



Expert Assessments

BELARUS CHANGE TRACKER

**Pavel Slunkin, Artyom Shraibman,
Philipp Bikanau, Henadz Korshunau,
Lev Lvovskiy**

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Russia's dominance of Belarus is acquiring a nuclear dimension while the Lukashenka administration turns into an engine for cultural Russification.



Belarus's economy is adapting to external shocks through deeper integration with Russia, while an ageing population and emigration flows are strongly impacting the labour market.



The trend of growing trust in the authorities against the backdrop of an anti-war consensus has come to a halt. The regime's repressions and controls over society have intensified, including stricter checks at state borders.

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INTRODUCTION.

WHAT IS THE BELARUS CHANGE TRACKER?

Belarus is going through the most turbulent period since its independence. The war in Ukraine* and the Belarusian authorities' complicity in Russia's aggression, combined with the country's still unresolved internal political crisis of 2020, have created a "perfect storm". Features of the turbulent situation include ongoing widescale repressions, unprecedented foreign sanctions and the severance of economic relations with Western partners, international isolation and intensified social polarisation within the country. The situation poses many new challenges for researchers. It is increasingly difficult to identify sustainable and relatively long-term trends through the mists of a controlled information environment and the extreme volatility in economics, politics and public sentiment, as well as in regional security issues.

To address these challenges, our five Belarusian experts produce a quarterly analytical report, the Belarus Change Tracker. The idea behind this product is to record and

analyse more general trends in place of observers' usual focus on individual events and the noise of daily information. The team includes two political analysts, two sociologists and economist. They are Pavel Slunkin, visiting fellow at the European Council on Foreign Relations; Artyom Shraibman, founder of the Sense Analytics consultancy; Philipp Bikanau, independent sociologist; Henadz Korshunau, programme director of Belaruskaya Akademia and senior analyst at the Center for New Ideas; Lev Lvovskiy, academic director at BEROCC.

The analytical "zest" of our report is an exclusive quarterly opinion poll that enables us to record shifts in public opinion across different segments of Belarusian society**.

The authors would like to thank the Friedrich Ebert Stiftung for its support in producing the report and Press Club Belarus for contributing to the dissemination of its results.

* While the authors use various designations of the Russian-Ukrainian war, they are all unanimous in interpreting this conflict as Russia's war against Ukraine.

** See "Technical Annex" for a detailed description of the sampling and data collection method.

SUMMARY

Russia's dominance over Belarus is acquiring a nuclear dimension — the country is set to become a testing ground for Russian nuclear expansionism. Belarus will assume all the attendant risks of hosting Russian nuclear weapons, while having no say in the protocols concerning their use. Belarus's cooperation with the Russian occupation administrations in territories seized from Ukraine is now taking place at the highest diplomatic level, while international organisations are assembling the legal case for Alyaksandr Lukashenka's prosecution for complicity in war crimes. There have been no new EU sanctions for more than a year and, despite the deteriorating situation in Belarus, the group of countries lobbying for the removal of the most painful sanctions — those on the potash industry — is expanding.

The saboteur attack on a Russian aircraft in Machulishchy, and increasing acts of sabotage in Russia, have prompted the Belarusian authorities to militarise and securitise domestic politics, including through abruptly tightened controls at all state borders and an active media campaign of regularly reporting the thwarting of purported new terrorist acts. Traditionally a relatively passive actor on cultural and historical issues, the Lukashenka administration is now becoming one of the main drivers of Russification. Earlier fragmentation in the democratic movement has been replaced by more substantive discussions that mainly focus on developing a strategy for the release of political prisoners.

Disagreement among EU countries has prevented the adoption of a new joint sanctions package. All this time, individual countries have continued to impose national sanctions, more often than not insignificant (in terms of their

effects), and Belarus has had time to adapt to the hit of last year's sanctions, finding ways to bypass them through deeper economic integration with Russia and through a search, so far not very successful, for new partners among the Far Arc countries.

Population ageing and emigration are beginning to have an increasingly serious impact on the labour market in Belarus. The state continues its crusade against entrepreneurs, as well as persevering with its loose monetary policy and its practice of directive support provided to non-performing state-owned enterprises.

This quarter saw the previously reported growth in confidence in the regime's institutions come to a halt. During the year, coinciding with the war, the regime's gain of trust wasn't significant — only 8 percentage points. Belarus's society remains divided as a result of the political confrontation, and attitudes to Russia's war against Ukraine remain firmly embedded in it. Despite the persistence of an anti-war consensus, society still lacks accurate information about the war. It is also safe to say that there continues to be a consensus among Belarusians — they oppose nuclear weapons.

A series of acts of sabotage in Belarus and Russia has been the main factor shaping the authorities' recent actions, including intensified repression, the imposition of more severe conditions in detention centres, and stricter controls both inside the country and at its borders. Given the impossibility of any proactive civic activity in Belarus, the country's civil society has demonstrated solidarity and self-organised outside Belarus with the help of the diaspora community.

1

FOREIGN POLICY

Russia's dominance over Belarus is acquiring a nuclear dimension — the country is set to become a testing ground for Russian nuclear expansionism. Belarus will assume all the attendant risks of hosting Russian nuclear weapons, while having no say in the protocols concerning their use. Belarus's cooperation with the Russian occupation administrations in territories seized from Ukraine is now taking place at the highest diplomatic level, while international organisations are assembling the legal case for Alyaksandr Lukashenka's prosecution for complicity in war crimes. There have been no new EU sanctions for more than a year and, despite the deteriorating situation in Belarus, the group of countries lobbying for the removal of the most painful sanctions — those on the potash industry — is expanding.

1.1. RUSSIA'S NUCLEAR GRIP ON BELARUS

The emergence of a nuclear dimension in bilateral military cooperation between Belarus and Russia was the key event in the period under review. On 25 May, the two sides signed "documents defining the procedure for maintaining Russian non-strategic nuclear weapons in a special storage facility on the territory of the Republic of Belarus."¹ It is noteworthy that such significant and truly historic accords were signed by the defence ministers, even though Lukashenka and Putin were holding joint multilateral meetings in Moscow on the same day.² The last time the countries amended their bilateral agreement on joint regional security, including defining the procedure for the presence of Russian troops in Belarus, it was also done by the defence ministers.³

Putin had previously announced plans to deploy Russian tactical nuclear weapons in Belarus after completing the construction of a storage facility by 1 July this year. However, so far there is no public news about the construction of either a new storage facility, or modernisation of an old

one, inside the country. The announced deadline is hardly realistic if this concerns long-term storage of nuclear weapons in Belarus. Meanwhile, Lukashenka said that "the relocation of nuclear warheads has already begun."

The move will hardly fundamentally change the military balance in the region,⁴ nor will it violate the two countries' formal commitments under the Treaty on the Non-Proliferation of Nuclear Weapons (NPT), and this explains the generally restrained reaction of Western countries to Russia's plans. For the time being, they do not see any intention of a real nuclear escalation in Russia's actions, but rather an attempt at nuclear blackmail, aimed among other things at influencing public opinion in the West.

Another Russian military facility of strategic importance will create far-reaching adverse consequences for Belarus. Despite statements by Lukashenka and propagandists that nuclear weapons will be under joint control of the two countries, this is highly unlikely and unfeasible. After signing the agreement, Russian defence minister Sergei Shoigu contradicted Lukashenka's claims and said that control over nuclear weapons and decisions on their use would remain with Moscow. Consequently, the map of Belarus will feature a new object, which may be a threat to third countries and at the same time a potential target in the event of a global military confrontation involving Russia. Moreover, the decision to use the nuclear weapons may be taken by Russia in total disregard of the interests of Belarus and its people. Even in peacetime, Russian nuclear weapons and the Russian troops stationed to guard the storage facility will serve as a military and political "anchor" for Russia in Belarus. The authorities will use these weapons as a deterrent against any ideas that the Ukrainian armed forces, or armed Belarusian oppositional groups, might have for the "liberation of Belarus from occupation".

The nuclear facility will be an additional incentive for Russia to prevent any democratic change in Belarus, so as not to jeopardise the nuclear deployment's "legal" status and physical security. And even if such changes eventually take place in Belarus, this strategic facility will further support Moscow's

1 <https://t.me/modmilby/28147>

2 The transfer of a part of one country's nuclear arsenal to the territory of another country is taking place for the first time since the signing of the Treaty on the Non-Proliferation of Nuclear Weapons in 1968.

3 <https://library.fes.de/pdf-files/bueros/belarus/19852.pdf>

4 Western nations agree that Russia already has nuclear weapons in the Kaliningrad region.

long-term presence and remain a key Russian resource protecting its military, political and economic interests.

1.2. BELARUS ENGAGES IN “SELF-ISOLATION”

The earlier trend towards Belarus's growing isolation, until now focused along its western borders where there has been the erection of a new “iron curtain”, took an unexpected turn. **Restrictions on movement across the eastern border** have now emerged, as Belarus introduced temporary border controls at six major entry points from Russia, while the small bypass roads in the Mahilyow oblast that lead to Russia have been dug up or blocked with trees. Citizens crossing the border in both directions are being subjected to random inspections. The main reason for increased border control was probably a series of bombings at Russian military and non-military facilities, which are believed to be connected with Ukrainian sabotage activities (Ukraine does not officially acknowledge its involvement in such actions). The Belarusian Ministry of Internal Affairs even announced the creation of a special unit to combat sabotage groups “along the entire perimeter of the borders”⁵ (see the Civil Society section for more details). These decisions may also have negative humanitarian consequences: since Russian territory is being used to evacuate people persecuted by the regime from Belarus, this route may now become even more dangerous.

1.3. BROTHERS IN STATUS: QUESTIONABLE ACHIEVEMENTS OF BELARUSIAN DIPLOMACY

The Lukashenka regime continues to look for ways of boosting its international activity and diversifying its range of foreign partners. Most of its partner states, however, are themselves suffering from dubious international reputations, sanctions and external isolation. During the period under review, Belarusian officials had bilateral public meetings with counterparts from Iran, Nicaragua, Russia, Zimbabwe, Pakistan, Hungary and the Russian occupation administrations. Most telling was the visit by the head of the occupation authorities in the Donetsk region, Denis Pushilin, and his meeting with Lukashenka in the latter's personal office. Pushilin's previous visits to Belarus were afforded a lower status by the Belarus regime (see BCT Issue 2). The ongoing erosion of Belarus's sovereignty leads to a situation whereby **the country's relations with the occupation authorities of various territories are becoming indistinguishable from its contacts with sovereign states**. The political recognition of Russia-occupied territories at the highest level is also consistently being enshrined in legal form. For example, another region of Belarus, this time

⁵ <https://www.belta.by/society/view/kubrakov-sotrudniki-mvd-nesut-sluzhbu-po-ohrane-porjadka-po-vsemu-perimetru-granitsy-568314-2023/>

Viciebsk, concluded an agreement with the Crimean occupation administration on the “establishment of working bodies in executive power.”⁶ It was signed by the head of the Viciebsk regional executive committee, Alyaksandr Subbotin.

1.4. CALLS TO TAKE LUKASHENKA TO THE HAGUE

Another trend emerging in the documentation of international organisations is for the **formalisation of the responsibility of the Belarusian authorities**, and Lukashenka personally, **for war crimes on the territory of Ukraine**. In response to these crimes, in addition to the regime's domestic repressions, the OSCE invoked the Moscow Mechanism against Belarus for the third time.⁷ The OSCE also recognised the forcible deportation of Ukrainian children to Russia and Belarus as crimes against humanity.⁸ And the Parliamentary Assembly of the Council of Europe (PACE), in its resolution on the same issue, has called on its members to hold Lukashenka accountable for his crimes by using international mechanisms.⁹ All this is taking place against the background of the International Criminal Court in The Hague issuing an arrest warrant for Vladimir Putin for similar crimes and calls by the Belarusian democratic movement to issue a warrant against Lukashenka.

1.5. GROWING POOL OF SANCTIONS SCEPTICS

Despite the non-stop deterioration of the human rights situation, the growing number of political prisoners, and continued assistance to Russia in its war of aggression against Ukraine, the Belarusian authorities have not been included in new EU sanctions packages for more than a year. The last time the EU imposed sanctions on Belarus was 3 June 2022. Since then, the number of political prisoners has increased by about 300 people, while the authorities' repressions have become even more brutal. Moreover, the **pool of the EU countries that are slowing down or blocking harsher sanctions decisions against Belarus has only expanded**. While Hungary previously led in playing this role, now a number of states are lobbying to ease European sanctions against the Belarusian potash industry for fear of triggering a famine in the southern hemisphere. Lobbyists and supporters of easing sanctions include Portugal, France, the Netherlands, Belgium and Spain.¹⁰ In the absence of consensus among European countries, the US, Canada, Poland and Ukraine are the ones that continue to

⁶ https://t.me/vitebsk_region_officially/14531

⁷ <https://osce.usmission.gov/joint-statement-moscow-mechanism-invocation-on-human-rights-violations-and-abuses-in-the-republic-of-belarus/>

⁸ <https://www.osce.org/files/f/documents/7/7/542751.pdf>

⁹ <https://pace.coe.int/en/files/31776.html>

¹⁰ <https://news.am/eng/news/733897.html>

exert pressure through imposing new sanctions on the Belarusian authorities (see the *Foreign Economic Relations* section for more details).

1.6. POSITIVE DYNAMICS IN RELATIONS BETWEEN THE DEMOCRATIC MOVEMENT AND UKRAINE

Over the last 18 months, Ukraine's relations with the the Belarusian regime have been pendulum-like, alternating periods of rapprochement with Belarus's democratic movement with periods of criticism towards them, and accompanying critical or appeasing rhetoric towards Lukashenka and his entourage respectively. The period under review was no exception. After the "fragile balance" described in the previous BCT issue, the relations between Ukraine and the de facto Belarusian authorities became tense again, with **some positive dynamics appearing in relations with the democratic forces**. Ukraine criticised plans to deploy Russian nuclear weapons in Belarus, announced by Putin and Lukashenka, and called on the international community to prevent this from happening. The Ukrainian Foreign Ministry issued an address to citizens of Belarus on the subject.

