



The Belarusian regime is deepening dependence on Russia and institutionalising relations with Russian-occupied territories in Georgia and Ukraine. There is an ongoing militarisation of both the Belarusian authorities and the democratic forces.



Economic recession endures, despite Russia's support and efforts to enter new markets, due to severed ties with the West and Ukraine. Real wages are tumbling. The combination of budgetary deficit and financial default is forcing the Belarus government resort to money issue and tax increases.



The Lukashenka regime has most likely exhausted resources endeavouring to increase trust among the politically-neutral part of society. The regime's policy has led to a significant demand for a forceful struggle against the government in the protest part of society.

Expert Assessments

BELARUS CHANGE TRACKER

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BELARUS
CHANGE
TRACKER

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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 still unresolved internal political crisis of 2020, persistent mass repressions, unprecedented foreign sanctions and the ensuing severance of economic relations with neighbours, international isolation and peak social polarisation have all merged into a "perfect storm" for the country. The situation poses many new challenges to researchers. It is increasingly difficult to identify sustainable and relatively long-term trends through the mists of a controlled information flow and the extreme volatility in both economics, politics and public sentiments, as well as in regional security issues.

To address this challenge, six Belarusian experts will 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 two economists. 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; **Kateryna Bornukova**, academic director at BEROC and visiting professor at Carlos III University in Madrid; and **Lev Lvovskiy**, BEROC senior research fellow.

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.

For the second edition of the Tracker, we conducted two public opinion surveys using different online panels. The survey operator is not being disclosed owing to the considerable risks involved when conducting socio-political surveys in Belarus. The first online panel surveyed 1,010 respondents from

17-31 August 2022. The second one surveyed 502 respondents from 17-21 August 2022. For comparative analysis the authors also looked at findings from a survey conducted from 14-28 October 2021 covering 1,448 respondents. In all three cases the sampling structure was determined by quotas reflecting the structure of the general population by gender, age, and region (based on residents of Belarusian cities with population over 5,000). In the two latest surveys, the sample was weighted by RIM Weights (Raking) on the grounds of the settlement size, education, gender, and age.

Despite considering our data reliable and valid, we acknowledge that 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 political repression in the country, which may add to respondents' anxiety about answering questions on politically-sensitive issues. 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 politically-sensitive questions. In addition, one should presumably not ignore the nature of online surveys, which the more economically and socially-active urban population engages with more than other sectors of society — as a result, it can be assumed that support for Lukashenka's policies in the sample may differ from the actual level of support.

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

SUMMARY

Against the backdrop of the Lukashenka regime's complicity in the war against Ukraine, there is increasing support in the EU for restrictions targeting all Belarusian citizens. The international perception of the country is drifting slowly back to its previous model whereby "Belarus equals Lukashenka". Diplomatic activity by Belarusian democratic forces alone is capable of slowing down this process. Belarus's dependence on Russia continues to deepen and its relations with occupation administrations in Ukrainian and Georgian territories are being institutionalised. Tensions on the Belarus-Ukraine border persist as military exercises there have continued for months, though the likelihood of the Belarusian army's entry into Ukraine remains low. The stance of democratic forces towards the Kremlin is toughening and Russia has been publicly called "the enemy of Belarusian independence".

The war in Ukraine remains a key driver of domestic political processes in Belarus and the authorities have begun to militarise previously civilian agencies, with the media one of the main targets of repressions. Pro-government and pro-Russian activists play an increasingly prominent role in initiating repressions, which has led to the first and as yet insignificant frictions within the nomenklatura. Most of the democratic forces have consolidated behind Tsikhounoukaya's cabinet, with "second tier" structures and politicians dissociating from it. The recent reconfiguration of the opposition has been accompanied by a radicalisation of its rhetoric and a growing tolerance of more militant methods of political struggle.

The summer of 2022 brought no significant changes in foreign economic relations. New sanctions imposed by the EU at the beginning of this period hardly affected Belarus, although the previous sanctions package came into full effect and had a great impact: exports to the EU collapsed by 56%. The decline in exports to the EU and the collapse in trade with Ukraine continue to play a major role in Belarus's current economic crisis, while financial restrictions have led to a technical default. Nevertheless, thanks to successful trade with Russia and a reduction in imports, Belarus had a trade surplus in the first half of this year. There are also the first signs of reorienting the sanctioned goods to new markets, but progress is too small to affect the macroeconomic situation so far.

