsk's mediation in the Russian-Ukrainian conflict failed to translate into the removal of European sanctions, unlike the previous peacemaking attempts in 2014–2016.

In early March, the EU introduced additional sanctions against Belarus in retaliation for its complicity in the Russian invasion of Ukraine. European businesses were urged to fulfill or otherwise end all previously signed contracts by June³. The

2 "EU considers new measures against Belarus". *Reuters*, 18 Feb. 2022, <https://www.reuters.com/world/europe/eu-mulls-new-measures-against-belarus-withdrew-some-staff-kyiv-sources-2022-02-18/>

3 "Council Decision (CFSP) 2022/356 of 2 March 2022 amending Decision 2012/642/CFSP concerning restrictive measures in view of the situation in Belarus". *EUR-Lex*, 2 Mar. 2022, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv%3AOJ.L_.2022.067.01.0103.01.ENG&toc=OJ%3AL%A2022%3A067%3ATOC

new sanctions targeted military and dual-use products, timber, cement, rubber products, steel, and iron. The National Bank of Belarus, along with state-owned institutions such as “Belagroprombank”, “Dabrabyt Bank”, and “Development Bank”, were disconnected from SWIFT. The EU banned trading shares of Belarusian state-owned enterprises on European platforms, selling euro-denominated securities to Belarusian clients, and supplying euro banknotes to Belarus. Furthermore, Belarusians were prohibited from depositing more than EUR 100,000 in the EU and from opening accounts in the EU’s central securities depositories⁴.

In April, following the failure of the Russian blitzkrieg and their subsequent retreat from northern Ukraine regions back into Belarus (which unveiled Russian war crimes in places like Bucha), the EU introduced its fifth sanctions package. While most of the restrictions targeted Russia, the EU also imposed a ban on Belarusian road transport, including transit, within its borders. Exceptions were made for pharmaceutical, medical, agricultural, and food products, including wheat.

Minsk responded by formulating a list of countries it deemed unfriendly, which specifically included EU member states. Belarus then paused payments to foreign entities based in the “unfriendly” countries and began settling debts with international financial institutions, including European ones, in Belarusian rubles, contrary to prior agreements. Lukashenko’s Decree 93 introduced measures that complicated the process for foreign investors looking to divest from Belarusian enterprises and repatriate capital out of the country.

Concurrently, Belarus granted visa-free access to citizens from neighboring EU nations. In a letter dated April 6, Foreign Minister Makei urged European counterparts to reinstate

4 “Ukraine: EU agrees to extend the scope of sanctions on Russia and Belarus”. *European Commission*, 9 Mar. 2022, https://ec.europa.eu/commission/presscorner/detail/en/ip_22_1649

dialogue with Minsk. He emphasized Belarus' intention to not get involved in the conflict and proposed a reevaluation of the "paradigm that will shape the future of Belarus-EU relations and European security in the upcoming years"⁵.

The West stipulated several conditions for resuming the dialogue: the release of all political prisoners, substantive dialogue with the Belarusian populace, new elections under international oversight, and the cessation of support for the war. In response, Minsk only escalated its repressions within the country.

As anticipated, in early June the EU introduced the sixth round of sanctions against both Russia and Belarus, targeting oil, tobacco, and potassium companies, "Beltamozhservice", "Belkommunmash", as well as the regime's propagandists (individuals and Belteleradiocompany collectively). Additionally, "Belinvestbank" was cut off from the SWIFT system⁶.

Minsk-Brussels Maneuvers:

Freezing Sanctions in Return for not Entering the War

As time passed, Belarus began to recognize the complexities of its situation due to the intensifying adverse effects of the sanctions on its economy. Minsk estimated that, as a consequence of the first five sanctions packages adopted by the EU, the volume of banned Belarusian exports to the EU and North America stood at \$16–18 billion annually⁷.

5 "Письмо Макея Европе. История одной переписки". *Reform.by*, 15 Apr. 2022, <https://reform.by/308625-pismo-makeja-evrope-istorija-odnoj-perepiski>

6 "Official Journal of the European Union, L153, 3 June 2022". *EUR-Lex*, 03 Jun. 2022 www.eur-lex.europa.eu

7 "Заблокирован экспорт на \$ 16–18 млрд". Названы суммы потерь от санкций ЕС и США". *Myfin.by*, 16 May 2022

In September, Minsk attempted to broker a deal with the EU using a pretense of amnestying political prisoners as a bargaining chip. The so-called amnesty scarcely impacted political prisoners and, as a result, failed to enhance relations with the EU. Subsequently, Belarus proposed a previously reliable asset – assistance in regional security. This encompassed the non-involvement of the Belarusian army in the war, refusal to recognize the September referendums in the occupied regions of Ukraine, and mediation between Russia and Ukraine. Makei emphasized that Minsk “supports a rapid resolution of the conflict through diplomatic channels”.

Yet, the most promising avenue for Minsk might have been its contribution to global food security. Belarus expressed its willingness to transport Ukrainian grain to the ports of Lithuania and Latvia by rail. In return, Minsk sought permission to ship its goods via these ports, primarily focusing on Klaipėda. However, this proposition was dismissed by Lithuania, Latvia, and even Ukraine.

In the meanwhile, Minsk managed to sidestep its inclusion in the seventh, eighth, and ninth rounds of sanctions put forth by the EU and its Western allies in July, October, and December of 2022 respectively. This outcome can be attributed less to Belarusian initiatives and more to the absence of consensus within the EU. Certain European nations, presumably France and Hungary, were hesitant to further tighten the sanctions against Lukashenko, aiming to preserve his maneuverability. On the other hand, nations such as Poland, the Baltic countries, and Ireland pushed for a synchronized approach to sanctions against both Russia and Belarus. This approach failed to gain unanimous support at the EU level.

The news of Belarus’ omission from the ninth EU sanctions package was met with considerable enthusiasm by Minsk. Lukashenko remarked on the reduced sanctions pressure, while Belarusian diplomats again endeavored to sway the global

community. They argued that the sanctions imposed on Belarus were not in response to election fraud, repression, human rights violations, involvement in the Russian assault on Ukraine or orchestrating the migration crisis. Instead, they maintained that the sanctions were the result of Belarus' independent and peace-loving policy stance.

In 2022, the EU only imported €3.2 billion worth of Belarusian goods – marking a 43.4% decline from 2021's €5.6 billion. Conversely, exports to Belarus amounted to €6.6 billion, a decrease of 4.6% from the previous year. While the EU continues to be Belarus' second-largest trading partner, trailing only behind Russia (with trade percentages of 12% and 60% respectively), Belarus ranks 49th on the EU's list of trade partners, accounting for a mere 0.2% of the EU's total trade⁸. This suggests that the EU has notably scaled back its trade relations with Minsk without encountering substantial repercussions for itself. At the same time, Belarus' reliance on imports from European nations remains despite the constraints imposed by EU sanctions and the reciprocal measures adopted by Belarus.

Conclusion

While the EU and the Western nations imposed new economic restrictions in response to Belarus' support of Russian aggression, official Minsk successfully managed to prevent an escalation of these sanctions. This outcome was influenced, in part, by the Belarusian army's non-participation in the Russian-Ukrainian war. A lack of consensus within the EU regarding a sanctions strategy against Belarus played a significant role as well.

8 “European Union, Trade in goods with Belarus”. *European Commission*, https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_belarus_en.pdf

Hesitant to provoke Minsk into entering the war, Brussels opted not to intensify the sanctions further, maintaining them at the level established by the sixth set of sanctions. With that said, previous rounds of sanctions had already significantly impacted Belarusian export flows to the EU. Any significant destabilizing move by the official Minsk might disrupt this precarious equilibrium, potentially pushing the EU to ramp up sanctions against Belarus at least to the level of Russia. Such actions could encompass an increased Russian military presence, stationing of Russian nuclear weapons, direct involvement in hostilities against Ukraine, or further provocations along the Belarus-EU border.

BELARUS–RUSSIA: THE GOLDEN AGE OF PLANNING

Yanov Polessky

Summary

Since the developments of the second half of 2020, Minsk’s “multi-vector” diplomacy has been consistently phased out, and its leverage in disputes with the Russian leadership has been growing weaker. As a consequence, the Lukashenko regime had to pay the highest possible price for Moscow’s political and economic backing. The transformation of Belarus’ territory into a de facto military and strategic platform for Russia is the most dramatic geopolitical transformation in Eastern Europe since the disintegration of the Soviet Union. Furthermore, the Belarusian leadership had to meet halfway with the Kremlin in terms of political reform and make concessions – unprecedented since the formal emergence of the Union State of Belarus and Russia in 1999 – when it came to economic integration. Minsk ceded its transit role to Moscow, and its connections between the Belarusian and the global economy now largely depend on Russia.

Trends:

- Clear emphasis on the militarization of relations;
- Loss of Belarus’ military and strategic sovereignty;
- Increased economic dependence on Russia;
- Reappearance of the oil rent;
- Big logistic maneuver: redirection of Belarusian export supplies from the West to the East.

Preamble: War “According to Plan”; War as a Cure for the Pandemic

Wars help generate challenges without which political elites would be unable to validate their authority. This is the only possible rational justification for war, although a contemporary armed conflict does not guarantee domestic political stability, let alone benefits that could cover the costs of such an undertaking. An illusion prevailed in the Kremlin at some point, though, that a quick victorious war was the most adequate response to the various contemporary “geopolitical challenges”.

In modern warfare, Umberto Eco reminds us, calculations and intentions of the main actors are irrelevant, because de facto we are dealing with the dynamics of a neural network.¹ Actors involved are not at all single-headed and monolithic, and live in terms of permanent making and breaking of consensus. Russia’s so-called Special Military Operation in Ukraine (SMO) is an inclusive conflict that does not set one homeland in opposition to the other – due to the buildup of the number of powers in this game, the initial payloads are distributed quite unexpectedly. China selling drones to both Ukraine and Russia, Belarus torn between peacekeeping and escalation are all typical storylines of such a conflict.

The CSTO’s “roundtrip” peacekeeping mission to Kazakhstan of early 2022 that lasted only seven days will go down in history as the shortest international mission of its kind. The reason for this brevity is simple: the situation had not called for external intervention in the first place. There had been nothing in Ukraine to suggest a WWII-style military invasion, with the massive use of aircraft, tanks and artillery. This version of war – Europe’s largest in the past 77 years – came as a surprise even to those who had not ruled out a proxy conflict of certain intensity.

1 Эко, Умберто. “Осмысляя войну”. *Пять эссе на темы Этики*. Санкт-Петербург, “Симпозиум”, 2000.

“Everything is going according to plan” will become the fundamental meme of this war, and “Putin’s plan” will turn into a symbol of deliberately false and unattainable goals, which were officially formulated as “prevention of NATO enlargement”, “denazification”, “demilitarization”, etc. None on this list has been achieved, although some positive externalities were obvious: the war became a good cure for the pandemic.

Three Union Shells: Transition, Complicity, Integration

By the end of 2021, Belarus and Russia had reached consensus on three basic sets of issues, which needed to be resolved for the former to enjoy the latter’s comprehensive economic and political support. As subsequent events showed, the Belarusian regime paid an exorbitant price for each of the three positions:

- a constitutional reform to institutionalize political transition in Belarus;
- intensification of military and political cooperation;
- implementation of 28 Union integration roadmaps.

I. The referendum amending the Belarusian Constitution was held on February 27. It never generated any major interest inside the country, because topping the agenda was the invasion of Ukraine that began on February 24; its results were not recognized internationally. The key idea of the amendments was to give the All-Belarusian People’s Assembly an extraordinary status, but it was never about the redistribution of powers between the legislative and executive branches. The All-Belarusian People’s Assembly is a forum of Lukashenko’s supporters, and participation is regulated by administrative methods; it will include the current and former presidents, representatives of

the legislative, executive and judicial branches, etc. The People's Assembly can cancel any laws and decisions of all state bodies.²

Within the framework of political transition, this institutional trick should ensure that the collective Lukashenko retains his monopoly on power while circumventing the risky election procedure. Indeed, Lukashenko cemented the moment of stability – but as long as the history of Belarusian elites is not a particular case of the “graveyard of aristocracies” scenario, the penultimate episode of which envisages transition from a personalist regime to collective rule. And only as long as the Kremlin, which has made it clear on numerous occasions that political transition in Belarus is not exclusively Belarus' internal affair, genuinely approves of the current status quo. Lukashenko's regime, therefore, assumes the current risks of the Russian political class.

II. For eight years, Minsk managed to dodge an agreement with Moscow on the establishment of a military base in Belarus, but in September 2020 everything changed drastically. Lukashenko spoke about the need to expand and deepen military and political cooperation, including a tighter schedule of exercises. One such military exercise was agreed with Putin in December 2021. The strategic game “Union Resolve–2022”, which was launched on February 10, was based on a scenario of a major regional war between the Union State of Belarus and Russia, on the one hand, and NATO countries with Ukraine joining them, on the other.

Belarus entered the war against Ukraine having an ambiguous status of an “occupied territory”³ and an accomplice in aggression. The global community recognized the latter role by

2 “Больше полномочий у ВНС, новые ограничения для президента. Вот какие изменения прописаны в проекте Конституции”. *Зеркало*, 27 Dec. 2021, <https://news.zerkalo.io/economics/7792.html?c>.

3 “В Верховной Раде предлагают признать Беларусь оккупированной территорией”. *Reformation*, 22 Oct. 2022, <https://reform.by/334775-v-ukraine-prosjat-priznat-belarus-okkupirovannoj-territoriej>.

promptly applying restrictive measures to Minsk (in addition to those already in place). Among others, Belarus' largest exporters were targeted by the sanctions. As a result, Belarus felt a double impact of sanctions, direct and indirect — through the negative consequences of the restrictions imposed on Russia.

Lukashenko had made sure that necessary funds were invested in the armed conflict well in advance. Over the prior 18 months, he had sought escalation with the West in a way that Russia's relationships with the West escalated simultaneously. He also completely neutralized the potentially anti-war “fifth column”, thus providing a favorable environment for Russian troops stationed in Belarus.

The ensuing events developed according to the same logic of escalation, and Lukashenko often interpreted the Kremlin's unilateral decisions as “agreements”. The February exercise “Union Resolve-2022” became a veil for the preparation and mobilization of the Russian invasion forces, and the missiles that hit Ukrainian settlements from the north became a “preventive” strike. In the same manner, the unified regional grouping of forces proposed by Minsk eventually turned out to be a cover for coaching newly mobilized Russian troops at Belarusian training grounds.⁴ In September 2022, Lukashenko activated the “madman theory” rhetoric, making threatening remarks about doomsday weapons, and six months later, an “agreement” on the deployment of tactical nuclear weapons in Belarus was announced. The Belarusian dictator seemed to anticipate his Moscow boss's wishes before they even condensed as such, and throughout the duration of armed hostilities in Ukraine, Lukashenko actively worked as the Kremlin's press secretary, justifying all its decisions. The Belarusian armed forces were never sent to Ukraine,

4 “Лукашенко создает базу, чтобы белорусы хотели от него избавиться по причине, по которой его выбрали.’ Шрайбман — о ядерном оружии в Беларуси”. *Зеркало*, 26 Mar. 2023, <https://news.zerkalo.io/economics/35436.html?c>.

although experts discussed prospects of their direct involvement in combat operations throughout the year.

III. If you have yielded in negotiations over the creation of a foreign “military base” in your country, then there are probably very few reasons for you to resist economic integration – the ultimate memorandum was signed in November 2021 at a session of the Supreme State Council of the Union State. It turned out that integration almost completely boiled down to the discourse of “import substitution”, a strategy aimed at making up for the deficit of critical imports and ensuring partial transition to national self-sufficiency, a.k.a. autarky.

Virtually all sectors of the Belarusian and Russian economies *scheduled* and announced import-substituting projects, but as of the beginning of 2023, outcomes were exclusively negative. Many manufacturing and service enterprises, which the economic authorities had expected would promptly occupy the empty niches vacated by withdrawing Western campaigns, reported losses for the fiscal year.⁵When it comes to economic mergers, though, Belarus and Russia did remarkably well, having achieved an impossible number of intergovernmental and interagency agreements and other transactions, some of which can indeed be categorized as “integration”. According to official statistics, by November 2022, 50% of Union State projects had been implemented, by December, 60% of all projects, and by the start of 2023, up to 70%.⁶ Out of 28 programs, seven were completed – those related to the traceability of goods, finance, accounting, nuclear energy, as well as currency, transport, veterinary and quarantine controls.

5 A good example is the Russian Vkusnoitochkafast food chain (known as Myotkryty in Belarus), which uses the former McDonald’s facilities, which reported RUB 11 billion losses in 2022.

6 “Колода из 28 карт снова в игре”. *Belarus in Focus*, 9-15 Jan 2023, <https://belarusinfocus.pro/be/belarus-rasiya/koloda-iz-28-kart-snova-v-igre/>.

These statistics might be far-fetched, and yet it is obvious that Minsk stopped resisting integration on a number of fundamental positions. This certainly includes the treaty on general principles of indirect taxation (VAT and excises) signed in October, which envisages amendments to the Belarusian Tax Code, and in the future – the creation of a supranational tax committee. Such a decision could inflict serious costs on the Belarusian economy (including its unofficial part) – with the exception of the oil refining sector, which was offered an opportunity to effectively navigate within the perimeters of the so-called “tax maneuver” of the Russian government.

All this could be categorized as an integration breakthrough, but Belarus has not yet benefited from any noticeable progress resulting from the implementation of union programs in such fundamentally important sectors as energy, industry, and transport. Lukashenko specifically pointed to the lack of headway at a meeting focusing on the Belarus–Russia relationship in early 2023. Summarizing his statement, one can draw the conclusion that at that stage, Minsk had miserably lost a number of critical disputable points in the trade of sovereignty to the Moscow establishment.

“Putin’s Plan” for Belarus

Economic support for Belarus in the form of cash, energy subsidies, other benefits and exemptions was provided in amounts that the Kremlin had determined as necessary and sufficient to avoid destabilization in the neighboring country. Incidentally, the “martial laws” did not radically affect the amounts of aid compared to the previous period.⁷

7 Львовский, Лев. “Дозировка щедрости. Как война изменила российскую экономическую поддержку Беларуси”. *Carnegie Endowment*, 6 Mar. 2023, <https://carnegieendowment.org/politika/89140>.

At the end of 2021, the Belarusian government requested \$3.5 billion from the Eurasian Fund for Stabilization and Development to restructure the state debt. This request remained unanswered. Then, following an increase in import substitution in bilateral relations, the Belarusian side formed 30 thematic bids and placed the price tag on them – about \$2.5 billion of investment (i.e. soft loans or even grants that do not need to be repaid). The amount of the “import substitution” loan finally agreed in November 2022 amounted to RUB 105 billion (over \$1.7 billion).

The postponement of the deadline to repay previous debts amounting to a total of \$1.4 billion from April 2023 to the period from 2028 to 2033 came as an additional bonus. The Belarusian government filed a corresponding request in March citing the “difficult financial situation”.

“Sensitive parameters”, in Putin’s language, concerning pricing in the energy sector were agreed without debate. The contractual natural gas price for 2023 was fixed at the same level (about \$128.52 per 1,000 cubic meters), but recalculated in Russian rubles. Over the past six years – despite disputes and scandals – almost nothing has changed: since 2017, the natural gas price has fluctuated just a bit below \$130 per 1,000 cubic meters. A special achievement is arguably the agreement fixing the natural gas price for three years in advance for the first time in the history of Belarusian–Russian relations. There is no official data on crude oil imports or refined oil exports. Based on indirect data and the discount of the Russian Urals blend to the benchmark Brent, BEROC economists believe that in 2022, Belarus’ profits from transactions with Russian oil amounted to about \$1.7 billion. If the favorable market situation persists and export supplies are re-established, Belarus will have an estimated \$2.7 billion in profits in 2023.⁸ These calculations suggest

8 “Возвращение нефтяной ренты”. BEROC, 14 Mar. 2023, <https://beroc.org/publications/view/vozvrashchenie-neftyanyoy-renty/>.

that oil rent is back, as well as that Belarus has benefitted from the sanctions imposed on the Russian oil industry for at least a short term.

Also high on the Belarus–Russia agenda is the major transport and logistics pivot prompted by the restrictions. Literally within a year, Belarus turned from a transit country into a “closed” region connected with external markets almost exclusively via Russia’s transport infrastructure – railroads and access to the sea. Throughout 2022, Minsk eagerly shared its plans to buy into Russian ports and build its own facilities for shipping significant volumes of exports, but there are no clear prospects in this regard. This issue (as in the case of the construction of the Belarusian Nuclear Power Plant) ultimately comes down to the Kremlin’s willingness and ability to extend additional loans to Belarus.

Trade

In 2022, trade between Russia and Belarus reached a new all-time high of about \$50 billion, according to the Belarusian leadership. The figure looks more like the original target for the year, not the actual performance. The official data reported by the Russian side differ significantly (by at least \$6.5 billion): mutual trade turnover amounted to \$43.4 billion in 2022, which included exports from Russia worth \$21.4 billion and imports worth \$22 billion.⁹ For the sake of simplicity and clarity, we will use intermediate mathematical indicators (see the table) based on the assumption that each party is lying, having its own ulterior motives.

9 “Москва оценила товарооборот России с Белоруссией в 2022 году в \$43,4 млрд”. ТАСС, 14 Feb. 2023, <https://tass.ru/ekonomika/17043377>.

Table 1. Belarus–Russia commodity trade in 2017–2022, \$ mln¹⁰

	2017	2018	2019	2020	2021	2022	% on 2021
Turnover	32,424	35,561	35,552	29,667	40,053	47,000	117.3
Export	12,898	12,986	13,569	13,157	16,392	23,000	140.3
Import	19,599	22,619	21,982	16,510	23,661	24,000	101.4
Balance	-6,701	-9,633	-8,414	-3,353	-7,268	+1,000	

Data: Belstat, author's projections (2022).

The marked increase in two-way trade (by 17% year-on-year according to Belarus and 12% according to Russia) did not come easy to Belarus and became a result of a complete loss of the Ukrainian market and a significant reduction in trade exchanges (by up to 70%) with the EU. However, economic analysts attribute the rapid growth of Belarusian exports to Russia to growing prices rather than physical volumes and point to the depreciation of the Belarusian ruble against its Russian counterpart.

Meat and dairy accounted for a considerable portion of Belarusian export deliveries to Russia, alongside oil products, and (probably) goods for the Russian army.

Conclusion

Having lost both its transit potential and several chessboards to play its foreign policy games, Lukashenko's regime was left alone with the only actual counterparty. In the near future, Minsk can only rely on benign intentions of the Kremlin's elites and a favorable foreign economic environment (and does so).

10 Data: "Статистика внешнеэкономической деятельности". Интерактивная информационно-аналитическая система распространения официальной статистической информации, <http://dataportal.belstat.gov.by/Indicators/Search?code=1063065>.

Belarus' heightened dependence on Moscow, however, is not tantamount to Putin's absolute control over Lukashenko, who will not always seek approval by Russia's top leadership when making all of his decisions. He will try to play his own game, which, however, is fatally limited by the progress of the war in Ukraine, sanctions, scarcity of resources and political and economic isolation of the Union State.

For what it's worth, Lukashenko's regime has moved towards the final phase of its development, i.e. it has entered the phase of extinction, in which risks are high and benefits are elusive and ambiguous.

BELARUSIAN-AMERICAN RELATIONSHIPS: BROKEN BEYOND REPAIR

Anton Penkovski

Summary

Over the past few years, Lukashenko's regime has made several dramatic mistakes that have made a return to constructive relations with the United States nearly impossible. Stakeholders no longer regard any pragmatic Russia-West balance strategies offered by Minsk as credible. Active participation in the war in Ukraine deprived the Lukashenko regime of one of its primary bargaining chips.

The loss of a full-fledged US diplomatic presence in Minsk, combined with the forfeit of many markers of autonomy, increased sanctions pressure, and the ongoing wave of repressions, has driven official Minsk and Washington to their lowest point in relations, with no foreseeable path forward. Nevertheless, Washington continues to actively support the democratic forces of Belarus in exile, albeit to a somewhat diminished extent due to the priority focus on events in Ukraine.

Trends:

- Degradation of bilateral relations: shifting from dialogue based on pragmatic small steps to intermittent working contacts.
- Minsk's alignment with Russian diplomacy concerning the West in general, and the United States in particular.
- Washington's over support for democratic forces in Vilnius, but without conferring the status of an exclusive representative of Belarus in its contacts with the United States.
- diminishing economic ties as a result of sanction pressures.

Diplomacy on the Brink of War

In early 2022, the bilateral relations between Belarus and the United States were incredibly strained. On the 30-year anniversary of diplomatic relations between the two countries, the focus wasn't on commemorating the milestone but on the potential loss of decades of US diplomatic achievements in Belarus. Soon after the closure of the offices of the Public Diplomacy Section and the United States Agency for International Development (USAID), Belarusian authorities demanded a further reduction of the embassy's administrative and technical staff. As a result, the American diplomatic mission found itself in a precarious position, with the remaining staff's sole focus being to maintain the diplomatic mission itself.

Simultaneously, US officials consistently voiced their concerns regarding the potential escalation of the Ukraine conflict into a full-blown war involving Belarus. As early as January 2022, during open briefings at the US State Department, concerns were raised about the presence of the Russian military, which was deemed a highly volatile factor.¹ The US State Department openly questioned A. Lukashenko's capacity to implement an independent policy, prompting his sharp reaction.

US citizens were repeatedly called upon to leave Belarus as soon as possible due to potential escalation risks. In response, Lukashenko dismissed such assessments as "a collection of fantasies and horror stories", attempting to accuse Washington of baseless alarmism. Shortly thereafter, the US diplomatic mission evacuated diplomats' families from Minsk, an action that Lukashenko's Foreign Ministry labeled as fearmongering.

1 "A Senior State Department Official on the Secretary's Upcoming Travel to Ukraine and Germany". U. S. *Department of State*, 18 Jan.2022, <https://www.state.gov/a-senior-state-department-official-on-the-secretarys-upcoming-travel-to-ukraine-and-germany/>.

On the eve of the war, US Assistant Secretary of State for European and Eurasian Affairs Karen Donfried reached out to Foreign Minister Vladimir Makei, while Chairman of the Joint Chiefs of Staff, General Mark Milley, spoke on the phone with Belarusian Chief of Staff Viktor Gulevich.

After the conflict had already begun, representatives of the Office of Sviatlana Tsikhanouskaya stated that Washington officials had briefed them on potential war scenarios. In this context, American intelligence was precise in determining Moscow's intentions.

Regrettably, it is unclear to what degree US officials demonstrated their knowledge of the Kremlin's plans in their interactions with the Lukashenko regime. Similarly, it is uncertain how informed the regime itself was about the looming conflict. Judging by the public statements of the official Minsk representatives, the only thing of note was a complete lack of interest in a dialogue with the United States.

Strong Reaction to Complicity

The US strongly condemned both Russia's military aggression in Ukraine and Lukashenko's role in this martial misadventure. The US added a new, and arguably the most consequential charge to their long list of grievances against Minsk: complicity in the war. On the very day the conflict erupted, the US imposed sanctions against several banks, state-owned enterprises, and individuals within the country's governance and Lukashenko's inner circle. The speed with which the sanctions were imposed suggests that they were premeditated and approved by the US leadership in advance.

The charge of complicity in the war destroyed Minsk's long-term strategy in relations with the West: positioning itself as a sufficiently independent buffer between the Kremlin's

expansion and the NATO frontier, thereby preventing an extensive military presence and independent actions of a foreign army on its soil. These developments also raised questions about Lukashenko's ability to control the situation in the country, further confirming his inability to pursue an independent policy.

In late February, right after the conflict onset, the American diplomatic presence in Minsk was downscaled, and American diplomats were moved to the Belarus Affairs Unit based at the US Embassy in Lithuania, established in Vilnius a year earlier. Officially, the move was predicated on safety concerns and Minsk's insistence on shuttering several embassy offices and trimming the embassy's personnel. Predictably, the Belarusian Foreign Ministry reacted with vehemence, accusing the United States of escalating the situation.

Throughout March, the United States continued to expand its sanctions against Lukashenko's regime, including a ban on luxury goods exports.² The US House of Representatives endorsed the termination of the "most-favored-nation" trade status for both Russia and Belarus. At the same time, the Office of Sviatlana Tsikhanouskaya positioned itself as the representative of the Belarusian anti-war movement, voicing its stance during a meeting with the US Ambassador to the OSCE, Michael Carpenter. Via its diplomatic mission in Vilnius, the US government clarified its perspective, delineating between Lukashenko and the people of Belarus.

In Vilnius, American diplomats set aside Minister Makei's invitation for a dialogue which was extended in a private letter to a number of Western diplomats. The United States, in line with other Western nations, treated this appeal of the head of

2 "Commerce Restricts the Export of Luxury Goods to Russia and Belarus and to Russian and Belarusian Oligarchs and Malign Actors in Latest Response to Aggression Against Ukraine". U. S. *Department of Commerce*, 11 Mar. 2022, <https://www.commerce.gov/news/press-releases/2022/03/commerce-restricts-export-luxury-goods-russia-and-belarus-and-russian>.

the Belarusian Foreign Ministry with open disdain, publicly reminding the Belarusian regime of the prerequisites necessary for initiating a dialogue.

In late April, Sviatlana Tsikhanouskaya traveled to Washington to attend the funeral of former US Secretary of State Madeleine Albright. The leader of the Belarusian democratic forces met with officials of the US State Department and USAID, along with the US Senate and Congress representatives. The democratic forces pressed the United States to increase pressure on the Lukashenko regime, in particular by condemning its participation in the war in Ukraine, while furnishing the American side with a plethora of documents substantiating the regime's illicit activities.

On 18 May, the US embassy in Kyiv resumed its work, a revival not mirrored by the diplomatic mission in Minsk. Thus, while the US State Department deemed Kyiv, embroiled in an armed conflict, a safe place for its diplomats, Minsk did not receive such an assessment. While the obvious physical threat to diplomats in the beleaguered capital of Ukraine was found justified, the maintaining an American presence in Minsk was simply deemed non-essential.