Official Kyiv also criticised the meeting between Lukashenka and Pushilin and recalled its ambassador from Minsk for consultations in protest, something many Ukrainian MPs and opposition politicians have long sought. It was on the initiative of Ukrainian MP Oleksiy Honcharenko that Lukashenka's name appeared in the PACE resolution demanding that he be prosecuted for deporting Ukrainian children from the occupied territories. Further on, in his interview with the Italian media President Zelenskyy made perhaps the most pro-Belarusian statement since the full-scale invasion. He compared the Belarusians' struggle for freedom with the war and noted that despite pervasive propaganda in Belarus, 70% of its citizens support Ukraine and oppose Russia.¹¹ The next day, Zelenskyy and Tsikhounouskaya attended the Charlemagne Prize ceremony in Aachen together and shook hands for the first time.¹² During his visit to Kyiv, Tsikhounouskaya's deputy, Pavel Latushka, held meetings at the Prosecutor General's Office of Ukraine, met with the adviser to the Head of the Presidential Office Mykhailo Podoliak, and delivered materials on the role of the Lukashenka regime in the forced removal of Ukrainian children from Russia-occupied territories.¹³

Meanwhile, the Ukrainian authorities, represented by the Chief of the Main Directorate of Intelligence Kyrylo Budanov, have for the first time publicly acknowledged the existence of communication channels with Lukashenka and other Belarusian officials.¹⁴ According to Budanov, the absence of shelling of Ukraine from Belarusian territory was a result of these contacts (we wrote about this in a previous BCT issue). MP Yevhen Shevchenko served as one of the contact points between the Ukrainian and Belarusian authorities.

1.7. DEMOCRATIC FORCES' CREEPING INTERNATIONAL INSTITUTIONALISATION

Sviatlana Tsikhounouskaya also **continued to expand the institutional presence** of the Belarusian democratic movement in international organisations and in bilateral formats. She led a Belarusian delegation to the Council of Europe's summit in Reykjavik (the previous one was in 2005), which was otherwise only attended by the official leaders of European states, and she also met with the president of PACE. Following her visit to the United States, the American side announced the launch of a "strategic dialogue" with the democratic forces of Belarus. The U.S. had previously used this format only in bilateral intergovernmental relations. In the case of Belarus, it will function in coordination with the democratic movement's representatives.

¹¹ <https://www.pravda.com.ua/rus/news/2023/05/13/7402078/>

¹² <https://news.zerkalo.io/economics/39112.html>

¹³ <https://news.zerkalo.io/economics/40415.html>

¹⁴ <https://www.pravda.com.ua/rus/news/2023/05/16/7402495/>

2

DOMESTIC POLITICS

The saboteur attack on a Russian aircraft in Machulishchy, and increasing acts of sabotage in Russia, have prompted the Belarusian authorities to securitise domestic politics, including through abruptly tightened controls at all state borders and an active media campaign of regularly reporting the thwarting of purported new terrorist acts. Traditionally a relatively passive actor on cultural and historical issues, the Alyaksandr Lukashenka administration is now becoming one of the main drivers of Russification. Earlier fragmentation in the democratic movement has been replaced by more substantive discussions that mainly focus on developing a strategy for the release of political prisoners.

2.1. "SECURITISATION" OF DOMESTIC POLITICS

In the spring, the authorities expressed particular concern for domestic security and the need for new "counterterrorist" measures. These narratives now permeate the regime's rhetoric and motivate many decisions, indicating a new trend — the securitisation of domestic politics. This can be considered part of a more general trend towards the militarisation of the Lukashenka regime, which has been documented since the first issue of the BCT.

The justification for this militarisation in propaganda is the authorities' previous statements about possible terrorist attacks by the opposition, as well as alleged potential invasions by NATO, the Armed Forces of Ukraine or the Kalinousky Regiment, and other imaginary threats. There was no reason to believe that the regime took these threats seriously. But the regime no longer treats such threats as virtual for several reasons, namely: the February drone attack on the Russian A-50 aircraft in Machulishchy; a series of successful sabotage attacks on the Russian railway near the Belarusian border; attacks on Russian propagandists; drone attacks on the Kremlin; and raids by Ukrainian units into Russian border territories. These incidents have become a real driver of many decisions, including in domestic politics.

A new surge of repression and increased control over border crossings in all directions (see the Civil Society section for details) have become a "natural" expression of this militarisation. Following the 2 May meeting between

Lukashenka and the security agencies, the KGB stepped up its "counterintelligence regime".¹⁵ The State Border Committee announced additional mobile groups at the border and, although Belarus's chief border guard Anatol Lappo mentioned only the western direction, it was the eastern border that saw particular active preparations for increased security. On 5 May, Belarusian border guards arrived at the Russian border with the obvious purpose of preventing possible saboteurs from entering Belarus. Apart from the checkpoints on the main highways — operating for the first time since the 1990s, with the exception of episodic control during the COVID-19 pandemic — the authorities also took measures to block country roads.¹⁶ Military units were re-deployed from the north to the south of the country to guard the railway.¹⁷ In May, an additional 130 riflemen were hired as paramilitary guards for the Belarusian Railway. In mid-May, the Homiel region was fortified with new "dragon's teeth" anti-tank defences.¹⁸ Exercises were organised for territorial defence units with subsequent installation of checkpoints in Homiel, while agritourism locations were banned in the areas bordering Ukraine.

The Machulishchy incident prompted the authorities to prepare for severe restrictions on the personal use of drones. Back in March, the list of restricted areas for drones was expanded significantly.¹⁹ And in May it became known that the government was developing a separate regulation on the issue, with ideas under discussion including a prohibition on individuals using drones altogether and the granting of such a right only to legal entities that have passed a special clearance procedure.²⁰

The KGB's increased public activity in disclosing and preventing new "terrorist attacks" is another important element of this trend. In March, the KGB stormed an apartment in Hrodna where a "terrorist" with a Russian passport (later

¹⁵ <https://www.belta.by/society/view/kontrrazvedyvatelnyj-rezhim-uzhestochat-v-belarusi-564413-2023/>

¹⁶ <https://nashaniva.com/ru/316385>

¹⁷ <https://belzhd.info/news/usilenie-mer-bezopasnosti-nabelorusskoj-zheleznnoj-doroge/>

¹⁸ <https://motolko.help/ru-news/pod-gomelem-poyavilis-protivotankovye-ukrepleniya/>

¹⁹ <https://pravo.by/document/?guid=12551&p0=W22339694&p1=1&p5=0>

²⁰ <https://news.zerkalo.io/economics/39577.html?tg>

identified by ByPOL as a KGB officer²¹) allegedly opened fire in return and threw grenades at the KGB officers. The detained owners of the apartment where he lived were later released from a SIZO (detention centre).²² The authorities never disclosed the “terrorist’s” name or real nationality — he was only shown on surveillance footage walking around Hrodna, carrying boxes and wearing a woman’s wig for disguise. In early April, state TV reported the arrest of a Belarusian and two Russians, whom the KGB accused of preparing bombings in Hrodna and planning a terrorist act in the Consulate General of Russia.²³ The KGB then reported that it had foiled a terrorist attack on 9 May: unnamed terrorists controlled by the Ukrainian secret services, the KGB alleged, hid explosives received in parcels in cemeteries to use against unnamed targets on Victory Day.²⁴ All these “revelations” were accompanied by highly publicised films on state TV that emphasised the professionalism and heroism of KGB officers. Given the numerous gaps and oddities in the official versions, all these activities looked like the agency’s attempt to rehabilitate itself in Lukashenka’s eyes for the failure in Machulishchy.

In addition, the previously described militarisation could also be observed in legislative activity. First of all, in April, amendments to the Forestry Code granting forestry officials the right to use weapons passed the first reading in the House of Representatives.²⁵ Secondly, on 23 May, the government submitted the bill on the People’s Militia to parliament, introducing a new type of armed formation.²⁶ The militia will be tasked with enforcing martial law on the ground, while assisting the police forces. It will be formed by local authorities from locals vetted by the security forces. The militia will be able to use weapons, detain people, check their documents, and similar. Finally, on 31 May, the Minister of Defence Viktor Khrenin announced that all Belarusian students will undergo basic military training starting from the new academic year.²⁷

2.2. LUKASHENKA'S ADMINISTRATION — A NEW DRIVER OF RUSSIFICATION

Previous issues of the BCT included detailed examples of the growing influence of pro-governmental and pro-Russian activists and bloggers. Their complaints attracted the authorities’ attention to various oppositional activities

²¹ <https://news.zerkalo.io/life/35128.html>

²² <https://news.zerkalo.io/life/36287.html>

²³ <https://news.zerkalo.io/life/36116.html>

²⁴ <https://news.zerkalo.io/life/38813.html>

²⁵ <https://www.belta.by/comments/view/o-sovershenstvovaniilesohozajstvennoj-dejatelnosti-8678/>

²⁶ <https://reform.by/opolchency-smogut-primenjat-silu-oruzhiezaderzhivat-opublikovan-proekt-zakona-o-narodnom-opolchenii>

²⁷ <https://sputnik.by/20230531/nachalnuyu-voennuyu-podgotovku-budut-izuchat-v-vuzakh-belarusi-1076147471.html>

or views, especially expressions of Belarusian identity and culture that do not fit into the new official ideological framework. Responding to these requests, the authorities resorted to repressions, cancelling concerts and exhibitions, renaming cultural institutions, and banning the celebration of “alien” celebrations such as Hallowe’en and Valentine’s Day. This trend continued during the reporting period. At the end of March, local authorities dismantled a monument to Larysa Hienijus in Zelva, Hrodna oblast, after several months of complaints by notorious pro-Russian activist Olga Bondareva. The pro-Russian activist had stated that Hienijus, a poet, had allegedly signed an anti-Semitic appeal to Adolf Hitler as a collaborator (in her lifetime, Hienijush claimed that her signature had been forged).²⁸

However, in the spring of 2023, it became clear that this trend was evolving into something new, as the authorities, primarily Lukashenka’s administration (PA), no longer needed grassroots initiatives to fight against Belarusian identity. Now, the PA itself has become the engine of this process. On 4 April, the State Property Committee issued an instruction to abandon the more than 20-year-old practice of using the Belarusian Latin alphabet in place names on street signs.²⁹ It is to be replaced by a simple transliteration of Belarusian or Russian names in Latin letters, without using the specific letters of the Belarusian Latin alphabet. The authorities’ plans to consider this issue were announced back in December 2022 by the PA head, Ihar Siarheienka.³⁰ At the end of May they started to replace the Belarusian Latin alphabet on bus stops in Minsk with Russian-language text.³¹

In mid-May Siarheienka, already the head of the Republican Council for Historical Policy under the PA, made several controversial statements that challenged the traditional perception of certain historical figures. In particular, Siarheienka said that the era of the Radziwiłł magnates during the Grand Duchy of Lithuania was not only a period of cultural blossoming and economic boom in the Belarusian lands, but also a period of torture, slave labour and punishment for most people. He also said that Tadeusz Kościuszko and Kastus Kalinouski were, first and foremost, heroes of Polish history.³² He accused the latter of “terror” against the Orthodox Belarusians and compared him to Stepan Bandera and Nazi collaborators.³³

In other words, the PA’s efforts contribute to the revision of Belarus’s historical policy, with a drift away from the national and even from the usual Soviet discourse

²⁸ <https://news.zerkalo.io/cellar/34824.html>

²⁹ <https://citydog.io/post/zaden-latinki-net/>

³⁰ <https://news.zerkalo.io/economics/27877.html>

³¹ <https://nashaniva.com/ru/317313>

³² <https://www.sb.by/articles/istoriya-eto-klyuch-k-ponimaniyubudushchego.html>

³³ <https://www.sb.by/articles/sergeenko-sfalsifitsirovanny-obraz-natsionalnogo-geroya-sposoben-kak-obeditit-tak-i-raskolot-obshch.html>

(in which Kalinouski was a hero) and a move towards the Russian imperial tradition. In the imperial tradition, the fighters for independence in the empire's "outskirts" are perceived as purely negative figures, while tsarist warlords, Soviet partisans and others — all those who stood for the unity of Belarusians and Russians and their struggle against the common enemy — are lionised. It is likely that a rewriting of school and university curricula in line with the new official historical narrative will follow. If this trend continues, it is easy to imagine the renaming of streets, squares and other sites named after Kalinouski and Kościuszko in due course.

Another strand of the Russification policy was seen in the creation of the Belaya Rus' party on a pro-Russian platform. The new party's decision to prioritise participation in Russian propaganda and humanitarian actions underscore its Russified identity. The party's leader, Aleh Ramanau, is known for his pro-Russian views; he announced that the party, together with Rossostrudnichestvo, would organise reciprocal visits and take in children from Russia-occupied Donbas.³⁴

This wave of Russification reveals an important peculiarity of the Belarusian regime. Despite the partial revival of some totalitarian practices, such as repressions, the cult of personality, militarisation, and the expansion of state control over private life, the authorities have failed to articulate their own, distinct ideology. As a result, the dominant pro-Russian and imperialist ideas — the so-called "Russian world" ideology — reappear each and every time the PA and other actors need to undertake some form of ideological mobilisation, rewrite history to suit political needs, or build a pro-government party for activist purposes.

2.3. GROWING UNITY AMONG THE OPPOSITION: DEBATE INSTEAD OF FRAGMENTATION

The democratic movement's lack of infighting, which emerged by the end of the winter, remained in place in Spring. There were neither new splits nor new coalitions. Sviatlana Tsikhanouskaya's United Transitional Cabinet (the Cabinet) was mainly engaged in diplomacy. Meanwhile, the Pospolite Ruszenie initiative that had broken away from its founders, the "power ministers" Alyksandr Azarau and Valery Sakhshchyk, continued its drift towards more right-wing, militant forces. In the previous issue of the BCT, we called these militant forces the opposition's "Kyiv Centre" owing to the leading role of the Kastus Kalinousky Regiment (in Ukraine). In the spring, the Ruszenie's Siarhei Kedyshka, along with the organisation Free Belarus's leader Zianon Pazniak, and some representatives of the nationalist organisation RUCH, participated as speakers in

a series of lectures in Polish cities.³⁵ During the period under review, instead of criticising other opposition structures, all right wing representatives excluding Pazniak focused on their own agenda — promoting assistance to Belarusian volunteer fighters in Ukraine, nation building and discussion of a "no-alternative" forceful scenario for power change in Belarus.

The renewed Coordination Council (CC) elected activist Andrei Yahorau as its speaker in a competitive election.³⁶ Alena Zhyvahlod, leader of the Honest People initiative, became the vice-speaker. Whereas the CC's relaunch in February was marked by conflict (the Council could not settle on the format of its relations with the Cabinet and lost one of its "founding fathers" Pavel Latushka), it has got down to its routine work as a discussion platform.

Most of the CC's spring discussions focused on the democratic forces' strategy for the release of political prisoners. The CC de facto became a platform for articulating alternative proposals and moderate criticism of the Cabinet and Tsikhanouskaya's office on this issue.³⁷ Alternative proposals put forward by CC members, in harmony with initiatives put forward by political prisoners' relatives, encourage the West to increase its flexibility regarding sanctions and contacts with Minsk. For supporters of this approach, this is the line that the democratic movement should pursue in order to release at least some of the political prisoners as soon as possible. In mid-April, disagreements over the CC's position on this issue led to the resignation of one of the most prominent opposition bloggers, Alyksandr Kabanau, who moved to work with ByPOL, or rather to work more closely with the Cabinet where ByPOL leader Azarau is a member. As the authorities demonstrate no willingness to bargain seriously with the West on this issue, the democratic forces' discussions remain largely theoretical.