The key domestic economic trend in Belarus during the summer of 2022 was a further decline in GDP accompanied

by a significant reduction in real incomes in sanctioned sectors. In response, the government continued to take measures to conceal information and create a rosier picture in the news. In addition to verbal interventions, representatives of the economic bloc focused their efforts on trying to address the challenge of a growing budget deficit. In this regard, the two main strategies were raising taxes and turning on the "money printing press".

It is highly likely that the Lukashenka regime has exhausted its available resources endeavouring to increase trust among the politically-neutral segments of society. Despite this, the conflict is, or has already been, transformed from a confrontation between groups divided by political preferences into a social confrontation. There has been a paradigm shift in the acceptability of militant means of political struggle — from its complete rejection early in the revolution to broad approval of militant methods today. The leaders of the democratic forces in Belarus are responding to the demand of the protest-minded part of society by relying on the use of force.

Despite the withdrawal of most Russian troops from Belarusian territory, the war has remained the key factor in government-society relations through the summer. It sets the basic directions for the expansion of the regime's repressions, determines the trajectory of the authorities' attempts to "reformat" civil society institutions, and shapes efforts to appropriate any expressions of national-cultural phenomena and processes. However, Belarusian society has already adapted to the repressions and developed its own ways of both existing in such conditions and resisting them.

1

FOREIGN POLICY

Against the backdrop of the Lukashenka regime's complicity in the war against Ukraine, there is increasing support in the EU for restrictions targeting all Belarusian citizens. The international perception of the country is drifting slowly back to its previous model whereby "Belarus equals Lukashenka". Diplomatic activity by Belarusian democratic forces alone is capable of slowing down this process. Belarus's dependence on Russia continues to deepen and its relations with occupation administrations in Ukrainian and Georgian territories are being institutionalised. Tensions on the Belarus-Ukraine border persist as military exercises there have continued for months, though the likelihood of the Belarusian army's entry into Ukraine remains low. The stance of democratic forces towards the Kremlin is toughening and Russia has been publicly called "the enemy of Belarusian independence".

1.1. MILITARY DIMENSION

The transition of the Russia-Ukraine war into a phase of positional warfare and Western sanctions (their toughness) that reached its interim ceiling have established a new political balance between the warring parties. Although this balance is unstable and dependent on developments at the frontlines, it is among the factors shaping the current domestic and foreign policy trends in Belarus.

The previous Belarus Change Tracker report* noted that, after the Russian invasion of Ukraine, the West began to shift rapidly from perceiving Belarus as a dual international actor with a clear division between "regime" and "people" towards the previous model in which Belarus was identified exclusively with the Lukashenka regime. This trend has intensified: against the narrowing list of potential sanctions against Belarus state institutions, enterprises and businesses loyal to the authorities,¹ there is increasing support for potential restrictions that would directly affect all Belarusian citizens. Moreover, the initiators and lobbyists for such sanctions include the countries that have traditionally sided with

Belarus's democratic forces. In Lithuania² and Latvia³, there were proposals to impose restrictions on the issuance of Schengen visas not only for the citizens of Russia, but also for Belarus, leaving visas issued on humanitarian grounds the only option available to Belarusians.⁴ And while such EU-wide decisions are unlikely, their prospective implementation at the regional level is quite realistic, especially in the event that Belarusian regime increases its involvement in Russia's war in Ukraine. If Poland (the only EU member neighbouring Belarus that has not yet come up with such proposals) joins this initiative, then the opportunities for Belarusians to travel to EU countries will decrease significantly. Among other things, this move could have a dangerous unintended consequence: against the backdrop of a formal ban on tourist visas, holders of humanitarian visas, offering an almost exclusive right to cross the EU borders, could face reprisals from the Belarusian authorities.

Belarusian-Russian military cooperation continues to deepen. During his June visit to St. Petersburg, Alyaksandr Lukashenka asked Vladimir Putin to help to upgrade the Belarusian air force so that the planes in service can carry nuclear warheads. The Russian side also announced the transfer to Belarus of Iskander-M tactical missile systems "capable of using both ballistic and cruise missiles, both conventional and nuclear versions."⁵ No official announcement has been made about the completion of this process, and the terms of use of the Russian weapons are unknown (except that Russia has no plans to actually transfer nuclear weapons to Belarus).⁶ However, given the exclusivity of the said missile complex, Russia's previous cautious position regarding its export, and Putin's words about its "transfer" rather than sale to Belarus, one can assume that the Iskander-M systems will be managed either jointly by the two countries or by Russia, which will further augment Minsk's military and political dependence on Moscow.

* <https://library.fes.de/pdf-files/bueros/ukraine/19337.pdf>

1 While between 24 February and 31 May (see BTP-1) Belarus was hit by four rounds of sanctions, there was only one additional set of sanctions adopted in the three summer months.