The Potassium Dilemma and Trade Turnover

In the late spring of 2022, Western media outlets reported that the US was considering the suspension of sanctions against the Belarusian potassium industry,³ imposed in 2020 in response to the Lukashenko administration's suppression of peaceful protests and violations of fundamental human rights. The media

3 "Russia Rejects Pleas to Permit Grain Shipments from Ukraine". *The Wall Street Journal*, 19 May 2022, https://www.wsj.com/articles/russia-rejects-pleas-to-permit-grain-shipments-from-ukraine-11652990107?mod=Searchresults_pos1&page=1.

suggested these restrictions could be suspended for six months in exchange for providing rail transit for Ukrainian grain to the Lithuanian port of Klaipeda. According to these accounts, both the UN and the United States were deeply concerned with the issue of global food security. Consequently, concessions to the Lukashenko regime could have been offered to ensure food accessibility for countries in Africa and the Middle East.

On May 20, during a press briefing⁴ by the US Department of State, official spokesperson Ned Price neither confirmed nor denied the journalists' interpretations, allowing further discussion of such a strategy in political and media circles. This potential strategic pivot instigated heated debates regarding the United States' unwavering stance towards the Lukashenko regime and the ethical considerations of engaging in negotiations with it. Regardless of these rumors, the US persisted in amplifying its sanctions measures, continued voicing support for the democratic forces of Belarus, and maintained regular dialogues with the Office of Sviatlana Tsikhanouskaya across various platforms.

Trade relations between the US and Belarus have deteriorated significantly. Based on the open data available at the time of writing this article, it is possible to note a significant downturn in bilateral trade. Historically, imports from the United States had overshadowed exports from Belarus. However, this dynamic shifted dramatically in early 2022. While January's trade patterns mirrored those of 2021, by March, the trade turnover collapsed significantly, following the conflict onset in Ukraine.

This shift can be attributed to the American sanctions regime, which has significantly curtailed the potential for collaborations between American and Belarusian businesses. Throughout the year, the US Treasury Department continued adding

4 "Department Press Briefing – 20 May, 2022". U.S. *Department of State*, 20 May 2022, <https://www.whitehouse.gov/briefing-room/presidential-actions/2021/08/09/executive-order-on-blocking-property-of-additional-persons-contributing-to-the-situation-in-belarus/>.

new entities to its sanctions list. As a result, 2022 stands as the most challenging year for US–Belarus trade relations in the past decade.

Nuclear Blackmail and Staff Shortages

In mid-June, US Special Envoy to Belarus Julie Fisher announced her resignation from her post in Vilnius due to her appointment as the US Ambassador to Cyprus.⁵ Before her role in Belarus, Fisher had served as the US Deputy Assistant Secretary of State. Her exit from Vilnius deprived the democratic forces in Belarus of a strong advocate for the nation’s interests at various levels in Washington.

As of the end of 2022, no replacement for Fisher was announced. This suggests that the Special Envoy for Belarus position may not follow the typical rotation practices of the State Department. It might be perceived as either not being of high priority or not sufficiently appealing for potential candidates.⁶

Some factions within the democratic forces, particularly Pavel Latushka’s People’s Anti-Crisis Administration, have pushed for the US to recognize Belarus as an occupied country. However, American diplomats refrained from adopting such a characterization, pointing out that the term “occupation” carries a specific definition and should be used appropriately. In August, after the establishment of the United Transitional Cabinet (UTC), part of the dialogue between the consolidated democratic forces and the US was assigned to the Foreign Affairs

5 “An Open Letter to the People of Belarus from Ambassador Julie Fisher. Statement by the U. S. Special Envoy for Belarus Julie Fisher”. U. S. *Embassy in Belarus*, 09 June 2021, <https://by.usembassy.gov/an-open-letter-to-the-people-of-belarus-from-ambassador-julie-fisher/>.

6 Пеньковский, Антон. “Треугольник Беларусь – США: что может разбить лёд?” *Наше мнение*, 28 Dec. 2022, <https://nmn.media/articles/7499>.

Cabinet representative, Valery Kovalevsky, who is also the head of the Tsikhanouskaya Cabinet.

Also in August, a new narrative emerged from Minsk, seemingly directed towards Washington. Reports began circulating about the information on the movement of supplies for land-based missiles into Belarus. Additionally, claims surfaced about the conversion of some Belarusian SU-25 aircraft by Russia to carry air-launched nuclear missiles. Lukashenko has repeatedly mentioned nuclear weapons in his interactions with both international and domestic audiences.

Throughout the second half of 2022, discussions revolved around Lukashenko's remarks on nuclear weapons and their geopolitical implications. These conversations ranged from Poland's alleged push for the US to utilize nuclear arms, to the potential deployment of nuclear weapons in a hypothetical Third World War. Makei also spoke about the growing nuclear threat at the UN General Assembly in New York. Doing so, the regime used its own nuclear-free status as another tool to attract the attention of Western politicians. The nuclear weapons rhetoric remained on the regime's agenda until the end of the year.

During the second half of 2022, the United States Federal Government assessed the possibility of the armed forces of Belarus' entry into the war in Ukraine. The assessment suggested that this eventuality was unlikely, stating that there were no signs of Belarus preparing to take part in hostilities on foreign soil.

The 77th session of the UN General Assembly in September saw both Sviatlana Tsikhanouskaya and Vladimir Makei in attendance. While other meetings of American officials at the conference were declared openly, engagements with Makei were kept under wraps, reflecting the evolving nature of diplomatic relationships with Belarusian officials. Despite the strained relations, the United States was among the first to offer condolences to Makei's family after his unexpected passing on 26 November.

The year concluded with the UTC announcing V. Kovalevsky's visit to Washington to discuss increasing support for Belarusian civil society. For its part, the US State Department reiterated its commitment to holding the Lukashenko regime accountable for its support of Russian military aggression.

Conclusion

In 2022, despite numerous warnings from the United States, the Lukashenko regime sided with Russia in its military aggression against Ukraine. This move not only abandoned the remaining avenues for dialogue with the United States but also demonstrated Lukashenko's lack of independence, paving the way for tougher sanctions. This action appears to mark the final choice of the Lukashenko's regime in the matter, eliminating any potential for a diversified foreign policy. The US government's previously enduring patience with the regime's eccentric actions seems to have reached its limit.

The sanctions imposed on Belarus intensified, and the trend of increasing restrictions persisted. The few remaining issues of concern that the United States held regarding Minsk were related to potassium fertilizers and the possible deployment of nuclear weapons.

The Office of Sviatlana Tsikhanouskaya further solidified its stance as the primary interlocutor for the United States. In contrast, official Minsk has assumed a role resembling that of a Kremlin satellite, albeit with a unique form of autonomy. Recent foreign policy actions have shown that the most severe political and economic pressures are applied not in response to violations of the rights and freedoms of citizens inside the country, but due to the regime's actions in the international arena — be it the forced landing of a *Ryanair* flight or aiding and abetting an invasion of a neighboring country.

Currently, it is challenging to envision any scenario in which Washington would re-engage in dialogue with Belarus' official leadership. In 2023, we can anticipate further economic sanctions, rendering the Belarusian market increasingly unappealing to American businesses. Sanctions will be implemented more to align with those imposed on the Kremlin and to prevent Belarus from being used as a loophole to bypass these restrictions rather than to directly impact the Lukashenko regime.

As we approach the fourth decade of relations between the United States and a nominally independent Belarus, the situation seems rather grim. Official Minsk is no longer regarded by Washington as an autonomous partner, and the democratic factions in Warsaw and Vilnius lack the necessary influence inside the country to solidify their status as the primary representative of Belarus in their interactions with the United States. Notable shifts in this dynamic are conceivable only if the democratic forces assume power in Belarus. Any other outcome or stasis in the situation would likely hold little interest for the United States. From Washington's perspective, the current sovereignty of Belarus is in great doubt.

BELARUS–POLAND: IN THE SHADOW OF THE REGIONAL WAR

Anna Dynier

Summary

Amid the escalating security crisis in the region caused primarily by Russia's aggression in Ukraine, supported by Minsk, the year 2022 turned out quite challenging for Belarus–Poland relations. The Lukashenko regime continued to exploit the border meltdown scenario, kept accusing Poland of wishing to attack Belarus, persecuted members of the Polish minority, and impeded the operation of Polish diplomatic and consular services.

Belarus pursued a highly confrontational historical policy on Poland — all the way to the destruction of Polish memorials. Since the above factors will likely remain in place as the main drivers of the Belarus–Poland relationship, there will hardly be any improvements in the near future.

Trends:

- Aggravation of Belarus–Poland political relations due to Minsk's support for Russia's invasion of Ukraine;
- Growing tensions, escalation of security conflicts;
- Curtailment of social and cultural contacts;
- Consistent downward trends in bilateral trade.

Political Relations

The deterioration of the Belarus–Poland relationship as a trend that became visible more than two years ago was further consolidated throughout the year 2022. The reasons were as follows: Belarus' support for Russia's aggression against Ukraine; offensive historical policy; ongoing repression against civil society, including the Polish minority.

Belarus' hostility towards Poland was manifested, among others, in Minsk's toughening official rhetoric. On September 17, the Day of National Unity, celebrated since 2021, Aleksandr Lukashenko suggested that the period of the Polish-Lithuanian Commonwealth should be viewed as the occupation of the Belarussian land by Poles and treated as the ethnocide of the Belarussians. He went on to say that Poland not only failed to remember that its liberation in 1945 was largely due to heroic sacrifices of the Belarusians, but also pursues an anti-Belarus policy¹.

The Belarussian authorities staged a series of pickets in front of Polish diplomatic offices. On April 19, a protest against the "anti-Belarus" policy of the Polish authorities was organized in front of the Polish Embassy in Minsk, and on April 26, a picket was held to condemn the construction of a fence on the border. On October 12 and November 11, anti-Poland protests were also staged near the Consulate General of Poland in Hrodna.

The authorities started destroying Polish memorials as part of their historical campaign. In July, the tomb of the Armia Krajowa soldiers killed in 1944 in the vicinity of Mikuliski in the Hrodna Region was demolished. Acts of vandalism and destruction of burial sites were also registered in Jodkavicy, Vaukavysk, Kacycy, Stryjouka, Surkont, Pieskaucy, and Pliebaniski. The Katyn cross at the military cemetery in Hrodna was damaged².

Belarussian official media released reports that back in the 1920s and 1930s, Belarus suffered significant losses due to the fact that its western lands were part of the II Polish-Lithuanian

1 "Лукашенко: белорусы освобождали Польшу, а чем она отвечает – фейкамиБелсата, байполами и байсолами?" БелТА, 17 Sep. 2022, <https://www.belta.by/president/view/lukashenko-belorusy-osvobozhdali-polshu-a-chem-ona-otvechaet-fejkami-belsata-bajpolami-i-bajsolami-524301-2022/>.

2 "Zniszczone polskie cmentarze i pomniki. Bilans antypolskiej kampanii na Białorusi". TVP Info, 31 Dec. 2022, <https://www.tvp.info/65399725/zniszczone-polskie-cmentarze-na-bialorusi-smutny-bilans-roku-2022>.

Commonwealth. Those statements explicitly hinted that in the future Belarus might consider demanding compensation from Poland for that period³.

Propaganda started to promote the image of Poles as Nazis who persecuted Belarusians during the two decades between the world wars. This approach borrows a portion of Russia's anti-Poland historical policy model. It is also suitable for highlighting allegedly revanchist and imperialist forces in Poland, which, according to propagandists, aspire to reclaim Belarus' western lands.

Polish politicians, for their part, support the Belarusian opposition and insist that the Lukashenko regime is responsible for the military aggression against Ukraine. The incidents and facts listed above clearly indicate that all official political contacts were suspended.

At the same time, Warsaw maintained active communications with Lukashenko's opponents in exile. In 2022, President Andrzej Duda had three meetings with Sviatlana Tsikhanouskaya in Warsaw to discuss the situation in Belarus, Minsk's support for Russia in its war against Ukraine, and repression of the Polish minority in Belarus⁴. Prime Minister Mateusz Morawiecki, Foreign Minister Zbigniew Rau and Minister of the Interior Mariusz Kamiński also met with Tsikhanouskaya and members of her transitional cabinet. The Polish politicians unanimously emphasized that a democratic and free Belarus was an essential security guarantee for Poland.

3 “Клишевич: мы сегодня Польше никаких официальных счетов за ущерб не выставляем, но у нас есть неоспоримые факты”. БелТА, 26 Sep. 2022, <https://www.belta.by/society/view/klishevich-my-segodnja-polshe-nikakih-ofitsialnyh-schetov-za-uscherb-ne-vystavljaem-no-u-nas-est-525777-2022/>.

4 “Andrzej Duda spotkał się ze Sviatłaną Cichanouską. Głównym tematem rozmowy sytuacja na Białorusi”. Polskie Radio 24, 5 July 2022, <https://polskieradio24.pl/5/1222/artukul/2994244,andrzej-duda-spotkal-sie-ze-swiatlana-cichanouska-glownym-tematem-rozmowy-sytuacja-na-bialorusi>.

Military Relations and Security Issues

Throughout 2022, Belarus offered its unconditional support for Russia in its aggression against Ukraine, providing its territory, ensuring logistics, training soldiers, making transfers of equipment and ammunition, and taking care of the wounded. Poland expressed clear criticism of these actions. Warsaw consistently refused to carry out any military inspections under the Treaty on Conventional Armed Forces in Europe, as well as the Vienna Document. The only manifestation of cooperation in security was the involvement of the Polish military attaché in the presentation of the Belarusian checkpoints on the border with Ukraine⁵.

As in 2021, the Belarusian authorities kept accusing Poland of waging a hybrid war, preparing for the annexation of Belarus' western territories, and supporting entities that wish to seize power in Belarus. Minsk continuously referred to the allegedly unambiguous facts of the militarization of Poland.

The regime took advantage of the supposed threats from NATO in order to deepen its military integration with Russia, specifically to deploy a regional grouping of troops. Poland criticized that initiative as an element contributing to increased tensions in the region.

Throughout 2022, Poland – along with Lithuania and Latvia – was making efforts to curb the border crisis triggered by the Belarusian and Russian authorities. The instrumentalization of migration – mostly from the Middle East and Africa – by the latter countries caused Eastern European nations, including Poland, to bear additional costs. Warsaw made up its mind to build a fence (which was equipped with electronic systems in the

5 “Командующий силами спецопераций ВС рассказал о белорусских пограничных блокпостах”. БелТА, 20 June 2022, <https://www.belta.by/society/view/komandujuschij-silami-spetsoperatsij-vs-rasskazal-o-belorusskih-pogranichnyh-blokpostah-509028-2022/>.

middle of the year once the construction had been completed) and provide border service with some military support.

On February 11, Emil Czecko, a member of Poland's 16th Pomeranian Mechanized Division who had deflected to Belarus, filed a petition to the court in The Hague through the Belarusian pro-government organization Systemic Advocacy Centre, claiming that the Polish services had committed genocide of migrants on the border. However, on March 17, Czecko was found dead in a rented apartment in Minsk. According to the Systemic Advocacy Centre, the Criminal Court in The Hague refused to hear the case.

Economic Relations

The volume of bilateral trade decreased; however, no radical changes were reported. Deliveries from Belarus to Poland went down by a third, but the flow of commodities from Poland remained at the pre-war level. In January–November 2022, Poland's trade with Belarus came to \$2.5 billion. Belarus imported more than \$1.5 billion worth of commodities and services, whereas its export supplies totaled more than \$1 billion⁶. A trade deficit of \$0.58 billion was reported for Belarus.

The sanctions imposed by the European Union will naturally produce a negative impact on mutual trade in the coming years, especially on operations with crude oil and oil products, as the restrictions will come into effect only after the previous contracts have expired.

Migration of Belarusians to Poland brought about an increase in the number of companies with shareholdings controlled by a Belarusian company or individual with Belarusian citizenship.

6 "Польша раскрыла данные торговли с Беларусью". *Thinktanks.by*, 20 Feb. 2023, <https://thinktanks.by/publication/2023/02/20/polsha-raskryla-dannye-torgovli-s-belarusyu.html>.

hosted the VIII Bulbamovie festival, which screened Belarusian films depicting the realities of the country, where persecution of independent communities is a routine practice. References to Belarusians' life abroad, as well as stories related to Russia's aggression in Ukraine were also on display. Work continued in Warsaw to build the Museum of Free Belarus, which was announced in 2021.

Conclusion

Russian aggression against Ukraine, the Lukashenko regime's repression against Belarusian citizens (including the Polish minority), destruction of Polish memorials, and persistent border crisis had a profoundly negative impact on Belarus–Poland relations. The year 2022 saw no cooperation between the two countries, not even on the local and technical levels, let alone official political contacts. Bilateral relations deteriorated even in comparison with the truly hard year 2021.

Poland consistently supported the activities of the United Transitional Cabinet formed by Sviatlana Tsikhanouskaya, hoping that in the future it would contribute to democratic transformations in Belarus. Migrants from Belarus also enjoyed assistance – both international protection and opportunity to work legally.

Given the progressing integration of Russia and Belarus and the increasingly hostile policy of Minsk towards Poland, no improvements in Belarus–Poland relations should be expected any time soon. Ukraine's victory in the war against Russia could become a breakthrough to trigger political changes in Russia and give hope for a change in Belarus.

BELARUS – UKRAINE: WAR WITHOUT WAR

Yevhen Mahda

Summary

In 2022, relations between Belarus and Ukraine shifted to an entirely new level. Lukashenko's regime positioned itself as a collaborator in Russia's aggression against Ukraine, while the Ukrainian leadership has found no opportunity for dialogue with Belarusian democratic forces in exile.

Armed units established by Belarusian citizens emerged within the Armed Forces of Ukraine.

Trends:

- A sharp erosion of trust between Kyiv and Minsk following the Russian invasion of Ukraine on 24 February 2022;
- A corresponding decline in bilateral trade;
- Persistent tensions within the “Lukashenko – official Kyiv – Belarusian democratic forces” triangle;
- Denying Minsk the role of a negotiating venue for the settlement of the Russian-Ukrainian conflict;
- The founding of the Kastus Kalinouski Regiment within the Ukrainian Armed Forces as an element of military development and a political stance.

Trade Before the War

In 2022, relations between Belarus and Ukraine started on a contradictory note. While Ukraine, consistent with its stance from the previous year, did not recognize Aleksandr Lukashenko as the legitimate president, it continued to actively trade with

Minsk. By the end of 2021, Belarus enjoyed a favorable trade balance with Ukraine, amounting to \$2.9 billion¹. This situation drew criticism from Belarusian politicians and activists who accused Ukraine of political hypocrisy.

By 2022, trade between Belarus and Ukraine plummeted due to the onset of hostilities, border closures, and Minsk's support for the Russian invasion of Ukraine. According to the Ukrainian customs service, trade turnover between the countries decreased by 74% from the previous year to \$1.6 billion², which is markedly lower than Belarus' leading trade partners³.

In an interview with Russian TV propagandist Vladimir Solovyov, A. Lukashenko promised to stop the export of electricity and fuel and lubricant materials to Ukraine in the event of a war. This is exactly what happened, for in 2022 Belarus has effectively become the “exporter” of Russian military into Ukraine.

Belarusian Army: a Passive Contributor

Aleksandr Lukashenko appears to have been briefed on Russia's impending actions against Ukraine. He formally initiated the “Union Resolve” exercise, which commenced in January 2022 on Belarusian soil. His conversation with Solovyov in early February 2022 hints at this foreknowledge. The self-proclaimed president

1 Беляев, Виктор. “Как торговала Беларусь с Украиной?” *Thinktanks*. by, 02 Mar. 2022, <https://thinktanks.by/publication/2022/03/02/kak-torgovala-belarus-s-ukrainoy.html>

2 “Статистика та реєстри”. *Державна митна служба України*, 2023, <https://customs.gov.ua/en/statistika-ta-reiestri>

3 “Общая информация о внешней торговле: направления, задачи, итоги за актуальный период”. *Министерство иностранных дел Республики Беларусь*, 2023, <https://mfa.gov.by/trade>.

of Belarus anticipated Ukraine's downfall, asserting that the "Belarusian army will act like the Russian one"⁴.

Despite this statement and periodic reports in the Ukrainian media about the possibility of direct involvement of Belarusian troops in Russia's aggression against Ukraine, no tangible evidence materialized over the year. Official Kyiv remained silent on the matter. However, there were instances of Belarusian nationals engaging in combat alongside the invading forces as part of private military companies.

Several factors explain why the Belarusian Armed Forces refrained from the direct participation in the invasion of Ukraine:

- The Belarusian army lacks combat experience;
- The inevitable significant loss of manpower from participating in conflicts could spark domestic unrest;
- Mobilization might inadvertently arm Lukashenko's adversaries;
- A majority of Belarusians do not support participation in the war against Ukraine⁵;
- Despite pervasive Russian propaganda, the country is not gripped by military hysteria;
- The mere possibility of a threat and various military activities on Belarusian land already tie up a substantial portion of Ukraine's forces, reducing the necessity of deploying the Belarusian Armed Forces on Ukrainian soil.

Belarus, however, has become the logistical hub for Russian aggression against Ukraine. Russian troops were stationed

4 "Интервью журналисту ВГТРК Владимиру Соловьёву". *Портал Президента Республики Беларусь*, 04 Feb. 2022, <https://president.gov.by/ru/events/intervyu-zhurnalistu-vgtrk-vladimiru-solovevu>

5 "Отношение белорусов к войне и ценностные ориентации. Результаты пятнадцатой волны исследований (15–27 марта 2023 года)". *Chatham House Belarus*, 12 Apr. 2023, <https://belaruspolls.org/wave-15>

within its borders, underwent combat training, treated the wounded, and repaired military equipment. Hundreds of Russian missiles targeting Ukrainian sites were launched from Belarusian territory.

Partisan and Frontline Belarus

The creation of a regiment named after Kastus Kalinouski Regiment could be seen as one of the factors that prevented Belarusian-Ukrainian relations from deteriorating completely. The formation of this unit, the death of some of its founders (Ivan Marchuk, call sign “Brest”, died in the summer of 2022 near Lysychansk), and the various challenges the Kastus Kalinouski Regiment faced have significantly impacted Belarusian-Ukrainian ties.

The PKK’s political ambitions also became evident, highlighted by the emergence of the political representative Dzmitry Shchygelski, who was previously associated with the “Cyber Partisans” and “Supratiu” movements.

A less-discussed aspect of Belarusian-Ukrainian relations after the Russian invasion are the attempts of the railroad partisans to hinder the movement of Russian troops through Belarus. Predictably, the Belarusian security forces thwarted these attempts with particular brutality, demonstrating Lukashenko’s fragile grip on the political situation in Belarus.

The unfolding events of the Russian-Ukrainian war, and the complicity of official Minsk dissolved any semblance of cordiality in Belarusian-Ukrainian relations. According to a survey by the “Rating” group, only 22% of Ukrainians expressed positive sentiments towards Belarusians, with 33% holding negative views, and 42% being neutral⁶. This attitude is partly explained

6 “Десятый общенациональный опрос: идеологические маркеры войны”. Социологическая группа “Рейтинг”, 03 May 2022, <https://ratinggroup.org>.

by the changing socio-political environment during the war, and the fact that the survey was conducted soon after the liberation of the Ukrainian territory bordering Belarus. For many Ukrainians, Belarus is associated with Aleksandr Lukashenko, and the attitude towards him extends to the entire Belarusian populace.

Diplomacy: Negotiation and Propaganda

In the early stages of the invasion, Minsk positioned itself as a venue for negotiations between Russia and Ukraine. Three rounds of negotiations (on February 28th, March 3rd, and March 7th, 2022) took place on the territory of Belarus, with Russian and Ukrainian delegations arriving through predetermined routes. However, Lukashenko's aspirations to emerge as a mediator, continuing the legacy of the "Minsk format", did not materialize – largely due to his diminished legitimacy after 2020 and his proximity to the Russian sphere of influence.

Belarusian propaganda, especially in broadcasts by pundit Ryhor Azaronak has adopted anti-Ukrainian narratives, mimicking the style of Russian propaganda. Lukashenko's claims about Ukraine's aggressive plans against Belarus quickly became a meme.

Nonetheless, diplomatic relations between Belarus and Ukraine persisted despite the complete evacuation of Belarusian embassy staff from Kyiv. Ukrainian Ambassador to Belarus Ihor Kyzym continued to perform his functions in Minsk, even though the number of diplomatic personnel there has been significantly reduced. This experienced diplomat continued to work in a country that had previously shown animosity towards him, all the while demonstrating a clear understanding of the Belarusian situation.

ua/ru/research/ukraine/desyaty_obschenacionalnyy_opros_ideologicheskie_markery_voyny_27_aprelya_2022.html.

Diplomacy is often personified, so the sudden death of Belarusian Foreign Minister Vladimir Makei further curtailed the already limited channels of communication between Belarus and the outside world.

Rhetoric of Democratic Forces and Kyiv's Behavior

The large-scale Russian invasion of Ukraine compelled Sviatlana Tsikhanouskaya to change her rhetoric, as condemned the Kremlin's actions from the outset. However, it would be a stretch to talk about it as a serious breakthrough in the Ukrainian direction for Tsikhanouskaya, the most prominent Belarusian political figure outside Belarus. Tsikhanouskaya never managed to get a meeting with Ukrainian President Volodymyr Zelenskyy. The issue is not so much tied to Tsikhanouskaya's overly positive portrayal of the actions of the Belarusian military (both among the Armed Forces of Ukraine⁷ and those within the Belarusian army⁸) but more to the apparent lack of political will from official Kyiv.

Tsikhanouskaya had to make do with a meeting with Oleksii Arestovych, adviser to the head of the Presidential Office of Ukraine⁹. Instead of a permanent representation of Tsikhanouskaya's office in Kyiv, Valery Kovalevsky, a member of the United Tsikhanouskaya Cabinet, had to build relations with the Ukrainian authorities at irregular opportunities.

7 “Тихановская вызвала скандал заявлением о том, что Киев спасли белорусы”. ZN.ua, 12 May 2022, <https://zn.ua/UKRAINE/tikhanovskaja-vyzvala-skandal-zajavleniem-o-tom-chto-kiev-spasli-belorusy.html>.

8 “У армии Беларуси был приказ о вторжении в Украину, но его не выполнили — Тихановская”. ЛІГАБізнесІнформ, 04 June 2022, <https://news.liga.net/politics/news/u-armii-belarusi-byl-prikaz-o-vtorjenii-v-ukrainu-no-ego-ne-vypolnili-tihanovskaya>.

9 In mid-January 2023, Oleksii Arestovych was dismissed from his post.

It should be noted that in 2022, the veteran of Belarusian politics Zianon Pazniak became active again. While his criticism of Tsikhanouskaya and his unwavering conservative agenda are well-known to Belarusians, they likely are not compelling enough to initiate dialogue with the Ukrainian authorities.

Conclusion: Perspective for 2023

December 2022 was punctuated by two significant events that shape forecasts for Belarusian-Ukrainian relations in 2023.

On December 9–11, the Belaruss-Ukrainian Expert Forum named after the Ostrovsky Princes took place in Lviv, acting as a venue for discussing the future of bilateral relations. It is worth noting that representatives of the United Transitional Cabinet, Kastus Kalinouski Regiment, Ukrainian parliamentarians, and experts from both nations took part in it (for obvious reasons, only Belarusian citizens in exile attended the forum in Lviv). One could say, this was the first attempt to find ways of restoring relations between Belarusian and Ukrainian societies since state-level communications are close to freezing.

Between December 17–23, under the auspices of the Ukrainian Center for Countering Disinformation, the “Belarus 2030” foresight session was conducted in Sinai, Romania. The gathering, attended by delegates from nearly all Belarusian democratic factions later caused a noticeable resonance within the Belarusian democratic community.

In 2023, relations between Belarus and Ukraine are unlikely to improve, given the tensions in the “Lukashenko – official Kyiv – Belarusian democratic forces” triangle.

There should be no illusions about the possibility of a military intervention into Belarus from Ukraine. Simultaneously, the potential direct involvement of the Belarusian army in Russian

aggression would eliminate the chances of mending ties in the near future.

For Ukraine, the primary aim should be to foster connections with exiled representatives of the Belarusian democratic forces and to relay a clear message to Lukashenko that business as usual is impossible in the future. The tenet “Without independent Ukraine, there is no independent Belarus. Without a democratic Belarus there is no secure Europe” underpins these bilateral relations.

Belarus and Ukraine are on the verge of establishing themselves as sovereign nation-states; 2023 may become the final stretch in this process.

DIVERSIFICATION OF LUKASHENKO'S FOREIGN POLICY: CHINA, KAZAKHSTAN, INDIA, IRAN

Roza Turarbekava

Summary

In the context of Russia's war against Ukraine and ensuing Western sanctions, Minsk sought to bolster its foreign policy, particularly towards Asian and Middle Eastern nations. However, it is necessary to distinguish between rhetorical foreign policy diversification and the one that delivers tangible results.

Analysis of bilateral relationships with China, India, Iran, and Kazakhstan indicates that the main task of offsetting foreign economic losses has been only partially achieved. At the same time, structural issues such as the unfavorable trade balance with China, insignificant trade volumes with Iran, and the capped bilateral trade with Kazakhstan remain unresolved.

Trends:

- Attempts to circumvent sanctions and gain access to new markets;
- Prioritization of political factors and declarations in foreign policy agenda over achieving favorable trade volumes;
- An increasing involvement of Belarus in Eurasian projects and organizations, including the SCO.

China: Declarations of an “All-weather” Strategic Partnership

In July 2022, as Russian troops were withdrawn from the north of Ukraine with a significant part of them also leaving Belarusian territory, Minsk announced its application to join the Shanghai

Cooperation Organization (SCO). With this move, Lukashenko attempted to captivate Beijing's attention and reinvigorate contacts between the two countries.

In September, Lukashenko attended the SCO summit in Samarkand, initiating the formal procedure for considering Belarus' application. In the context of a reduction in Russian air attacks from the territory of Belarus, the European Union began to apply a more differentiated approach to Minsk which was considered a positive signal by Beijing.