³⁴ <https://news.zerkalo.io/economics/38465.html>

³⁵ <https://t.me/ruchbelnac/439>

³⁶ <https://belsat.eu/ru/news/13-03-2023-koordinatsionnyj-sovet-vybral-spikerom-andreya-egorova-kto-eto-i-chto-govoril-na-debatah>

³⁷ <https://malanka.media/news/27376>

3

FOREIGN ECONOMIC RELATIONS

In the spring of 2023, Belarus marked a full year without any new, significant sanctions being imposed on its economy. For many months, disagreement among EU countries has prevented the adoption of a new joint sanctions package. All this time, individual countries have continued to impose national sanctions, more often than not insignificant (in terms of their effects), and Belarus has had time to adapt to the hit of last year's sanctions, finding ways to bypass them through deeper economic integration with Russia and through a search, so far not very successful, for new partners among the Far Arc countries.

3.1. OLD SANCTIONS ARE BYPASSED, NEW ONES ARE IMPOSED

Despite formal progress in adapting the economy to the sanctions regime, Prime Minister Raman Halouchanka said in March that a quarter of the economy was under severe sanctions and a number of sectors continued to experience significant difficulties.³⁸ Alyaksandr Lukashenka also confirmed the existence of problems at the end of April, noting the positive trend in exports of potash fertilisers and petroleum products, which point to a recovery of trade in these.³⁹ In late May, Deputy Prime Minister Mikalai Snapkou said that the losses from the sanctions had been fully compensated for by reorienting trade to Russia and China.⁴⁰

Efforts to compensate for the negative effects of sanctions have taken place on two tracks. Some restrictions can be circumvented through schemes for the formal resale of Belarusian goods to companies located in non-sanctioned jurisdictions, and these companies, in turn, sell these goods to the EU. This scheme has been leveraged with some limited success, for example, by the timber industry enterprises. The second track, which indirect data show is the more important one, is using Russian logistics channels to export Belarusian goods to non-European markets. This

track is predominantly for the exports of potash fertilisers and petroleum products.

The Belarusian Investigative Center (BIC) has published another investigation proving the circumvention of sanctions by the timber industry through countries such as Kazakhstan and Kyrgyzstan.⁴¹ According to BIC, one of the side effects of the ban on exports of Belarusian wood to the EU was a reduction in exports of counterfeit tobacco products, which had been previously often hidden in batches with plywood and pulp. According to the findings of another BIC investigation, Lithuanian businessperson Saulius Kotis admitted that he had helped to bypass the sanctions imposed on Grodno Azot (Belarus) using his company registered in Kyrgyzstan.⁴²

Since Belarus has an open economy, imports are often no less critical for its consumers and producers than exports. Thus, after military sanctions were imposed, experts expressed concerns about the possibility of substituting imports from EU countries. Since Belarusian enterprises continued working in 2022, imports of intermediate goods were eventually substituted for analogues. In particular, according to China's customs statistics, Belarusian exports grew one-and-a-half times in one year and amounted to ca. \$700 million, while imports of Chinese goods to Belarus doubled and amounted to \$1.4 billion.⁴³ Even in the context of dire relations between Belarus and the EU, though, the Chinese figures still remain many times lower than comparable European statistics. According to Eurostat, Belarusian exports to the EU, which decreased by more than 50% in 2022, amounted to \$3.4 billion, while imports dipped by only 15%, dropping just below \$6.9 billion.⁴⁴ Parallel imports have also been arranged through other post-Soviet countries, which has been evidenced by the striking anecdotal news in May about an increase in smartphone and laptop imports from Kazakhstan: by 286 times and 20 times respectively.⁴⁵

³⁸ <https://www.tvr.by/videogallery/informatsionno-analiticheskie/vopros-nomer-odin/tseny-v-belarusi-rekordnyy-eksport-razvitie-ekonomiki/>

³⁹ <https://news.zerkalo.io/economics/37916.html>

⁴⁰ <https://www.belta.by/economics/view/snopkov-poterina-zapadnyh-rynkah-kompensirovany-postavkami-v-druzhestvennyye-strany-568204-2023/>

⁴¹ <https://investigatebel.org/ru/investigations/v-evropu-cherez-aziyu-kak-belarus-po-prezhnemu-prodaet-sankcionnyu-faneru-i-pellety-v-es>

⁴² <https://siena.lt/news/galimo-sankciju-apejimo-schemoje-sudalyvaves-lietuvis-prisipazista-ir-atsipraso>

⁴³ <https://news.zerkalo.io/economics/38841.html>

⁴⁴ <https://news.zerkalo.io/economics/39188.html>

⁴⁵ <https://news.zerkalo.io/economics/39647.html>

One probable reason for the EU's failure to introduce new packages of sanctions during the year is the lack of agreement among European countries on the issue of prospective new sanctions on Belarusian potash. According to statements by Igor Udavitsky, owner of the bulk cargo terminal in the Klaipeda Seaport (Lithuania), the EU has been thinking about easing sanctions on potash fertilisers.⁴⁶ Politician Pavel Latushka has corroborated this with similar rumors. According to him, some EU countries have been lobbying for the lifting potash sanctions, largely in the interests of Brazil. It is most likely that Portugal is behind this, since it has close historical ties with Brazil; however, other countries may be joining in this coalition lobbying on the issue of potash sanctions, Spain in particular.⁴⁷ Against this background, Nutrien (a Canadian company) has raised its export expectations for Belarusian potash for 2023. Previously, the company's analysts expected that Belarus would be able to supply the global market with only 40–60% of its pre-war volumes. According to the new forecast, Belarus's 2023 exports could be 60–75% of the 2021 volumes.⁴⁸

In previous issues of the BCT, we noted that, according to indirect data, Belarusian oil enterprises found new markets to substitute for lost Ukrainian exports. There was further evidence supporting this conclusion in March: officials said that the trade turnover of the Vitebsk region with the UAE increased by 97 times in 2022.⁴⁹ Considering the lack of any cultural and historical affinity or ties between the UAE and the Vitebsk region, one can reasonably assume that this sudden increase concerns sales of petroleum products.⁵⁰

Despite the absence of any new significant sanctions packages, individual countries continued to impose sanctions on Belarus. In March, the US Treasury imposed sanctions on BelAZ, MAZ, Lukashenko's private jet, and members of the Central Electoral Committee (CEC).⁵¹ The US has also tightened export monitoring on Belarus and Russia since May.⁵² South Korea has expanded the list of goods banned from being exported to Belarus and Russia by ten times.⁵³

⁴⁶ <https://officelife.media/news/41334-es-zadumalsya-nad-snyatiem-sanktsiy-s-beloruskogo-kaliya/>

⁴⁷ <https://news.zerkalo.io/economics/39711.html>

⁴⁸ <https://reform.by/kanadskaja-nutrien-povysila-ocenku-jeksporta-beloruskogo-kalija-v-2023-godu>

⁴⁹ <https://vitebsk.gov.by/special/ru/gorod-ru/zelenaja-ekonomika-i-sozdanie-sovmestnyx-proizvodstv-mogut-stat-perspektivnymi-napravlenijami-v-28691/>
This news was posted on Belta (main state news portal), and then it was deleted.
(<https://www.belta.by/amp/regions/view/eksportnyj-potentsial-logistika-vysokie-tehnologii-vitebskaja-oblast-i-oae-budut-rasshirjat-552874-2023>)

⁵⁰ <https://beroc.org/publications/view/vozvrashchenie-neftyanoy-renty/>

⁵¹ <https://reform.by/minfin-ssha-vvel-sankcii-protiv-belaza-maza-samoleta-lukashenko-i-chlenov-cik>

⁵² <https://euroradio.fm/ru/ssha-usilili-eksportnyj-kontrol-v-otnoshenii-rb-i-irf-v-spiske-1200-pozicij>

⁵³ <https://www.svaboda.org/a/32376674.html>

Ukraine has also begun to impose sanctions against Belarusian companies, but at present this is more a political and declarative step, since trade between the two countries de facto reduced to almost zero following the full-scale invasion of Ukraine last year.⁵⁴

In response to the aforementioned sanctions circumvention investigations, Lithuania and Poland tightened controls at their borders with Belarus further. In particular, Lithuania stated that it would monitor "illogical" cargo routes that run to third countries through Belarus more closely.⁵⁵ Lithuania also tightened the rules for cross-border transport of foreign currency in cash⁵⁶ and froze assets owned by Russians and Belarusians worth over \$80 million.⁵⁷

Poland has also introduced a number of measures to limit cross-border traffic with Belarus; however, the motivation for these actions is somewhat different from Lithuanian actions. The Bobrovniki border crossing was closed in response to the arbitrary prosecution of Andrzej Poczobut, an activist from the Polish minority in Belarus.⁵⁸ This case has potentially set an important precedent. It was the first time that sanctions were imposed for a specific reason, and, in addition, the Polish Foreign Ministry explained that if Poczobut was released, the border crossing would be immediately opened. Thus, the Poczobut case will serve as a litmus test of the readiness of the Lukashenko regime to conduct any negotiations on sanctions. Poland announced it would stop Belarusian trucks and semi-trailers passing through the last operating border crossing, the one at Kukuryki, from 1 June.⁵⁹ However, this measure was taken in response to the protests of Polish freight forwarders and is better understood as an attempt to protect their business interests, rather than as a sanction in the strictest sense.⁶⁰

3.2. TRADE WITH RUSSIA GROWS, BUT MINSK WOULD LIKE MORE STILL

The role of Russia in the Belarusian economy continued to grow in the spring of 2023. Russia has helped Belarus through loans and subsidies, opened up its markets to

⁵⁴ <https://euroradio.fm/ru/pod-ukrainskie-sancii-popali-16-krupnykh-beloruskikh-predpriyatij>

⁵⁵ <https://euroradio.fm/ru/litovskaya-tamozhnya-zakroet-lazeyku-v-sankciyakh-protiv-belarusi-i-rossii>

⁵⁶ <https://www.lrt.lt/naujienos/verslas/4/1986767/seimas-sugrieztino-grynuju-pinigu-gabenima-per-siena-su-rusija-ir-baltarusija>

⁵⁷ <https://www.delfi.lt/ru/news/live/litva-zamorozila-imuschestvo-rossijan-i-belorusov-na-summu-80-mln-evro-ischt-vozmozhnost-konfiskacii.d?id=93433147>

⁵⁸ <https://belsat.eu/ru/news/23-03-2023-pozhertvuet-li-lukashenko-polonofobiej-v-obmen-na-bobrovniki-chtogovoryat-eksperty>

⁵⁹ <https://news.zerkalo.io/economics/40305.html?tg>

⁶⁰ <https://t.me/pozirkonline/16739>

Belarusian goods, and provided its logistics capacity. However, Belarusian officials say that this is not enough and they count on further improvements in the terms and conditions for Belarus.

According to the calculations made by experts at BEROC, Belarus could earn about \$1.7 billion in oil rents in 2022 and, if discounts on Russian crude oil continue to be in force, Belarus will be able to make another \$2.7 billion in 2023. The fact is that due to the sanctions imposed on Russia, the predominant grade of Russian crude oil — Urals — was sold at a significant discount compared to the Brent oil standard pricing in 2022. This handed Belarus unique arbitrage opportunities: it could buy the Urals oil at a discount and sell the resulting petroleum products at average market prices, since these are referenced to the Brent oil price.⁶¹

Economic cooperation between the two countries expanded in a number of areas in the spring: (i) Belarus has substituted its procurements of European road repair materials for Russian materials;⁶² (ii) Russia has agreed to buy electricity from the Belarusian NPP starting from 2024;⁶³ (iii) the Mogotex company, which started supplying fabric for the uniforms of the Russian Armed Forces last year, plans to open new production facilities in Chechnya and make uniforms there;⁶⁴ (iv) the Russian occupation administration in Crimea has proposed the export of Belarusian goods through its seaports;⁶⁵ (v) the Belarusian Cement Company has increased its exports to the Russian market by several times;⁶⁶ (vi) Russian brands have started confectionery production in Belarus;⁶⁷ and finally, (vii) Belarusian Ambassador to Russia Dzmitry Krutoy has stated that the plan is to achieve the pre-war volumes of Belarusian cargo, transhipped through the logistics infrastructure of Russia, in 2023.⁶⁸

Belarusian officials are also finding reasons for dissatisfaction despite the progress in trade and economic relations between the two countries. For example, when meeting Belarusian Ambassador to Russia Dzmitry Krutoy, Lukashenka hinted at issues with the allocation of a \$1.5 billion loan, which Russia had promised to help fund import

substitution.⁶⁹ Dzmitry Krutoy has himself complained, in several media interviews, that Belarusian businesses cannot compete with the goods imported to Russia as “parallel imports”.⁷⁰

3.3. BELARUS CONTINUES TO SEEK A REPLACEMENT FOR UKRAINE AND EU PARTNERS IN THE FAR ARC⁷¹

Since Belarus has found itself isolated from its neighbours and traditional trading partners, and Lukashenka has become an international pariah, the authorities keep trying to find new international interlocutors. In the spring, this trend developed via a number of new contacts with “exotic” countries.

First of all, in March, the Kenyan media reported a record-breaking deal for Kenya to buy Belarusian agricultural machinery worth \$320 million.⁷²

Meanwhile, Belarus and Iran signed a “Comprehensive Cooperation Roadmap until 2026.”⁷³ However, the economic relations between the two countries have not developed in the best possible way: the current value of Belarusian exports to Iran is ten times smaller than a decade ago.⁷⁴

There have been many meetings, at various levels, between representatives of Belarus and Zimbabwe in recent months. Lukashenka signed an agreement on establishing a joint committee on cooperation with Zimbabwe in early May, hoping to further already-deepening bilateral relations. According to Deputy Prime Minister Piotr Parkhomchyk, Belarus and Zimbabwe increased trade by 160% in 2022.⁷⁵ Cooperation is not limited to trade, however. First, a decision was made to conclude a cooperation agreement between the Belarusian Union of Women (BUW) and the Women of Zimbabwe after the pro-government the BUW met the first lady of Zimbabwe.⁷⁶ Moreover, the National Academy of Sciences of Belarus plans to develop space technologies with their Zimbabwean colleagues.⁷⁷

Another partnership is with Nicaragua. In May, following a visit of the Minister of Foreign Affairs of Nicaragua to

61 <https://beroc.org/publications/view/vozvrashchenie-neftyanyoy-renty/>

62 <https://officelife.media/news/41330-belarus-budet-zakupat-materialy-dlya-stroitelstva-dorog-ne-v-evrope-a-v-rossii/>

63 <https://mir24.tv/news/16545494/belaes-nachnet-postavlyat-elektroenergiyu-v-rossiyu>

64 <https://tass.ru/v-strane/17344783>

65 <https://sputnik.by/20230331/krym-predlozhit-eksportirovat-belorusskie-tovary-cherez-svoi-porty-1073893180.html>

66 <https://www.belta.by/economics/view/belorusskaja-tsementnaja-kompanija-narastila-otgruzku-produktsii-v-rossiju-pochti-v-4-raza-565988-2023/>

67 <https://sputnik.by/20230524/belarus-nachala-vypuskat-pechene-pod-rossiyskimi-brendami-1075876059.html>

68 <https://sputnik.by/20230523/posol-belarusi-rasskazal-o-planakh-perevalki-gruzov-cherez-porty-rossii-1075833958.html>

69 <https://ria.ru/20230522/kredit-1873394697.html>

70 <https://news.zerkalo.io/economics/39729.html>

71 The term “Far Arc” is often used by Lukashenka and other Belarusian politicians to describe far away countries that are not traditional trade partners of Belarus

72 <https://reform-by.cdn.ampproject.org/c/s/reform.by/kenijskie-smi-pishut-pro-zagadochnuju-sdelku-s-belarusjuna-320-mln-dollarov/amp>

73 <https://news.zerkalo.io/economics/34484.html>

74 <https://www.svaboda.org/a/32315727.html>

75 https://t.me/government_by/753

76 <https://www.belta.by/society/view/bszh-i-zhenschiny-zimbabve-zakljuchat-soglashenie-o-sotrudnichestve-559828-2023/>

77 <https://news.zerkalo.io/economics/39082.html>

Minsk, Belarus signed an agreement on granting export credits to the Central American country.⁷⁸ In addition, the Minister hinted at the potential engagement of Belarus in the construction of the Nicaraguan Canal — a proposed alternative to the Panama Canal.⁷⁹

The trend of contacting any countries that are ready to communicate with Minsk will most likely continue in the future. Past and present experience, though, shows that these ties will continue being not very significant for the country's economy, since these are predominantly poor and underdeveloped countries.

Finally, anecdotal evidence of corruption emerged in April, when journalists from the Belarusian Investigative Center, together with international colleagues, discovered that Belarus owed Venezuela \$1.5 billion for the crude oil Belarus had bought in Venezuela a decade earlier.⁸⁰ The Former Oil Minister of Venezuela confirmed the existence of the debt, too.⁸¹ The fact that this debt has not been included in Belarusian statistics, and Venezuela, suffering from an acute shortage of foreign currency, has not claimed the \$1.5 billion for 10 years, most likely indicates a corrupt deal involving representatives of the two governments.

78 <https://reform.by/belarus-budet-predostavljat-nikaragua-jeksportnye-kredity>

79 <https://reform.by/nikaraguanskij-ministr-upomjanul-vozmozhnoe-uchastie-belarusi-v-stroitelstve-alternativy-panamskomu-kanalu>

80 <https://investigatebel.org/ru/investigations/how-lukashenko-hasn-t-paid-venezuela-nearly-dollar1-5-billion-in-oil-money>

81 <https://tegra.ph/Kogda-CHaves-umer-pervoe-hto-ya-skazal-Maduro-est-dolg-04-13>

4

THE DOMESTIC ECONOMY

Spring 2023 marked a year since the beginning of a full-scale war in Ukraine and, accordingly, since the main package of military sanctions were imposed. During this time, the Belarusian economy managed to largely adapt to the negative shock of sanctions and partially build new supply chains. Population ageing and emigration are beginning to have an increasingly serious impact on the labour market in Belarus. The state continues its crusade against entrepreneurs, as well as persevering with its loose monetary policy and its practice of directive support provided to non-performing state-owned enterprises.

4.1. GDP GROWS AS THE ECONOMY ADAPTS TO SANCTIONS

The decline of the Belarusian economy, which began with the loss of the Ukrainian market and military sanctions, ended a year after the start of the full-scale war. The economy has gradually adapted to the sanctions through new supply chains and comprehensive Russian support and the absence of new negative shocks. The drop in real GDP in January and February 2023, compared to the corresponding months in 2022, was 5% and 1.9%, respectively. GDP then grew by 0.7% in March and by 4% in April. It should be noted that the March and April indicators were benchmarked with a low baseline, since a recession began in March and April 2022 (the fall was 3.3% in March and 6.5% in April). Thus, despite the emerging recovery trend in the Belarusian economy, real GDP is still fixed at a level, which is 2.5% lower than in the corresponding periods of 2021.

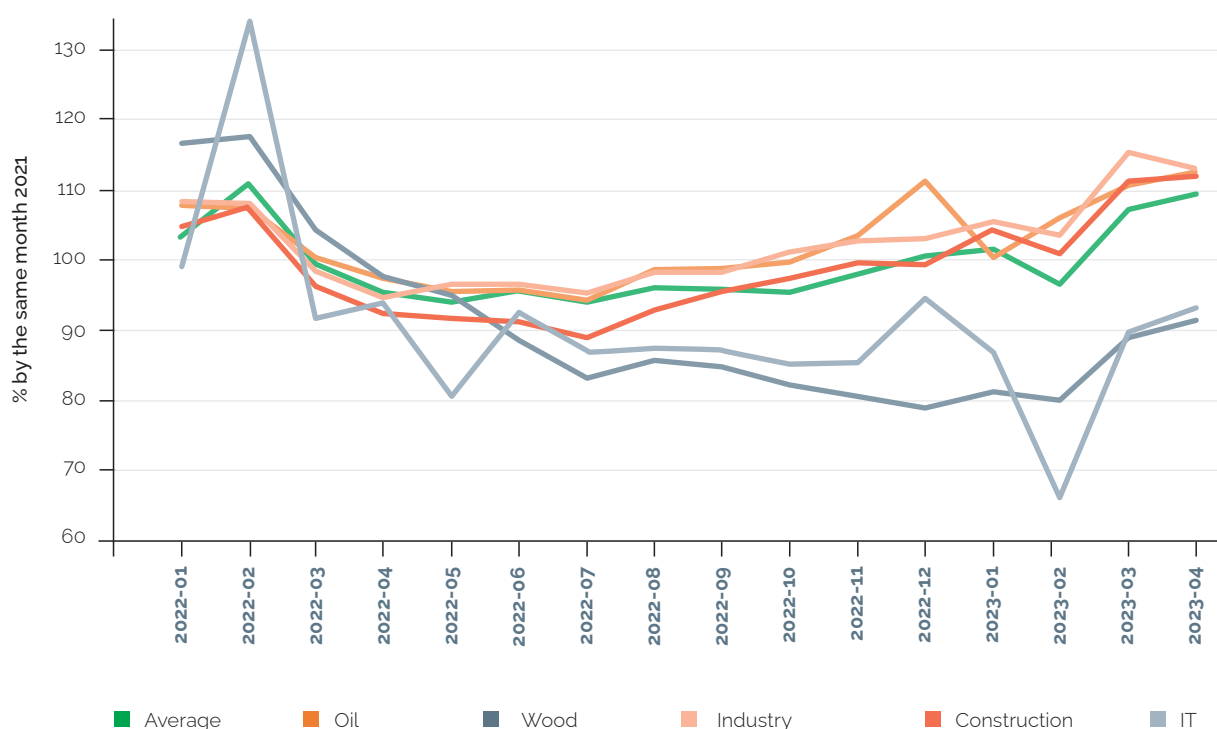
The key driver of economic growth in March was manufacturing industry (10.6% year-on-year (YoY)). In April, the growth rate in the manufacturing sector slowed down, but still remained high (4.9% YoY). This sector was one of the main targets of the sanctions, and it suffered more than others due to broken logistics chains. But it appears that, a year after the war started, these problems have gone at least partially. The rapid growth of the manufacturing sector in March also contributed to the fact that the trade sector, which had been an anti-leader throughout last year, became the growth leader for April. Moreover, almost all growth in this sector fell on wholesale trade, while retail demand remained depressed.

The main anti-leaders are still the IT and transport sectors. The drop in the IT sector in February, March and April, compared to the corresponding months of last year, amounted to 14.8%, 19.4% and 14%, respectively. These figures are due to two factors. First, the crisis in the IT sector and the outflow of IT workers; although these factors have stabilised, they are not over yet. Second, unlike other sectors, the IT sector continued to grow for several months after the war started in 2022, which means that the growth of the sector is compared to relatively high levels reported a year ago. The indicators of the transport sector, which remains one of the anti-leaders in the economy, demonstrate an unstable positive trend: the sector's decline slowed down; it was 17% in February 2023, 9.2% in March 2023, and 2.2% in April 2023. The crisis of transport services is explained by the fact that Belarus is de facto excluded from transiting goods between the West and the East. Nevertheless, recovery of the manufacturing sector has been building some positive trends in recent months.

It is worth noting that the manufacturing sector has been showing record-breaking growth against the backdrop of growing stockpiles. Stockpiles reached a historical high in March 2023, amounting to more than 75% of the industrial production volume. It is worth recalling that this indicator was as high in 2020, when, unlike its trading partners, Belarus did not have the COVID-19 lockdown and continued stockpiling in the absence of buyers. In 2021, thanks to recovering global demand, as well as the fact that sanctions imposed on Belarus were not de facto in effect yet, Belarus managed to sell off its stockpiles, thus addressing impending financial challenges. Whether it will be possible to sell the accumulated stockpiles in the current period is an open question: this depends both on overcoming logistical problems in circumventing sanctions and on the standing of the key trading partner economies.

Another trend observed in previous issues of the BCT, that of decreasing average real wages versus the corresponding period a year earlier, has been replaced by a trend of growing wages (YoY) in late 2022 — early 2023. Real wages began to grow in spring 2023, thus significantly outpacing the economic recovery. In April, the real wages of Belarusians were 9.6% higher than a year

Figure 1.
Average real wages versus the same month a year earlier for people employed in oil refining, logging, manufacturing and construction sectors



Source: Belstat

earlier. Growth exceeds the decline in 2022: i.e., unlike GDP, real wages have also been growing compared to the pre-crisis year 2021. Perhaps the growth of wages is stimulated by a shrinkage of the labour supply.⁸² In terms of real wages, employees in the IT sector and the wood-working sub-sector lag far behind the trend.

One of the side effects of the strong reduction in wages and employment in the IT sector, against the backdrop of rising average wages in the economy as a whole, has been the bridging of the income gap between Minsk and the country's regions. In March 2022, residents of Minsk earned 77% more than other Belarusians, and in March 2023, this indicator had shrunk to 56%.

4.2. BELARUS CONTINUES TO LOSE WORKERS AND EVEN ENTIRE COMPANIES

We did not single out demographics as a separate trend in the previous issues of the BCT. However, declining labour supply in Belarus is a stable background process and the absence of any sharp movements ensures that it rarely captures the attention of the press or analysts.

⁸² For additional information, see Section 4.2.

The Belarusian labour market has been losing tens of thousands of people annually due to natural demographic processes (such as ageing and small cohorts of citizens born in the mid and late 1990s joining the workforce). In recent years, emigration has become another reason that fewer people are making up the working-age population.

In March 2023, 4.176 million people were employed in the Belarusian economy, which was almost 70,000 people fewer than in 2022.⁸³ According to researchers at BEROC, up to 170,000 Belarusians could have emigrated to Lithuania and Poland in 2021–2022 alone.⁸⁴ According to the Association of Belarusian Business Abroad (ABBA), at least 2,000 companies have exited Belarus since 2020.⁸⁵

The IT sector remains the leader in terms of relocation of companies and employees. The outflow of IT workers was over 17,000 people in 2022, and the sector lost about 1,700 more IT workers in January–February 2023. Two more well-known companies announced their exit from Belarus in March.⁸⁶ Responding to this, the authorities classified

⁸³ <https://t.me/pozirkonline/16479>

⁸⁴ <https://beroc.org/upload/medialibrary/39e/39e10070c02bd21e582e4858465018a4.pdf>

⁸⁵ <https://nashaniva.com/ru/315365>

⁸⁶ <https://devby.io/news/gurtam-akveo-vse>

employment statistics in the IT sector in April.⁸⁷ Against this background, the average salary in Minsk began to decline significantly, and the office space market in the capital set an anti-record in the entire history of observations: about 19.5% of the office space was still vacant as of the beginning of 2023.⁸⁸

In general, the number of open vacancies has increased by one-and-a-half times in Belarus in the two most recent years.⁸⁹ Contributing to this trend is the exit of health workers, who have been another large group of people emigrating. Belarusian medical science degrees have been recognised in a number of European countries for some time already. The difference in potential income, coupled with repression and neglect of medical doctors in Belarus, has been nudging specialists to emigrate. According to official data,⁹⁰ Belarus lacked almost 5,000 medical doctors and over 3,000 nurses in May. This may be an underestimate because the data was published by the Ministry of Health of Belarus, which has been known for its manipulation of data in the past.⁹¹

According to demographic models based on the latest available demographic data for Belarus, the working-age population will continue to decline at an accelerated rate (relative to overall population decline) in the coming years. In the absence of new negative shocks, the outflow of IT workers should decrease significantly in the coming months, since the majority of those willing to emigrate have most likely enjoyed employee relocation programmes already. However, the outflow of health workers is likely to continue: first, no one has implemented centralised programmes for relocating medical doctors, which means that they will decide in favour of emigration more slowly; and second, as the number of health workers decreases, the authorities will clearly shift the work duties of those who emigrated on the remaining labour force, further worsening the working conditions of medical doctors.

4.3. MANUAL CONTROL

The state continued the trend of increased state intervention in the economy in the spring of 2023. The government is manually deciding which enterprises to help in the face of a budget deficit, the National Bank is continuing its loose monetary policy, and entrepreneurs and foreign businesses are on a short leash.