At the SCO summit, Lukashenko and Xi Jinping signed a declaration, establishing a comprehensive and all-weather strategic partnership.¹ This partnership was further solidified in March 2023 during Lukashenko's visit to China and the subsequent adoption of the "Joint Statement of the People's Republic of China and the Republic of Belarus on the further development of all-weather and all-round strategic partnership between the two countries"² along with *twenty-seven* intergovernmental, inter-agency, and interregional agreements. This visit by Lukashenko can be viewed as the most significant foreign policy event for Belarus since the onset of Russia's war in Ukraine, with Belarus officially supporting China's peace plan for Ukraine.

Despite these developments, a closer look at the Belarusian-Chinese relations reveals an embellishment of accomplishments and an omission of potential issues. For instance, an agreement on trade in services and investment, envisaged as a key document for future bilateral relations, is likely to clash

1 "Лукашенко и Си Цзиньпин встретились в Самарканде". БелТА, 15 Sep. 2022, <https://www.belta.by/pre-cfrsident/view/lukashenko-i-si-tszinpin-vstretilis-v-samarkande-523894-2022/>.

2 "Совместное заявление КНР и РБ о дальнейшем развитии всепогодного и всестороннего стратегического партнёрства между двумя странами в новую эпоху". Посольство КНР в Республике Беларусь, 02 Mar. 2022, https://www.fmprc.gov.cn/rus/zxxx/202303/t20230302_11033905.html.

with Belarus' obligations within the Union State and the customs regulations of the EAEU. This conflict may consequently delay the signing of the agreement.

Belarusian propagandists often highlight the growth of trade with China, a claim that is difficult to analyze due to classified statistics. Generally, in the pre-crisis era, China was the third biggest trade partner of Belarus; today it is positioned as the second biggest trade partner.³ Although the bilateral trade between the countries is growing, this growth is not substantial (Table. 1), indicating no significant breakthroughs in exports.

Table 1. Bilateral trade between Belarus and People's Republic of China

Year	2019	2020	2021	2022
USD, bln	3.8	4.6	4.9	5.8

Experts also highlight that in recent years, China has reduced credit and investment cooperation with Belarus. In addition, Minsk's severe political conflict with the EU and Western sanctions have called into question the advantages of Belarus' role as a transit route for Chinese goods, further fueling Beijing's concerns about the future of its economic relations with the country.⁴

3 “Товарооборот Беларуси и Китая в 2022 году достиг 5.8 млрд долл. — за счёт чего и какие планы на 2023 год?” *Беларусь сегодня*, 18 Mar. 2023, <https://www.sb.by/articles/bolshie-perspektivy-vostochnogo-partnerstva.html>.

4 Елисеев, Андрей, Алешко-Лесселс, Ольга. “Отношения Беларуси и Китая в 2020–2022 годах: что скрывается за “Всепогодным партнёрством””. *EAST Center*, Dec. 2022, <https://library.fes.de/pdf-files/bueros/belarus/19850.pdf>.

Kazakhstan: Increased Trade to Circumvent Sanctions

Bilateral Belarusian-Kazakh relations are officially termed as a strategic partnership, a designation based on political rather than economic considerations. Kazakhstan has never been a priority trade partner for Belarus. Despite Belarus' ambitions to achieve \$1 billion in bilateral trade, a goal declared for many years, it has not been realized. The discrepancy in exports, geographical distance, and Russian interests continue to limit the growth of cooperation between Belarus and Kazakhstan.

However, in 2022, official Kazakh statistics reported a significant increase in trade: between January and November of 2022, bilateral trade reached \$915.6 million, marking an increase of 13.4% compared to the same period in 2021. As before, a trade surplus is noted: Belarusian exports amounted to \$707 million.⁵

This growth is primarily attributed to Belarusian state companies and enterprises using Kazakhstan to export their products, circumventing existing sanctions. In April 2023, the Belarusian Research Center published a report noting that certain Belarusian private and state-owned companies continue to export sanctioned goods, like plywood and heating pellets, to Europe through companies in Kazakhstan and Kyrgyzstan.⁶

Kazakh media have reported cases of European goods being transferred to Belarusian carriers before their final delivery to Kazakhstan. In April 2022, the European Union imposed sanctions on Belarusian and Russian truckers. In retaliation, Belarus banned the movement of trucks with European plates within its

5 “Экономическое сотрудничество”. *Посольство Республики Казахстан в Республике Беларусь*, <https://www.gov.kz/memleket/entities/mfaminsk/activities/2188?lang=ru>.

6 “В Европу через Азию”. ВІС, 03 Apr. 2023, <https://investigatebel.org/ru/investigations/v-evropu-cherez-aziyu-kak-belarus-po-prezhnemu-prodaet-sankcionnyu-faneru-i-pelety-v-es>.

territory. This action led to the trans-shipment or transfer of cargo at specific points within Belarus. However, Astana objected to these practices, viewing them as direct violations of both the EAEU customs code and Kazakhstan's national legislation.

In the summer of 2022, Astana lifted restrictions for Belarusian carriers (initially until 2023, and subsequently extended to 2024),⁷ but in early 2023, it introduced a ban on their registration in Kazakhstan. This action is only a partial solution as it does not fully address the issue of evading sanctions: in 2022 alone Kazakhstan registered several thousand trucks and transport companies from Russia and Belarus.

In the West, discussions are intensifying about the possible introduction of secondary sanctions against Central Asian countries, which are perceived as avenues for circumventing existing sanctions. If such measures are implemented, the recent surge in Belarusian-Kazakh trade could face a similarly sharp decline.

India: the Limited Market for Potassium

Deputy Foreign Minister Sergei Aleynik's visit to New Delhi in August marked the highest level of bilateral contact in Belarusian-Indian relations after February 2022.⁸ Although Lukashenko and the Indian Prime Minister attended the SCO summit in Samarkand, a bilateral meeting did not take place. That said,

7 "Казахстан вновь разрешил белорусским перевозчикам грузоперевозки с перецепкой". *Экономическая газета*, 18 May 2023, <https://neg.by/novosti/otkrytj/kazakhstan-vnov-razreshil-belorusskim-perevozchikam-gruzoperevozki-s-peretsepkoj/>.

8 "Беларусь и Индия согласовали подходы к развитию политического и торгово-экономического сотрудничества". *БелТА*, 04 Aug. 2022, <https://www.belta.by/politics/view/belarus-i-indija-soglasovali-podhody-k-razvitiyu-politicheskogo-i-torgovo-ekonomicheskogo-517084-2022/>.

bilateral contacts are likely to intensify, as India is set to chair the SCO in 2023.

The extent to which sanctions have affected Belarus' trade with India remains unclear due to the lack of open statistical data. Nonetheless, in early February 2022, the media reported that the Indian side planned to purchase 1 million tons of potassium, intending to pay in rupees to avoid sanctions.⁹ This volume is noticeably less than the usual annual import volume of 4–5 million tons. Subsequent information about increased Indian procurement of potassium from Canada, Israel and South Korea suggests that alternatives to Belarusian fertilizers are being explored.

Iran: a New Old Ally

Belarusian-Iranian relations have seen substantial pauses. The early 2000s experienced a surge in contact, promising significant growth. However, as international sanctions against Iran intensified in 2007–2008, cooperation was halted. Renewed mutual interest has arisen due to Belarus' increasing involvement in Eurasian projects and organizations such as the EAEU, the Belt and Road Initiative, and the SCO, especially in the context of Russia's war in Ukraine and EU and US sanctions.

In March 2023, after a long hiatus (the last visit being in 2007), Lukashenko visited Iran. Given Iran's arms deliveries to Russia for the war in Ukraine, this visit drew significant global media attention. The US State Department viewed the visit as a move to deepen Iran–Russia relations to circumvent sanctions and bolster military-technical cooperation.

9 “India could buy potash from Belarus in rupees as sanctions hit Minsk-sources”. *Reuters*, 02 Feb. 2022, <https://www.reuters.com/world/india/exclusive-india-could-buy-potash-belarus-rupees-sanctions-hit-minsk-sources-2022-02-02/>.

Following the talks, Iranian President Ebrahim Raisi and Aleksandr Lukashenko signed a road map for comprehensive cooperation for 2023-2026. While the full text of the document remains classified, areas of potential cooperation include transit of goods (particularly potassium fertilizers), construction of railway infrastructure within the North-South transport corridor, and trade in medicinal products and technological equipment.

During the visit, an ambitious target was set to elevate trade and other forms of economic cooperation to \$1 billion. This goal stands in stark contrast to the 2022 bilateral trade figures of merely \$100 million, and a slightly higher figure of \$150 million in 2017.¹⁰ On average, Belarusian-Iranian bilateral trade does not exceed \$50-70 million per year, and no clear prerequisites for the declared ten to twenty-fold increase in trade are evident.

Conclusions

In light of Russia's large-scale war in Ukraine and Belarus' involvement in it, coupled with the sectoral sanctions from the European Union and the United States, the importance of Asian and Middle Eastern foreign policy for Minsk has significantly increased. Despite certain achievements, however, full compensation for foreign trade losses could not be achieved.

During the war, traditional partners like Kazakhstan became means to circumvent sanctions, which largely explains the growth in trade and the establishment of branches of Belarusian companies in these nations.

China, despite its status as an "all-weather strategic partner", has not become a highly profitable partner. A continuing

10 "Торгово-экономические отношения". *Посольство Республики Беларусь в Исламской Республике Иран*, https://iran.mfa.gov.by/ru/bilateral_relations/economic/.

trade deficit marks the economic interactions between the two countries, potentially leading to future conflicts with Russian interests within the Union State.

India stands as a substantial market for numerous Belarusian products, with potassium fertilizers being paramount. However, the exact details of these transactions remain obscure. Some indicators suggest a significant decline in Belarusian exports with no signs of a breakthrough in trade and economic relations.

The overemphasis on the Middle East direction, particularly in the cooperation with Iran, stands out. Belarusian-Iranian relations illustrate the significant weight placed on political factors, despite the minimal volume of mutual trade and investment.

BELARUS-UNITED NATIONS: FURTHER DISENGAGEMENT FROM HUMAN RIGHTS MECHANISMS

Anais Marin

By Anais Marin, associate fellow with Chatham House, and UN Special Rapporteur on the situation of human rights in Belarus (since November 2018)

Summary

The priority of Belarus' foreign policy within the UN system has been to boost its reputation, tarnished by the crackdown on post-2020 election protests. Diplomatic activism focused on highlighting the country's progress in reaching the Millennium Sustainable Development Goals (SDGs) and building support for its bid to join the UN Security Council. However, these efforts have yielded limited success due to the role played by Belarus in Russia's aggression against Ukraine.

In 2022, Minsk withdrew from a key UN treaty on environmental rights and from the First Optional Protocol to the International Covenant on Civil and Political Rights, thus preventing Belarusian citizens from filing complaints with the Human Rights Committee. Belarus continued its policy of selective engagement with the Human Rights Council (HRC), taking no notable steps in the follow-up to the 3rd cycle of the Universal Periodic Review (UPR).

Trends

- Belarus is abandoning key international human rights obligations, including in withdrawing from the Aarhus Convention and denouncing the optional protocol to the International Covenant on Civil and Political Rights;
- Belarus' priority in the UN is to build a reputation as a champion in the implementation of SDGs, albeit in a selective manner, — emphasizing mostly its high Human Development Index;

- Belarus' support to Russia's aggression against Ukraine undermined its diplomatic efforts and diminished its chances of being elected to the Security Council as a non-permanent member.

Belarusian Politics at the UN: Focus on the SDGs, Attempts to Enter the Security Council

For the past decades the focus of Belarus' activism within the UN system has centered on showcasing the country as a champion in the field of human development. Belarus enthusiastically embraced the agenda set by the General Assembly, first with the eight Millennium Development Goals and then with the 17 Sustainable Development Goals (SDGs). Belarus has achieved commendable results in eradicating extreme poverty and hunger and reducing child mortality. This allowed Belarus to improve its Human Development Index, despite difficulties in fighting tuberculosis and HIV/AIDS.

In 2022, Belarusian diplomats in New York sought support for their application for non-permanent membership in the UN Security Council (Belarus has been a candidate since 2007). However, this effort was hampered by the post-2020 human rights crisis, which made Belarus a subject of concern within the Security Council. Two informal "Arria formula" meetings were held at Estonia's initiative: one on September 4, 2020, addressing the human rights situation in Belarus following the August 9 election, and another on January 22, 2021 discussing media freedom in Belarus.

The dire human rights situation in the country, however, never made it to the Security Council's *formal* agenda due to the veto power of Russia and China, permanent members that consistently support Minsk in condemning international attention to human rights as undue interference.

Another factor tarnishing the Belarusian government's image at the Security Council is the enabling role Belarus played in

Russia's aggression against Ukraine since February 2022. This significantly undermined Belarus' election bid, especially after Slovenia decided to run as well for the only available seat at the Council representing the Eastern European regional group.

The UN: Did Not Help to Lift the Sanctions, but Did Not Recognize as Co-aggressor Either

The UN General Assembly (UNGA) “deplored” the involvement of Belarus in the “unlawful use of force against Ukraine”, in its resolution ES-11/1 (paragraph 10), adopted on 2 March 2022, to condemn Russia's aggression. The resolution, which received historic support, called on both countries to abide by their international obligations. However, the UNGA refrained from officially labeling Belarus as a “co-aggressor” for permitting its territory to be used as a launchpad for military aggression against Ukraine.

Throughout the year, the UN Secretary General in his recurring calls for a peaceful settlement of the conflict consistently reminded of Belarus' enabling role in Russia's aggression. In response, the Belarusian leadership attempted to showcase its concern about global food safety, but made little headway in New York during negotiations over a so-called grain deal.

In June 2022, Minsk offered to let Ukrainian grain shipments transit through Belarus by rail to reach Baltic Sea ports. In exchange, Belarus sought permission to export its own potash fertilizers through those ports, which had been targeted by EU sanctions in response to Minsk's support for Moscow's aggression. Ukraine, however, opposed this option, and in July the grain deal brokered by the UN and Turkey without Belarus.

In August 2022, Aleksandr Lukashenko wrote to the UN Secretary-General a letter asking him to facilitate the easing of Western sanctions against Belarus, and in December Deputy

Foreign Minister Yury Ambrazevich reiterated this demand during a meeting with Antonio Guterres — to no avail.

Selective Engagement with Human Rights Mechanisms

Situation at the Human Rights Council

At the 49th session of the HRC in March 2022, the UN High Commissioner on Human Rights presented a progress report on the human rights situation in Belarus in the context of the 2020 elections¹. The report resulted from an investigation conducted by a group of experts under the Coordinator for the OHCHR examination of the human rights situation in Belarus (OEB) from 2021 to 2022, including interviews with hundreds of alleged victims of human rights violations.²

The Belarusian authorities do not recognize this mandate, refuse to cooperate with the team and deny the Office of the High Commissioner for Human Rights (OHCHR) access to Belarus. Representatives from the Belarusian diplomatic mission participated in these interactive dialogues solely to contest the legitimacy of this mandate.

Belarus is not a member of the Human Rights Council (HRC): Belarus had applied in 2009 for membership but failed and has not made subsequent attempts to secure a seat in the HRC. A mandate for a Special rapporteur on the situation of human rights in Belarus was created in 2004.

1 “Доклад Верховного комиссара о ситуации с правами человека в Беларуси в преддверии президентских выборов 2020 г. и после них”. OHCHR, 4 Mar. 2022, <https://undocs.org/ru/A/HRC/49/71>.

2 OHCHR Examination of the human rights situation in Belarus: <https://www.ohchr.org/en/hr-bodies/hrc/ohchr-belarus/index>.

Universal Periodic Review

Like other countries with a questionable human rights track record, Belarus prefers to engage with the UN through the Universal Periodic Review (UPR), a mechanism of the HRC run by member States themselves.

Belarus, however, has not yet submitted a follow-up report nor evidenced significant progress towards implementing the 266 recommendations received during its third UPR examination cycle in 2020, even though it accepted 137 of them (according to Belarussian data, even more, 156).³ Most commitments made during previous cycles (2010 and 2015) remain unfulfilled, such as the establishment of a National Human Rights Institution (appointing an *ombudsperson*) and the implementation of dispositions listed by the government in its National Human Rights Action Plan (2016-2019).

In 2022 Belarus took no positive steps regarding the recommendations it endorsed during the third UPR cycle. Among them: aligning its legislation with its international obligations under the Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment, and notably adhering to its Optional Protocol, which allows individuals to submit requests directly to the Committee Against Torture (CAT) when their rights under the Convention are violated. Belarus also failed to implement a national plan of action related to the Convention on the Rights of Persons with Disabilities, a core treaty that it ratified in 2016.

International Instruments and Cooperation with Treaty Bodies

In 2022, Belarus denounced the first Optional Protocol to the 1966 International Covenant on Civil and Political Rights (ICCPR)

3 See Matrix of recommendations and Infographics, <https://www.ohchr.org/en/hr-bodies/upr/by-index>.

and in November, notified the UN Secretary-General of its withdrawal from the individual complaints mechanism. Thus, the Human Rights Committee, which had examined hundreds of complaints from Belarusian victims of rights violations under the ICCPR, can no longer accept complaints from Belarusian citizens.

In the same year, Belarus withdrew from the Aarhus Convention, a key UN treaty on environmental rights, which covers access to information, public participation in decision-making and access to justice in environmental matters.

Cooperation with other treaty bodies has been sporadic and selective. In 2022, Minsk held a dialogue with the Committee on Economic, Social and Cultural Rights. Belarus had accumulated a 20-year delay in fulfilling its reporting obligations to the Human Rights Committee, responsible for monitoring the implementation of the ICCPR. Minsk resumed reporting to the Committee in 2018, but never complied with the interim measures requested by the Committee to withhold executions until it completes its review of death penalty cases⁴. Belarus has not joined the Second Optional Protocol to the ICCPR (on the abolition of the death penalty), and the 2022 constitutional amendments did not abolish capital punishment either.

As a result of Minsk's actions, Belarus' commitment to its international human rights obligations has been questioned even further. Since February 2023, Special Procedures are the only mechanism left for Belarusian individuals to report violations of their rights to the Human Rights Council.

Selective Engagement with Special Procedures

The Belarusian authorities maintain a policy of non-recognition and non-engagement with the mandate of the Special

4 "Belarus: Concerns over State's lack of cooperation with Committee". CCPR Centre, 30 Oct. 2018, <https://ccprcentre.org/ccprpages/belarus-concerns-over-state-cooperation-with-committee>.

Rapporteur on the situation of human rights in Belarus. The mandate-holder (Miklos Haraszti from 2012 to 2018, and Anaïs Marin, since then) has never been granted access to Belarus for an official visit. Since 2021 the Belarusian delegation enforces an “empty-chair” policy during interactive dialogues held when the Special Rapporteur presents yearly reports to the Human Rights Council and the General Assembly. In 2022, UN member states supportive of Belarus’ stance in these forums, such as the Like-Minded Group of Developing Countries, also boycotted these sessions.

In its national report submitted to the HRC in the framework of the third UPR (2020) Belarus issued a standing invitation to nine out of 45 thematic Special Procedures mandates⁵. However, the respective mandate-holders have not received follow-up information about possible opportunities for an official visit to Belarus. The Special Rapporteur on the human rights of migrants, Felipe Gonzáles Morales, conducted a visit to Belarus and Poland from July 12 to July 25, 2022, to monitor the situation with third-country migrants at the border of both countries. It was the first time in 12 years where a Special Procedures mandate-holder was granted access (the last being the Special Rapporteur on the issue of human trafficking in 2009).

Belarusian authorities continue to cherry-pick which mandates to cooperate with. In 2022, they replied to only one of the 10 Communications (allegation letters or other letters) sent by Special Procedures mandate-holders that year, resulting in a significant drop in the response rate from 80 percent in 2021 to just 10 percent in 2022.⁶

5 A/HRC/WG.6/36/BLR/1, 25 Feb. 2020, пункт 22.

6 All Communications and eventual replies are accessible via this search tool: <https://spcommreports.ohchr.org/>.

Conclusion

In 2022 Belarus exhibited a consistent trend of disengagement from UN human rights mechanisms and essential instruments meant to ensure due protection and promotion of the fundamental rights and freedoms of Belarusian citizens within the UN system. This trend began after the human rights crisis in 2020 and considerably accelerated in 2022, the year when the jailed human rights defender Ales Bialiatski received the Nobel Peace Prize. This augurs ill of the willingness of the current Belarusian leadership to comply with its international obligations. Instead, it is likely to continue focusing on the economic components of the Sustainable Development Goals, the only area in which it can report progress.

SOCIETY

CIVIL SOCIETY: COOPERATION IN EMIGRATION, LOYALIST HIERARCHY, NOBEL PRIZE BEHIND THE BARS

Vadim Mojeiko

Summary

Belarusian civil society organizations (CSOs) experienced an increase in already severe repressions from the side of the state in 2022. Active civil society (CSO) actors who remain in Belarus tend to operate discreetly, avoiding attention and sensitive topics. Emigrated CSOs have begun to rebuild their infrastructure from scratch, forming new configurations and achieving stronger political representation. Meanwhile, the government has been establishing a hierarchy of GONGOs, controlled pseudo-civil organizations that imitate genuine CSOs. These developments took place in the context of a historic event: the 2022 Noble Peace Prize was awarded to Ales Bialiatski, a political prisoner and the leader of the country's human rights center "Viasna".

Trends:

- Total widespread liquidation of CSOs that began in 2021 increased by more than 25 percent;
- Successful cooperation and increased political representation of re-located CSOs;
- Many CSOs, especially those still operating in Belarus, maintain a low profile, with some even remaining anonymous;
- The state is Building a hierarchical system of loyal Governmental Organizations (GOs), ranging from fully controlled GONGOs to local initiatives with almost all the features of ordinary CSO.

Total Repression: Civil Society Purge in All Directions

In the summer of 2022, Lukashenko stated that “society should be purged of these scoundrels” from CSOs. According to him, under the “fashionable banner” of non-governmental organizations for the “protection of dogs and cats”, these entities “absorbed all that we had to fight against”. He emphasized that “politically motivated people were thrown in”, leading to their prominence in the front lines of the 2020 protests¹.

Despite the fact that the current scouring of Belarusian CSOs has been going on since 2021, it only seems to grow in scale. About 670 civil society organizations were liquidated in 2022 alone, an almost 25% increase compared to 2020–2021.

Liquidation of CSOs in Belarus from September 2020 to December 2022.

	From September 2020 to December 2021	In 2022	Total after the 2020 elections
CSO in the process of enforced liquidation	309	448	757
CSOs that decided to self-liquidate	194	222	416
Total	503	670	1173

Source: Author’s calculations based on Lawtrend and OEEC monitoring data.

As in 2021, CSOs of all legal forms and areas of work were subjected to government persecution. For a long time, three significant categories of organizations managed to avoid mass liquidation: independent trade unions, religious organizations,

1 “Лукашенко призвал зачистить общество от “негодяев”: все должны пойти работать, убираться и напрягаться”. REFORM.by, 10 Jun. 2022, <https://reform.by/316731-lukashenko-prizval-zachistit-obshhestvo-ot-negodjaev-vse-dolzhy-pojti-rabotat-ubiratsja-i-naprjagatsja>.

and political parties. However, repressions against trade unions began in the spring and summer of 2022. Mass detentions of independent trade union activists occurred in April. In June, the Prosecutor General's Office petitioned the Supreme Court for the termination of trade union activities. In July, the court dissolved the Belarusian Congress of Democratic Trade Unions² and all its member trade union organizations.

The liquidation of almost all political parties (including pro-government parties) only transpired in 2023. To date, only religious CSOs have escaped mass liquidation but it seems to be just a matter of time. With no one to protect them, those communities may either fall victim to a new wave of CSO purges or follow the path of the Belarusian Orthodox Church, which in 2022 increasingly exhibited characteristics of a GONGO, engaging activities unusual for the clergy, such as the Metropolitan's visits to the army.

After 2020, the relatively peaceful symbiosis between the state and the Catholic Church was shattered. Authorities labeled Metropolitan Kondrusiewicz an agent of Poland, and only Vatican diplomacy managed to avert a prolonged conflict between Lukashenko and the church³. Sergej Oleinik, who has been the Ambassador of Belarus to the Holy See and the Order of Malta since 2002, continued to hold this rank alongside all public service positions for twenty years). In February 2022, Oleinik was appointed the first deputy head of the Ministry of Foreign Affairs, and in December, he assumed leadership of Belarusian foreign policy. In the autumn of 2022, authorities began

2 "В Беларуси через суд начали ликвидировать независимые профсоюзы". *Euroradio*, 13 Jul. 2022, <https://euroradio.fm/ru/v-belarusi-cherez-sud-nachali-likvidirovat-nezavisimye-profsoyuzy>.

3 Можейко, Вадим. "Царква ў Беларусі: паміж Богам і кесарам". *Экспертно-аналітычны клуб*, 23 Sep. 2022, <https://belarusinfofocus.pro/be/carkva-%D1%9E-belarusi-pamizh-bogam-i-kesaram/>.

blackmailing the Vatican when, following a suspicious fire, the Red Church was closed to priests and parishioners⁴.

CSOs in Emigration: Cooperation, Regionalization and Distancing

In 2022, CSOs, displaced by repression across the borders of Belarus, developed new spaces, (re)registered their organizations in the host countries, and rebuilt sector infrastructure in new configurations.

The main hubs of Belarusian CSOs became Poland (Warsaw and Białystok), Lithuania (Vilnius), and Georgia (Batumi and Tbilisi). Regionalization is becoming an important factor in networking and cooperating with other relocated CSOs exemplified by the difficulty of traveling from Georgia to Poland as opposed to within Belarus. In 2022, Tbilisi hosted the “Citizens Meetings”, which gathered dozens of Belarusian CSOs that had moved to Georgia, and the “Dzyakui” award ceremony, which replaced the awards “Zrabili” and “RADA AWARDS” previously held in Belarus.

Emigrant CSOs were able to respond to public requests for change in the main representative political body of the democratic forces – the Coordinating Council (CC). The reconstituted CC now predominantly consists of CSO representatives, with 73 delegates, compared to only 25 from the first composition, and an additional 15 who were directly elected⁵. Although assessing the CC’s effectiveness is outside of the scope of this

4 Василевич, Наталья. “Почему власти ополчились на Красный костел в Минске?”. DW, 10 Oct. 2022, <https://www.dw.com/ru/pocemu-vlasti-opolcilis-na-krasnyj-kostel-v-minske/a-63394277>.

5 “Статут (Регламент) Координационного совета Беларуси”, 2 Mar. 2023, <https://rada.vision/documets/statut-reglament-koordinacionnogo-soveta-belarusi>.

analysis, the successful cooperation and increased political representation of CSOs are evident.

At the same time, the question remains whether such CSOs remain fully Belarusian or become purely diasporic. The difference in legal regimes, logistics, and organizational interests makes these CSOs, like the ones in Warsaw and Tbilisi, very different even from each other. This distinction is even more pronounced when compared to CSOs in Minsk or Vitsebsk.

Positive Despite

Historically, the main event of Belarusian CSOs in 2022 was undoubtedly the awarding of the Nobel Peace Prize to Ales Bialiatski, the founder and leader of the human rights center “Viasna”. Bialiatski shared the prize with Ukrainian colleagues from the “Center for Civil Liberties” and Russians from the “Memorial”. This honor symbolizes the crucial role of CSOs in bringing people together in times of war around common human rights values. Unfortunately, it needs to be noted that Bialiatski received the prize while incarcerated, and this fact did not affect his impending – 10-year sentence.

In 2022, the Belarusian Rada of Culture launched “Magistrates”, a community of donors providing stable funding for cultural projects, replacing the crowdfunding initiative destroyed by the authorities in 2020. The first such project was “Knigauka”, an initiative to revive the Belarusian publishing house “Yanushkevich” in Poland, which was dismantled by the Lukashenko regime in 2022. The State Control Committee seized the publishing house’s equipment, froze its bank accounts, and labeled some of the books as “extremist materials”. An attempt by the publisher to open a bookstore resulted in a raid on the opening day, May 16, 2022, by propagandists and security forces who conducted

a search and arrested the publisher, Andrey Yanushkevich, for one month, similar to his colleague Nasta Karnatskaya.

Resistance Does Not Advocate

CSOs in emigration often feel unable to influence the situation within Belarus. There is also a question of what CSOs that still remain in Belarus can do inside the country to reach their target audiences: most lack access to media and educational institutions, as well as the willingness to engage in public activities. In 2022, Belarusian CSOs did not conduct advocacy campaigns within the country, even with regard to the laws “On Public Associations” and “On the Basics of Civil Society” which directly affected their functioning (only GONGOS participated in discussing them with the authorities).

Some CSOs continued their existence and activities in Belarus with limited publicity: “League of Youth Voluntary Service (LYVS)”, “World without Borders”, “Ecomonitoring” (liquidated in May 2023), “Belarusian Guides”, “Belarusian Association of UNESCO Clubs”, “Republican Association of Wheelchair Users”, “Lifeguide” (PA “Belarusian Association for Assistance to Disabled Children and Young People with Disabilities”), animal protection societies “Egida” и “Kind Heart”, and even LGBTQ+ initiative from Mahilyou “New Regions”. Others held events but categorically avoided any publicity for fear of losing their already critically narrow windows of opportunities for working in the country

In such circumstances, it is questionable whether an organization can remain a genuine CSO Regardless of the strategies employed. Public organizations, wary of discussing sensitive issues and criticizing authorities, are prevented from carrying out their mission and advocating for the interests of their target groups. An organization operating as a secret cell of the

ideological underground, working with a narrow circle of members may be useful for very specific target groups, but without public engagement and transparency it cannot be deemed a true CSO.

I Do (Not) Know this Mask

What unites CSOs both in Belarus and in emigration is a common practice of anonymity. Information about their teams has been removed from their websites and social networks, activists decline to give public comments to the media, and events are held without disclosing the names of the organizers, coupled with a ban on photography. This trend spans a diverse range of events, from the “Dzyakui” award ceremony in Tbilisi to a queer picnic by “New Regions” in Mahilyou.

While this anonymity is a response to valid security concerns, it also hampers the image and credibility of CSOs. It is simply impossible to find information about many CSOs and their activities in open sources.

The partnership of civil society organizations ByNGO is a notable example. The only publicly available information about the organization is its role as one of the five representatives of the Council of Europe’s contact group on relations with Belarus (alongside “Viasna”, BAJ, BHC, and RADA), and it is the only entity among these that does not disclose the name of its delegate⁶. Despite ByNGO’s consolidation of real, experienced, and active CSOs, it represents a paradoxical situation where an anonymous delegate represents civil society at such a high level.

6 “Отвѣты на главные вопросы о работе Контактной группы Совета Европы по отношениям с Беларусью”. Офис Светланы Тихановской, 08 Dec. 2022, <https://tsikhanouskaya.org/ru/events/news/a52f18859233449.html>.

“I’ll Go Build My own CSO,
With Charities and Belyakov!”

The authorities are aware of the fact that the surge in Belarusian societal activity in 2020 was not an accident, but an outcome of inevitable processes of social development, including a growing demand for civic participation in various forms. Despite the regime’s efforts to push this demand down, it cannot be completely destroyed or reversed. Hence, the authorities not only struggle with independent formats of public self-organization but also endeavor to establish their own.

For example, the fight against unregulated Telegram channels (e.g., labeling them extremist, taking the relatives of channel administrators hostage, hijacking a passenger flight to arrest the channel administrators) is not combined with attempts to return to the past (e.g., forcing society to read government-controlled newspapers). Instead, the government creates alternatives in a new space. Examples include official Telegram channels of government agencies offering exclusive information, like the flagship “Pool of the First” channel, coupled with old promotion methods, such as forced subscription of security forces and state employees.

Similarly, the fight against real CSOs coincides with the fostering of new and promotion of existing loyal players on the field. The authorities aspire not only to eradicate existing CSOs and hinder any unmonitored activities but also to construct themselves a loyal and faithful civil society.

This intention was officially documented in February 2023, when Lukashenko signed the law “On the Foundations of Civil Society”. However, efforts in this direction were already underway in 2022. In particular, in the summer of that year, Lukashenko emphasized the importance of building a loyal pro-governmental CSO system at a time of the subsiding political crisis: “While we have opportunities (these lunatics seem to have left

us alone), we need to write the law on civil society as we need it ... Our pillars are young people – BRSM, trade unions, our parties ... The subjects of this civil society – these are the ones who are on the [our] list. Not the way we've been stuffed or the way it's built in the post-Soviet republics, so that now they don't know how to get out of it ... We know, he who pays the piper calls the tune".⁷

Thus, Lukashenko wants to be the one “calls the tune”, and he does not attempt to hide this intention. The structure of a loyal CSO is not declared anywhere and is likely not comprehensively understood even within the ruling circles, but a discernible hierarchy can be identified.

At the top level are old and large GONGOs, clear to and fully controlled by authorities. These entities gained access to the All-Belarusian People's Assembly as representatives of NGOs with Belaya Rus, BRSM, and the Federation of the Trade Unions being prime examples.

The middle level comprises public GONGOs and loyal CSOs primarily engaged in propaganda functions. This includes both explicit GONGOs created by and/or with the authority, such as the society “Knowledge”, and loyalist CSOs established ad hoc for specific individuals or events. For example, “Actual Concept” exists so that Aleksandr Shpakovsky can present himself as the director of the analytical center, thereby enhancing the propaganda effect by falsely presenting himself as an authority in science. “Systemic Legal Protection” by Dmitry Belyakov was created in the context of the migration crisis, and in 2022 continued to exploit the situation for propaganda purposes. Belyakov also registered “Emil Chechko International Charity Fund”⁸,

7 “Лукашенко: закон о гражданском обществе надо выстроить так, как это надо в Беларуси”. БЕЛТА, 10 Jun. 2022, <https://www.belta.by/president/view/lukashenko-zakon-o-grazhdanskom-obschestve-nado-vystroit-tak-kak-eto-nado-v-belarusi-507202-2022/>.

8 “Псевдоправозащитник Беляков зарегистрировал фонд имени Эмиля

the name of the Polish deserter even after he was found hanged in Minsk.

The lower level includes loyal CSOs that actively praise the Lukashenko regime but otherwise possess all or nearly all characteristics of conventional CSOs. A case in point is the charity fund of the Paralympian Alexey Talay, which in 2022 honored with the “For Spiritual Renewal” award for its charitable projects, including forcibly displacing Ukrainian children from the Donbas for “recovery”⁹.

Such a hierarchical model corresponds to the cautious approach of the Lukashenko regime, unaccustomed to relying on even its supporters’ initiative. The regime is unwilling to give space to overly ambitious and therefore dangerous individuals, and not without cause suspects many of them are even more loyal to Moscow than they are to Minsk.

Conclusion

The cooperation of emigrant CSOs will play a significant role in fulfilling the civil society functions for Belarus that are achievable from abroad. Existing connections with the “resistance” CSOs will help compensate for the separation from the Belarusian context.

Niche CSOs loyal to the authorities will inadvertently allow the growth of a more pro-Russian activist base than a pro-Lukashenko one, potentially leading to conflicts with institutionalized elites.

Чечко”. *Reform.by*, 10 Nov. 2022, <https://reform.by/337057-psevdopravozashhitnik-beljakov-zaregistroval-fond-imeni-jemilja-chechko>.

- 9 Валерья Сцяцко, “Алексей Талай: Премия нас вдохновляет, мотивирует, но это не причина расслабляться”. *Звезда*, 10 Jan. 2022, <https://zviazda.by/ru/news/20220110/1641805668-aleksey-talay-premiya-nas-vдохновляет-motiviruet-no-eto-ne-prichina>.

In 2023, the scouring of CSOs operating in Belarus will continue, albeit at a decelerated pace — a consequence of the near-total elimination of such organizations, with the few remaining ones steering clear of the public eye. Despite this, the authorities will continue their dual approach towards Catholic organizations, employing both incentives and deterrents. due to the Vatican's cautious stance and historical precedence of revitalizing the Western foreign policy vector through state visits to the Pope in 2009 and 2016.

IMPACT OF THE RUSSIAN-UKRAINIAN WAR ON THE MASS CONSCIOUSNESS OF BELARUSIANS

Henadz Korshunau

Summary

In 2020, Belarus witnessed a wave of protests and a horizontal revolution. 2021 marked a period of regime counter-revolution and an intensification of repressions. In 2022, the major shaping factor in the dynamics of mass consciousness of the nation was the next phase of the Russian-Ukrainian war, which commenced on 24 February 2022. This included the invasion of Ukraine by Russian forces from Belarusian territory. This outbreak of hostilities profoundly shocked the Belarusian society and triggered several shifts in the mass consciousness of Belarusians, impacting certain long-standing beliefs.

Trends:

- The formation of a robust anti-war consensus within the Belarusian community.
- A noticeable lack of societal consolidation around the current leader, which contrasts with the typical behavior observed in societies facing existential threats.
- A marked shift in the Belarusians' commitment to geopolitical neutrality due to the Russian-Ukrainian war.
- The contraction of horizontal connections amidst ongoing repressions, coupled with a move abroad of the locus of Belarusian activism and self-organization.

Automatic Anti-War Consensus

“As long as there is no war!” This sentiment stands as a foundational pillar in the cultural narrative of Belarus’ contemporary

history. It is a recurring theme echoed in the recollections of the older generation, the Belarusian literature from the latter half of the twentieth century, and even in the rhetoric of Aleksandr Lukashenko. This sentiment became the foundation of the Belarusians' perspective on what Russia termed a “special military operation” and what Ukraine labeled the next phase of the Russian-Ukrainian war.

Even before February 24, 2022, it was evident that an overwhelming majority of Belarusians would disapprove of a military aggression on Ukrainian soil. Both indirect data and specific queries in sociological studies supported this notion. For instance, a survey conducted by Chatham House just prior to the war's onset (January-February 2022)¹ revealed that a mere 12–13% of respondents endorsed the hypothetical notion of backing the Kremlin in its conflict with Ukraine. Additionally, as of the end of 2021, the primary concern among Belarusians was the anxiety surrounding the anticipated resurgence of hostilities in Ukraine, as indicated by the Belarusian Analytical Workshop (BAW).²

Against this backdrop, it was hardly surprising that the onset of the next phase of the Russian-Ukrainian war saw an overwhelming anti-war sentiment resonate throughout Belarusian society. Results from various publicly available sociological studies consistently demonstrate that fewer than 10% of respondents supported Belarus' engagement in the conflict on Russia's side. This stance towards the Ukrainian conflict solidified

1 “Что думают беларусы про предстоящий референдум и возможную войну (Результаты социологического опроса, проведённого с 20 января до 9 февраля 2022 года”. *Chatham House*, 2022, <https://drive.google.com/file/d/1oKltxOEv7rmdrShkFMElIN7krtTtejaz/view>.

2 ““Глубинный народ” Беларуси чувствовал приближение войны. Данные социологического опроса за 2021 год”. *Reform.by*, 15 Mar. 2022, <https://reform.by/303208-glubinnyy-narod-belarusi-chuvstvovai-priblizhenie-vojn-y-dannye-socoproza-za-2021-god>.

almost instantly and remained consistent throughout the year, irrespective of the evolving dynamics on the battlefield.

Belarusians' consensus regarding the potential establishment of Russian military bases or the placement of nuclear weapons within Belarus has remained unchanged. Various studies indicate that, at least during the early months of the hostilities, the share of respondents in favor of deploying military bases hovered at around 25%, while support for nuclear weapons stood at 8–9%. It's worth mentioning that an additional 10–14% of respondents were somewhat amenable to the idea of situating Russian nuclear armaments on Belarusian soil.

The Desire for Peace and Calm

The beginning of the new phase of the Russian-Ukrainian war came as a shock to Belarusian society. Typically, in such situations, the “rally around the flag” phenomenon can be observed. The term refers to society uniting around its political leader, resulting in increased trust in them in times of a major threat.

At first, one might assume that this effect was observed in Belarus as well. Data from the Belarusian Tracker of Change indicates a 10% surge in trust in the authorities following the initiation of hostilities in Ukraine. After a period of stability during the summer, a second wave of increased trust emerged in the fall (rising by 6%) and continued into the winter of 2022–2023 (rising by 5%). This can likely be attributed to the differences in approach to the conflict when compared to Russia. The Belarusian authorities:

- Did not send their troops into Ukrainian territory;
- Refrained from making overt mobilization calls;
- Prevented a complete economic collapse;
- Consistently conveyed a peace-oriented rhetoric (though aligned with Russia's perspective).

It's evident that the aforementioned points are in many ways manipulative and propagandistic, influencing a portion of the society. Consequently, over half of the urban population believes that Belarus is not involved in the Russian-Ukrainian war and doesn't act as a co-aggressor (though, by international standards, it very much does).

Interestingly, in this scenario, the regime's propaganda couldn't entirely dominate public sentiment. We witness a non-conventional form of unity, which sociologist Andrei Vardamatski has termed as "consolidation without a flag". This implies that the anti-war consensus which emerged in Belarus did so independently, without a guiding political figurehead. Existing studies³ indicate that the base of support for the Lukashenko regime hasn't grown over the past year. With respect to the urban demographic, it has remained static, hovering around 20–25%.⁴

Consequently, the rise in trust towards state entities shouldn't be perceived as growing trust in Aleksandr Lukashenko's governance. Rather, it seems more apt to interpret it as an approval of Belarus' decision to refrain from active participation in the war. Sociologist Philip Bikanau perceives this trend as the emergence and fortification of a "desire for calm".⁵

3 "Отношение белорусов к войне и ценностные ориентации". Chatham House, Mar. 2023, https://drive.google.com/file/d/1Ebm0wj6mBbImpii_aIWJmLoejYMmmuH/view.

4 Такой вывод мы делаем на основании того, что с утверждением: "Стране необходима сильная рука лидера, который должен принимать важные государственные решения единолично" — согласны всего 24% опрошенных (8% полностью согласны и 16% скорее согласны).

5 "Беларусский трекер перемен (декабрь 2022 — февраль 2023)". БТП, Feb. 2023, <https://library.fes.de/pdf-files/bueros/belarus/20149-20230322.pdf>.

Declining Popularity of Geopolitical Neutrality

The Russian-Ukrainian war has also impacted the foreign policy neutrality stance traditionally held in Belarusian mass consciousness. The concept of geopolitical neutrality gained prominence by the late 2000s and, until recently, was widely embraced by most Belarusians. In the early 2010s, its proponents constituted between 50 and 55% of the population. Following the revolutionary year of 2020, this figure rose even further, reaching almost two-thirds of Belarusian society (63–64%).

While the notion of neutrality began losing its supporters in 2021, about half of the population still subscribed to it. Essentially, these were the champions of “active” neutrality – individuals who believed Belarus could serve as a bridge between the East and the West while fostering close ties with both the European Union and Russia. However, 2022 exposed the impossibility of such a stance.

With the onset of the Ukrainian conflict, societal support for neutrality dipped below 50% (March – 47%, June – 46%, November – 43%).⁶ This decline occurred predominantly at the expense of “active” neutrality advocates, their numbers waning by over a third. Interestingly enough, the percentage of those favoring complete non-alignment saw a modest increase, from 20% to 23%.⁷

This drift away from the neutrality camp predominantly veered “eastward”. Following the onset of the war, those advocating for a Belarusian alliance with the Russian Federation saw

6 “Отношение белорусов к войне и ценностные ориентации”. *Chatham House*, Mar. 2023, https://drive.google.com/file/d/1Ebmb0wj6mBbImpii_aIWJmLoejYMmmuH/view.

7 “Медиапотребление, отношение к мобилизации и идеологическая самоидентификация белорусов (Результаты опроса общественного мнения, проведённого с 11 по 20 ноября 2022 года)”. *Chatham House*, 2022, <https://drive.google.com/file/d/1Hqziwnh3ZJLfX85QWj-HrSsnLJv18ZC/view>.

an 8% increase, moving from 29% in November 2021 to 37% in the first quarter of 2022. Concurrently, the faction endorsing Belarus' accession to the European Union grew by a third, from 12% to 16%.

The remainder of 2022 saw only marginal fluctuations in these percentages. The proponents of unionizing with Russia hovered around 37–38%, while those endorsing simultaneous alignment with both the European Union and Russia fluctuated around 24–25%. Conversely, the portion of the population supporting passive neutrality waned from 23% to 18%, and the share of the advocates for European integration increased to 18%.

Although the war initially jolted Belarusian society, its progression and associated catastrophic events scarcely influenced the geopolitical leanings of Belarusians, save for a slight dent in confidence towards the imperative of neutrality. This observation is further corroborated by the relatively stable sentiments Belarusians hold towards Russia. After a dip below 80% in 2021–2022, the fraction of those holding a favorable view of their Eastern neighbor has stabilized around 71–73%⁸.

Shrinking Horizontal Ties and Increasing Diaspora Activity

The Belarusian Revolution of 2020 was characterized by the explosive growth of horizontal ties, which the authorities rightly perceived as a threat and attempted to counteract. The initial repressions against activists from horizontal communities were observed as early as 2020. By 2021, there was a clear shift towards the communities' complete eradication. The onset of the war in Ukraine in 2022 only amplified this trajectory.

8 “Отношение белорусов к войне и ценностные ориентации”. Chatham House, Mar. 2023, https://drive.google.com/file/d/1Ebmb0wj6mBblmpii_aIWJmLoejYMmmuH/view.

With that said, horizontal ties could not be completely eliminated. Research⁹ conducted by the Center of New Ideas and the “People’s Poll” initiative suggests that while horizontal relations did “narrow”, they persisted at foundational levels, such as the “circle of acquaintances” (having like-minded people) and the “circle of communication” (regular interactions). Furthermore, there was a noticeable transition from online interactions with like-minded individuals to more offline communications.

Discussing the online format of horizontal ties, the protest segment of the Belarusian society continues to demonstrate a high level of participation in online communities. Lower-income individuals, older age groups, and activists from small towns (including villages and district centers) have begun connecting to these online platforms. In the current climate, communities that revolve around non-profit organizations spanning various sectors, as well as independent projects or initiatives, are sought after the most. Overall, horizontal ties are becoming less politicized and are shifting towards more civic-oriented activities¹⁰.

Amidst the ongoing domestic repressions, the endeavors of Belarusians who moved abroad and became part of the Belarusian diaspora have gained significant relevance. Precise data on post-2020 migration rates is currently unavailable, but it is safe to say that it represents the largest migration wave in Belarus’ recent history, which could potentially influence the country’s social dynamics.

Research indicates that Belarusians who remain in the country hold the expectation that the diaspora will act as a representative voice for the Belarusian society, standing in opposition

9 Коршунов, Геннадий. “Горизонтальные связи: что осталось от тех структур самоорганизации, которые возникли в 2020 году”. *Центр новых идей*. June 2022. <https://newbelarus.vision/wp-content/uploads/2022/06/ГОРИЗОНТАЛЬНЫЕ-СВЯЗИ.pdf>.

10 Там же.

to the Lukashenko regime¹¹. Indeed, the diaspora is well-positioned to fulfill this role.

A typical profile of an active Belarusian abroad could be described as follows: likely a 35-year-old male with a higher education, employed in the private sector, and earning a relatively high income. Such an individual maintains strong ties to their home country and actively keeps abreast of events unfolding in Belarus.

It's worth noting that horizontal ties within the Belarusian diaspora are notably tight-knit. What sets them apart is their cross-border nature; the majority of active Belarusians abroad predominantly interact with fellow Belarusians globally. Simultaneously, a significant portion of the active Belarusian diaspora engages in various social and civic activities, including pro-Belarusian and anti-war advocacy.

Conclusion

The development of the situation in Belarus and its reflection in mass consciousness will be significantly influenced by the progression of military actions in Ukraine. Other factors include the extent of Belarus' involvement in the conflict and the reactions of neighboring countries (as well as the broader international community) to that involvement or lack thereof. Generally speaking, if Ukraine prevails, there might be a resurgence in protest dynamics, especially with active support from the diaspora. If the war becomes protracted, the double occupation of Belarus will intensify, and the regime pressure on the society will increase. Regardless of the outcome, society's rejection of the war and the Lukashenko regime is likely to persist.

11 Коршунов, Геннадзь, Кудревич, Максим “Дияспора как часть беларусскаго общества”. *Центр новых идей*, Jan. 2023. https://newbelarus.vision/wp-content/uploads/2023/01/Diaspora_full-version.pdf.

DEMOCRATIC ORGANIZATIONS: CLUSTERING AROUND TSIKHANOUSKAYA

Zmicier Kuchliej

Summary

The coalition of political organizations led by Sviatlana Tsikhanouskaya retained its leadership in the Belarusian democracy movement. The crisis within the movement was temporarily resolved once the United Transitional Cabinet (UTC) was established, which involved popular personalities. In Tsikhanouskaya's cabinet, the security component was reinforced at the request of supporters of change. The protest movement turned anti-war following the Kremlin's attack on Ukraine, with limited mobilization of the democracy core during Lukashenko's plebiscite.

Discussions of possible ways to democratize Belarus – from forcing the ruling class to pursue a dialogue to a regime change resulting from a national liberation movement – were stepped up in political organizations. Criticism of the Tsikhanouskaya coalition was periodically amplified by attempts to restructure influence in favor of other political centers. However, neither the Forum of Democratic Forces headed by Valery Tsepkalo, nor the Kastus Kalinouski Regiment in cooperation with Zianon Pazniak was able to seize the initiative.

The party building process in Belarus gradually froze, although individual political organizations (the United Civic Party (UCP), the Belarusian Social Democratic Party (BSDP) (“Hramada”), the organizing committees of Viktor Babaryka’s “Together” (“Razam”) and Andrey Dmitriyev’s “Our Party” (“Nasha Partiya”) held some events – including anti-war – for their sympathizers.

Trends:

- Continued leadership of the broad coalition of political organizations led by Sviatlana Tsikhanouskaya, with recurrent challenges from other political centers;

- Prevalence of ultimatum-like positions and sanctions rhetoric amidst democracy organizations;
- Complete cessation of public and street actions by political organizations, change to online communications with sympathizers, and use of the underground format.

Introduction

In conditions of authoritarian reactionary policy, political organizations sought to maintain their core membership, as well as engage political migrants in their activities. The Lukashenko regime increased the costs of sociopolitical activism, with repression targeting not only activists, but also dissidents. The impact of democratic forces on Belarus' domestic agenda progressively declined, in no small measure due to the elimination of independent media by protectors of the regime. Individual media outlets attempted to build an infrastructure abroad; however, notwithstanding all their efforts, they were unable to bring their respective audiences back to the level of 2020.

The proportion of state propaganda and Russian outlets in the country's media environment expanded, which significantly narrowed the media capacity of political organizations. The democratic forces were mostly centered on an anti-war, international, repression and sanctions agenda, which the democratic core called for. Political organizations gradually focused their attention on the consolidation of supporters of the European choice.

The democratic forces saw their work with their audience inside Belarus blocked in every possible way by protectors of the regime, including through the demolition of the legal framework and hikes in costs of socio-political activism. The rhetoric of democratic organizations towards the Lukashenko regime became increasingly harsher in response to ongoing repression, complicity in the war in Ukraine, and gradual surrender

of sovereignty to the Kremlin. Against the backdrop of the enhanced international isolation of the Lukashenko regime, political organizations intensified their engagement with Western leaders.

Lukashenko's Plebiscite: Anti-War Mobilization of Society

Following lengthy discussions, the broad coalition of democratic forces led by Sviatlana Tsikhanouskaya approved its general strategy to mobilize supporters of change and encourage them to spoil ballots at the constitutional referendum. The participants in the “Cross Out the Referendum” campaign successfully communicated their message to supporters of protests. About 73% of respondents in the “People’s Poll” (“Narodnae apytanne”) independent opinion poll said they were ready to support the Tsikhanouskaya coalition’s action strategy¹.

Intensified reactionary practices, broadening repression and escalated persecution of dissenters formed the backdrop for the plebiscite. Votes were cast amid the beginning of the Kremlin’s aggression against Ukraine, which accounted for the anti-war nature of the civic mobilization.

Some political organizations – both registered parties and Viktor Babaryka’s team (the organizing committee of the “Together” party) – distanced themselves from the Tsikhanouskaya coalition for fear of repression. However, their approaches had a lot in common with the “Cross Out the Referendum” campaign. Zianon Pazniak, a 1990s opposition leader, was among the main critics of Tsikhanouskaya’s voting initiative and called for voters to ignore Lukashenko’s plebiscite.

1 “Отношение к инициативам протеста: январь 2022”. *Народнае апытанне*, 30 Mar. 2023, <https://public.flourish.studio/story/1025090/>.

The democratic forces were compelled to give up on large-scale monitoring due to possible repression. The opposition parties managed to nominate only a few dozen representatives to election commissions.

During the main polling day in Minsk, Hrodna, Mahilyou, Zodzina and some other cities, lines were formed near some polling stations. At Tsikhanouskaya's appeal, protests focused on anti-war messages, and street rallies were staged in Minsk, albeit on a much smaller scale compared to 2020. Human rights activists reported detentions of over 900 demonstrators².

Anti-War Decentralized Movement: Initiative of the Democratic Forces

The democratic forces swiftly responded to the Kremlin's invasion of Ukraine by initiating an anti-war movement that resonated with broad sections of the population. Political organizations managed to consolidate their positions in society during the first few weeks of Moscow's aggression. At the start of the war, the audience of independent media grew as well, as the state propaganda increasingly got closer to the Kremlin's narratives.

The position of the democratic forces was consistent with the anti-war sentiment in society, which paved the way for the recruitment of activists to participate in nonviolent protests (anti-war graffiti, leaflets, and acts of defiance) as well as sabotage on railroads and attacks on the state's online infrastructure, especially in the first months of the war.

Public protests were scarce and were gradually phased out as a result of severe persecution. However, Lukashenko's forces

2 "Спис затриманых у асноўны дзень рэферэндума 27 лютага". Праваабарончы цэнтр "Вясна", 30 Mar. 2023, <https://spring96.org/be/news/106930>.

were unable to put an end to the underground movement, which operated until the end of the year.

Militants from BYPOL, “Resistance” (“Supratiu”), and Cyber Partisans were actively involved in supporting the decentralized underground initiative to counter Russia’s aggression. According to BYPOL, up to 200,000 activists were engaged in the “Victory” (“Peramoha”) plan. The anti-war movement acquired the form of sabotage and wrecking of railroad facilities and cyber attacks on the infrastructure used to support Russian troops.

The underground guerrillas and cyber partisans carried out a few successful operations on the Belarusian railroad, which slowed the advance of Russian troops through Belarus toward Ukraine. The rail war was halted once most of the Russian weapons and military equipment had been withdrawn from the territory of Belarus.

In conjunction with crowdfunding initiatives and diasporas the democratic forces focused on providing support for refugees, to help Ukraine, including support of volunteers.

Foreign Policy Achievements: Democratic Forces vs. the Regime

The democratic forces succeeded in preventing or partially lifting restrictive measures from the European countries’ side toward Belarusian citizens due to the Lukashenko regime’s support for the Kremlin’s invasion of Ukraine. Political organizations focused their efforts on a mission to separate the Lukashenko regime from Belarusian society in the eyes of the international community.

Success in the international scene is attributable to Sviatlana Tsikhanouskaya’s vigorous activities. In 2021–2022, the leader of the democratic forces completed about 90 international visits and met with dozens of country leaders and top political figures.

The Tsikhanouskaya coalition attempted to imitate the diplomatic functions of the state now that the Lukashenko regime was in isolation, as well as amid the gradual withdrawal of civil and political rights from opponents of the ruling class.

Tsikhanouskaya's Office and Cabinet, the National Anti-Crisis Management (NAM)³ led by Pavel Latushka, intensified communications with Western capitals with a view to promoting the isolation of the Lukashenko regime and organizing an international tribunal for complicity in Russia's aggression, as well as with the purpose of maintaining support for civil society.

Tsikhanouskaya Coalition: Leadership in Shaping the Democracy Agenda

The coalition of political organizations led by Tsikhanouskaya preserved its leading role in the democracy movement despite periodic challenges from alternative political entities. The democratic forces intensified their cooperation and coordination during Lukashenko's plebiscite as part of the "Cross Out the Referendum" campaign. The core of the alliance was formed by Tsikhanouskaya's Office, the Coordination Council, NAM, as well as "Voice" ("Holas"), "Honest People" ("Sumlienniya ludzi"), and ZUBR.

Tensions among democratic forces and criticism of the broad coalition led by Tsikhanouskaya gradually escalated after the February referendum as society began recovering from the shock caused by the Kremlin's aggression in Ukraine. The crisis in the democratic community was defused in August by conducting the large-scale New Belarus conference and establishment of Tsikhanouskaya's Cabinet with the inclusion of popular

3 Таксама па-руску: "Антикризисное народное управление" (НАУ).

leaders of democratic organizations, as well as revision of decision-making procedures within the broad coalition.

Joining the United Transitional Cabinet (UTC) were such prominent media figures as NAM chief Pavel Latushka and former military commander Valery Sakhshchyk, as well as representatives of BYPOL. The leadership of the Tsikhanouskaya coalition reinforced its security component at the request of the democratic core. Some opposition leaders, including Zianon Pazniak and Valery Tsepalo, refused to participate in the Conference and instead concentrated on their own political projects.

Tsikhanouskaya's Cabinet enjoyed considerable credibility, but over time suffered reputational losses following a series of media scandals, first in connection with the Russian citizenship of Representative for Defense and National Security Sakhshchyk, and then due to the leave of Representative for Finance and Economy Tatsiana Zaretskaya. Another scandal that tarnished the Cabinet was associated with the safety of activists after an undercover agent of the Main Directorate for Combating Organized Crime and Corruption of the Interior Ministry was reported to have been working for the Black Book of Belarus initiative.

Little by little the Coordination Council was losing its influence in formulating the agenda for the democracy movement. However, after the New Belarus conference, the democratic forces initiated a new phase of reforms providing for the involvement of a broader representation of civil society in the Council's operations.

In the first half of the year, the NAM, headed by Latushka, was coordinating activities within the broad Tsikhanouskaya coalition, but the political organization operated autonomously. The NAM drew the attention of harsh critics of Lukashenko and worked mostly on promoting sanctions policies, thus deepening the international isolation of the regime. After the New Belarus conference, NAM leader Latushka became Tsikhanouskaya's deputy in the UTC.

The Tsikhanouskaya coalition made repeated attempts to establish closer ties with the Ukrainian leadership, but to little avail. Representatives of the Ukrainian establishment occasionally made contradictory statements on Belarus, which often caused mixed reactions among national democrats and disoriented activists of the anti-war movement.

Alternative Political Projects

Throughout 2022, those opposition activists who questioned Sviatlana Tsikhanouskaya's leadership were often overly critical of the Office and eventually the UTC.

In the *first half of the year* Valery Tsepkalov, one of the former 2020 presidential candidates, sought to capture leadership of the democracy movement and brought together some critics of Tsikhanouskaya within the Forum of Democratic Forces of Belarus initiative. However, his attempts to rearrange influence in the democracy movement and confrontational rhetoric had an opposite effect and affected the oppositionist's rating among the democracy core.

The Forum failed to put in place its large-scale National Council project with online voting, which would otherwise have enabled it to seize the initiative in the democracy movement. Politicization of Belarusian society is currently on the decline, and the largest mobilization initiatives (Voice, Honest People, ZUBR, backyard initiatives, etc.) choose to align their activities within the framework of the Tsikhanouskaya coalition.