The execution of the consolidated budget, and, consequently, the indicators of the current budget deficit, were

⁸⁷ <https://devby.io/news/it-zakryto>

⁸⁸ <https://thinktanks.by/publication/2023/04/14/rynok-ofisov-postavil-antirekord-za-vsyu-istoriyu-nablyudeny.html>

⁸⁹ <https://www.svaboda.org/a/32424425.html>

⁹⁰ <https://news.zerkalo.io/economics/39760.html>

⁹¹ <https://gazetaby.com/post/takoe-chuvstvo-chno-v-oficialnoj-statistike-soblyu/17865/>

classified a year ago, which, however, clearly did not help to overcome this very deficit. Indirect factors suggest that there are serious issues with budget execution, and there are serious problems in 2023: for example, all budget deficit limits were initially raised, and the budget deficit ceiling for Minsk has already been increased twice since the beginning of the year.⁹² Lukashenka even held a special meeting about budgetary savings in March.⁹³

Despite statements by First Deputy Prime Minister Mikalai Snapkou about profitability growth in enterprises,⁹⁴ many of them, as before, have been facing chronic financial challenges. For example, the authorities decided in April to use the state budget to repay a non-performing loan previously issued by Belgazprombank to the BMZ plant (Byelorussian Steel Works OJSC).⁹⁵ It was decided in April to allocate several tens of millions of Belarusian rubles to support the timber and cement industries.⁹⁶ Tax incentives for the Belarusian NPP were extended in May until 2042.⁹⁷

As expected earlier, the state has been expanding investment in fixed assets since the beginning of the year.⁹⁸ In 2022, the state allocated about twelve billion Belarusian rubles to help enterprises.⁹⁹

Despite the limited default status, Belarus was able to raise funds successfully on the domestic and Russian stock markets three times in the spring. Russian ruble denominated securities worth \$200 million were placed in April,¹⁰⁰ and US dollar denominated securities worth \$30 million were placed in May.¹⁰¹

Another trend intensified in the spring: the restriction of entrepreneurial activity and the strengthening government controls. Officials have been looking at individual

⁹² <https://sputnik.by/20230407/defitsit-byudzheta-minskasnova-velichen-chem-ego-zakroyut-1074121510.html>

⁹³ <https://www.belta.by/president/view/ekonomija-bjudzhetnyh-sredstv-stala-temoj-soveschaniya-ulukashenko-555677-2023/>

⁹⁴ <https://www.belta.by/economics/view/snopkov-ekonomika-belarusi-adaptivna-k-agressivnym-dejstviyam-zapada-503886-2022/>

⁹⁵ <https://sputnik.by/20230406/vlasti-vyplatyat-belagroprombanku-kompensatsiyu-za-kredit-dlya-bmz-1074069053.html>

⁹⁶ <https://news.zerkalo.io/economics/37772.html>

⁹⁷ <https://reform.by/nalogovye-igoty-dlja-belajes-prodleny-do-2042-goda>

⁹⁸ <https://officelife.media/news/41616-belstat-investitsii-v-osnovnoy-kapital-vyroslivpervye-za-neskolko-let/>

⁹⁹ <https://www.belta.by/economics/view/snopkov-podderzhanam-glavy-gosudarstva-belarusskaja-ekonomika-podderzhanana-br12-mlrd-568249-2023/>

¹⁰⁰ <https://officelife.media/news/42051-minfin-belarusi-zanyalna-birzhe-63-mln-cherez-obligatsii-v-rossijskikh-rublyakh/>; <https://reform.by/belarus-razmestila-v-rossii-obligacii-na-10-mlrd-rossijskikh-rublej>

¹⁰¹ https://www.minfin.gov.by/public_debt/bonds/currency/nodoc/300/cd918336a0364478.html

entrepreneurs, not for the first time, and have announced that they will curtail the list of business activities permitted to individual entrepreneurs.¹⁰² Furthermore, “artisans” will be subject to a new tax.¹⁰³

The Minister of Antimonopoly Regulation and Trade stated that there were no plans to abolish the price regulation system.¹⁰⁴ In addition, drug-pricing control has been resumed in Belarus.¹⁰⁵ The practice of opening criminal cases for overpricing also continues.¹⁰⁶

In the spring, the National Bank continued to pursue its expansionary monetary policy, lowering the refinancing rate whenever there was news about inflation slowing down.¹⁰⁷ At the same time, this was not good enough apparently, because Lukashenka criticised Pavel Kallaur, Chairman of the National Bank of Belarus.¹⁰⁸

Supervision of foreign companies operating in Belarus may be reaching a new level, as well. In the previous issue, we wrote about the record-breaking fine imposed on Olvi PLC (Finland) as a punishment for trying to exit the Belarusian market. In its Q1-2023 report, the company stated that it would no longer sell its subsidiary, Lidskoe Pivo JSC (Lida Brewery (Belarus)), and it was going to pay the fine issued to it.¹⁰⁹ Georgy Grits, a pro-government analyst, suggested on a state TV programme that fashion retailer Zara should be obligated to stock Belarusian-made products on the shelves of its outlets. The Ministry of Light Industry endorsed the analyst’s proposal soon after.¹¹⁰

102 <https://news.zerkalo.io/economics/39233.html>

103 <https://www.belta.by/economics/view/nalog-na-professionalnyj-dohod-s-1-ijulja-stanet-objazatelnyim-dlja-remeslennikov-566751-2023/>

104 <https://www.belta.by/economics/view/bogdanov-rasskazal-kak-budut-korrektirovat-sistemu-regulirovanija-tsen-568316-2023/>

105 <https://reform.by/registraciju-cen-na-lekarstva-vernuli-v-belarusi>

106 <https://news.zerkalo.io/economics/36220.html>

107 <https://reform.by/nacbank-snizhaet-stavku-refinansirovanija-do-10-godovyh>

108 <https://nv-online.info/predsedatel-nacbanka-pavel-kallaur-poluchil-preduprezhdenie.html>

109 <https://officelife.media/news/42398-finy-okonchatelno-otkazalis-ot-prodazhi-lidskogo-piva-i-oplatyat-shtrafgoskontrollya/>

110 <https://www.belarus.kp.ru/online/news/5281119/>

5

TRENDS IN PUBLIC OPINION

This quarter saw the previously reported growth in confidence in the regime's institutions come to a halt. During the year, coinciding with the war, the regime's gain of trust wasn't significant — only 8 percentage points. Belarus's society remains divided as a result of the political confrontation, and attitudes to Russia's war against Ukraine remain firmly embedded in it. Despite the persistence of an anti-war consensus, society still lacks accurate information about the war. It is also safe to say that there continues to be a consensus among Belarusians — they oppose nuclear weapons.

5.1. INTERPRETATION OF SURVEY FINDINGS

Our study is based on an online panel. This means that the distributions of responses in our sample *may differ significantly from those of the Belarusian urban population as a whole*. The sample is subject to shifts and may be affected by both opt-in bias (the self-selection effect) and the sample's composition may not be representative of the general population (that is, all Belarusian citizens living in cities). Also, the BCT sample was previously constructed on a quota basis, which could introduce distortions: for example, if a man of 18–24 years responded to an invitation to participate in the study after we had already recruited the "required" number of men aged 18–24, then he was not able to take the survey.

From BCT Issue 4 onwards, we changed our approach to sampling. To understand the new approach, and also our re-weighting of the older data, let us briefly explain how online panels work. An online panel is a service that recruits Belarusians online to take part in surveys. Recruiting is done via online advertising in such services as Google, Yandex, OK, VK (VKontakte) and Facebook, as well as via a snowball effect. The online panel gathers 70,000–100,000 participants. After registering in the panel, these people receive invitations to participate in various surveys.

Every month approximately 750 new participants are recruited, most of whom cease to be active panellists within six months, while about 15% remain active.

Starting from the Issue 4 of the BCT, the surveys do not claim to be representative of Belarusian society; they only reflect trends recorded in the online panel. The logic of the

BCT survey is that significant changes or trends in wider society will be reflected in the survey's baseline population of 70,000–100,000 panellists, hence, random selection of a small sample of, say, 1,000 respondents and a weighting of the sample according to the online panel's structure should also reflect these changes.

At the same time, we can confidently speculate about trends and phenomena within particular groups (segments) of society under study. Thus, the survey divides society into four segments, and it is reasonable to expect that the inherent features of a particular segment observed in the survey are also characteristic of this segment in the wider Belarusian society.

5.2. SOCIAL CONFRONTATION: PREVIOUS GROWTH IN CONFIDENCE IN THE REGIME HAS STOPPED

Compared to February and early March 2023, we observe no trends in relation to the size of the segments obtained via Social Conflict Segmentation (SCS) (see Figure 2). Previous reporting periods found a continuing increase in the size of those segments that tend to have confidence in state institutions and government supporters, and increased distrust of non-state institutions and government opponents. The situation has become very interesting, since those increases in the size of the segments have stopped with the latest survey wave. We hope that future BCT issues will allow us to specify whether the growth has truly stopped or simply slowed down.

This publication arrives exactly one year after the first issue of the BCT, so we have an opportunity to review trends since May 2022. The recorded growth in support towards the Alyaksandr Lukashenka regime was rather limited, notwithstanding its dominance over the information field,¹¹¹ sweeping repressions against dissidents, and the exploitation of Belarusians' anti-war sentiments and fears.

In the quarter under review, the Social Sentiment Index (SSI) showed no clear trends (see Figure 3).

¹¹¹ Belarusian Identity in 2022: A Quantitative Study. <https://library.fes.de/pdf-files/bueros/belarus/19770-20221206.pdf>

Figure 2.
Dynamics by aggregated segment of social conflict

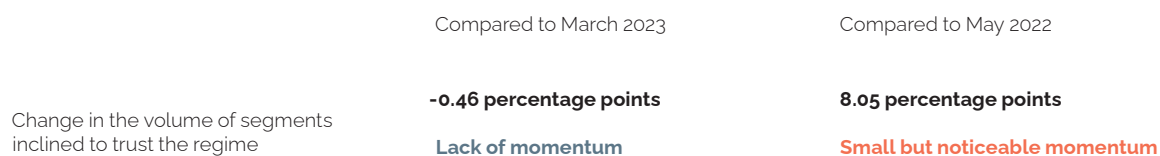
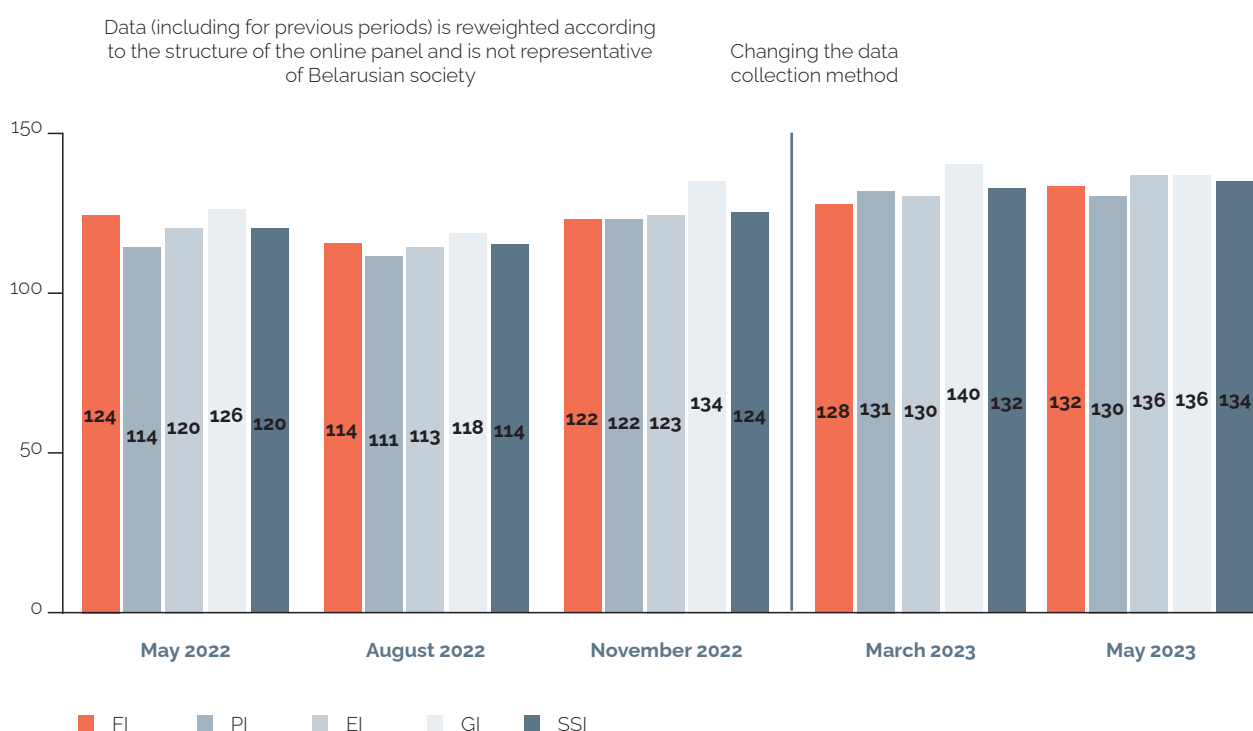


Figure 3.
SSI dynamics



The SSI measures the political, economic and social concerns of Belarusians. The SSI varies over a range from 0 to 200, where values below 100 indicate that negative appraisals are prevalent. In addition to the general SSI, four partial indices (the SSI components) were constructed:

- A family situation index (FI), reflecting respondents' subjective assessments of the emotional and material situation of their families;
- A country prosperity index (PI), combining assessments of the economic and political situation of the country as a whole;
- An expectations index (EI), reflecting people's perceptions of their personal future and that of the country;
- A government assessment index (GI), reflecting the level of approval of the state authorities in the country.

We do not observe any statistically significant increase in these indicators in this quarter. The indicators have reached a much higher level than one year ago, which can be explained by perceived economic growth, the absence of sharp decline in the quality of life that many probably expected, as well as the perceived image of Belarus as a "safe haven" free from war.

5.3. SOCIAL CONFRONTATION: A CONTINUING SPLIT

Relations between the four identified social groups remain tense, with a significant social distance remaining quarter-to-quarter between Lukashenka's supporters and opponents (See Figure 4).

Figure 4.
Bogardus scale, distance between opponents and supporters of the regime

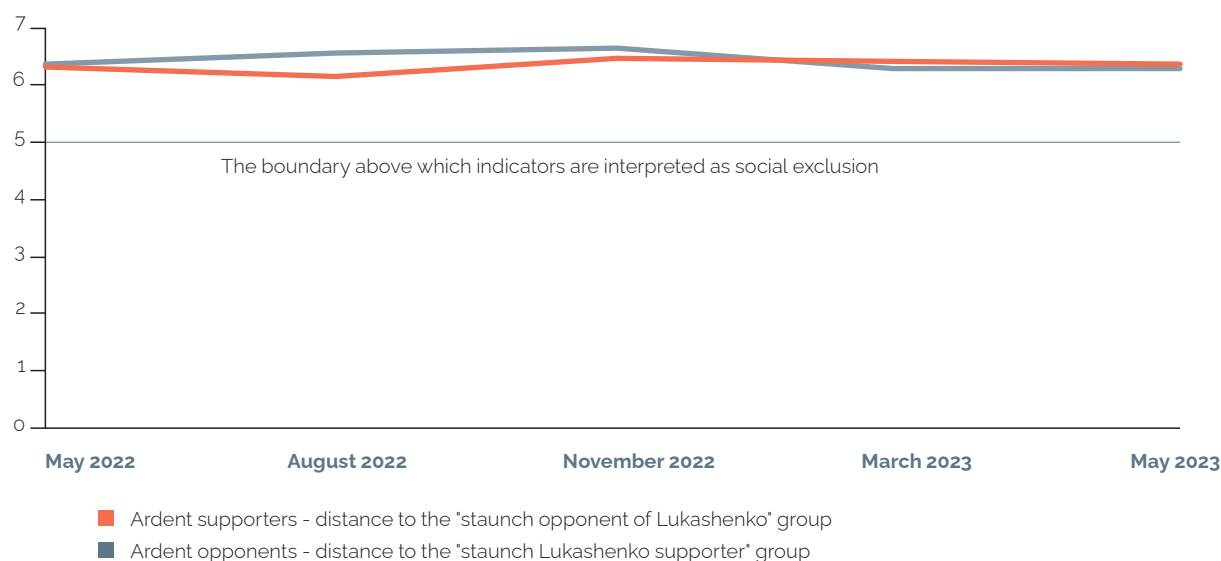


Table 1.
Preferences by media consumption, by SCS¹¹²

Media and Persons Group	Ardent supporters	Moderate supports	Moderate opponents	The ardent opponents
Belarusian non-state	2,5%	1,4%	11,8%	38,3%
Belarusian state / pro-governmental	29,1%	14,5%	10,0%	5,8%
Russian non-state	2,0%	2,8%	17,5%	36,4%
Russian state / pro-governmental	33,0%	27,1%	21,8%	11,2%
Ukrainian	3,0%	2,0%	6,2%	20,9%
Unclear / neutral	0,5%	2,2%	1,9%	1,5%
Hard to say	43,8%	52,8%	47,4%	26,2%
Other	4,4%	6,1%	4,7%	3,4%

The replication of the results from one study to the next largely confirms the invariability of the identified socio-political conflict. Groups in Belarusian society have incompatible conflicting value systems and beliefs.