In the *second half of 2022*, volunteers from the Kastus Kalinouski Regiment, who voiced their political ambition⁴, attempted to assume the role of an alternative pillar of the

4 "У полка Калиновского появятся политические представители". ГО "Дзеркало Ньюс", 05 Sep. 2023, <https://news.zerkalo.io/economics/21341.html>.

national-democratic movement. Belarusian militants in Ukraine stepped up their cooperation with Cyber Partisans and Zianon Pazniak. Despite considerable support for the fighters among advocates of change, civil society remained divided on their political statements. Nevertheless, the Kalinouski Regiment managed to shore up its standing in the media landscape and kept its distance from Tsikhanouskaya's Cabinet.

The team of one of the highest-ranking politicians Viktor Babaryka was gradually losing its influence in the democracy movement, and the "Together" party project was suspended on account of repression. Dialogue with Lukashenko as an agenda issue was losing its influence, primarily because of the apparent reluctance of the ruling class to embark on such dialogue and its intention to completely depoliticize society.

Parties: Internal Migration

The development of party projects was suspended due to the adverse political situation and incessant repression, and so were efforts to organize constituent congresses of new parties ("Together", "Our Party"). By the end of the year, operations of the registered parties and political organizations which criticized the regime moderately had been almost completely paralyzed.

Political parties were eager to distance themselves from the Tsikhanouskaya coalition's initiatives for fear of a harsh response from the regime's guards. Registered organizations shifted their focus to internal organizational and outreach activities for their sympathizers, and cautiously promoted their anti-war agenda.

Some leaders of political parties were persecuted and imprisoned, including chairman of the Belarusian Popular Front (BPF) Ryhor Kastusiou and leader of the United Civic Party (UCP) Mikalai Kazlou. "Our Party" leader Andrey Dmitriyev, a former

2020 presidential candidate, was detained in early 2023. A significant number of political activists were forced to emigrate.

From time to time right-centrists resumed their cooperation. The UCP, Belarusian Christian Democracy (BCD), and the “For Freedom” movement, in cooperation with Tsikhanouskaya, contributed to a tough resolution against the Lukashenko regime at the congress of the European People’s Party⁵, the largest party association in the European Union.

The loyalist political projects initiated by Yury Voskresensky and former MP Hanna Kanapatskaya were nipped in the bud amid authoritarian reaction and crackdown on dissent, coercion of loyalty to the Lukashenko regime, and ideology-driven consolidation of the ruling class.

Conclusions

The coalition led by Sviatlana Tsikhanouskaya continues to shape the agenda for the protest movement, including by exchanging regular feedback with the democratic core. On the other hand, the social base of the broad coalition is gradually boiling down to supporters of Belarus’ pro-European choice. Political organizations focus on ultimatum and sanctions narratives that hardly strike a chord with the general public.

Meanwhile, the mobilization capacity of the democratic forces continues to narrow against the backdrop of persistent repression, migration of activists, and a shrinking audience of independent media. At the same time, high-profile unpopular acts by the ruling class, such as the decision to let the Kremlin deploy nuclear weapons in Belarus, create a window of opportunity for the democratic forces to mobilize society.

5 “Emergency Resolution Nr. 5 adopted at the EPP Congress.” *European People’s Party*, 20 Mar. 2023, <https://www.epp.eu/files/uploads/2022/06/FINALE-5.pdf>.

At the same time, the democratic forces appear to have an increasingly important role in forming the agenda of Western capitals on Belarus.

Political parties will be strengthening their coalition cooperation, especially if they happen to lose their official status. Some organizations will continue their activities via foreign representative offices. Some activists will operate within the renewed legal framework as affiliates of public associations, steering committees, or join other political projects with a suitable ideology if the current ruling class remains in power.

MEDIA: CRIMINALIZATION OF THE PROFESSION, THREATS TO BIG TECH, LOSS OF INFORMATION SOVEREIGNTY

Project MediaIQ

Summary

In 2022 the condition of Belarusian media continued to deteriorate. This affected not just non-State media, which primarily were forced to relocate their editorial offices outside of Belarus, but also state-owned entities. The latter ceased any pretense of professional journalism, becoming mere conduits of propaganda, including Russian militarism.

Non-state media that have found themselves abroad grappled with the challenge of discrepancy between the “external” delivery of content and its perception by the audience in Belarus. Those that retained the ability to work domestically were compelled into self-censorship, steering clear of not just political, but also social issues.

Consequently, a significant portion of the audience is deprived of information necessary to critically evaluate and understand the socio-political landscape of Belarus, including perceptions related to personal safety.

Trends:

- Criminalization of media content consumption;
- Diminished demand for political content
- Growing dependency of non-state media on Big Tech algorithms;
- State media’s erosion of information sovereignty.

Media Market: Depoliticization and Resource Scarcity

After the outbreak of the Russian war in Ukraine on February 24, 2022, numerous exiled media outlets underwent yet another relocation, this time from Ukraine. Nevertheless, the majority of

publishers acclimated to the new conditions, managing to restructure, retain their teams, and, most importantly, preserve the audience's trust.

A Chatham House study revealed that 29% of Belarusian urban audiences have full or partial confidence in Belarusian non-state media. Trust levels are even higher (up to 70%) among this media's specific target audience. Intriguingly, within the same demographic, trust in Belarusian and Russian state-controlled media stands at 38% and 40%, respectively.¹

Despite attempts by the Belarusian authorities to obliterate non-state media, these outlets persevere. Not only do they continue their operations, but they are also exploring avenues to bolster influence over audiences in Belarus.

With that said, the regime has systematically dismantled the business models of non-state media at both national and regional levels: accounts were frozen, legal entities behind media publishers were liquidated, and the labeling of publications as “extremist” and subsequent website blockages deprived these media outlets of domestic advertiser support. Moreover, the prevailing structure of donors and their program priorities only partially meet the needs of Belarusian independent media. The challenges of operating editorial teams in exile come with their own set of challenges and associated financial burdens.

By the end of 2022, the Belarusian non-state media landscape comprised media in exile, distributed editorial offices (newsrooms) and domestic media, each adhering to varied editorial policies. The domestic media market is primarily characterized by niche publications, certain regional outlets, and some national platforms that, although not overly promoting a pro-government stance, have refrained from covering salient socio-political issues.

1 “Медиапотребление, отношение к мобилизации и идеологическая самоидентификация белорусов”. *Chatham House*, 20 Dec. 2022, <https://belaruspolls.org/wave-13>.

The media consumption of Belarusians is also undergoing a transformation. The diminishing demand for political content, which is primarily negative, is a result of repression, self-censorship, propaganda, and significant barriers to accessing information domestically.

Criminalization of the Profession: Repression and Internet Censorship

In the “Press Freedom Index 2022”, Belarus ranked 153rd out of 180, making the poorest performance among European nations (along with Russia). The repression of non-state journalists and media outlets is systemic in nature. The media sector witnessed extensive criminal prosecutions, detentions (43 recorded), raids (55), arrests (20), fines, and deportations from the country.

According to BWA monitoring, 17 criminal verdicts were passed in 2022. Journalists and media professionals were sentenced to jail terms ranging from 1.3 to 14 years.² An additional 11 criminal cases were initiated but remain adjudicated. The international NGO “Reporters without Borders” highlighted Belarus as one of the top five nations with the highest number of incarcerated journalists (33), holding fourth place in terms of the number of imprisoned women journalists.³

Media consumption too has been criminalized, with legislation outlawing possession and distribution of extremist content.

Indeed, Belarus practices Internet censorship. Official statistics from 2022 indicate that the state either wholly or partially restricted access to over 3,000 Internet resources — spanning

2 “СМИ в Беларуси в 2022 году”. БАЗ, 20 Jan. 2023, <https://baj.by/ru/analytics/smi-v-belarusi-v-2022-godu>.

3 “Round-up of journalists detained, killed, held hostage and missing in 2022”. *Reporters without Borders*, https://rsf.org/sites/default/files/medias/file/2022/12/RSF_Bilan2022_EN.pdf.

non-state media websites, Telegram channels, and chats.⁴ Content from approximately 1,500 online sources was flagged as extremist, and 9 media outlets were branded as extremist entities. On May 14, the Supreme Court designated ООО “TUT BY MEDIA”, previously Belarus’ premier online platform, as an extremist organization. At the request of the Russian Prosecutor General’s Office, the social network “VKontakte” proceeded to block several pages and groups linked to Belarusian independent media.

In October, Lukashenko’s Decree 368 greatly eased the intelligence agencies’ access to online content. Communication providers and online resource proprietors are now required to enlist in a special electronic interaction system for intelligence agencies, ensuring their platforms provide unobstructed online access to law enforcement.

Consequently, in the global ranking of Internet freedom charted by the human rights group Freedom House in 2022, Belarus received only 28 out of 100 points — the lowest score since 2016.⁵

Digital Platforms as an Opportunity — and a Serious Threat

In light of website blockages and targeted technological repression from both Belarusian and Russian states, independent media have diversified their content distribution channels. Consequently, they’ve become heavily reliant on the algorithms of major tech companies. This is particularly evident in search

4 “Материалы для членов информационно-пропагандистских групп”. Мингорисполком, Dec. 2022, https://minsk.gov.by/ru/actual/view/209/2022/inf_material_2022_12.shtml.

5 “Belarus: Freedom of the Net 2022 Country Report”. Freedom House, <https://freedomhouse.org/country/belarus/freedom-net/2022>.

engines, where, following the silencing of prominent platforms like *Tut.by*, Belarusians now come in search of news. However, Belarusian public-political news stories remain elusive.

Belarusian independent media have limited visibility on Google services. When the services do cover international events, Belarusian media are largely overlooked.⁶ Google neither distinguishes Belarus as a unique region nor facilitates searches for news in the Belarusian language. As a result, searches concerning Belarus often yield results from non-state Russian media. The blocking of non-state media websites by the Belarusian authorities depresses these sites' search rankings even further, reducing their visibility.

Surprisingly, the policies and algorithms of the Russian search engine “Yandex” are comparatively more amenable to Belarusian independent media than American Google, despite still suppressing the distribution of independent content.⁷ “Zen. News”, for example, prioritizes news from Belarusian state sources and those non-state outlets practicing self-censorship.

On platforms like YouTube, Belarusian independent media are overshadowed by Russian and Ukrainian content. Default settings associate the region “Belarus” with the Russian language⁸. Search results for “news” are dominated by Russian content; “news of Belarus” yields primarily Ukrainian content; and “war in Ukraine” offers a mix of Russian and Ukrainian perspectives. Searching for “*навіны*” (Belarusian for “news”) produces

6 Парфёненко, Пётр. “Как Google оставляет белорусов в российском медиаполе”. *MediaIQ*, 19 Sep. 2022, <https://mediaiq.info/kak-google-ostavlyayet-belarusov-v-rossijskom-mediapole>.

7 Парфёненко, Пётр. “Как “Яндекс” угнетает продвижение повестки белорусских негосСМИ”. *MediaIQ*, 03 Oct. 2022, <https://mediaiq.info/kak-yandeks-ugnetayet-prodvizhenie-povestki-belarusskih-negossmi>.

8 Парфёненко, Пётр. “Беларусские негосСМИ проигрывают в YouTube российской и украинской пропаганде”. *MediaIQ*, 28 Oct. 2022, <https://mediaiq.info/belarusskie-negossmi-proigryvajut-v-youtube-rossijskoj-i-ukrainskoj-propagande>.

largely irrelevant results. In all cases, non-state Belarusian media rarely feature prominently.

In 2022, many media outlets grappled with challenges related to promoting their content on *Facebook* and *Instagram*.⁹ The page of the “Belsat” TV channel faces potential deletion, and advertising opportunities dwindle. These hurdles can be attributed to policy changes introduced by Meta in July 2022. The company expanded its definition of political and public-political advertising to encompass content related to war, politics, and elections, as well as mentions of specific politicians. To place a political advertisement tailored for Belarus, advertisers are required to be Belarusian residents. As a result, state propagandists can advertise unhindered, while independent media are sidelined.

Organic promotion suffers due to widespread repression: out of the concern for their safety, users hesitate to engage with content deemed extremist, refusing to “like”, comment on or share such posts. These limited interactions negatively impact the content’s algorithmic ranking.

The Mouths of Propaganda Betray Information Sovereignty

In 2022, the state grounded its information policy in the public escalation of violence, the promotion of Russian narratives about the war, censorship, disinformation, and slander¹⁰. The pro-

9 Печинин, Андрей. ““Охваты с миллионных упали до тысячных”. Как нововведения Meta отразились на продвижении контента белорусских независимых медиа”. *MediaIQ*, 21 Dec. 2022, <https://mediaiq.info/ohvats-s-milionnyh-upal-do-tysyachnyh-kak-novovvedeniya-meta-otrazilis-na-prodvizhenii-kontenta-belarusskih-nezavisimyh-media>.

10 Парфёненко, Пётр. “Динамика и виды топовых нарративов госпропаганды в 2022 году. Инфографика”. *MediaIQ*, 12 Dec. 2022, <https://mediaiq.info/dinamika-i-vidy-topovyh-narrativov-gospropagandy-v-2022-godu-infografika>.

paganda strategy focused on “participation in the information war”, with the propagandists themselves identifying as “media front fighters”. In comparison with 2020 and 2021, conspiracy theories and narratives, as well as hate speech, were employed more frequently. According to MediaIQ, more than 50% of the examined messages of Belarus-1, ONT, and STV TV channels contained paganda (67.55, 64.27, and 55.64%, respectively).

Since February 24, state-owned media abandoned the information sovereignty, stipulated in the Information Security Concept of Belarus, in their coverage of Russia-Ukraine relations, opting instead to echo Russia’s stance. It was reflected in the choice of topics, prevailing narratives, and the vocabulary used.

The war events were either selectively presented in line with Russia’s interests (highlighting Russian military achievements and omitting retreats or civilian casualties) or were presented from an overtly pro-Kremlin perspective, with Belarusian media voicing support for the Russian army. Amplifying Russian narratives conflated Belarus’ interests with those of the Putin regime, aiming to legitimize in the court of public opinion the inclusion of Belarus in an all-out war against Ukraine.¹¹

As such, throughout 2022, the state media was more involved in selectively covering regime-important topics – like opposition to sanctions, economic triumphs, the constitutional referendum, and Belarus’ peacekeeping role in the war – than in traditional journalism and reporting.

At the same time, state media found themselves in fierce competition with Russian media for the Belarusian Internet audience. To promote their propagandistic narratives, state media turned to platforms like *YouTube* and *Instagram*. *Baltic*

11 Печинин, Андрей. “Не будет ни Вильнюса, ни Варшавы, ни Киева. Если будет надо, и Берлина”. Как пропаганда готовит беларусов к войне. *MediaIQ*, 01 June 2022, <https://mediaiq.info/ne-budet-ni-vilnjusa-ni-varshavy-ni-kieva-esli-budet-nado-i-berlina-kak-propaganda-gotovit-belarusov-k-vojne>.

Internet Policy Initiative's monitoring effort has recorded a significant surge in the audience of YouTube channels belonging to Belarusian state media.

Conclusion

The Belarusian media space is a place of fierce confrontation. As state-owned media transform into mouthpieces for both Belarusian and Russian propaganda, non-state media strive to maintain journalistic standards, no matter how difficult it may be for them.

A new category of media is emerging: officially non-state, but working within Belarus and restricted by self-censorship. Such media might become more appealing to neutral audiences or those who, out of fear for their security, steer clear of media labeled extremist

Coupled with the growing disconnect between exiled media and their audience in Belarus, this further deepens the rift in Belarusian society.

EDUCATION: NO COUNTRY FOR PRIVATE AND FOREIGN ENTITIES

Siarhei Alsheuski

Summary

The state of Belarusian education in 2022 can best be characterized by the systematic undermining of the foundation of private Belarusian schools, which at the beginning of the year seemed to be a more efficient and high-quality alternative to the state education system. This deterioration was evident not only in the de facto dismantling of private general education but also in the persistence of repressive and intimidating policies directed at students and educators across all educational levels. As a rule, country schools saw an expansion of military-patriotic education, while universities intensified personnel purges and implemented ideological employment interviews, especially for managerial roles.

Trends:

- Persistent repressive and intimidating policies towards students and educators;
- Altering the mode of knowledge assessment to obscure the declining quality of school education;
- Erecting barriers to higher education for ideologically non-conforming applicants and creating hurdles for those seeking admission to foreign universities.

Liquidation of Private Schools

In October 2022, Aleksandr Lukashenko enacted a law mandating the licensing of preschool and school education¹. This move

1 “Александр Лукашенко подписал Закон о лицензировании”. *Президент Республики Беларусь*, 17 Oct. 2022 <https://president.gov.by/ru/events/aleksandr-lukashenko-podpisal-zakon-o-licenzirovanii>.

can be considered a tactic to realize one of the hidden objectives of the Concept for the Development of the Education System of the Republic of Belarus until 2030: the elimination of private school education. The primary objective of the Concept is to ensure universal access to free general secondary education.

In addition to licensing, the system employed various means to pressure private education entities: administrative (such as imposing regulations and withholding the certification of school buildings), judicial (through lawsuits by regulatory authorities aiming to shut down private schools)², and even criminal actions. In one case, the esteemed Belarusian tutor, Yevgeny Livyant, along with his family and associates, were detained following inspections at branches of the tutoring center “100 points”. They face accusations of tax fraud³. Consequently, some private education providers found it necessary to cease operations and hastily exit the country.

After the clampdown on private schools in Minsk, only three remained and were granted a license⁴. Notably, the Minsk International Gymnasium, which was established in 2020 near the capital in the upscale Drozdy village and is linked to Irina Abelskaya, mother of Nikolai Lukashenko, faced no hurdles whatsoever.

Centralized Exam as a Tool to Mask the Inadequate Quality of School Education

The 2022 Education Code introduced notable alterations to the rules governing final examinations. A centralized exam (CE) for

2 “МЧС и санстанция подали иски о приостановке работы четырёх частных школ”. *Zerkalo*, 12 Oct. 2022 <https://news.zerkalo.io/life/23822.html>.

3 “Силовики возбудили шесть уголовных дел после проверок филиалов репетиторского центра “100 баллов””. *CityDog*, 05 Apr. 2023 <https://citydog.io/post/liviant-centr-kryminalki/>.

4 “В Минске остались только три частные школы, которым выдали лицензию”. *Zerkalo*, 14 Apr. 2023 <https://news.zerkalo.io/life/36940.html?c>.

school graduates was established, focusing on two subjects: one of the two official languages and a subject of the student's choice. In my perspective, this was implemented to sidestep questions about the discrepancies between school grades and scores obtained on the centralized test. This shift is especially interesting in light of prior adjustments made to the test scoring methodology, which caused the average score to rise dramatically to 50 (equivalent to 7 in a 10-point system).

The new CE got rid of level 5 problems (required to get scores above 80). Now, students who have genuinely mastered the school program at a level equivalent to 7 or 8 will be able to earn 9 or 10 in the exam. Overall, the conversion scale of CE scores to grades appears flawed (Table 1). For instance, a student can get an 8 in chemistry with just 49 out of 100 points on the exam, while a score of 77 out of 100 in mathematics equates to a perfect 10⁵.

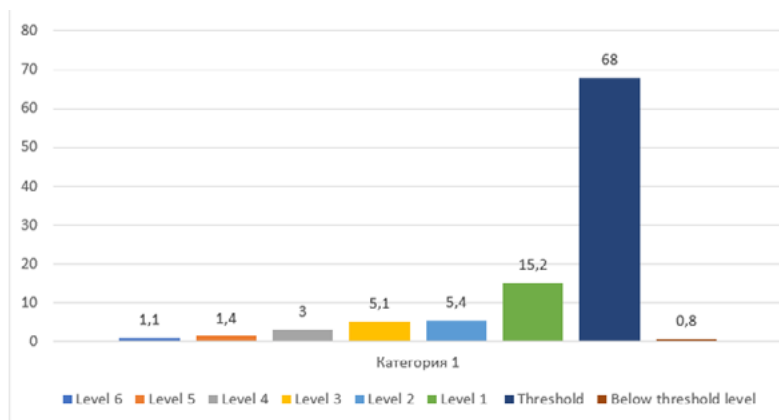
Table 1. Grade scale for CE participants.

“Belarussian language”, “Russian language”										
10-point scale	1	2	3	4	5	6	7	8	9	10
CEscores	1-2	3-6	7-14	15-25	26-32	33-41	54-67	54-67	68-81	82-100
“Math”										
10-point scale	1	2	3	4	5	6	7	8	9	10
CEscores	1-2	3-9	10-18	19-28	29-37	38-45	46-54	55-63	64-76	77-100
“Physics”										
10-point scale	1	2	3	4	5	6	7	8	9	10
CEscores	1-6	7-15	16-24	25-32	33-41	42-46	47-50	51-61	62-78	79-100

5 “Шкала перевода результатов ЦЭ-2023 в десятибалльные оценки”. 1prof, 27 Jan. 2023 <https://1prof.by/news/v-strane/shkala-perevoda-kak-itogicze-budut-pereschityvat-v-desyatibalnye-oczenki/>.

“Chemistry”										
10-point scale	1	2	3	4	5	6	7	8	9	10
CEscores	1	2-3	4-7	6-13	14-25	26-33	34-48	49-64	65-84	85-100

Simultaneously, the outcomes of the national monitoring of mathematical literacy present concerning results regarding the training of highschoolers: 68% of students were unable to pass the assessment.



In response, the National Institute of Education introduced an additional “threshold” level of mathematical literacy in an attempt to obscure this alarming fact. It is worth noting that, in difference from this test, PISA (Programme for International Student Assessment) doesn’t have a threshold level or any assessment levels below threshold⁶.

6 “80% учителей были в ужасном состоянии”. Эксперт — о том, что сейчас происходит со школьным образованием в Беларуси и что с ним не так”. CityDog, 01 Dec. 2022 <https://citydog.io/post/uchitel-o-shkolah/>.

Purges Driven by Politics and War

The education system continued to witness personnel purges. In October 2022, the KGB conducted a raid on the institutes of the National Academy of Sciences. The security forces detained at least 44 people. Some were released upon signing a non-disclosure agreement, while others faced administrative arrests⁷.

When filling out leadership positions in educational institutions, candidates undergo “interviews” with representatives of the security agencies to gauge their loyalty to the current regime. Additionally, educational institutions regularly hold preventive talks with both students and educators, aiming to intimidate and prevent “illegal actions”.

Reasons for these purges include not only an individual's stance on the 2020 elections but also opinions on the war in Ukraine. As an example, in Bobruisk, a history teacher faced trial for wearing a blue and yellow ribbon in her hair. This act was interpreted as “active participation in a mass event in the form of picketing⁸”. While some colleagues stood by her, others reported her to the police. I was also made aware of an incident where a teacher reported a student to the police for expressing a view on the war in Ukraine that deviated from the official stance. The student was subsequently expelled from his advanced class.

Higher Education Reserved for the Ideologically Aligned

The college and university admission process has reintroduced character references for schoolchildren. Coupled with other

7 “Тенденции в вузах: “чистки”, русификация и лояльность””. *Маланка Медиа*, 14 Nov. 2022 <https://malanka.media/news/17070>.

8 “Учительницу истории в Бобруйске судят за синюю и жёлтую ленты в волосах”. *Euroradio*, 24 Mar. 2022. <https://euroradio.fm/ru/uchitelnicu-istorii-v-bobruyske-sudyat-za-sinyuyu-i-zhyoltuyu-lenty-v-volosah>.

recent changes, such as an increase in the so-called targeted recruitment (i.e., guaranteed free education in exchange for an employment obligation at the government's discretion) and a decrease in available paid positions, these can be seen not only as means to exert pressure on students and their guardians, but also as a filter for entry into higher education that sorts prospective students into “friends” and “enemies”.

All these shifts are diminishing the appeal of higher education in Belarus among the youth. As a result, there is an increasing number of applicants each year planning to pursue higher education abroad. The Lukashenko regime has attempted to counteract this trend in several ways:

- Creating artificial obstacles for obtaining internationally recognized copies of high school diplomas⁹;
- Terminating intergovernmental agreements with Poland on the recognition of higher education and academic degrees and with France in the realms of culture, education, science, and media;
- Issuing military conscription notices to 17-year-old students in their final year of school;
- The parliament's initial approval (although not finalized) of a proposal to abolish military deferrals for students choosing to study abroad¹⁰.

However, these measures seem more likely to accelerate the emigration of young Belarusians even further.

9 “Очередь за апостилом растянулась до 2023 года, места продают с рук (дорого)”. *Dev.by*, 18 July 2022 <https://devby.io/news/apostil-letto>.

10 “Минобразования: отсрочки от службы для студентов, обучающихся сейчас за границей, останутся”. *БелТА*, 03 Mar. 2023 <https://www.belta.by/society/view/minobrazovanija-otsrochki-ot-sluzhby-dlja-studentov-obuchajuschisjsja-sejchas-za-granitsej-ostanutsja-553550-2023>.

Conclusion

In the short term, the developments the education system witnessed in 2022 can be described as an ideological purge, aimed at fostering conformity and suppressing dissent. However, in the long term, this approach is likely to produce a generation that, in just five or so years, may not accept the authority of the current regime, potentially igniting a new wave of social protests that will surpass even that of 2020.

In 2023, the repressive policies are expected to persist. They will predominantly impact educators in their professional capacities, leading to emotional burnout and a lack of motivation. This, in turn, will contribute to a further decline in the quality of education. In response, Belarusians will further integrate into the global educational landscape, thereby minimizing the adverse effects resulting from the actions of the Lukashenko regime.

RELIGION: WAR AS A MATTER OF CONSCIENCE

Alexander Shramko

Summary

Throughout 2022, the regime continued its efforts to achieve ideological unification and total control of all sectors of public life, including religion. Having ensured almost complete subordination of the Orthodox Church hierarchy, the authorities refocused their work towards the less compliant Catholic Church. Believers were expelled from the Red Church in Minsk, which turned into a sort of bargaining chip in the regime's haggling with the Vatican.

Repression against clergymen and active believers who participated in the 2020 protests continued. Since the war in Ukraine started, persecutions for anti-war activity were added.

Trends:

- State's endeavor to ensure maximum loyalty of all confessions and denominations, up to banning uncontrollable religious entities;
- War-induced aggravation of divisions in the religious environment, forcing believers to make a moral choice;
- Paralysis of grassroots religious initiative resulting from pressure and repression against clergy members and active believers in Belarus;
- Increased influence and significance of foreign centers, with communications maintained through individual channels.

Before the War

The brief two-month pre-war period of 2022 saw *three* landmark developments concerning the *three* Christian denominations.

When it comes to the Belarusian Orthodox Church (BOC), the amendments to the Constitution of Belarus are indicative.

Deceived by the trust and ostensible benevolence of the regime, the church hierarchs willingly responded to the call to put forward its amendments. As a result, none of the modifications proposed by the BOC were adopted. The BOC was therefore clearly given to understand its entirely subordinate position as an ideology valet with no independent ideology component whatsoever. As Natallia Vasilievič notes, “you [the BOC] will not have any alternative ideology, other than that of the Belarusian state — be it Litvinism or Western-Russianism”.¹

The outcomes of the “normalization” of the Catholic Church seem to look more ambiguous. On the one hand, both the Vatican and the local hierarchs had to make reluctant compromises, which in 2022 mostly concerned the terms of lease of some state-owned churches by believers. Hopes for the promised relaxation of these crippling conditions made both the Vatican and the local hierarchs turn a blind eye to the expulsion of believers from the Church of St. Simeon and St. Helen in Minsk.

The Catholic leadership cut a poor figure when Aliaksandr Zaitsau, a businessman close to the leader of the regime, was awarded the Pontifical Equestrian Order of St. Gregory the Great on behalf of Pope Francis. Moreover, they tried to hide the conferment of the order from the general public². Not all Catholics happen to support this servility of the Vatican in its relations with the regime.

On the other hand, according to the *Rerum Novarum* channel, the situation in the Catholic Church in Belarus is many times better than in the BOC. The role of dismissed Metropolitan Tadeusz Kondrusiewicz as a de facto leader and spiritual authority remains significant. Moreover, “other bishops and priests here

1 Наталля с двумя “Л”, 21 Jan. 2022, <https://t.me/burbalka/291>.

2 “Приближённый к Лукашенко бизнесмен Зайцев получил титул рыцаря Ордена св. Григория Великого”. *Reform.by*, 27 Dec. 2022, <https://reform.by/priblizhennyj-k-lukashenko-biznesmen-zajcev-poluchil-titul-rycarja-ordena-sv-grigoriya-velikogo>.

have never been purged, and every here and there Catholics of various levels continue to voice their dissent”.³

The third significant development is associated with the escalation of the situation with detained Protestant philosopher Uladzimir Mackievic. The refusal to grant him a meeting with a Protestant pastor, which is a direct violation of his freedom of religion, is a way to put him under pressure.

These three incidents reflect the general attitude of the regime towards the main Christian denominations: to subdue the Orthodox Church, to make an arrangement with Catholics, and to crack down on Protestants.

Reaction to the War

Russia’s full-scale invasion of Ukraine provoked an immediate response from both official church hierarchs and regular believers. On the very next day after the war broke out, the head of the Conference of Catholic Bishops in Belarus published a statement saying “the tragic news... has filled our hearts with sorrow” and calling for a prayer “for a speedy end to the ongoing conflict and least possible casualties”.⁴

On the following day, Metropolitan Veniamin, the head of the BOC, made a similar statement, calling for church members to pray and for the warring sides “to take steps to meet half way”.⁵

3 “За нашу і вашу свабоду”. *Rerum Novarum*, 03 Jan. 2022, <https://t.me/rerumnovarum/385>.

4 “Сообщение Председателя Конференции Католических Епископов в Беларуси епископа Витебского Олега Буткевича в связи с военным конфликтом в Украине”. *Catholic.by*, 24 Feb. 2022, <https://catholic.by/3/news/belarus/14328-pavedamlenne-starshyni-kkbb-biskupa-butkevichau-suvyazi-z-vaennym-kanfliktam-va-ukraine#ad1>.

5 “Обращение Митрополита Минского и Заславского Вениамина, Патриаршего Экзарха всея Беларуси, в связи с ситуацией в Украине”. *Белорусский Экзархат*, 03 Mar. 2022, <https://t.me/BelExarchate/1502>.