The opposing groups perceive each other mainly through the prism of political attributes, which is the basis for the persisting social tension.

Each side occupies its own information bubble. This prevents interaction between them and reinforces existing attitudes towards both themselves and members of other groups. Belarusians, depending on their views, are divided into three information bubbles that have little interaction with the narratives of the "other" sides. There

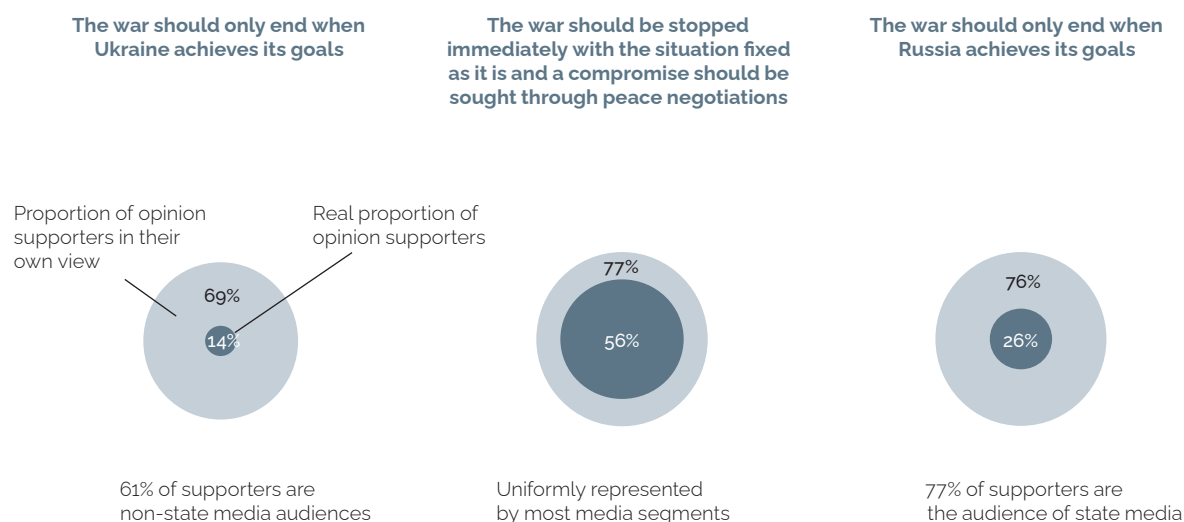
are two good examples to illustrate this: first, looking at the political speakers followed by members of the groups (see Table 1) and, secondly, the observations of Chatham House researchers who have established a very interesting phenomenon. Even extremely small groups of those who support either Russia or Ukraine's full achievement of their goals in the war (as opposed to an immediate cessation of hostilities) believe that their position in Belarusian society is shared by an overwhelming majority (see Figure 5).

People who strongly distrust the Lukashenka regime are the most isolated. Members of this group feel less and less connected to the Belarusian state, identifying themselves as citizens of Belarus less often than others.¹¹³

¹¹² See the Technical Annex for details on the relevance of media personalities and journalists to each group.

¹¹³ FES. Belarusian Identity in 2022: A Quantitative Study. <https://library.fes.de/pdf-files/bueros/belarus/19770-20221206.pdf>

Figure 5. Chatham House respondents' perceptions of what proportion of society shares a particular view on the war in Ukraine



1. There is a lot of talk about how hostilities will end. There are three popular opinions. Which of these opinions is closest to your views?
2. Which part of Belarusian society do you think holds the same opinion as you do?

In contrast to other segments, **ardent opponents** feel the problems in the country more deeply and attach great importance to civic values.¹¹⁴ They seek to transform the country and restructure the system. Their main conflict is with representatives of the other, state-supported national project, who do not want such transformations.

Isolation is further exacerbated by the fact that people who are also less included in the system (such as **moderate opponents**) experience a certain distance from **ardent opponents**. According to the Bogardus scale, the social distance of these people from both ardent supporters and ardent opponents of Lukashenka is equally great; they are therefore on the verge of social isolation.

The distribution of answers of **moderate opponents** to the questions about trust in people or organisations that are associated with **ardent opponents** can also be interpreted as the presence of certain distance between the core of the regime's opponents and their more neutral flank (see Table 2).

Such distrust perhaps contributes to the de-politicisation of **moderate opponents**, as suggested in a previous BCT issue.

5.4. PERCEPTION OF THE WAR AND ITS PLACE IN BELARUS'S SOCIAL CONFLICT

As before, support for Russia is clearly associated with trust in the Lukashenka regime, while support for Ukraine is associated with distrust of it. In general, the configuration of society's support for either warring party remained unchanged (See Figure 6).

The anti-war consensus, found in previous surveys, remains. Although there is a slight increase in the support for Belarusian troops entering the war on Russia's side, one can hardly speak about any significant changes of public opinion on this issue (See Figure 7).

There is still no consensus in Belarusian society about who will win the war. Chatham House researchers found a correlation between media consumption and perceptions of either party's success in the war.¹¹⁵ This is confirmed by our analysis, as the segments of **ardent opponents** and **moderate opponents** (57% and 14%, respectively) are much more likely to think that Ukraine is winning the war — and they are less likely to obtain news

¹¹⁴ FES. Belarusian Identity in 2022: A Quantitative Study. <https://library.fes.de/pdf-files/bueros/belarus/19770-20221206.pdf>

¹¹⁵ Chatham House. Belarusians' views on the war and value orientations. <https://belaruspolls.org/wave-15>

Table 2.

Distribution of answers by trust in other segments (moderate opponents and ardent opponents)

Group	Degree of trust in the group representative	Tendency not to trust	The ardent opponents
Citizens of Belarus who emigrated in fear of prosecution at home	Fully trust	3,2%	30,2%
	Rather trust	54,8%	60,8%
	Rather distrust	36,1%	7,4%
	Fully distrust	5,9%	1,5%
Participants in protests on the summer and autumn of 2020	Fully trust	1,6%	33,5%
	Rather trust	53,5%	60,1%
	Rather distrust	38,8%	5,8%
	Fully distrust	6,0%	0,6%
People who do not trust the authorities	Fully trust	1,1%	27,3%
	Rather trust	58,7%	67,8%
	Rather distrust	36,6%	4,9%
	Fully distrust	3,7%	0,0%
People who trust the authorities	Fully trust	0,8%	0,5%
	Rather trust	12,8%	0,0%
	Rather distrust	82,3%	45,0%
	Fully distrust	4,1%	54,5%
Supporters of the current government	Fully trust	1,2%	1,2%
	Rather trust	11,2%	0,0%
	Rather distrust	79,5%	19,3%
	Fully distrust	8,2%	79,5%
People who reject the results of the 2020 presidential election	Fully trust	8,0%	46,5%
	Rather trust	62,4%	47,8%
	Rather distrust	24,1%	2,4%
	Fully distrust	5,4%	3,3%
People who reject the results of the 2020 presidential election	Fully trust	2,3%	1,4%
	Rather trust	14,2%	5,3%
	Rather distrust	72,1%	24,6%
	Fully distrust	11,4%	68,7%
People labelled political prisoners	Fully trust	1,1%	25,4%
	Rather trust	54,9%	67,9%
	Rather distrust	40,8%	6,7%
	Fully distrust	3,2%	0,0%

from state media (see table 1). Also, **ardent supporters** and **ardent opponents**, as the most politicised segments, are significantly less likely (34% and 13%, respectively) to have difficulty answering this question.

Given the hegemony of Russia's information agenda in Belarus, a widespread misunderstanding of the situation may indicate a certain degree of distrust in information about the Russian forces' "brilliant success" in Ukraine (see Figure 8).

5.5. NUCLEAR WEAPONS IN BELARUS

An important development in the past quarter was the decision to deploy Russian nuclear weapons on the terri-

tory of Belarus. Although the deployment seems inevitable, the decision runs counter to Belarusian public opinion. Thus, in addition to the anti-war consensus that wishes to see "no Belarusian soldiers at war", there is also a widespread anti-nuclear weapons consensus.

According to Chatham House, the overwhelming majority of Belarusians oppose the placement of nuclear weapons in Belarus.¹¹⁶ Our study found an interesting pattern: despite the correlation between (dis)trust in the regime and attitudes towards the Russian nuclear weapons, the approval of the deployment of Russian nuclear weapons

¹¹⁶ Chatham House, Belarusians' views on the war and value orientations. <https://belaruspolls.org/wave-15>

Figure 6. Findings on Belarusians' level of support for Ukraine

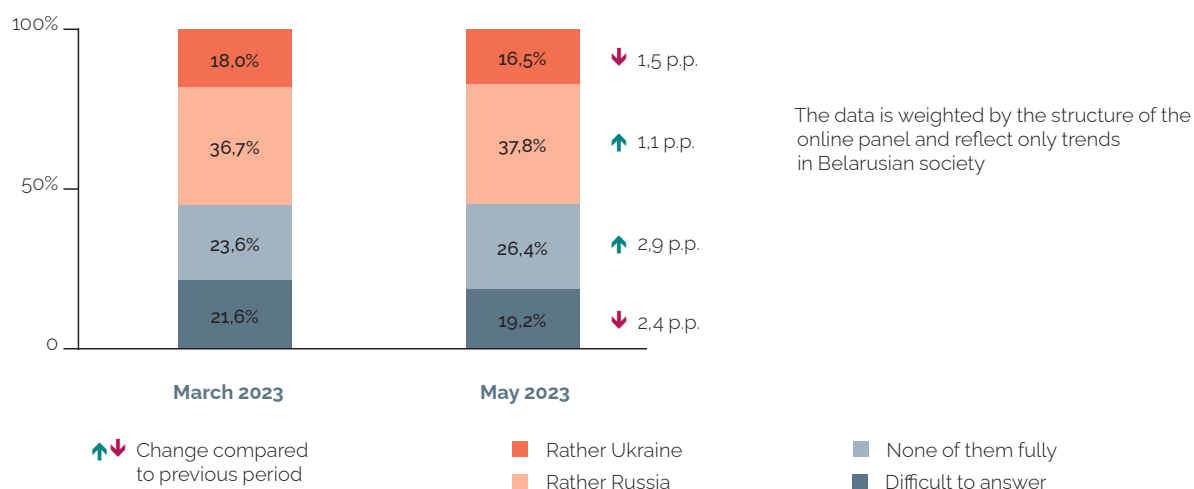
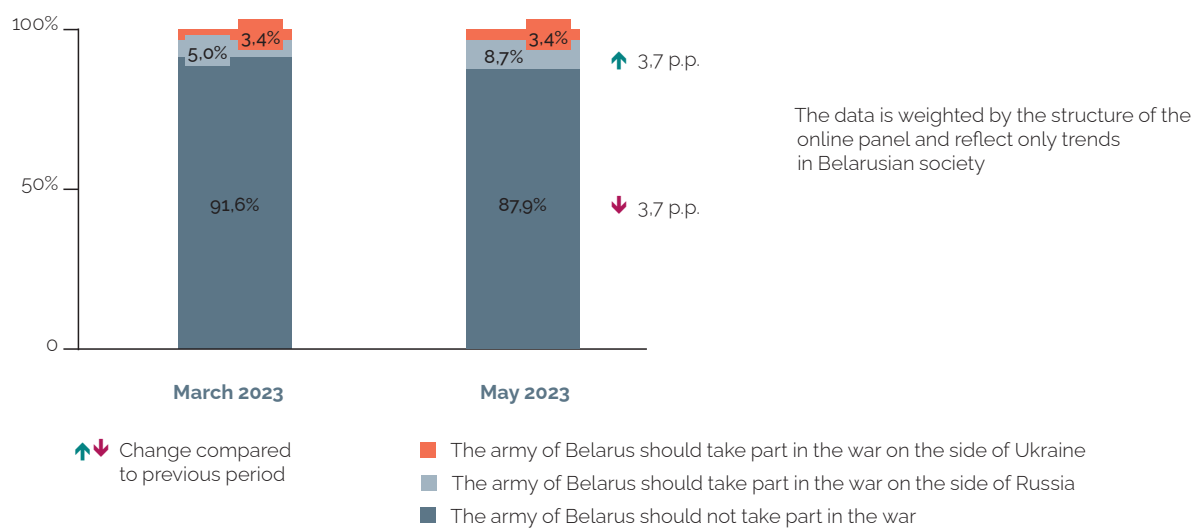


Figure 7. Views on the potential participation of the Belarusian army in the war



in Belarus among **ardent supporters** and **moderate supporters** is noticeably lower than their passive support of Russia in the war, inferred from other issues. More specifically, less than half of **ardent supporters** would say that they welcome the deployment of Russian nuclear weapons in Belarus, while the share among **moderate supporters** is about one third. Similarly, less than half of respondents representing this segment are prepared to say that they do not consider Russian nuclear weapons a threat to Belarus (see Table 3).

One has to understand that the deployment of nuclear weapons is an important part of the Belarusian authorities'

political narrative. Statements about the significance of the nuclear weapons' presence in Belarus and how they guarantee the country's security are part of the pro-governmental information campaign. But, even in the face of possible persecution for holding views that diverge from those conveyed by the state, Belarusians are ready to express opinions that run counter to the government's narrative. Perhaps, in the future, there will be an increase in support for the deployment of nuclear weapons at the expense of segments that tend to trust the regime, but at the moment the prospect of the deployment of nuclear weapons to Belarus frightens and displeases a significant part of Belarusian society.

Figure 8.
Which side is winning the war? Perception dynamics

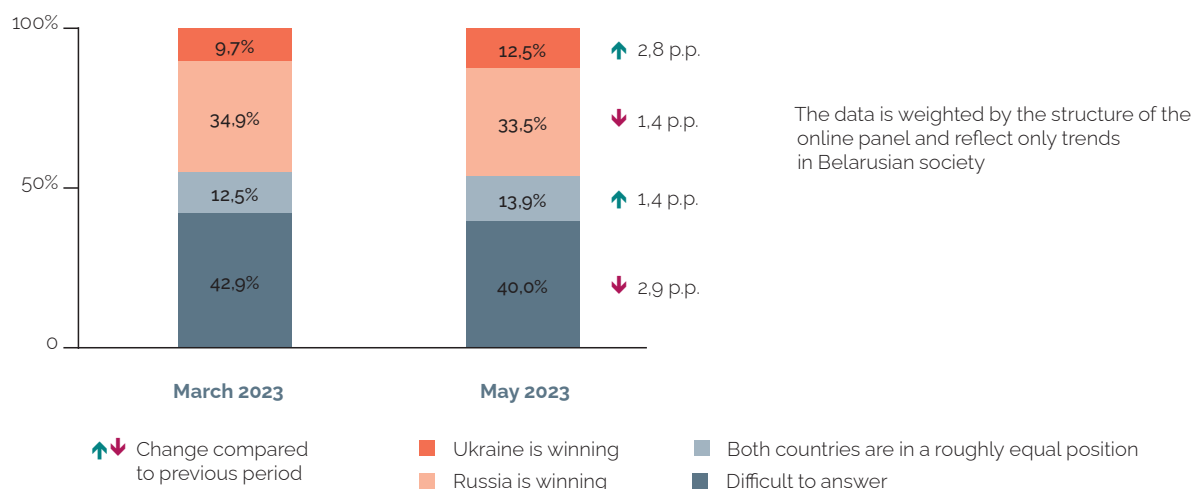


Table 3.
Attitudes towards the deployment of nuclear weapons in Belarus, by SCS

Statement on the deployment of Russian nuclear weapons	Attitude towards the statement	Ardent supporters	Rather trust	Rather distrust	Ardent opponents
...it guarantees Belarus's security	Fully agree	33,8%	19,7%	6,6%	3,5%
	Rather agree	20,7%	22,7%	7,4%	2,9%
	Rather disagree	10,8%	17,5%	19,8%	6,7%
	Fully disagree	6,1%	14,2%	47,1%	85,6%
	Hard to say	28,5%	25,8%	19,2%	1,3%
...it poses threat to Belarus	Fully agree	10,5%	10,6%	28,8%	74,3%
	Rather agree	10,7%	21,4%	35,1%	13,9%
	Rather disagree	18,1%	23,7%	12,3%	2,9%
	Fully disagree	28,7%	16,2%	8,7%	4,7%
	Hard to say	32,0%	28,1%	15,1%	4,2%
...it does not fundamentally change my life	Fully agree	26,3%	14,2%	10,7%	6,8%
	Rather agree	22,3%	32,0%	21,6%	11,9%
	Rather disagree	8,8%	15,8%	18,5%	28,3%
	Fully disagree	8,8%	7,2%	20,3%	41,1%
	Hard to say	33,8%	30,8%	28,9%	12,0%
I welcome the deployment of Russian nuclear weapons on the territory of Belarus	Fully agree	24,1%	11,5%	4,2%	2,2%
	Rather agree	21,9%	20,5%	8,1%	0,9%
	Rather disagree	9,2%	17,0%	15,1%	4,7%
	Fully disagree	13,6%	17,7%	54,4%	87,2%
	Hard to say	31,3%	33,3%	18,4%	5,0%

6

STATE AND SOCIETY RELATIONS: THE (COUNTER)TERRORIST PARADIGM

A series of acts of sabotage in Belarus and Russia has been the main factor shaping the authorities' recent actions, including intensified repression, the imposition of more severe conditions in detention centres, and stricter controls both inside the country and at its borders. Given the impossibility of any proactive civic activity in Belarus, the country's civil society has demonstrated solidarity and self-organised outside Belarus with the help of the diaspora community.

6.1. NEW WAVES OF REPRESSION: COUNTERTERRORISM "CLEAN-UPS"

The Lukashenka regime's pressure on society continues to develop according to the logic of an occupation administration. Permanent repressions¹¹⁷ are supplemented by periodic "mopping-up operations": these are, in effect, punitive actions that are initiated in response to sabotage, either real or imagined (the security forces have a habit of announcing the uncovering of plots, almost certainly fictitious), by the regime's opponents and intended to neutralise all opponents. The spring of 2023 gave the Belarusian authorities plenty of occasions, both in Belarus and in Russia, to initiate such mop-ups.

The most important occasion was undoubtedly the drone attack on a Russian aircraft at the Machulishchy airfield in Belarus at the end of February. Its scale and unexpectedness forced the Belarusian authorities to undertake an unprecedented manhunt, including numerous checks on roads, intensified control at border crossings with EU countries, and mass searches. Beginning in the Minsk region, where the airfield is located, a wave of detentions swept across the entire country. Law enforcers focused on those who had already been detained under "protest" articles in the legal code, as well as airsoft players, professional

shooters, drone owners, and members of the historical re-enactment community.

On 7 March, 10 days after the Machulishchy attack, Alyaksandr Lukashenka finally explained what was happening and effectively announced the start of the next phase of repression — a new "brutal mop-up" of government opponents.¹¹⁸ In practice, this meant, first of all, an increase in the number of mass searches and collective detentions in various locations across the country. One security agency alone (GUBOPIK, a department in the Ministry of Internal Affairs) was "processing" between 20 and 60 people each day.¹¹⁹

Secondly, the repression on professional grounds has intensified, including new mass dismissals of workers in state-owned enterprises showing any signs of disloyalty towards the authorities (e.g. workers from Glubokskiy electroseti, Belaruskalii, and Militarized Railway Security), and broader persecution for membership in professional associations that have "lost the trust" of the authorities (journalists, priests, lawyers, psychologists, teachers and doctors).

As a result, March 2023 saw the most detentions in the past 12 months, with 613 people detained on political grounds. The intensity of detentions subsided in April (342 cases) and rose again in May to almost 400. As a result, at least 1,350 people were in detention during the spring of 2023, which is the highest figure since the winter of 2022. At the same time, one should not expect the repressions to abate, not least because, in May, KGB Chairman Ivan Tertel announced a tightening of the counterintelligence regime in Belarus.

6.2. TORTUROUS CONDITIONS IN PLACES OF DETENTION

The spring of 2023 also saw the introduction of far stricter conditions for political prisoners in detention. In part

¹¹⁷ Old trends persist, including detentions of the relatives of famous figures, detentions of entire families, detentions of returnees from abroad, public detentions and trials, "carousels" of detentions and sentences, and "penitential" confession videos (no longer confined to being made by security forces).

¹¹⁸ <https://president.gov.by/ru/events/ceremoniya-vrucheniya-gosudarstvennyh-nagrada-i-generalskih-pogon-1678175601>

¹¹⁹ <https://news.zerkalo.io/life/34851.html>

this involved the authorities' customary methods of putting pressure on prisoners — such as overcrowded cells, depriving prisoners of bedding, imposing new prison terms, physical violence, torture in the cold, and designating inmates as being “prone to extremism” (leading to increased attention from the prison administration)¹²⁰ — but the period also witnesses the emergence of two new trends.

The first is far stricter “information isolation” for political prisoners. Belarus has long and arbitrarily restricted prisoners' right to correspond with their family, or to call them by telephone, but the spring saw a greater extent of isolation. Prominent political prisoners were placed in punitive isolation cells and cell-type facilities for long periods of time. Not only are the detention conditions much worse in these facilities, affecting the prisoners' health, but any communication with the “outside” is practically impossible. Lawyers who are not in prison themselves are being denied access visits to their clients, and relatives are dissuaded from talking to the media with threats that the imprisoned family member will only be treated more harshly if details appear in public.¹²¹

As a result, the public has heard nothing for months about several prominent political prisoners. Some information occasionally makes its way into the media space, but only in critical circumstances, such as news about the emergency hospitalisation of Viktor Babaryka or the death of Mikalai Klimovich. And sometimes these leaks prompt instant reprisals against doctors, as was the case with Babaryka's hospitalisation.¹²²

The second trend concerns the de facto withdrawal of medical care in places of detention. Former political prisoners have repeatedly reported that medical assistance in prisons was only provided in critical moments when their lives were in danger. Under such circumstances, medicines delivered by relatives “on the outside” were a lifeline for prisoners, especially those with chronic illnesses.

Since spring prisoners have been deprived of this lifeline. According to human rights activists, the pre-trial detention centres and prisons have refused to accept medical parcels for prisoners since April, citing an order of the Department of Corrections, according to which only foreign insulin and vitamin-mineral complexes can be given to persons in custody. Such requirements have not been officially reported anywhere.¹²³

¹²⁰ Torturous conditions of detention forces political prisoners to take extreme measures, ranging from suicide attempts (I. Lo-sik) to renouncing their Belarusian citizenship (Polina Sharendo-Panasiuk).

¹²¹ <https://ru.hrodna.life/2023/04/21/ivashyna-pagroz/>

¹²² <https://news.zerkalo.io/economics/39536.html?tg>

¹²³ <https://t.me/viasna96/18973>

6.3. EXPANSION AND TIGHTENING OF GOVERNMENT CONTROL OVER SOCIETY

The authorities' intensified “counterterrorist” line also reinforced the previously reported trend of maximising government control inside the country (see BCT issue #5 for winter 2022–2023). Several main vectors are now clearly defined here:

1. Legislative. In the spring of 2023, the government adopted several legal acts that significantly expanded the spheres of its control in the country. The new laws introduce the death penalty for high treason against state officials or military personnel, allow the KGB to restrict the right of any citizen to leave the country, abolish military deferment for those training abroad, and obligate doctors to work for five years instead of two years after their residency.
2. Preventive. This vector, aimed at preventing violations of the existing order, can be divided into two components. First, it entails stricter control over potentially disloyal citizens, expressed through: (a) promises of additional checks for those who took part in any form of automobile activism during the 2020 events (e.g. honking car horns to support protesters or blocking roads);¹²⁴ (b) compulsory installation of the “Magnet” tracking bot in the telephones of politically unreliable citizens;¹²⁵ (c) plans for a six-fold increase in the number of surveillance cameras in Minsk;¹²⁶ and (d) training of special units within the Ministry of Internal Affairs to operate surveillance drones in Belarusian cities.¹²⁷

The second component is the expansion of the spheres of general control over society as a whole, which includes: (a) statements on the need for nationwide control of internet use;¹²⁸ (b) orders to the administrators of student groups to monitor students' social media pages and write monthly reports;¹²⁹ (c) restrictions on attorney-client privilege concerning foreign clients;¹³⁰ (d) attempts to control family relationships and ban childfree communities;¹³¹ and (e) proposals for a social utility system for citizens similar to the Chinese social credit system.¹³²

¹²⁴ <https://nashaniva.com/313200>

¹²⁵ <https://d2041s90g1m7rs.cloudfront.net/314748>

¹²⁶ It should be reminded that the Belarusian authorities are actively using facial recognition systems to identify those involved in the 2020 events.

¹²⁷ <https://z3rk4lo.xyz/news/life/37971.html?tg>

¹²⁸ <https://euroradio.fm/prykryvayuchysya-abaronay-dzyacey-ulady-moguc-uzmacnic-cenzuru-u-secive>

¹²⁹ <https://euroradio.fm/vykladchyki-belaruskikh-vnu-buduc-sachyc-za-staronkami-studentau-u-sacsetkakh>

¹³⁰ <https://t.me/motolkohelp/29600>

¹³¹ <https://news.zerkalo.io/life/39009.html?tg>

¹³² <https://nashaniva.com/315098>

3. Strengthening and expanding border controls. There has been a precipitous increase in the number and scrupulousness of checks on Belarus's borders with EU countries. The first round of extra checks was in response to the explosion at the Machulishchy airfield, and later ones by sabotage actions in Russia. At border crossings, particular attention is paid to Ukrainians¹³³ and Belarusians who are included in a database, "Riots" (listing participants in the 2020 events), as well as those who travel abroad visa-free because they have a residence permit in another country.¹³⁴ Also, according to some reports, the Belarusian security services have become more attentive to those who leave Belarus on humanitarian visas, some of whom are being detained.¹³⁵

Border controls have also been expanded to include both the strengthening of control at the airport and the introduction of stricter controls at the Russia-Belarus border, something which has not happened before. Both Russian citizens and Belarusians are subjected to passport checks, their cars are carefully inspected, and they are often summoned for interviews where their smartphones are checked (see the Foreign Policy section for details).

6.4. "THE RUSSIAN WORLD" VS. CIVIC SOLIDARITY

The Belarusian authorities continue the policy of promoting "the Russian world" ideology. They have created patriotism classes in schools, where the viewing of propaganda films has become compulsory, named streets after Russian cities, effectively banned criticism of the Soviet period and revised the "state memory" policy so that Belarusian heroes have no place (see the Domestic Politics section for details). Manifestations of national identity — i.e. Belarusian — are condemned as standing in opposition to the Russian world. Access to literature in the Belarusian language is restricted in every way, and monuments to the victims of Stalinist repressions and figures of Belarusian culture and history are being destroyed or desecrated. Moreover, apart from Belarussianness, manifestations of other nationalities (Polish, Lithuanian, Roma) are also being suppressed.

Given the impossibility of any opposition to the regime or even basic free civic activity inside the country, Belarusian society demonstrates its solidarity abroad with the help of the diaspora.

In this regard, the spring of 2023 was marked by a series of solidarity actions by the Belarusian diasporas in dozens of countries. They included rallies and other actions honouring Freedom Day in March, the Chernobyl marches in

April and anti-war rallies in May. Actions of solidarity with current political prisoners of the Lukashenka regime, initiated by Svyatlana Tsikhanouskaya, were held on 21 May.

In addition to street actions and events, the growing self-organisation of Belarusians forced into emigration deserves attention. For example, lawyers deprived of their right to practice their profession in Belarus have founded the Belarusian Independent Association of Human Rights Lawyers, while Belarusian health professionals created a system of healthcare monitoring in Belarus.

A scheme for transferring part of one's taxes to Belarusian NGOs, developed by Godna (so far only applicable in Lithuania and Poland), was another significant Belarusian initiative that appeared this spring.