A common feature can be observed in both statements made by the top hierarchs of the two leading confessions: it is as if the question is not about the aggression committed by one side and repelled by the other, but about the involvement of two equals in a “conflict between the countries”. Reactions of foreign hierarchs of the Catholic Church, as well as some Orthodox Church leaders (for example in Finland and Lithuania) are much more explicit and, as a rule, contain unambiguously condemnations of Russia’s aggression against Ukraine. Anyway, during the initial phases of the war, the official Vatican, too, sought to maintain a “war of equals” approach.

Private reactions by priests and regular churchgoers were much more categorical and a lot more varied – especially in the BOC. Russia’s aggression was mostly criticized by the same priests and laypeople who were on the people’s side during the tragic events of 2020. Almost any sort of public anti-war statement immediately triggered persecution by the authorities. Priest Mihail Maruha, detained as he was carrying flowers during an anti-war protest and eventually sentenced to 13 days in jail, was among the first victims. Some of the women who came to the Minsk Cathedral at the call of the Union of Mothers of Belarus to pray for peace were also detained.

Those members of clergy who supported the regime during the Belarusian protests also spoke in favor of the war. Homiel Archimandrite Savva (Mazuka) voiced his support for aggression on the Russian Spas TV channel. Notorious Archbishop Antonij (Daronin) of Hrodna forbade his priests to pray for peace in Ukraine during their services.

The St. Elisabeth Convent in Minsk, headed by its director Andrey Liemiasonak, clearly stood out in this respect. The monastery had been providing humanitarian aid to the Donbass for many years, its support being declared as aid to “civilians”. However, in August 2022, the monastery stopped hiding its involvement in fundraising campaigns to support the Russian military

as well. “Helping Brothers” is the name of the monastery’s volunteer group led by nun Aliaksandra, which is responsible for raising money for the needs of the military.

The St. Elizabeth Monastery is known for its overseas fund-raising network and sales of ceremonial articles. Many people in Europe therefore believed they were helping the monastery, but in fact were indirectly financing Russia’s aggression. The dissemination of facts about the actual operations of the monastery eventually evoked some response, which was additionally supported by the Belarusian diaspora. Following the exposure, Europeans denied the monastery participation in a few European fairs, such as the famous Winchester Cathedral Christmas Market in the UK.

Repression Against Clergymen and their Families

In 2022, the regime’s persecution of the clergy, just as repression of the nation as a whole, continued on a new scale. However, in the context of the war, an additional category of persecution came about — for anti-war speeches and aid to Ukraine. For example, *seven* Roman Catholic, *one* Greek Catholic, and *three* Orthodox members of the church were held administratively liable for their anti-war stance.

The persistent persecution of Uladzislau Bahamolnikau, an Orthodox priest and lecturer at the Minsk Theological Academy, drew a particularly strong response. Over a period of 100 days he served *seven* consecutive administrative arrests. A criminal case was opened against him eventually, and he was released on his own recognizance. He is accused of not only donating money to help Ukraine, but also of participation in “mass riots” for what was in fact a requiem service for Raman Bandarenka, a protester killed by security forces, as well as a hunger strike in support of political prisoner Ihar Losik.

The leadership of the BOC never came to the priest's defense, but Bahamolnikau came back to serve at his parish and was not subjected to any church penalties. Perhaps his release on his own recognizance — instead of placement in custody, which would be usual practice in such cases — became a result of behind-the-scenes negotiations between the BOC and the authorities.

In 2022, the Mikalai Autukhovich case was tried in court. He and other defendants were charged under *twelve* articles of the Criminal Code, including the “act of terrorism”. Involved in the case were 12 persons, including Orthodox priest Siarhei Rezanovich from Brest, his wife Liubou and son Pavel. Liuboŭ, 57, was kept in a separate cage confinement as “especially dangerous”. They all were handed huge sentences of 15 to 19 years and received no support or petition from the church leadership.

The Christian Vision group monitors all instances of persecution⁶.

Expulsion from the Temple: the Case of the Red Church

In 2022, the situation around the Church of St. Simeon and St. Helen in Minsk, also known as the Red Church, became a new landmark in the relationship between the state and the Catholic Church. In the early morning of September 26, in a small annex to the church, the fire, which parishioners referred to as “odd and ambiguous” was happened. After that the church was forcibly shut down. On October 5, Minskaya Spadchina, a state-owned enterprise that acts as the proprietor of the church building, addressed a notice of termination of the uncompensated use

6 “Мониторинг преследований по основаниям, связанным с религией, во время политического кризиса в Беларуси”. Царква і палітычны крызіс у Беларусі, 12 Apr. 2023, <https://belarus2020.churchby.info/monitoring-prsledovaniy-po-cerkovnoj-linii-vo-vremya-protestov-v-belarusi/>.

agreement to the leadership of the parish and demanded that assets should be removed from the church within a week. The officials cited the urgent need for the renovation of the church, which, as it turned out later, they were in no hurry to perform. No dialogue with the parish was held, and neither was any joint appraisal of the building.

In the fall, the church members kept having services in the priest's house next to the church, but on December 30, that humble place of prayer was also taken from the congregation. The leadership of the Catholic archdiocese sought to keep in check the parishioners who had petitioned against the arbitrariness of the authorities. Great hopes were most likely pinned on negotiations involving the Vatican Nuncio Ante Jozic (which in itself is an indication that the renovation of the building had nothing to do with the decision). By all appearances, the regime had caused the whole situation with the church to have leverage to bargain with the Vatican or even to blackmail it.

Similarly, on September 25, the police forbade members of the New Life Protestant Church to gather for Sunday services in the parking lot outside the building, from which the church had been expelled by the authorities in February 2021. Pastors were detained, tried and sentenced to administrative fines.

All Churches to Serve the State

Attempts were ongoing to not only bring the major churches under control, but also turn them into accomplices in the ideological indoctrination of citizens. Naturally, the BOC showed the most compliance in this regard. According to the official BOC website, during the joint lighting of Christmas candles with the dictator, Metropolitan Veniamin “voiced his willingness to further collaboration with the state in addressing challenges to contemporary society”. He immediately confirmed this

commitment by distorting the biblical concept of the holiday as he claimed that Christ's mission on earth was for people to live "for the benefit of our neighbors and the good of our Fatherland".⁷

The "willingness to further collaboration" materialized into an emblematic ceremony – a copy of the miracle-working Zhyrovichy Icon of the Mother of God was delivered to the headquarters of the Minsk riot police⁸, tarnished by blood during the protests, although the official BOC website was too embarrassed and kept quiet about it.

Cases were reported when crowds were drawn to various propaganda events through the effort of churches gathering their audiences. For example, a diocese in Homiel brought together young people for a compulsory quiz on the Great Patriotic War, celebrating the Independence Day of Belarus⁹.

Attempts were made to enlist the less obedient Catholic Church for ideology service as well. For instance, Hrodna bishop Aliaksandr Kaskievich wrote letters to parish leaders asking them to organize commemoration of victims of the Great Patriotic War "because of the request of secular authorities".¹⁰

7 "В праздник Рождества Христова Патриарший Экзарх и глава государства зажгли рождественские свечи в храме Преподобных Оптинских старцев в Минске". *Официальный Портал Белорусской Православной Церкви*, 07 Jan. 2022, <http://church.by/pub/news/v-prazdnik-rozhdestva-hristova-patriarshij-ekzarh-i-glava-gosudarstva-zazhgli-rozhdestvenskie-svechi-v-hrame-prepodobnyh-optinskih-starcev-v-minske>.

8 "Чудотворную Жировичскую икону Божией Матери доставили в расположение ОМОН в Минск". *БелТА*, 09 Apr. 2022, <https://www.belta.by/regions/view/chudotvornuju-zhirovichskuju-ikonu-bozhiej-materi-dostavili-v-raspolozhenie-omon-v-minske-495152-2022/>.

9 "Гомельская епархия в принудительном порядке собирает молодёжь для интеллектуальной игры на тему ВОВ". *Флагшток – Гомельщина*, 22 June 2022, <https://t.me/flagshtok/8967>.

10 "У сувязі з просьбай свецкіх уладаў". *За нашу і вашу свабоду/Rerum Novarum*, 18 June 2022, <https://t.me/rerumnovarum/582>.

In some cases, Catholic hierarchs turned out to be a lot simpler. For example, Vitsebsk bishop Aleh Butkievich disallowed priest and blogger Vyachaslau Barok, who had left for Poland following repression, to make media publications and online posts. The bishop substantiated the ban by saying that Barok “is paying too much attention to the political situation in Belarus” and his statements allegedly “cause confusion among believers”. The prohibition is in line with the measures taken against the priest by the official authorities, which included many of his videos in the list of extremist materials.

Conclusion

The Christian Vision group was very active throughout 2022, operating from abroad, as were virtually all other civil society organizations. Christian Vision was monitoring the religious component of persecution, assisting political prisoners and their families, and facilitating the relocation of those threatened with repression. Christian Vision’s proclamations and messages reflect the general position of those Belarusian Christians who are independent from the regime¹¹.

Amid suppression of any initiative and independent action, in 2023 we should expect a further decrease in parish activity and narrowing of church life exclusively to the ceremonial component. On the other hand, growing migration from Belarus rekindles hopes for a shift of church activity to foreign countries. The establishment of an exarchate of the Constantinople Patriarchate in Lithuania may give additional impetus to this activity, encouraging the clergy and lay people to move to an alternative jurisdiction and promoting the national religious infrastructure within the diaspora.

11 “Хрысціянская візія”. Царква і палітычны крызіс у Беларусі, 03 Агр. 2023, <https://belarus2020.churchby.info/category/christian-vision/>.

BELARUSIAN CULTURE: SEARCHING FOR A NEW LAND

Maxim Zhbakov

Summary

The “year of pause” that is how it is tempting to call 2022, but this would be both true and fake. The political stagnation and lack of any real breakthrough on all fronts are obvious. The victory did not happen. Struggle in Belarus has ceased to be news, and Putin’s invasion of Ukraine has substantially depreciated the image of Belarusian people: from the heroic peaceful protester to the dubious citizen of the co-aggressor country.

Belarusian culture had to designate its European priority for the second time after the wave of emergency evacuation in the wake of the 2020 election. But does Europe need: Belarusian culture or cancellation of it, and what can Belarusian culture offer in this situation? In all these matters, Belarusian culture has been an auxiliary resource, which was manifested in its restrained anti-imperial thinking, its modest presence in the anti-war public field, and its low-key solidarity with Ukraine.

Nevertheless, its soft media presence gave Belarusian culture a chance for an organizational and semantic reboot and realignment. The policy of repression and coercion ultimately pushed subsidized state culture beyond any meaningful creative process. Both dimensions of live cultural work — domestic counterculture and foreign visits — demonstrated their capacity for creative adaptation in crises throughout the year.

Trends:

- Political stagnation and ongoing cultural terror are turning legal Belarusian culture into a simulation project of the colonial administration, thereby stripping it of any conceptual content and artistic value;
- Cultural repression expands with the help of bottom-up pro-government activists and “media infokillers”, who de facto appropriating the repressive and retaliatory functions of the law enforcement agencies;
- After two years of shock, Belarusian culture is getting back to its operational format, exploring its post-traumatic style and moving along two

directions: the clandestine culture of art-resistance within the country, and the profound existential search conducted by cultural migrants.

Administrative Terror: Loved Ones are not to be Parted With!

The current status of Belarusian culture is predetermined by its geographical, political, mental and stylistic dissociation. Cultural divisions are correlating with the gaps between political and social.

The most visible feature of the cultural dimension is the increasingly distinct identification of the two oppositely directed development paths – westernization (gradual integration into the European cultural space) and russification (bureaucratic coercive pro-government pressure on creative communities). This is not simply a movement in different directions, but an existence according to different maps of meaning.

The further we move, the more obvious the naiveté of all era-of-stability hopes for a harmonious alliance between the state culture industry and independent creativity. At the moment, these two are not only about different work techniques and interpretations of culture and culturality. They represent incompatible forms of life, where each perceives the opposite as an ideological challenge and a direct threat.

The results of the brutal mopping up of disloyal cultural activism alongside the conceptual and stylistic lethargy of state ideology are quite obvious: official culture is irreversibly turning into a simulation project of the colonial administration.

No alternative is in sight. Loyal art becomes agro-trash¹, transmits banalities, and broadcasts as if a local media service targeting parochial agro bosses, making the concepts of artistic

1 “Художница Светлана Жигимонт представила на выставке свою ‘Сказку-быль про Беларусь’”. *Мінская праўда*, 18 Oct. 2022, <https://mlup>.

quality and national identity not so much non-existent as utterly unimportant. The bigger part of what happens in the public cultural field is taking the ritualistic declarative format of a weird game with neither purpose nor meaning.

Police terror became a top agitation resource, and the most widespread manifestation of love for the motherland – repentant videos of cultural figures.

The Black Hundred: Return of the Wild Hunt

Throughout 2022, state culture completed its definitive shift toward the authoritarian and repressive branch of the security agencies. In fact, the bureaucratic and ideological vertical of pressure on cultural figures was shaped, its apparent purpose being to punish for improper reposts and hunt for disloyal members. Inertial homogeneity becomes the primary characteristic of a cultural product that satisfies the regime, and controllability – the undeniable quality mark.

The dismantling of civil society and hard persecution of activists, along with the massive flight of cultural figures and the regime's desperate attempts to enlist popular support, bring about an enabling environment for hyperactive outcasts to gain social weight. Hysterical and undereducated pseudo-patriots come to the fore, embracing the format of a pro-government popular inspectorate of the cultural landscape, which is essentially a whistle-blowing practice to disclose public enemies.

Amidst this sweeping purge of local culture, two wild hunts paradoxically confuse their missions and butt heads – professional propagandists and improvised popular controllers. They start to act as enforcers and work as investigative teams. In May,

by/18102022/hudozhnicza-svetlana-zhigimont-predstavila-na-vystavke-svoyu-skazku-byl-pro-belarus/.

a group of television propagandists came to the opening of the Januškievič publishing house book store with an inspection (the shop never worked even a day)². Eventually this trend quite logically developed into a hunt for their own: in February 2023, the regular grassroots snitch Bondarava publicly accused MP Marzaliuk of nationalism.³

In a state of permanent self-defense against everything alive and informal, the country's cultural field remains divided according to the prison principle: the supervisors and the supervised. This, in turn, forms peculiar schemes for cultural work in times of crisis: mental censorship, repressive centralism, noise enthusiasm, and encouragement of grassroots snitching. This is not a matter of conceptual choice, but pure pragmatism: the intimidated layman is encouraged to protect themselves (from the frightened authorities) by telling on their neighbor.

In cultural terms, this implies that mechanisms are put in place to destroy local communities, degrade horizontal ties, and further atomize repressed society.

Visible and Invisible: the Secret Life of Belarusian Culture

In the context of an escalated frontier regime and permanent visa extremes, private life and business become a geopolitical choice. It is better to refrain from publishing your itinerary: for an average Belarusian cultural activist any departure from the place of residence looks disturbingly alarming. On these scales,

2 “Вы ещё не читали эту книгу, а уже делаете оценки”. Перед обыском в книжном магазине туда пришли Азарёнок и Гладкая”. *Медиазона* – Беларусь. 16 May 2022, <https://mediazona.by/article/2022/05/16/books>.

3 “Марзالیюка бо Бондаравы? Прыхільнікі ўлады высвятляюць, хто ‘псеўдапатрыёт’, а хто сапраўдны”. *Гродна*, 23 Feb. 2023, <https://hrodna.life/2023/02/23/marzaljuk-ili-bondareva/>.

last year's two tours — that of Petlia Pristrastija in Europe and of LSP in Russia — look equally problematic. The visit of the Belorusskie Pesniary to Moscow's Blue Light New Year show sounds like a political declaration. You will have to report to the regime for singing in the West, whereas fellow citizens will condemn you for entertaining the East.

A few years back, a group visit of Belarusian artists to the St. Petersburg Concrete Trampoline exhibition would have been treated as another cute escapade with a commercial implication. However, currently any trip to the aggressor country appears to be inconsistent with the rules of wartime. Therefore, the visitors encountered a wave of harsh criticism that was unexpected (yet quite logical).⁴

The organizers of Pradmova, the (now) offsite Belarusian intellectual book festival, had invited Russian writers as headliners in the spring of 2022, after the war broke out. As a result, the entire Ukrainian delegation and many Belarusian authors refused to participate. There was neither determination nor will to defuse the scandal.⁵

The sharp narrowing of European contacts with artists from the co-aggressor country multiplied by the mopping up of risky themes and unwanted people creates the illusion of a stagnant, locked and stifled internal Belarusian culture. But this is not the case. Lukashenko's cultural policy reproduces the obsolete Soviet approaches — with exactly the same (i.e. opposite of the desired) effects.

On the one hand, the harsh cultural censorship ensures the least problematic public environment for the regime. On the

4 “Хотели под шум бомб заработать на стране-агрессоре?” В Петербурге открылась выставка с работами белорусских авторов — и разгорелся нештучный скандал. <https://citydog.io/post/skandal-vystava/>.

5 “Хотели под шум бомб заработать на стране-агрессоре?” В Петербурге открылась выставка с работами белорусских авторов — и разгорелся нештучный скандал. <https://citydog.io/post/skandal-vystava/>.

other hand, it inevitably gives rise to an incarnation of the catacomb culture of the Soviet times: the secret theater, behind-closed-doors film screenings, home reading-rooms, lightning-fast street actions, and clandestine workshops. Play of meanings, complex metaphors, encrypted messages... Authors and their audiences are under the radar of the authorities together. They do not exist. But they are still there. Such as Alek-siej Strelnikov, the theater critic and director, who died before his time in December 2022⁶ – the significance of his work in recent years has been broadly appreciated only recently.

It is no longer about discoveries and revelations. The live cultural environment inside the country is focused on the preservation of its human and creative resources. It illegally replicates the fundamental patterns of creative experience – the freedom of expression, active subjectivity, and work of imagination, and critical judgment skills. The main outcome and quiet victory of informal culture is the very fact of its existence.

The dusty regime brings back to life ancient and, it would seem, long exhausted forms and themes. And once again encourages covert creativity. It turns out that at our collective farm, there are some eternal values: cultural guerrilla warfare and cultural terror.

In the Presence of Absence: the Return of Planners

Hopes of a creative breakthrough and victory of the revolutionary street design were crushed along with the white ribbon parades. Progressive agitprop art was transformed into musical

6 “Падпарадкавацца гэтаму страху – значыць прайграць! Апошнія інтэр-в’ю Аляксея Стрэльнікава”. *Новы час*, 18 Dec. 2022, <https://novychas.online/asoba/aposznjae-interv-ju-aljakseja-strelnikava>.

satire and battle chants, only to remain a background soundtrack (or a museum exhibit), rather than a generator of events.

Attempts to feed to the public the outdated Belarusian mythology-2020, stories of protests and sufferings still prevail, although they are not intended for long-term use, having originated as short-lived media effects. There is no future in this scheme. There is, at best, a heroic past.

Our revolutionism *made in 2020* is a beautiful episode that has yet to be embedded into a coherent chain of events. The fundamental incompleteness of the Belarusian cultural project inevitably brings forth immature authors, half-baked events, and hasty texts. It is still in many respects emergency amateur art.

The perceptible absence of any fresh ideas and stagnation of creativity are especially conspicuous against the backdrop of heightened attempts to build up Belarusian cultural institutions abroad. The main resource required for the design of new flight control centers is formed by ex-cultural functionaries and active Euro-dilettanti. The natural desire to reanimate the former bonds and vertical contacts turned out to be inevitably flawed in the new context, because our chaos does not fit well into global matrices and administrative timesheets.

The Belarusian Council for Culture, Inbelkult 2.0, the National Revival Program, the Belarusian Independent Film Academy, PEN Belarus in Warsaw, the Book Institute... Having no clear vision of the situation and no understanding of the context, confusing ambitions with competencies, new constructors are building scenarios and claim to be leading the way, gathering coalitions and fighting for resources. Their best result would be a center for crisis cultural administration, whereas the worst-case scenario will see another unnecessary superstructure hanging over the live flow of cultural practices. The bureaucratization of Belarusian culture is another challenge and a real threat to free creativity.

Euro-Locals: Withdrawals, Search, Adaptation

Belarusian culture of the transition period boils down to practices of self-determination and upgrade. A time of patchiness. The overall breakdown of conventions and communications (both inside the country and internationally) remains a challenge and problem for creators and cultural managers, deprived of their former comfy status as a cultural alternative living off subsidies of domestic patrons and foreign donors.

The prolonged creative block of culture in exile — many of those who left had expected a brief exit and a quick return — increasingly call for a conceptual and stylistic reboot along with a search for effective schemes of an author's presence in new landscapes.

On the one hand, those creative groups and projects from Belarus' inner Europe that went abroad and renewed their European contacts have been given a palpable impetus to grow. They have evolved as independent culture embassies, as the now Berlin-based Minsk's “Ÿ Gallery” team. On the other hand, much of what had previously been acceptable, appeared to be unsustainable and unable to make a name in the new environment and attract a fresh audience. In the depressed community of emergency refugees and displaced guerillas, the new old émigré style is still in demand.

Verses, stories, stand-up, readings. Recognizable household know-how without any quality improvements. Invariable conversational genres. More Kupala Theater alums. Even more vehemence. Readings of Orwell's works are followed by washed-out *Sphagnum* by Viktor Martinowitsch. The tour of the Krasnaya zelen satirical couplet performers ended, and the sarcastic novel *Pigs* by musical journalist Aliaksandr Carnucha went viral.⁷

7 “Посмотрите на наше телевидение — как над ними не смеяться?” Журналист Александр Чернухо — о дебютном романе “Свињи”, русском мире и “Онлайнере””. *Наша ніва*, 06 May 2022, <https://nashaniva.com/ru/289543>.

However, many patterns have been broken as well. Belarusian cultural migrants are rediscovering Europe, this time not as transit visitors, but as permanent residents. The nervous “I Want to Go Home” (a characteristic title of a Warsaw exhibition) still serves as a label of experiences typical of a certain part of cultural activists. But in parallel, a thoughtful search for a new identity is underway. New codes are explored, the environment is probed, and relevant vibes are searched for.

The highlight of visiting Belarusian culture is the international success of a new project by Belarus Free Theater. The production of Alhierd Baharevich’s “Dogs of Europe”⁸ turned out to be an ambitious mix of Belarusian schizo, Euro-grotesque, well-rehearsed chaos and aggressive multimedia. Mikita Laurecki’s award-winning *Date in Minsk* constitutes a *no-budget* dive into the shadows of the collective soul. Another striking example is the odd double of 2022. A couple of musical noir albums from both sides of the border: Minsk’s *Sonk* from the industrial post-rock project *Syndrom Samazvanca* and Berlin’s “Over!” from the alliance of Svetlana Ben and Galya Chikiss. The origins are different: the former played advanced progressive rock and broken electro-pop, while the latter focused on melodramatic art-*chanson*. The mission is the same: to become the radio of the broken era. It is here that Ben’s subtle lyricism and *Syndrom*’s angry energy are woven into a common soundtrack of the collective soul.

It is about the crazy age and irreparable shifts of consciousness. About the irreversible loss of harmony and the tragic sweetness of personal loneliness and daily despair. A critic labeled “Over!” as post-traumatic pop – and couldn’t have put it better.⁹

8 “Спектакль ‘Сабакі Эўропы’ Беларускага Свабоднага тэатра ўвайшоў у дзясятку лепшых брытанскіх спектакляў года”. *Reformation*, 22 Dec. 2022, <https://reform.by/spektakl-sabaki-e-ropy-belaruskaga-svobodnaga-tjeatra-vajsho-u-dzjasjatku-lepshyh-brytanskih-spektaklja-goda>.

9 “Дмитрий Вачедин. Посттравматический поп: почему зла не надо бо-

In Lieu of the Conclusion

Creative resources sprout up on the debris of the demolished cultural ecosystem formed during the era of conventional stability. The wreckage of prior opportunities and arrangements contributes to a new wave of creative pursuits.

Personal cultural self-determination (whatever the address and place of residence) becomes a solo venture, an experimental uncensored exploration of the patchwork cultural space. New authors enter the zone of the unobvious, which lends the incomplete project of new Belarusian culture a savory flavor of risk and unpredictability.

The coming of a new lost generation seems inevitable — a new group of creative youth lacking quality education and legal opportunities to make a statement, relevant cultural experiences, a developed system of values, and clear self-identification. Their intuitive *Belarusianism* has a slim chance in their homeland, but gradually forms a critical mass of those discontented with the current state of affairs. Spontaneous Belarusians are trending again — even though their clumsy texts in Belarusian limp on both feet.

When it comes to cultural events and initiatives held abroad, they create a new Europe rather than a new Belarus. Belarus Free Theater's most recent experience is quite telling. Our unique local expertise and special energy multiplied by state-of-the-art foreign technologies and coupled with European management open a fundamentally different window of opportunities, in contrast with the provincial retardation of our country of origin. Two years after the cultural shock, the era of texts and events is coming.

яться". DW, 14 Dec. 2022, <https://www.dw.com/ru/posttravmaticheskij-pop-iz-berlina-pocemu-zla-ne-nado-boatsa/a-64086856>.

THINK TANKS: A SIGNIFICANT CONTRACTION OF THE SECTOR

Natallia Rabava

Summary

For Belarusian researchers the year 2022 was tarnished by the war in Ukraine. Think tanks operated mostly abroad, whereas individual researchers who stayed in Belarus were subjected to repression. The sector shrank to five consistently working centers, and its overall productivity declined. Belarusian society, both inside the country and abroad, remains a hard-to-reach object of study.

Trends:

- Operation from abroad due to repression and persecution in Belarus, as well as restrictions imposed on Belarusians abroad;
- Narrowing of the sector to five main working think tanks and resulting decrease in its overall productivity;
- Impact of the war on the work of think tanks.

International Context: the War

2022 was a challenging year, marked by the war in Ukraine. Think tanks, not unlike other civil society organizations (CSOs) in Belarus, were affected by the repercussions of the war, which took the form of:

- Multiple restrictions imposed on Belarusians in various countries as citizens of a co-aggressor country;
- The need for a new relocation for those who originally went to Ukraine (both individual researchers and think tanks, for example, BEROC);

- Removal of Belarus from the international agenda focusing on political crisis, repression, and political prisoners amid the newly sparked interest in Belarus as a co-aggressor. Opinion polls covered *inter alia* the attitude of Belarusian citizens to the war. Social studies, including those non-public, were conducted by foreign institutions as well;
- Partial refocus of the agenda towards international relations and security issues.

Belarus Context: Relocation and Repression

In 2022, the sector of Belarusian independent think tanks was primarily represented by entities operating from abroad, where such organizations were faced with staffing issues, consistent development challenges, and inevitably lost their live connections with the object of their research. In Belarus, not a single registered independent operating think tank remained, while individual researchers (both independent and representing a specific think tank) who stayed in the country were regularly subjected to repression.

Analysts Tatsiana Kuzina and Valeryia Kastsiiuhova spent the entire year behind bars (they were sentenced in March 2023 to 10 years in prison each). In June 2022, philosopher and methodologist Uladzimir Mackievic was handed a sentence of five years in prison. In December, military analyst Yahor Lebiadok was sentenced to five years in prison for his expert activities, and in June, sociologist Tatsiana Vadalazhskaya was given a sentence of 2.5 years of restricted freedom.

In September, sociologist Yauhen Merkis, who collaborated with the Center for New Ideas, was detained and charged with assisting extremist activities.

Sociologist Aksana Shelest and urban researcher Kiryl Malchou were detained for 15 and 13 days, respectively.

Key Actors and Research

During the reporting period, the productivity of the sector as a whole dwindled and was even more concentrated within just five think tanks. Whereas six years earlier, there used to be fifteen operating think tanks, which were even ranked¹, currently the sector relies on those few that have survived.

The Ideas Bank has served as a joint platform for publishing and discussing ideas for possible reforms, as well as expert opinions on various issues and findings of surveys. Overall, however, think tanks lacked a system of peer review and discussion.

The *Belarusian Economic Research and Outreach Center* (BEROC) published about 50 policy briefs, studies, and working papers – more than in 2021. BEROC's products include reviews and monitoring of Belarus' economy and finance, studies focusing on social and pension policies, impact of the political crisis on the private sector, effects of sanctions, green economy, digital and cryptocurrencies, economic reconstruction of Belarus, activities of business associations and businesses abroad, reform of state-owned enterprises, leasing, professional mobility, etc. The think tank also published findings of surveys of businesses and households on their economic well-being and expectations.

BEROC's educational activities were conducted online and narrowed, compared with the 2021 level: it organized the Tenth International Conference in Economics and Finance, launched a Green Economy school project for journalists, and conducted courses as part of the XII Student School in Economics and Finance, as well as an online seminar on the digital currency market.

In 2022, the *Center for New Ideas* (CNI) proved more active and visible. The CNI published studies and articles with a focus on society (collective trauma of Belarusian society, horizontal

1 Рябова, Наталья. “Исследовательские и аналитические центры”. *Беларуский ежегодник 2017*, <https://nmnby.eu/yearbook/2017/page24.html>.

connections, perception of events in Ukraine by residents of Belarusian regions and protesting Belarusians, consumption of media products by the protesting part of society); foreign policy (studies on degradation, Belarus and international law); regional development (materials on the restoration of Belarusian regions in English); and the media image of Belarus abroad in 2021–2022. Furthermore, the CNI released the Belarus Resilience Index 2021, having introduced a new methodology to estimate the country's status in the following areas: politics, economy, society, and media environment. The think tank continued with its podcasts “In the Context” and “Idea Podcast”.

CNI's Pavel Matsukevich released new issues of the 19 Lenin Street Pulse review of Belarusian foreign policy, and Henadz Korshunau posted articles clarifying takeaways of social studies. CNI's educational and outreach functions (mostly online, but not only) gained more visibility as it conducted the *Re-shape* conference, courses at the School of the Young Reformer, the Belarus Urban Fellowship 2022 educational course, organized Case Club events, lectures, and expert discussions.