¹³³ https://mediazona.by/article/2023/05/31/no_borders_no_cry

¹³⁴ <https://d2o41s9og1m7rs.cloudfront.net/316359>

¹³⁵ <https://t.me/belamova/35769>

TECHNICAL ANNEX

To analyse changes in public opinion, the Belarus Change Tracker team orders opinion surveys from two data providers. Data from the main provider are used to prepare the section "Trends in Public Opinion". The secondary provider's results are analysed to check whether the trends visible in the main provider's data are reproduced and verified by the secondary data. This primarily applies to analysing segments of social conflict.

Previously, quota sampling was used to collect data. This involved mapping the structure of the internet-connected urban population of Belarus by gender, age, settlement size and education. From this issue onwards, the BCT team has abandoned quotas and is using simple random sampling aimed at reflecting the structure of the online panel.

Providers send out 25,000 invitations to random users and keep the survey open for seven days. The resulting sample is not representative of the urban population of Belarus, but it is representative of the structure of the online panels.

The logic of the BCT survey is that significant changes or trends in society will be reflected in the survey population of 70–100,000 panellists. A random selection of a small sample of, say, 1,000 respondents and a weighting of the sample according to the online panel's structure should also reflect these changes.

At the same time, we can confidently speculate about trends and phenomena within particular groups (segments) of society under study. Thus, the survey divides society into four segments, and it is reasonable to expect that the inherent features of a particular segment observed in the survey are also characteristic of this segment in the wider Belarusian society.

Data from previous BCT issues have also been re-weighted by the structure of the online panel. A possibility therefore remains that the differences observed between the present (fourth) issue and the first three issues are due to a change in the sampling approach.

FEAR FACTOR

While considering our data reliable and valid, we acknowledge that any data collected through surveys in Belarus should be treated with caution. The distribution of responses in the sample may be skewed by the context of repression by the Belarusian authorities, which add to respondents' anxiety about answering sensitive questions.

For example, many respondents discontinued the survey when presented with a question about their approval of the activities of Alyaksandr Lukashenka and the Belarusian government. This leads to potential distortion of response distributions in the achieved sample towards "neutrality", as well as to the "washout" of neutral respondents who may overreact to sensitive questions.

In the main provider's data, one can observe a dropout rate (the ratio of those who completed the survey to those who started the survey) of 28%. This is on average 12% higher than in "non-sensitive" surveys taking a similar length of time for respondents to complete. At the same time, there is no significant difference in the dropout rate between the last two waves in BCT surveys, which means that the SCS dynamics have nothing to do with a washout of regime opponents from the sample.

In addition, one should not ignore the nature of online surveys: the more economically and socially-active urban population engages with these far more often than other sectors of society, and, as a result, it can be assumed that support for Lukashenka's policies in the sample may differ from the actual level of support.

Table 1 below summarises the response rates in data collection. Table 2 provides a comparison of the structures in the achieved sample, the invitations sent out, the main online panel and the urban population of Belarus with internet access.

We have also made the data sets used in the study freely accessible:

- in dynamics (.sav; .xlsx);
- in statics (.sav; .xlsx).

Table 1.

Main indicators of data collection

	Number of people	Percentage
A1. Invitations sent out	25000	
A2. Those who started to fill out the questionnaire	1602	
A3. Those who did not pass the screening section of the questionnaire	297	
A4. Those who dropped out of the survey after the screening section	366	
A5. Those who completed the survey	978	
Response rate (A2/A1)		6.41%
Dropout rate (A4/(A2-A3))		28.05%

Table 2.

Structure comparison (invitations, sample, panel, urban population)

Age group	Invitations sent out	Those who completed the survey	In the panel structure (target for re-weighting)	In the structure of urban residents with internet access
18–24	27%	10%	11%	10%
25–34	36%	28%	26%	22%
35–44	24%	24%	29%	22%
45+	12%	38%	33%	45%
Gender				
Male	52%	48%	31%	44%
Female	48%	52%	69%	56%
Region				
Brest oblast	14%	13%	14%	12%
Vitebsk oblast	12%	10%	12%	12%
Gomel oblast	15%	15%	15%	14%
Hrodna oblast	11%	10%	11%	10%
Minsk oblast	14%	11%	15%	10%
Mogilev oblast	12%	11%	11%	11%
Minsk city	22%	30%	22%	31%

SEGMENTS OF SOCIAL CONFLICT

The Social Conflict Segmentation (SCS) is based on the assessment of people's confidence in both state and non-state institutions, as well as in supporters and opponents of government. During data collection, respondents are asked to rate how much they trust or distrust certain groups, for example "the militia" or "people designated as political prisoners". The analysis of these assessments allows us to divide Belarusian society into four groups according to their degree of trust or distrust in the authorities: (i) ardent supporters, (ii) moderate supporters, (iii) moderate opponents and (iv) ardent opponents.

Almost half of society comprises moderate and ardent opponents and they tend not to trust the government structures. The other half is formed of moderate and ardent supporters. Both segments vary significantly in socio-demographic characteristics: the group of ardent opponents is dominated by men and people with higher levels

of education, and representatives of this segment are more likely to live in Minsk and have higher incomes. By contrast, there are more women among the ardent supporters of the authorities. People in this group are generally less well-educated and have below average incomes. Ardent and moderate supporters demonstrate high confidence in pro-governmental institutions and those social groups that were singled out through factor analysis as "supportive of the authorities".

Below is a list of institutions, people or groups of people that we asked the respondents to rate on a scale of "fully distrust – rather distrust – rather trust – fully trust".

- Armed Forces;
- Police;
- Investigative Committee;
- Prosecutor's Office;
- State Security Committee;
- State media;
- Non-state media;

- Government;
- Officials;
- Citizens of Belarus who emigrated in fear of prosecution at home;
- Participants in protests on the summer and autumn of 2020;
- People who do not trust the authorities;
- People who trust the authorities;
- Supporters of the current government;
- People who reject the results of the 2020 presidential election;
- People who recognise the results of the 2020 presidential election;
- People labelled political prisoners.

MEDIA AND PERSONS GROUPS

Table 3.

Classification of opinion leaders by political position

Belarusian non-state	Belarusian State/ Prostate	Russian non-state	Russian state / pro-state	Ukrainian	Uncertain/neutral
Артем Шрайбман	Александр Аверков	Максим Кац	Владимир Соловьев	Дмитрий Гордон	Александр Смирнов
Сергей Тихановский	Юрий Воскресенский	Юрий Дудь	Артемий Лебедев	Роман Свитан	Лариса Ларина
Зміцер Лукашук	ОНТ	Руслан Усачев	Артем Шейнин	Олег Жданов	Медкова Лана
Сильные новости	НТВ	Ирина Шихман (А поговорить?)	WarGonzo	Юрий Швец	Даня Милохин
Маланка	Глеб Лавров	Марк Фейгин	Такер Карлсон	Алексей Арестович	Артур Бабич
NEXTA	Иван Эйсмонт	Александр Невзоров	Сергей Михеев	BalaganOFF	АЛКОБАРД
BELSAT	Андрей Кривошеев	Алексей Пивоваров (Редакция)	Никита Михалков	Владимир Золкин	Денис Талалай
Радьё Свабода	Григорий Азарёнок	Леонид Парфёнов	Маргарита Симоньян	Владимир Зеленский	Шарф
Светлана Тихановская	ЧП.ВУ	Дмитрий Потапенко	Ольга Скабеева	Михаил Подоляк	Коля Майнер
Павел Латушко	Игорь Тур	Юлия Латынина	Евгений Попов	Антон Геращенко	Vasya BTC
Андрей Курейчик	БелТА	Илья Варламов	Андрей Норкин	Денис Казанский	This is Хорошо
Реальная Беларусь (Артем Шапоров)	Надежда Сасс	Майкл Наки	Юрий Подоляка	FREEдом	Smartpress
Татьяна Мартынова	Вадим Гигин	Екатерина Гордеева	Андрей Караулов	Иван Яковина	myfin
Александр Класковский	Александр Шпаковский	Алексей Венедиктов	Сергей Карнаухов	Поліна Дашкова	Кокобай
Никита Мелкозеров	Людмила Казак	Екатерина Котрикадзе	Анатолий Шарий	Олеся Медведева	Точка
Сергей Чалый	Александр Серебренников	Валерий Соловей	Александр Семченко	Аркадий Бабченко	
TUT.by	Алексей Дзермант	Екатерина Шульман	Владимир Познер	Сергей Любарский	
Дмитрий Болкунец	Андрей Муковозчик	Андрей Пионтковский	Ксения Собчак	Доктор Комаровский	
Степан Путило	Екатерина Забенько	Станислав Белковский	Владимир Боглаев	Николай Давидюк	
Денис Дудинский	Александр Лукашенко	Михаил Шейтельман	Валентин Катасонов	Руслан Коцаба	
Константин Каверин	Ксения Лебедева	Геннадий Гудков	Андрей Малахов	Марьяна Сыч	
Зеркало	Телеканалы «Беларусь»	Игорь Яковенко	Клим Жуков	Егор Мисливец	
Александр Кнырович	Марат Марков	Илья Пономарёв	Евгений Сатановский	Инна Воронова	
Валерий Карбалевиц	Марат Минский	Глеб Пьяных	Артем Гаспарян	24 Канал	
Ксения Луцкина	Евгений Перлин	Зинаида Пронченко	Дмитрий Пучков	STERNENKO	
Наталья Радина	Сергей Гусаченко	Алексей Навальный	Игорь Стрелков (Гиркин)	Юрий Бутусов	

Belarusian non-state	Belarusian State/ Prostate	Russian non-state	Russian state / pro-state	Ukrainian	Uncertain/neutral
Виктор Марчук	Виктория Сенкевич	Олег Комолов	Евгений Пригожин	Сергей Жирнов	
Ирина Халип	Евгений Кулешов (Evgen Live)	Василий Уткин	Дмитрий Никотин	ICTV	
Руслан Кулевич	Виолетта Соколович	Валентин Петухов	Михаил Хазин	Злой Одессит	
Александр Чернухо	Марианна Муренкова	Настя Ивлеева	Дядя Слава	Даша Счастливая	
Ольга Карач	Мария Петрашко	Михаил Веллер	Дмитрий Василец	Aleksey Durnev	
Александр Азаров	Екатерина Тихомирова	Кирилл Набутов	Дмитрий Киселёв	Виталина Цымбалюк	
Голиков. Как есть.	Олег Гайдукевич	Саша Митрошина	Ирада Зейналова	Юлия Витязева	
Сергей Петрухин	Юлия Перцова	Карен Шаинян	Сергей Мардан	Игорь Тышкевич	
Андрей Паук	Анна Эйсмонт	Наталья Зубаревич	Яков Кедми	Людмила Немиря	
Слава Комиссаренко	Тамара Хамицевич	Виктор Шендерович	Андрей Суздальцев	Алексей Гончаренко	
Лариса Грибалёва	Алесь Мухин	Алекс Экслер	Тамир Шейх	Polonsky News	
Светлана Алексиевич	Наталья Качанова	Дмитрий Шепелев	Михаил Онуфриенко	СЕРГІЙ ЛЕЩЕНКО	
Катерина Андреева	Полина Шуба	Маша Борзунова	Александр Песке	Курбанова LIVE	
Антон Мотолько	Карина Пашкова	Некоглай	Александр Сладков	Труха	
Станислав Ивашкевич	Григорий Кисель	И Грянул Грэм	Семен Пегов		
Лев Львовский	Евгений Пустовой	Дмитрий Орешкин	Евгений Поддубный		
Daroha	Добрай раніцы, Беларусь	Аббас Галлямов	Александр Коц		
Александр Фридман	Телеканал ВТВ	Владимир Пастухов	Владимир Путин		
Виталий Рымашевский	Пул Первого	Иван Ургант	Мария Захарова		
Обычное утро	Гомельская правда	Игорь Рыбаков	Дмитрий Губерниев		
Николай Масловский	Петрыкаўскія навіны	Маргарита Кальц	Антон Красовский		
Ярослав Писаренко	Телеканал МИР	Мелани Бачина	Сергей Переслегин		
Маргарита Левчук	Лидер FM	Эхо Москвы	Татьяна Ремезова		
Андрей Стрижак		Александр Романенков	Вадим Такминёв		
Еўрарадыё		Иван Жданов	Евгений Фёдоров		
Илья Малиновский		Сергей Гуриев	Юрий Левитас		
Страна для жизни		Антон Лядов	Игорь Прокопенко		
Ник и Майк		Антон Хардин	Андрей Девятков		
Красная Зелень		Сергей Бунтман	Андрей Тюняев		
		Максим Курников	Евгений Спицын		
		Владимир Милов	Алла Довлатова		
		Евгений Понасенков	Анна Чапман		
		Александр Горбунов	Анатолий Вассерман		
		Кремлевский Цирк	Сергей Брекотин		
		Sasha Sotnik	Ольга Бузова		
		Телеканал Дождь	Леонид Якубович		
		Euronews	Стас Ай, Как Просто!		
			Роман Бабаян		
			Злой Эколог		
			Anna Van Densky		
			Пламен Пасков		
			[КОНСПИРОЛОГ]		
			Павел Онищенко		

Belarusian non-state	Belarusian State/ Prostate	Russian non-state	Russian state / pro-state	Ukrainian	Uncertain/neutral
			Александр Вальдман		
			Роман Голованов		
			Борис Корчевников		
			Мария Бутина		
			Дмитрий Ефстафьев		
			КАКОВО?!		
			Вадим Такменев		
			Ольга Белова		
			Дмитрий Стешин		
			Скотт Риттер		
			Захар Прилепин		
			Николай Вавилов		
			Андрей Безруков		
			Андрей Фурсов		
			Дмитрий Борисенко		
			Donbass Devyshka		
			60 минут		
			Sputnik		
			ДНК (передача на НТВ)		
			РИА Новости		
			Телеканал СТС		
			Пусть Говорят		
			Россия 1		
			Первый канал		
			Время покажет		
			Телеканал ТНТ		

AUTHORS:

**Pavel Slunkin, Artyom Shraibman,
Philipp Bikanau, Henadz Korshunau,
Lev Lvovskiy**

Design: Roman Marchishin

CONTACTS

The Friedrich Ebert Foundation in Ukraine /
Project Belarus

Christopher Forst | FES Representative for Belarus
St. Borysohlibska 15A, Kyiv, 04070, Ukraine

Tel.: + 38-044-234-10-38 | Fax: + 38-044-234-10-39

All texts are available on the website:
<https://belarus.fes.de>

Orders / contacts:
belarus@fes-dee.org

Expert Assessments

BELARUS CHANGE TRACKER



Russia's dominance of Belarus is acquiring a nuclear dimension while the Lukashenka administration turns into an engine for cultural Russification.



Belarus's economy is adapting to external shocks through deeper integration with Russia, while an ageing population and emigration flows are strongly impacting the labour market.



The trend of growing trust in the authorities against the backdrop of an anti-war consensus has come to a halt. The regime's repressions and controls over society have intensified, including stricter checks at state borders,