The *Belarusian Institute for Public Administration Reform and Transformation* (BIPART) published studies on reforms of public administration and civil service, reviews of the socio-demographic portrait of the civil servant and the new law on civil service, and prepared monitoring reports on the status of civil society organizations. BIPART released infographics, analytics and commentaries for the Kosht Urada (Cost of the State) project. The Institute resumed courses and experience exchange sessions at the SYMPA School of Young Managers in Public Administration.

The *Center for European Transformation* (CET) published a report on the findings of its study on the practices of “professional ban” in 2020–2022, participated in the publication of the book “Civil society in Belarus 2015–2021: from stable development to new challenges”, and posted comments.

The *Institute of Political Studies Political Sphere* issued regular analyses and commentaries. On September 30–October 2, 2022, the Institute held the Tenth International Congress of Belarusian Studies, which brought together about 300 participants (200 visited the congress in person and 100 participated online). The Congress named winners of the Congress Prize for the best research papers of 2021. In the run-up to the Congress, the Institute organized a series of discussions on the status of individual sciences in Belarus amid the war and political crisis.

Belarus Security Blog issued reports on the use of unmanned aerial vehicles (UAVs), released the Eurasian Security Digest, national and economic security monitoring reports, commentary and analyses.

The *Belarusian expert network Nashe Mnenie (Our Opinion)* apparently had a very hard time following the imprisonment of its editor Valeryia Kastsiuhova. The network's updated website was re-launched at the very end of 2022, with only 10 original materials posted in the usual *Nashe Mnenie* format. Nevertheless, the *Belarusian Yearbook* (in Russian and English), a monitoring of developments of the hard year 2021, was published and presented. *Nashe Mneniye*, together with the *Press Club*, *Belarus in Focus* and BISS, also organized monthly online meetings of the Belarusian Expert-Analytical Club.

The *Belarusian Institute for Strategic Studies (BISS)* published two studies centered on the language policy and value transformations in Belarus.

The *International Strategic Action Network for Security (iSANS)* expert network issued reports and articles on the referendum in Belarus, early year developments in Kazakhstan, disinformation and justification of the war by Belarusian state-controlled television, crackdown on the third sector in Belarus, European integration of Ukraine and Moldova, Russian military propaganda, and energy.

The *Center for Strategic and International Studies* (CSIS) published the report entitled “Belarus in the Co-Aggressor Trap: Getting Out of it and Resolving the Political Crisis of 2020” and offered commentary to the media.

In 2022, a team of experts launched a new joint product, the Belarus Change Tracker², an overview of the main trends in foreign and domestic politics, economy, and public opinion in Belarus.

Some think tanks completely or partially ceased their operations. CASE Belarus became part of the parent organization CASE. At the time of this review, the think tank’s individual website was not active. In 2022, there were no publications on the *Eurasian States in Transition Research Center* (EAST) website. The *IPM Research Center* worked inconsistently, either in a state of “warm ashes” or issuing *ad hoc* commentary. The *Regional Expert Club*, which emerged in Mahilyou in 2020, produced only a handful of brief podcasts.

Black Box Sociology

Most of independent sociology’s work continued online, with an increasing use of panel studies instead of other methods, which can be attributed to concerns that answers to political and even social questions may not be straight due to the fear factor, as well as general difficulties in engaging respondents. Both “non-public” sociological surveys and “people’s polls” were conducted as part of various – often political – campaigns, such as the “People’s Poll”, “Honest People”, etc.

At the same time, some experts insist that the current studies (even though there are more of them now) poorly reflect and cannot properly account for the real status of Belarus’ society,

2 Беларусьский трекер перемен, 10 Apr. 2023, https://beroc.org/publications/policy_papers/beloruskiy-treker-peremen/.

which is increasingly becoming a “black box”. However, even attempts to study the diaspora – seemingly more accessible – cannot help the ambiguity. Belarusian society, both inside the country and abroad, remains a hard-to-reach object to study.

Other Researchers: From CSOs to Politicians

Once in a while research products are published by civil society organizations (CSOs), which are not think tanks, or organizations close to certain political actors. For example, ACT, an outreach NGO, annually prepares and publishes its CSO Sustainability Index (jointly with USAID). The *Office for European Expertise and Communication* (OEEC) published the findings of its research “Belarusian Women in Emigration”, presented the takeaways of the survey exploring the pressures on Belarusian CSOs during the repression period, conducted together with the Legal Transformation Center *Lawtrend*, and monitored the liquidation of NGOs.

As part of its core activity the *Legal Transformation Center Lawtrend* published reports and results of monitoring of the situation with CSOs, along with a study on repression of female activists and gender organizations.

The *Human Constanta human rights organization* published a chronicle of the struggle against “extremism” in Belarus, reviews of new laws, materials on hate speech, and educational articles. The *Belarusian Helsinki Committee* published reports and articles.

The *Baltic Internet Policy Initiative* published the findings of its study Disinformation in Belarus and monitored the consumption of media products by the Belarusians. The international CSO *EuroBelarus* contributed to the material entitled “The analysis of cultural policy models and funding mechanisms

of the culture sector in Eastern Europe” (in Belarusian and English).

The project Fifth Republic³ (implemented by the Education Office for New Belarus in partnership with the media) developed and published a series of materials and discussions dedicated to various aspects of public life in Belarus: from the development of the new Constitution to social policy. Some experts from CSOs were involved in the publication of the “Belarusian Civil Society Report on Sustainable Development Goals Implementation”, prepared by the Sviatlana Tsikhanouskaya Office.

Some of the studies produced by both think tanks and CSOs and quasi-political structures are non-public.

As before, the *state research sector* hardly published the results of its studies on public platforms. However, the *Minsk Dialogue* expert initiative and the *Northern Eurasia* center for continental integration studies and development posted their analyses, articles, and podcasts.

Impact on Policy Making and Relations with Stakeholders

State

As in 2021, cooperation between independent think tanks and the Belarusian state was virtually nonexistent. On the other hand, the research sector interacts with the proto-state – alternative democratic forces. Engagement with foreign stakeholders (diplomats, international organizations) grew stronger mostly in the form of consultations, requests for analytical products, conferences and other events.

3 “Пасля пратэстаў: аналіз медыяматэрыялаў праекта “Пятая рэспубліка””. *Reform.by*, 19 Mar. 2023, <https://reform.by/paslja-pratjesta-analiz-medyjamatjeryjala-praekta-pjataja-rjespublika-sup-1-sup>.

Civil society organizations

The number of studies commissioned by CSOs shrank back in 2021 and never recovered in 2022. However, CSOs remained one of the objects researched as part of studies of the current situation: the status of civil society was in the focus of an unprecedented number of papers, and this trend continued in 2023.

Media

Just as CSOs, throughout 2022, media outlets were subjected to repression, were labeled as “extremist” and as a result were losing their readership. However, the multiplatform operation of some outlets notably made up for some of the losses. The media continue working and keep collaborating with think tanks: they request commentary and analysis, while think tanks, for their part, benefit from media platforms to post their materials, columns, and findings of studies.

Political Parties and Movements

Looking to maintain the status of independent entities, think tanks as a rule choose not to engage in systemic cooperation/consultation with any political force on an institutional basis. Results of research and individual projects that may attract political actors (e.g. the Bank of Ideas) are presented to all democratic forces. However, individual analysts/experts have acted as consultants working with particular political forces or leaders, which is perceived as their personal initiative and responsibility.

Conclusion

The operation of think tanks and CSOs in general becomes increasingly dependent on external factors, and especially on how the war in Ukraine progresses. The war is the paramount factor to reckon with by anyone making forecasts for 2023. If we assume that the war will be protracted, the think tank sector will likely remain at the same level or even further contract. If the war should end in 2023, a lot will depend on its aftermath and the effects on the internal situation in Belarus and repression. If the conflict escalates even more, we should expect the sector to narrow, all the way to the point when research topics are limited to international relations and security.

ECONOMY

MACROECONOMIC SITUATION: BAD, BUT COULD BE MUCH WORSE

Dzmitry Kruk

Summary

In 2022, the Belarusian economy was significantly impacted by the dual forces of war and sanctions, leading to a deep recession characterized by spiraling inflation and moments of financial instability. Yet, certain compensatory measures and economic strategies helped cushion these shocks, resulting in a macroeconomic outcome that, though bleak, was more favorable than anticipated. Unfortunately, the policies (or lack thereof) adopted by the authorities exacerbated the erosion of both economic and human potential. Consequently, the Belarusian economy has become alarmingly reliant on Russia, casting a shadow of uncertainty over its future trajectory.

Trends:

- A drastic shift in the economic landscape, primarily driven by war and sanctions, leading to a recession;
- The emergence of a broad spectrum of compensatory effects that, to an extent, balanced the negative repercussions on the national economy;
- Diverse strategies employed to combat the economic shocks and their fallout;
- In terms of key macroeconomic indicators, 2022 was the worst year in a long period (but not as bad as it could have been);
- An unwelcome shift: the economy's overwhelming dependence on Russia.

The Quiet Before the Storm and a Potential Hurricane

Before the Russian invasion of Ukraine, most economic projections hinted at a modest recession of around 2%, spurred by the fading impact of foreign trade successes and the imminent enforcement of sanctions imposed in mid-2021. Although Lithuania began restricting the transit of Belarusian potash fertilizers in February 2022, these fertilizers constituted only about 3.0–3.5% of Belarus' gross value added. Hence, large-scale, immediate alterations in the national economy weren't anticipated.

However, the landscape changed drastically following the regime's involvement in the Russian aggression against Ukraine, followed by sweeping sanctions. The nation's economy grappled with a sharp double-digit decline in output, significant depreciation of its national currency, a surge in inflation, and comprehensive financial upheaval. The multifaceted sanctions and escalating reputational risks (of doing business with Belarus as a country, as well as with Belarusian companies) led to profound transformations within its economic fabric.

For 2022, pressing economic queries revolved around the depth and duration of the recession, and whether Belarus could avert a comprehensive financial crisis. For long-term concerns include the extent of human capital erosion and the potential loss of current economic capabilities.

Regrettably, the priorities of the Belarusian authorities remained tethered to short-term challenges, often sidelining or overlooking long-term risks.

Sanctions Storm: from Swift Collapse to Gradual Erosion

In response to Belarus' involvement in Russian aggression, Western nations introduced a series of sanctions that encompassed:

- An export and transport embargo impacting products which accounted for roughly 30% of Belarus' total exports to Western and other nations.
- Embargo on certain crucial imports, especially high-tech items.
- Constraints, extending up to total blockages, on financial transactions involving Belarusian entities.
- A plethora of punitive measures targeting prominent Belarusian banks, businesses, and individuals.
- Freezing a segment of Belarus' reserve assets.

The direct implications of these sanctions were magnified as numerous developed countries began distancing themselves from Belarusian businesses. Driven by reputational concerns and apprehensions about potential subsequent sanctions, this shift impacted Belarusian companies (and their products or operations) not previously sanctioned. Echoing this sentiment, several Belarusian enterprises and skilled professionals commenced their exodus from the country. Adding to these challenges was the significant erosion of the Ukrainian market, previously absorbing about 10% of Belarusian exports.

In the face of such compounded shocks, the bleakest projection for the Belarusian economy hinted at a swift decline in output and wealth by roughly 20% within three to five quarters, regressing to 2007-2008 levels. This scenario also entailed considerable financial turbulence and price volatility. Indeed, the months following the war's onset and the imposition of sanctions (March to April) saw the economy teetering close to this trajectory. However, subsequent interventions by the authorities managed to cushion these initial shocks and alleviate their aftermath.

Warm Compensating Breeze: Adjusting to a New Landscape

While prevailing sentiment points to an increasingly challenging environment for the Belarusian economy in light of the war and sanctions, several positive disturbances have also emerged.

Enhanced Price Competitiveness in Russia: Throughout 2022, Belarusian producers witnessed a significant rise in their price competitiveness in the crucial Russian market: by 10%¹ per year, by 20% in July-August. The fluctuation of the Russian ruble, initially depreciating due to the invasion of Ukraine, and subsequently strengthening with the spike in oil and gas revenues, played a central role. This presented Belarus with favorable conditions for exchange rate formation and bolstered their trade prospects. The Belarusian authorities could have facilitated the depreciation of the Belarusian ruble (BYN) in relation to the Russian ruble (RUB), thereby enhancing price competitiveness in the Russian market. This would not have introduced further threats to domestic financial stability, especially considering that the USD/BYN exchange rate remained close to its pre-war level during this period.

This effect was most pronounced during the summer months but started to wane in the latter half of the year. Nevertheless, by the end of the year, the price competitiveness remained high relative to historical standards. Throughout the year, this factor played a significant role in bolstering exports to Russia.

Reclamation and Augmentation of Oil Rents from Russia: Belarus not only re-established its oil rents from Russia but amplified their scale. As a result of anti-Russian sanctions, the difference between the Russian oil grade Urals and the

1 Оценка по индикатору реального обменного курса, который является наиболее широкой метрикой для ценовой конкурентоспособности. В среднем в 2022 году белорусский рубль подешевел к российскому рублю в реальном выражении на 9.4%.

international Brent expanded, allowing Belarus to procure oil at prices 30% lower than global prices². Just a year prior, this differential was a mere 13%. Based on the initial trajectory of the Russian tax maneuver, the discount was projected to decrease to 5% by 2023. Consequently, Belarus reaped substantial benefits, ranging anywhere from \$0.8 to \$2.3 billion, equivalent to 1.2% to 3.1% of its GDP.

The oil price discount became the primary driver for rejuvenating the capacity for oil processing and the export of oil products. By the year's end, this capacity had recovered to about 90% of pre-war levels, and for the entire year, it stood at 63%. Though direct data on who the final buyer of Belarusian oil products remains obscure due to sanctions, a significant portion of the oil products might be sold in the Russian market.

The rejuvenation of oil refining became a chief contributor to alleviating the economic downturn induced by the sanctions. Even though the direct contribution to the GDP was modest (around 1%), when considering the inter-industry repercussions, the sector contributes approximately 11% to Belarus' GDP. By mitigating the initial blow to the export of petroleum products, the authorities successfully staved off substantial losses tied to this shock.

Advantageous Terms of Trade: 2022 saw Belarus experience its most favorable import-export ratios in eight years, approaching historic peaks between 2012 and 2014. This shift was attributed to the global inflation surge and the resultant hike in worldwide prices for many traded commodities. Concurrently, Belarus implemented strategies to curb the rise in import prices by: (1) stabilizing gas prices and maintaining low oil prices, and (2) curtailing investments, particularly by opting out of purchasing high-end investment goods.

2 "Возвращение нефтяной ренты". BEROC, 14 Mar. 2023, <https://beroc.org/publications/view/vozvrashchenie-neftyanoy-renty/>.

The enhancement in macro-level terms of trade played a pivotal role in staving off financial destabilization. Despite a tangible decline in physical output for numerous enterprises, the monetary value of revenues witnessed a more modest downturn and even registered an uptick in certain instances.

Exploiting Vacant Niches in the Russian Market: As numerous Western companies retreated from the Russian market, certain Belarusian manufacturers seized the opportunity to fill these voids.

Adaptation in Business Operations: Both state-run and private businesses showcased commendable agility in adapting to the novel landscape. This adaptation often took the form of establishing new supply chains or locating alternate trading partners. Some entities even found avenues to navigate around the sanctions.

Each of these effects played a role in cushioning the initial economic shock and diminishing its detrimental impact on production.

Helmsman at the Helm: (Un)conventional Measures

Beyond the compensatory effects, which largely arose serendipitously, the Belarusian authorities took active measures to mitigate the impact of various economic shocks.

Ensuring Low Gas Prices

In 2022, this conventional instrument for Belarus' budget gained new significance. Amid the backdrop of war and Russia's deliberate push to hike energy prices, gas prices in Europe soared to record heights, peaking at about €3,000 per 1000m³ (compared to an average of roughly €200 per 1000m³ over the previous

decade). By securing an agreement with Russia at the start of the year to maintain the 2021 gas price for Belarus (approximately \$128 per 1000m³), the Belarusian administration effectively locked in an average annual rate that was about 10% of European spot quotes.

Given the actual volume of gas imports, the monetary advantage of this gas price discount was substantial: \$18.3 billion, or 25% of the country's GDP. However, if Belarus had to purchase gas without this discount, its acquisition volume would likely plummet. The heightened price would render many industrial sectors unprofitable and make utility payments unaffordable for a significant portion of the populace. As such, this calculation serves more as an illustrative benchmark, and the derived figures shouldn't be seen as a direct reflection of production dynamics or overall prosperity.

Reducing the Public Debt Burden

The savings achieved on external debt payments can be considered a unique innovation. This was primarily due to a sovereign debt restructuring agreement with Russia, which postponed payments amounting to \$1.4 billion, originally due from March 2022 to April 2023, to 2028-2033. However, a deliberate default also played a role in the savings. Following a series of regulations which declared that, in the face of sanctions, public debt payments would primarily be made in Belarusian rubles, coupled with instances where dues were not settled, rating agencies Fitch and Standard & Poor's downgraded Belarus' rating to the default level.

From the perspective of international lenders and the conventions of international financial markets, the default rating assigned by two out of the three major rating agencies is enough to confirm a default. Yet domestically, this did not trigger a financial crisis, as the government's obligations continued to be

met and regarded as priority. The situation is unprecedented, and from an economic standpoint, the default is somewhat ambiguous.

Based on the initial payment schedule for 2022, Belarus was obligated to settle about \$2.5 billion of external debt. According to official statistics, \$1.6 billion was disbursed. The savings of \$0.9 billion likely reflect the 2022 agreement with Russia. Moreover, due to the deliberate default, the actual foreign currency strain of servicing the public debt may be even lower than the statistics suggest. The authorities set aside funds for state debt payments in Belarusian rubles within state-owned banks, preserving foreign exchange assets in reserves. As a result, in addition to conserving foreign currency, these funds created an additional liquidity buffer for banks.

Besides the savings on payments, Belarus managed to procure substantial new public debt. Even though the authorities closed the specific data on public debt to the public in 2022, available statistics indicate that in 2022 new government borrowings totaled \$1.56 billion, even though the authorities did not disclose detailed information. These new loans likely originated from Russia under the so-called import substitution program valued at 105 billion rubles (approximately \$1.7 billion based on the exchange rate at the time of the announcement).

Signing of a Tax Agreement with Russia

The Agreement “on Common Principles of Indirect Taxation” entails Belarus adopting Russian tax administration rules and practices, which includes integrating Belarus into the Russian system with the relevant software. In exchange, Belarus will be granted inter-budgetary transfers, framed as compensation for the impacts of the Russian tax reform. Given the current oil price levels, the yearly volume of these inter-budget transfers is estimated to be around \$0.5–0.7 billion.

In return for this compensation, Belarus has, in effect, relinquished a significant portion of its tax sovereignty. Although the main short-term benefits of this skewed exchange are slated for 2023, Belarusian refineries were essentially subsidized by the Russian budget as early as the fall of 2022 and through schemes involving Russian intermediaries.³ This played a role in the resurgence of oil refining in the latter half of 2022.

Policy Interventions

The authorities reverted to their extensive history of hands-on regulation, which can provide some stabilization in the short term. This encompasses manual oversight of supply and logistics chains, direct price control, mandates on production, employment and wages, directed lending, and recapitalization of state-owned banks.

These measures have broadened the leeway in both monetary and fiscal policy. Beginning in mid-2022, monetary conditions were deliberately eased, encompassing both reductions in interest rates and policy tools designed to promote lending and create positive monetary momentum. However, much of this momentum was stifled by banks. Facing high risks and prevailing uncertainties, they adopted a more conservative stance, favoring the preservation of liquidity surpluses over taking on hard-to-evaluate risks in a wartime and sanctioned environment. The excessive monetary stimulus, when combined with price shocks from sanctions, logistical challenges, and heightened global inflation, amplified inflationary pressures. By mid-year, inflation hovered around 20%, but subsequent factors like the appreciation of BYN against the USD, subdued consumer and investment demand, domestic low energy costs, and politically influenced consumer price regulations started to counteract

3 Козлов, Дмитрий; Дятел, Татьяна. “Союз межсезонный”. *Коммерсантъ*, 26 Oct. 2022, <https://www.kommersant.ru/doc/5633434>.

its growth. On an annual scale, inflation decelerated, but it remained in the double digits.

Double Macroeconomic Results for the Year

With a decline of 4.7%, 2022 marked the deepest recession for Belarus in the past 28 years. The country's output level regressed to that of 2017. Inflation peaked at its highest in eight years, with a cumulative annual inflation of 12.8% and an average annual rate of 15.2%.

However, given the conditions of war and sanctions, Belarus could have spiraled into a full-blown financial crisis, potentially losing up to 20% in output and revenue. From this perspective, the worst-case scenario was avoided, making the actual losses seem moderate in comparison.

There are even glimpses of optimism. Both the average real wages and the real incomes of the population contracted significantly less than the output, declining by 1.8% and 3.6% respectively. By year's end, real wages began to rebound, almost reaching their pre-war levels.

Considering both perspectives, the economic outcomes of 2022 can be summed up as: "bad, but it could have been much worse". This, however, does not mean that the year was good.

Russian Anchor and a Bomb in the Cargo Hold

A significant long-term outcome of the year was Belarus' evolution from being highly dependent on Russia to being wholly reliant on it. In foreign trade, Russia's share surged from 50% in previous years (about 40% in exports and 55–60% in imports) to 60% (approximately 60% in both exports and imports).

The energy and credit dependence of Belarus on Russia intensified. The special conditions for energy supply became crucial for the functioning of the Belarusian economy. Regarding debt, Russia is not just Belarus' primary creditor and the lender of last resort but, essentially, its only accessible creditor.

More significantly, new areas of dependence emerged: fiscal, logistical, and infrastructural. Inter-budget transfers from Russia, facilitated by the agreement "On General Principles of Indirect Taxation", are expected to account for about 10% of the Republican budget revenues. This creates a significant Russian influence on the Belarusian fiscal domain: any disruption in fund transfers can destabilize the entire public finance system.

Exports outside of Russia also hinge on the Russian logistical infrastructure, including seaports and railways. Furthermore, Russia can exert substantial influence through Belarus' infrastructural dependence on its software for critical areas like tax administration, banking settlements, and other transactions.

By the end of 2022, Russia possessed a comprehensive set of tools to influence the Belarusian economy's current state. If Moscow desires, it has the capability to thrust the Belarusian economy into chaos.

Conclusion

2022 proved to be a tumultuous year for the Belarusian economy. In sheer numbers, it underwent a swift and profound recession, paired with soaring inflation and pockets of financial instability. Yet, the depth and severity of the economic downturn were notably less than initially anticipated. This was because the shifts in the external landscape brought not only adversities but also stabilizing influences. Furthermore, the economic authorities' (un)conventional strategies played a part in mitigating the crisis.

However, in terms of qualitative characteristics and prospects, the picture is more somber. Belarus is continually battered by external shocks that systematically erode its economic foundation. The government's short-term interventions have only exacerbated the decay of the national economy, driving the nation into complete reliance on Russia. Given these circumstances, Belarus' economic trajectory is now largely influenced by Russia and the health of its economy.

CURRENCY MARKET AND BANKING SYSTEM: NO COLLAPSE

Project Kosht Urada

Summary

In 2022, Belarus' currency market and banking system faced severe difficulties stemming from the war in Ukraine and subsequent sanctions. In the spring, the situation appeared disastrous, but measures taken in Russia and Belarus, the delayed effects of the sanctions, and other factors contributed to stabilization. Both the ruble and the banks survived, albeit not unscathed.

Trends:

- Following the onset of the war in Ukraine, the Belarusian ruble (BYN) plummeted after the Russian ruble (RUB). However, as RUB stabilized and thanks to restrictions on currency operations inside Belarus and a relatively strong balance of payments, BYN recovered from the shock;
- For a time, banks did not fully meet their obligations to customers, further eroding confidence in BYN and the overall banking system, yet a full-fledged default was avoided;
- The outflow of foreign currency from the banking system persisted throughout the year. Additionally, there was a noticeable transfer of funds from time deposits to current accounts, as well as an increase in money supply;
- In the second half of the year, BYN inflow to banks, along with a decrease in economic activity and demand for loans, resulted in a liquidity surplus in the banking sector and the stabilization of interest rates.

The Exchange Rate Plummeted, but then Rebounded

The year 2022 was stressful for the Belarusian currency market. After Russia's invasion of Ukraine on February 24, RUB plummeted. This decline inevitably affected the BYN, and the subsequent numerous sanctions only seemed to only worsen the already fragile position of the national currency. However, emergency measures, taken primarily by the Russian central bank, temporarily stabilized the situation, preventing a catastrophic year for the Belarusian currency market.

Immediately after the onset of hostilities, RUB began to plummet, depreciating against the dollar by 49.6% by March 11¹, with the rate reaching a record 120.4 to the dollar. On the Belarusian market, the dollar's growth was not as significant, but still substantial: by March 11, BYN depreciated against the dollar by 24.5%², reaching a record BYN 3.3 to the dollar.

This significant difference in the growth rates of the dollar in Belarus and Russia was due to the strengthening of BYN against RUB. As of March 11, the RUB rate on the Belarusian market had dropped by 17%. This situation was devastating for Belarus' foreign trade, heavily tied to Russia. An expensive BYN in relation to RUB made Belarusian goods expensive for Russians, and Russian goods cheap for Belarusians, which in the medium term could greatly increase imports while reducing exports. However, in the short term, the National Bank allowed such fluctuations in exchange rates to prevent a significant rise in the dollar, seen by the population as a beacon of stability.

1 “Динамика официального курса заданной валюты”. Банк России, https://www.cbr.ru/currency_base/dynamics/.

2 “Официальные курсы белорусского рубля по отношению к иностранным валютам”. Национальный банк Республики Беларусь, <https://www.nbrb.by/statistics/rates/ratesDaily>.

In 2022, the National Bank allowed BYN to strengthen significantly against RUB, expecting that the Russian currency would at least partially recover its lost positions in the future. This strategy aimed to keep the dollar stable and return the exchange rate of BYN against RUB to levels comfortable for exporters. This expectation was realized.

After the late February – early March collapse, RUB began to recover quickly, returning to pre-war levels in April. This rebound took place for several reasons: the Russian central bank imposed unprecedented restrictions on capital movements, and high commodity prices and sanctions imposed on Russia led to an increase in the country's export revenues, while imports declined.

The National Bank of Belarus, for its part, did not impose bans on either currency sales or the release of hard currency deposits. Technically, when implementing various new restrictions, the banks acted on their own initiative. They limited hard currency issuance from accounts, halted the sale of cash dollars and euros, and often set daily limits or high spreads (the difference between the purchase price and the sale price) for cashless currency exchange transactions, making the exchange unprofitable. Despite these restrictions, the combined efforts, along with the strengthening of the RUB and, subsequently, the BYN, quelled the currency panic, contributing to the further stabilization of Belarus' currency market.

Atypical Non-residents and Typical Fluctuations

By the end of 2022, Belarusian enterprises (\$1.33 billion) and banks (\$0.65 billion) became the net buyers of foreign currency. Operations by the general populace had negligible influence on the ruble's exchange rate at the end of the year. Belarusians sold

a total of \$0.03 billion in absolute terms – a minor amount in the broader financial market. In contrast, non-residents set a record as net sellers, injecting the market with \$2.51 billion. This figure is about five times the annual volume of past net sales by non-residents (Table. 1). The sharp increase in foreign currency sales by non-residents can likely be attributed to Russian citizens making expenditures in Belarus using Russian debit cards and payments stemming from parallel imports to Russia.

Table 1. Dynamics of the difference between the volume of purchase and sale of foreign currency, 2018-2022, USD million³

	2018	2019	2020	2021	2022
Individuals	-1114.8	-597.7	1969.8	-53.4	-26.3
Legal entities	672.4	-531.7	977.9	-678.9	1327.5
Non-residents	-493.7	-571.9	-596.7	-575.0	-2509.1
Domestic banks	-617.8	-705.9	-714.4	-151.1	645.8

Note. Positive numbers – net currency purchase, negative – net currency sale.

Overall, the market generated a currency surplus that allowed the Belarusian ruble to stabilize, and the National Bank at least partially plugged the hole in the Gold and foreign currency reserves. During the currency panic of February and March, the regulator was compelled to draw from these reserves to moderate the ruble's volatility. The interventions during these two months are estimated at approximately \$0.9 billion.

3 “Статистический бюллетень № 12(282), 2022”. Национальный банк Республики Беларусь, https://www.nbrb.by/publications/bulletin/stat_bulletin_2022_12.pdf.

Table 2. Annual BYN volatility, 2018–2022. %⁴

	2018	2019	2020	2021	2022
USD/BYN	9.5	-2.4	22.3	-1.2	7.4
EUR/BYN	5.0	-4.4	34.0	-9.0	1.1
RUB/BYN	-9.2	9.2	2.6	-1.6	10.2

Note. Positive number — BYN weakened, negative — BYN strengthened.

As a result, in 2022, the Belarusian ruble depreciated by 7.4% against the dollar and by 1.1% against the euro (this difference is due to the strengthening of the dollar against the euro). The Russian ruble also fell by 10.2%, which had a positive impact on foreign trade. As indicated in table 2, such annual fluctuations in the exchange rate can hardly be described as unprecedented, but rather typical for the Belarusian market.

Restrictions on Withdrawals from Banks

The risk of a large-scale withdrawal of deposits posed a significant challenge for the banking system in 2022. Consequently, in March, most banks imposed restrictions on bank account disbursements. Since these measures weren't uniformly mandated by the National Bank, but were instead individually decided on by the banks, these restrictions varied significantly. For instance, as of March 12, Alfa-Bank permitted withdrawals up to a maximum of 10,000 dollars and 3,000 euros every 30 days, while Priorbank set a cap of 3,000 dollars per day. Some banks,

4 “Официальные курсы белорусского рубля по отношению к иностранным валютам”. Национальный банк Республики Беларусь, <https://www.nbrb.by/statistics/rates/ratesDaily>.

on the other hand, did not impose any restrictions⁵. In almost every case, the currency was disbursed upon request.

Checking accounts with debit cards also had withdrawal caps. For example, as of March 12, BelVEB set a withdrawal limit of 1000 USD/EUR per day, while Belgazprombank allowed up to 500 USD per day. These restrictions hindered account holders who, for example, might have wanted to travel abroad briefly and withdraw their savings from foreign ATMs.

In essence, these measures signified a breach of banks' obligations to customers. Nevertheless, they averted a full-scale default. It is important to understand that depositors' funds aren't simply stored in a bank vault; they are channeled into the economy in the form of loans. Thus, a bank cannot instantly return all the deposited money upon request. By extending disbursement times and imposing daily and monthly limits, banks staved off a collapse. However, these actions significantly eroded trust in the banking system.

It is understandable that the most substantial outflow affected foreign currency accounts. Depositors who save in dollars and euros generally do not have confidence in the Belarusian ruble. Thus, they tend to be more cautious and risk-averse compared to the average BYN deposit holder.

Despite the restrictions, in March, foreign currency deposits held by individuals shrank by 9.7%⁶. This includes a 5.9% reduction of all individual funds from term deposits, and a significant 21.5% decrease from transfer deposits (commonly referred to as checking accounts). In monetary terms, Belarusians withdrew \$512.2 million dollars from banks. Without the imposed limitations and the presence of non-redeemable deposits, which couldn't be prematurely accessed, this figure would have been much larger.

5 “Лимиты и ограничения на валютные операции в банках”. *Наши грошы*, 13 Mar. 2022, <https://t.me/naszyhroszy/1487>.

6 “Широкая денежная масса”. *Национальный банк Республики Беларусь*, <https://www.nbrb.by/statistics/monetarystat/broadmoney>.

Legal entities, for their part, have shifted their foreign currency assets from fixed term accounts to checking accounts to facilitate access. In March, term foreign currency deposits belonging to legal entities fell by 11.7% (\$347.1 million), whereas transfer deposits rose by 12.7% (\$312.2 million).

The outflow also affected the transfer deposits in Belarusian rubles. In March, individuals withdrew 7.7% (BYN 262.3 million) from such accounts, while legal entities pulled out 7.9% of all funds (BYN 314.8 million). Yet, term deposits in BYN remained relatively stable. This stability can be attributed to the existence of non-redeemable BYN deposits, as well as the mindset of the typical BYN depositor, who seemingly has a greater trust in both the BYN and the banking system than those with foreign currency deposits.

Banking System Avoided Collapse

Even with the implemented restrictive measures, banks faced liquidity shortages in March. This compelled the National Bank to hold credit auctions to supply banks with the requisite funds. In just one month, the regulator held six such auctions, dispensing BYN 2.9 billion, even though the banks' demand reached BYN 7.9 billion.⁷ The APRs for some of these loans surged past 30 percent despite a 12 percent refinancing rate. The interbank lending market also saw annual rates above 30%, further emphasizing the liquidity crunch.

Yet, mirroring the currency market dynamics, the initial panic subsided, and the banking system began to stabilize in April. Interest rates declined, deposit outflows slowed down, and occasionally, there was even a noticeable influx of funds into banks. Consequently, the National Bank resumed its regular

7 “Итоги кредитных аукционов”. Национальный банк Республики Беларусь, <https://www.nbrb.by/mp/auctions/LombCredits>.

practice of holding deposit auctions⁸ as banks rebalanced their liquidity surpluses. Unfortunately, from mid-summer onwards, the regulator ceased publishing reports on liquidity support activities, leaving us without a comprehensive view of the entire year of operations.

Summing up 2022, individual term deposits in BYN grew by 22.2% (or 1.14 million), set against an annual inflation rate of 12.8%. Meanwhile, individual transfer deposits expanded by 11.9% (451.4 million). Legal entities bolstered their BYN holdings in transfer accounts by 55.5% (or 2.24 billion) but reduced their term deposits by 6.0% (318.2 million).

The situation concerning foreign currencies held in bank accounts is less favorable. By the end of 2022, the general populace withdrew a total of \$516 million from checking and term accounts, which equates to 9.8% of the entire foreign currency holdings of individuals that were deposited in banks at the beginning of the year. Legal entities, however, increased their foreign currency reserves by 5.7%, or \$316 million, primarily by shifting funds from term deposits to current accounts. This means that the influx of foreign currency from legal entities failed to offset the significant withdrawals initiated by the population.

The Volume of Cash and Loans in Russian Rubles is Growing

In 2022, the broad money supply – all money in the economy, including rubles, foreign currency, both in cash and deposits, experienced a modest growth of 6.8%. This reflects the National Bank's intention to uphold a relatively strict monetary policy, aiming to mitigate further inflationary pressures through excessive monetary issuance.

8 “Итоги депозитных аукционов”. Национальный банк Республики Беларусь, <https://www.nbrb.by/mp/auctions/deposits>.

A notable trend within the year's broad money supply was the surge in cash circulation. Between January and December, the total cash volume swelled by 38.3%, reaching an all-time high of BYN 6.611 billion. This trend confirms the diminishing trust in the banking system and potentially points to the expansion of the shadow economy.

Interest rates returned to normal in 2022. Throughout January to December, the average APR on new bank deposits in BYN stood at 8.4%, which is even lower than the rate in 2021 (11.4%). At the same time, the average rate on new foreign currency deposits reached 4.6% compared to 2.1% in 2021. This demonstrates the banks' sustained demand for foreign currency, even in the face of a stable currency market and the declared ambition to *de-dollarize* the economy.

During the year, the average interest rate on new BYN loans was pegged at 14.6%, a jump from 12.7% a year earlier (excluding preferential loans). Simultaneously, there was a pronounced spike in foreign exchange loans: the average APR on new loans in foreign currency stood at 13.2%, compared to 6.9% in 2021. The secret behind this growth is the transition in 2022 to the Russian ruble as the main foreign currency for lending, diverging from the previous trend of primarily lending in dollars and euros.

The mean rate on ruble loans and deposits within the interbank market hovered around 8.3%. However, during the second half of the year, the interbank rates were limited to merely 1–2%, signaling a significant liquidity surplus. The high annual average can be attributed to the spike observed in March.

Conclusion

The year 2022 was relatively stable for the foreign exchange market and the banking system of Belarus. Surprisingly, several

indicators even appear to look positive. This stability can be largely attributed to the significant reinforcement of the Russian ruble mid-year, propelled by severe foreign currency restrictions and a serious reduction in imports. Belarusian banks have also played a crucial role by preventing a massive exodus of funds, albeit through breaching contractual terms with their clientele.

Factors like the general economic downturn, declining credit activity, and manual price regulation aided in stabilizing interest rates. While the numerous sanctions did not lead to immediate catastrophic damage, they persist, casting a shadow on the prospects for 2023.

With the Russian ruble experiencing another decline in late 2022 and no signs of recovery in 2023, it is likely the Belarusian ruble will follow suit. This devaluation, coupled with an unfavorable pricing landscape and ongoing sanctions, will strain the balance of payments and exert additional pressure on the national currency. Furthermore, the limited foreign currency reserves at the disposal of the National Bank might prove insufficient for tangible currency interventions to support BYN.

In response to the economic downturn, both the government and the National Bank may opt for a more lenient monetary policy to stimulate the economy. This may involve turning to currency issuance, potentially igniting inflation in the second half of the year and causing a subsequent surge in interest rates.

The continued drain of foreign currency from accounts will further destabilize the banking system. Both the ruble exchange rate and the banking system remain susceptible to considerable risks. Any potential shocks can lead to the unfolding of highly unpredictable and pessimistic outcomes.

ENERGY SECTOR: RESTORATION OF RENT

Alexander Avtushko-Sikorski

Summary

In 2022, Belarus faced sanctions imposed on its oil-processing industry, but was nevertheless able to reap significant oil-related benefits from the restrictions applied to the Russian oil and gas sector. The gap between the prices of natural gas that Russia charged Belarus and European buyers resulted in a significant subsidy, while the use of Russian seaports and hikes in global prices of oil products made refined oil export unprecedentedly profitable. This trend, however, is unlikely to remain even in the medium term.

Trends:

- Increased profitability of the oil and gas sector;
- Politically – insufficient growth of oil and gas rents to ensure the population's stronger loyalty to the authorities;
- Uncertainty in the electricity market.

Natural Gas

The year 2022 was notable for the fact that Belarus had classified the volumes of imported Russian natural gas. The price of supplies was the only thing known to the public – \$128.52 per 1,000 cubic meters, but the total volume was available neither in the official compilations of the Belstat statistics authority, nor in the *Comtrade* database.

Nevertheless, supplies can be estimated in volume terms based on press releases of Gazprom Transgaz Belarus. According

to one of them¹, in value terms, natural gas supplies were estimated to reach \$2.44 billion in 2022, which implies that natural gas deliveries had been projected at 18.98 billion cubic meters (bcm) last year. Actual deliveries remain unknown, but we will be using the estimated volume in comparisons below.

It can be assumed that natural gas import went down by 4.1% year-on-year in 2022, while the price was unchanged per 1,000 cubic meters. Belarus failed yet again, for the sixth time in a row, to procure a significant reduction in the annual price of Russian natural gas. Nevertheless, the situation in the European market for natural gas that emerged following Russia's invasion of Ukraine brought about unprecedented benefits to Belarus due to a *de facto* natural gas subsidy.

Table 1. Change in the average annual price of Russian natural gas for Belarus and benchmark (aggregate indicator) natural gas price on the border with Germany, 2015–2022.

	2015	2016	2017	2018	2019	2020	2021	2022
Average price of Russian natural gas on German border, \$/1,000 cubic meters	268.63	160.63	197.90	269.42	156.00	111.00	519.00	1,324.4
Price of Russian natural gas for Belarus, \$/1,000 cubic meters	144.00	137.00	130.00	129.00	127.00	127.00	128.50	128.5
Price difference \$/1,000 cubic meters	124.63	24.63	67.90	142.42	29.00	-16.00	390.50	1,159.9

Source: Belstat², IMF³, author's calculations.

- 1 “Газпром” продлил на 2022 год контракты на поставку газа в Беларусь и его транзит”. ТАСС, 27 Jan. 2022, <https://tass.ru/ekonomika/13548031>.
- 2 Hereinafter: “Внешняя торговля”. Национальный статистический комитет Республики Беларусь, www.belstat.gov.by.
- 3 Hereinafter: “Primary Commodity Prices”. *International Monetary Fund*, www.imf.org.

As shown in Table 1, in 2022 the difference between the price that Belarus was paying for Russian natural gas and the benchmark price for European countries (aggregate indicator) on the border with Germany exceeded \$1,000 per 1,000 cubic meters, which is a new all-time high. The unparalleled gap is attributed to sanctions imposed by the EU on Russia's oil and gas sector in the wake of Russia's invasion of Ukraine, which entailed a dramatic reduction in natural gas supplies to the European market in volume terms.

For the European Union, one of the strategies was to reduce Russian gas consumption and switch to other energy sources or gas imports from other countries, in order to reduce political dependence on Russia, as well as the amount of funds from which Russia can finance military operations. Furthermore, in the run-up to the heating season, European countries sought to rapidly increase the volumes of natural gas in underground storage facilities (UGSF).

This process took time. Given that Russia used to be the largest supplier of natural gas to the EU at the beginning of 2022 and operated the most stable and extensive infrastructure for gas transportation, the decision to curtail purchases of Russian natural gas naturally spurred prices in the European market. In addition, Russia significantly reduced pumping volumes through its gas mains, citing the fact that gas was resold under long-term contracts at higher prices in the reverse mode and, later, the newly imposed sanctions. This also pushed natural gas prices in European countries.

By the end of 2022, the share of import from Russian in the EU's market for natural gas had dropped from 48.7% to 12.9%⁴, whereas gas prices had fallen considerably due to the concerted actions of European countries that were switching to alternative

4 "Infographic – Where does the EU's gas come from?" Council of the European Union, <https://www.consilium.europa.eu/en/infographics/eu-gas-supply>.

suppliers, significant volumes stored in underground facilities, and the very warm winter. Nevertheless, the rapid leap in natural gas rates in the EU countries enabled Belarus to benefit from the import price gap, which de facto formed a natural gas subsidy.

However, Belarus will be unable to enjoy the same subsidy in 2023, as European consumers quickly contracted natural gas supplies from alternative sellers, pushing natural gas prices downward. Russia will be charging Belarus the same price for its supplies of natural gas, fixed at \$128.5 per 1,000 cubic meters, for at least three more years, and Minsk currently has no leverage to revise it.

Oil

In 2022, statistics on Belarus' oil refining volumes, import and export of crude oil and refined oil products were completely classified, whereas in 2021, data were available only for a brief period. It is not known where Belarus was buying crude oil, but it is quite obvious that the largest seller was Russia.

Calculations performed by BEROC experts suggest that in 2022 Belarus imported 10.3 million tonnes of Russian crude oil at \$504 per tonne, which compares to the Brent blend price of \$604.2 per tonne.⁵ Their estimates are used to outline changes in volumes of crude oil import in Belarus and Belarusian export of refined oil products since 2016 (Table 2).

5 “Возвращение нефтяной ренты”. BEROC, 14 Mar. 2023, <https://beroc.org/publications/view/vozvrashchenie-neftyanoy-renty/>.

Table 2. Import of Russian crude oil in Belarus and export of Belarusian refined oil products to international markets, 2016–2022

	2016	2017	2018	2019	2020	2021	2022
Crude oil import in volume terms, mln tonnes	22.9	18.1	18.0	18.2	16.0	N/A	10.3
Import in value terms, \$ bln	3.745	5.292	6.800	6.580	3.890	1.990 ¹⁾	5.191 ²⁾
Crude oil price, \$/tonne	192.00	294.00	373.60	365.50	343.12	N/A	504.00
Crude oil price in world market, \$/tonne	363.90	388.70	513.70	458.50	306.88	476.80	604.24
Refined oil export in volume terms, mln tonnes	13.000	12.300	11.900	10.500	8.487	3.390 ³⁾	N/A
Refined oil export revenues, \$ bln	4.040	5.340	6.500	5.200	2.747	1.470 ⁴⁾	5.800
Refined oil price, \$/tonne	311.00	434.14	546.20	495.23	323.70	433.62 ⁵⁾	600.00

Notes. 1) UN Comtrade data, which may be incomplete; 2) the price of the Urals blend in the global market was used as a benchmark to compare the price that Russia charged the world and Belarus for its crude oil in previous years, but the so-called tax maneuver eliminated almost the entire difference, so in this issue the Brent blend price is used; 3) data for January–April 2021; 4) data for January–April 2021; 5) calculated on the basis of statistics for January–April 2021.

Source: Belstat, IMF, UN Comtrade Database, BEROC estimates, author's calculations.

As can be seen from the table, in 2022, the decline in the volume of Russian crude oil imports to Belarus was more than 150% compared to 2020. This can be attributed to the European sanctions applied to Belarus' export of crude oil and oil products: Belarus did not need as much crude oil as before, whereas

its own crude was most likely used for domestic refining. The per-tonne crude price doubled, and revenues from the export of Belarusian refined oil soared.

Despite the significant increase in the price of Russian crude oil, the Belarusian oil industry reported profits. *Firstly*, Russian crude was still much cheaper for Belarus than what foreign consumers paid. *Secondly*, even though sanctions were imposed by the EU and the lucrative Ukrainian market was unavailable, Belarus was still able to generate more revenues from sales of refined oil products than back in 2019. One of the reasons is probably the agreement reached in 2021 on the transshipment of Belarusian oil products via the seaports in Ust-Luga and St. Petersburg (instead of the Baltic seaports), which facilitated the export of Belarusian oil products to third countries.

It appears that the sanctions applied to the Russian oil sector helped the Belarusian oil refining sector to survive amid limitations on the import and export of Belarusian oil products imposed by European countries. However, we cannot say that Belarus regained its status of a typical beneficiary of the oil rent, as was the case in the second half of the 2000s. There are three reasons for this:

- the high revenues from the export of oil products will not remain in the long run, as Western consumers managed to replace Russian crude deliveries;
- the super profits generated by foreign supplies of refined oil products last year against the backdrop of sanctions only enabled Belarus to get by and make up for the inaccessible markets of Ukraine and European countries;
- for countries living off rent the main issue is how to invest it⁶, but in 2022, unlike in previous year, the Belarusian authorities failed to transform the excessive incomes from

6 Balmaceda, M. *Politics of Energy Dependency: Ukraine, Belarus, and Lithuania between Domestic Oligarchs and Russian Pressure*. 2013. University of Toronto Press.

foreign deliveries of oil products into additional loyalty inside the country.

In 2023, Russia's oil supply and transportation conditions for Belarus will presumably remain in place, but profits will be limited.

Electricity

The complete disconnection of Ukraine from the Belarusian energy system became the pivotal event for the electric power industry. What was originally a scheduled disconnection (to test both the operation within the power grid of mainland Europe and to test isolated operation) eventually became permanent.

Belarus was therefore unable to continue exporting electricity to Ukraine, losing one of its largest buyers. Electricity export statistics were classified in 2021, but in 2020 Belarus exported 1.1 billion kilowatt-hours to Ukraine, while meeting 70% of its own requirement. The Ukrainian market will remain inaccessible for Belarus for both political and technical reasons: in 2022, Ukraine was fully connected to the European power grid, whereas the massive shelling of the energy infrastructure by Russian troops made it obvious that the Ukrainian grid is capable of effective operation even if it is partially isolated.

The relevance of the construction and operation of the Belarusian Nuclear Power Plant becomes even more questionable. Although it stood idle for half of 2022, now that the second power unit has been commissioned, the challenge of exporting the surplus becomes increasingly complex. Russia does not look like it can act as a major buyer: the Russian electricity market does not have a deficit to cover, so supplies are only possible at a significant discount. The most likely scenario is to encourage

Belarusians to increase electricity consumption while lowering tariffs.

Conclusion

The Belarusian energy sector has been able to adapt to the sanctions imposed by the West, which brought it considerable profits. The situation in the European natural gas market resulted in a significant gas subsidy for Minsk due to the price gap, whereas revenues from sales of refined oil products increased as well.

However, Belarus will not reinstate its positions as a petro-state feeding off the oil rent. The super profits of the oil and natural gas sector have not been translated into political loyalty, and the economic effect of the adaptation is likely to be short-lived, so next year we will most likely observe a significant decrease in the profitability of Belarusian oil refining and a much narrower gas subsidy. The only thing that can prevent this is a revision of the terms of oil and natural gas trade which, however, seems extremely unlikely.

REAL ECONOMY: A FORCE MAJEURE COLLAPSE

Nikolai Suboshich

Summary

The half-war environment and persistent sanctions, which were expanded and thereby directly affected up to a third of the Belarusian economy, compelled the authorities to pursue structural readjustments. Their response, albeit poorly timed, was enough to curb the slump in GDP, which was nonetheless the worst since 1995. All sectors suffered, most of all the manufacturing industry. Oil refining and the chemical industry were the first to feel the effects of the old and new sanctions. Agricultural sector avoided external restrictions, and so that it grew, whereas the broadening food deficit and growing prices in the world market resulted in a higher proportion of food in the country's overall exports.

Manual adjustment of the national economy, which is increasingly applied in Belarus and is being introduced in Russia, is a constraint on business initiative. It is clearly not the best time to develop existing or create new companies, now that the economy is transformed to meet wartime needs, laws to protect individual rights and investments are no longer enforced, and most resources are distributed in favor of the public sector and confidants.

Trends:

- Record contraction in the economy amid increased government regulation;
- Attempt at structural reorganization with a refocus on the Russian market;
- Increasing impact of sanctions on key export-oriented sectors;
- Withdrawal of foreign companies and capital, mass flight of skilled professionals;
- Decreased share of private business in the economy, business decline.

Half-War: the End of Recovery

The war in Ukraine, in which Belarus became involved, frustrated the post-pandemic economic recovery efforts and thwarted the early year plans for its continued growth. GDP dropped by 4.7% year-on-year (to BYN 191.4 billion), a new record fall since 1995.

The collapse in industry (by 5.4% year-on-year, to BYN 169.6 billion), and especially in its most critical component – manufacturing – contributed to the downturn the most. The volume of output in that latter segment, which accounts for more than 25% of gross value added in the country, went down by 6.2%. Because the *Belstat* statistics authority has not published detailed data since 2022, it is impossible to say which of the ten groups in the manufacturing sector were the worst underperformers. The Minsk Region, where the *Belaruskali* potash giant is located, which suffered from both sectoral and corporate sanctions, reported the most sizable fall in manufacturing output.

The Minsk Region therefore became the country's leader in terms of decline in the manufacturing industry: minus 16.0% from the level registered in 2021. The Vitebsk Region was second with minus 6.8%, the Mahilyou Region third with minus 6.7%, followed by the Hrodna, Homyel, and Brest Regions with minus 3.6%, minus 3.1%, and minus 1.1%, respectively. The city of Minsk as a region was the only one where the manufacturing industry grew in volume terms on a year-on-year basis, by 1.9%¹.

1 “Индекс промышленного производства в % к соответствующему периоду предыдущего года”. *Интерактивная информационно-аналитическая система распространения официальной статистической информации*. Национальный статистический комитет Республики Беларусь, <http://dataportal.belstat.gov.by/Indicators/Preview?key=136993>; “Промышленность / Оперативные данные / Годовые данные”. Национальный статистический комитет Республики Беларусь, <https://www.belstat.gov.by/ofitsialnaya-statistika/realny-sector-ekonomiki/promyshlennost/>.

Of the other three industrial production index components (around 15% of its total volume), only the mining industry managed to increase output, by 2.5%. Output in the group “supply of electricity, natural gas, steam, hot water and conditioned air” edged down by 2.3% from the 2021 level, and in the group “water supply; collection, treatment and disposal of waste, activities to eliminate pollution”, edged down by 2.6%.

The sanctions had a negative impact on such crucial sectors as wholesale and retail trade, transportation, and information and communications, which, taken together, are comparable to the manufacturing industry by the volume of its gross value added. Cargo turnover went down by 25.4%, wholesale shrank by 17.8%, and retail, by 3.7%. The information industry is increasingly suffering from outflows of workers: in 2022, the number of professionals who terminated their employment in the industry exceeded the number of newly employed specialists by 16,500 people.

Agricultural sector contributed positively to the country’s GDP. After the unsuccessful year 2021, when the sector’s production dropped by 4.2% year-on-year, in 2022, agricultural organizations, farmers and part-time farms reported BYN 31.8 billion worth of output in current prices, an increase by 3.6% in comparable prices. Gross output went up in all of the five key crop categories (cereals and legumes, potatoes, vegetables, sugar beet and colza), along with the production of milk, the most important export item of the livestock industry. The output of eggs, livestock and poultry to produce meat (in live weight) went down from 2021.

Rotation of Minuses

The priority objective of the structural rearrangement of the national economy was to rapidly find new outlets for oil products,

fertilizers, and timber, which were under sectoral sanctions, as well as to expand the range of exported products, primarily by supplying more items to Russia, which seeks substitution for Western goods.

Losses were unavoidable. According to the National Bank of Belarus, exports of commodities and services totaled \$46.8 billion in 2022, down by 5.4% year-on-year. Imports of commodities and services came to \$42.4 billion, a decrease by 6.7%. Therefore, a surplus of \$4.3 billion was reported in the country's trade in 2022, up by 8.5% year-on-year, which was for the most part attributed to the fact that import deliveries fell faster than export supplies dropped.

The commodity trade surplus amounted to \$172.4 million, while trade in services accounted for the remaining \$4.2 billion of the surplus. The latter contracted faster than trade in goods: exports of services went down by 10.8% (to \$9.2 billion), and imports shrank by 11.3% (to \$5.0 billion)².

Due to its methodology, *Belstat* reported foreign trade data that differ from those presented by the National Bank. Furthermore, *Belstat's* data shed light on how foreign trade activities evolved in 2022 in terms of both their quality and volumes in the two key areas – within the CIS and beyond it.

For the first time since 2006, a surplus was attained in commodity trade with the CIS, at \$2.27 billion. This shift is due in almost equal parts to increased export deliveries to that region and lower volumes of imports, primarily of energy products from Russia. The surplus can be viewed as an achievement, since Belarusian exporters reported it despite the virtually complete loss of the Ukrainian market – formerly Belarus' *second* largest trading partner and the main contributor to the country's surplus in commodity trade.

2 “Внешняя торговля товарами и услугами Республики Беларусь”. Национальный банк Республики Беларусь, <https://www.nbrb.by/> <https://www.nbrb.by/statistics/foreigntrade>.

For the first time since 2013, the country saw a deficit in non-CIS commodity trade (minus \$2.58 billion). The key factor here was the narrowing of exports to the EU, especially of oil products. Import supplies decreased a lot less.

According to Belstat, commodity exports to the CIS increased by \$2.2 billion, which was not enough to cover the drop in supplies beyond the CIS (by \$3.9 billion)³.

Private Capital: to Flight or Wait and See

The authorities postponed their efforts to restructure the economy during the few initial months when state-controlled industries kept growing amid the assumption that the war in Ukraine would be short-lived. That late response affected, among others, the pace of talks over Belarus' own seaport infrastructure in Russia. On the other hand, the growing deficit in the Russian market caused by the mass withdrawal of Western businesses opened a window to increase shipments of products and ensure a relative stability of mechanical engineering, food-processing, light industry and some other sectors.

Private business, which once again found itself without state support, became more susceptible to trade and financial constraints and adapted to the new challenges faster. Months' worth of stocks of imported materials and components were created (the public sector followed suit) amid tightening sanctions, which temporarily eased procurement-related tensions and had a positive effect on GDP.

Immediate problems were addressed; however, the main challenge posed by the protracted crisis — the vague development

3 “Объёмы внешней торговли по месяцам”. Национальный статистический комитет Республики Беларусь, <https://www.belstat.gov.by/ofitsialnaya-statistika/realny-sector-ekonomiki/vneshnyaya-torgovlya/vneshnyaya-torgovlya-tovarami/operativnye-dannye/>.

prospects – remained to be tackled. In this regard, most private businesses took a wait-and-see attitude, counting on a political resolution of the conflict and choosing to postpone the implementation of almost all of their plans.

Other private businesses made up their minds to leave the Belarusian and Russian markets and were forging ahead with their plans at various speeds. Most of them are foreign companies and representatives of the Belarusian high-tech sector. In 2022, several dozen residents left the High Tech Park (HTP), the number of new registrations dropped several times over. One of the most prominent IT-companies with Belarusian capital, *War-gaming Group*, sold its business and left the market.

The startup ecosystem as good as stopped its development. Tacit migration continues: while maintaining corporate entities and minimal necessary staff, high-tech companies redirect orders and relocate employees to Eastern and Southern Europe, Central Asia, and Transcaucasia. In 2022, the Belarusian office of *EPAM Systems*, the country's largest IT employer, was behind not only Ukraine, but also Poland and India by its number of employees.

Tightening of economic regulations by the authorities (in November 2022, price controls were applied to more than 85% of consumer goods, along with other unprecedented restrictions) and efforts to combat any manifestation of disloyalty (detention and conviction of *Priorbank JSC* Chairman *Sergey Kostyuchenko* and other high-profile cases) encourage representatives of other industries to leave Belarus.

The authorities took steps to prevent the mass exodus of private capital. To this end, alienation of foreign owners' shares in some companies was restricted – a respective list of businesses was introduced in summer and has been extended since then. The list included about a *third* of foreign companies operating in Belarus. The drop in the number of bankruptcy cases observed throughout 2022 is associated with administrative obstacles to

this way for a business to withdraw from the market, rather than improvements of the economic situation.

The global credit insurer COFACE moved Belarus into the group of countries with a *very high* risk of corporate default as early as the first half of 2022. Belarus remained there until the end of the year⁴.

The third group of entrepreneurs became involved in parallel import schemes trying to benefit from the window of opportunities in the Russian market. Sources of growth still remain there; however, their capacity is limited in the short term. This is due to tougher international sanctions compared to those imposed on Belarus and stiffer competition there, including from Chinese suppliers and investors. Furthermore, the militarization of the Russian economy leads to further tightening of regulation. In wartime, Russia has every chance to surpass the level of unlawful interference in business that is observed in Belarus today.

The Russia–Belarus integration trend spurred by the war leads to Russia’s increased presence in the local economy, which encompasses a growing number of markets and niches. At the end of 2022, Russia’s FDI in Belarus accounted for more than 56% of combined direct investments in the country. Given investments by Russians from offshore jurisdictions, the share is estimated at 75% or even more.

Conclusion

The overoptimistic official forecasts for the development of the national economy in 2023 (targets for GDP growth and commodity and service export expansion had been set at 3.8% and 5.5%,

4 “Country Risk Assessment Map –Q4 2022”.Coface Group, <https://www.coface.com/News-Publications/Publications/Country-Risk-Assessment-Map-Q4-2022>.

respectively) run counter to not only the much more cautious outlook offered by international institutions, but also expectations in Russia itself. According to the Bank of Russia, the best-case scenario for its economy is up to 2.5% GDP growth. The situation in Belarus almost entirely depends on developments in Russia, which appears to have been stuck in the protracted war and is suffering from growing sanctions pressures. Aggravating challenges in the global economy can additionally hinder economic growth in Belarus.

Continuous militarization of the economy may produce an effect such as production growth under import-substituting and military programs for Russia at the initial stage, alongside an extensive use of available logistics capacities to transfer products from China, Iran and in the scope of parallel import schemes. The possible effect is narrow, though, due to the insignificant number of industries involved in the process and limited estimated volumes.

New sanctions imposed as a response to the possible deployment of nuclear weapons in Belarus, as well as stricter control over the compliance with previous packages of restrictions will increase pressure on both the public and private sectors of the economy.

As a rule, poorer terms of trade (rising global prices of resources, more complicated logistics, more expensive loans, and increased risks) encourage the Belarusian authorities to recover losses in the public sector by exploiting private business. Similar processes are taking place in Russia, which used to be viewed by Belarusian business as a country with a more liberal and attractive environment for entrepreneurship. Further aggravation of conditions in the neighboring state can become a serious obstacle to attempts to make up for local losses elsewhere and compel Belarusian businesses to terminate their operations altogether.