2 <https://www.politico.eu/article/visa-solidarity-baltic-states-russia-tourists/>

3 <https://rus.delfi.lv/news/daily/latvia/kolc-zapret-na-vyda-chu-viz-grazhdanam-rossii-i-belarusi-dolzhen-byt-dostignut-na-urovne-es.d?id=54628734>

4 At the moment, such restrictions on citizens of Belarus have not been adopted.

5 <https://www.bbc.com/russian/news-61938818>

6 <https://ria.ru/20220628/rakety-1798609427.html>

The Ukrainian leadership has stayed on high alert for threats emanating from the territory of Belarus. In June, President Zelenskyy convened a meeting at the Headquarters of the Supreme Commander-in-Chief on this issue, and six Ukrainian regions tested their preparedness to respond to potential attacks from Belarus.⁷ Due to the “unpredictable situation” on the border with Belarus, the authorities in Lviv have set up a city defence staff and organised additional training for the volunteer territorial defence units.⁸ For his part, Lukashenka speculated that Belarus “may still have to fight for the west of Ukraine”⁹ and accused Kyiv of shelling Belarusian territory.¹⁰ Lukashenka said that he had instructed the military “to set as targets decision-making centres”¹¹ in the capitals of states hostile to his regime, thus maintaining the already high tensions in the region.

In the meantime, there are still no obvious steps indicating the imminent entry of the Belarusian army into Ukraine or for a new invasion of Russian troops from the territory of Belarus. The Belarusian army is mostly stationed at permanent bases, military equipment is not being redeployed en masse to the southern borders, and no strike groups are being formed there. Russian units redeployed from the territory of Belarus after the Russian army’s retreat from northern Ukraine remain predominantly on the eastern front. Furthermore, unlike prior to the Russian invasion, Western intelligence has not issued any public warnings about Belarusian army plans to invade Ukraine.

Nevertheless, a series of military and mobilisation measures are being conducted for the fourth month in a row on the southern borders of Belarus, involving both Belarus’s regular armed forces and its territorial defence troops. The exercises are conducted on a rotational basis, ensuring a wide overall coverage of the participants with a relatively low one-time concentration of personnel and weapons. Both purely defensive tasks and offensive manoeuvres, such as assault river crossing, are being practised during the exercises. In the Homiel region, they monitored the turnout during mobilisation, recording the dates and numbers of citizens arriving on summons. The authorities also conducted raids in areas bordering Ukraine, detaining local activists and disloyal citizens in an attempt to minimise the risk of leaks of sensitive information. This “cleansing” suggests that the southern direction is seen by the Belarusian authorities as a source of potential threats and

the location of possible significant increase in military activity in the future.

Although the Belarusian armed forces’ preparedness for direct engagement has increased compared to February 2022, its functional state is still insufficient for the successful conduct of offensive operations on foreign territory on its own. Moreover, Russia’s strategic failure in this war is becoming increasingly evident, thus reducing the benefits to the regime of sending the Belarusian army to Ukraine, and the benefits have never been obvious to begin with. Russia’s failures are also increasing the costs of any such move for the Belarusian side.

1.2. PARTNERS IN INTERNATIONAL ISOLATION

Belarus continued to pursue greater cooperation with the administrations in the Russian-occupied territories of Ukraine and Georgia. Lukashenka has, for the first time, de facto recognised the independence of the “DPR” and “LPR”,¹² but specified that there was “no need” to formalise this decision and that cooperation was developing successfully anyway, with Belarus not hiding it. According to Lukashenka, he will formalise such legal recognition through a presidential decree should the need arise.

Meetings with representatives of the occupation administrations are still kept at a relatively low level by the Belarusian side, but bilateral relations are gradually being institutionalised. Back in May, Dmitry Mezentsev, the state secretary of the Union State of Russia and Belarus, and Aleh Slizheuski, former Belarusian minister of justice and current member of the Permanent Committee of the Union State, officially visited the Donetsk oblast and held meetings with the occupation authorities.¹³ In June, Lukashenka’s special representative Viktor Sheiman paid a visit to Abkhazia and met with the “president” of the self-proclaimed republic.¹⁴ In July, the governor of Viciebsk oblast signed a protocol of intent to cooperate with the “government of the Republic of Crimea” during the Forum of Regions of Belarus and Russia in Hrodna¹⁵ Also in July, the deputy head of the Brest region executive committee and chairman of the Brest city council met the “DRP” delegation visiting Belarus.¹⁶

7 <https://news.liga.net/politics/news/ugroza-iz-belarusi-danilov-zayavil-o-proverke-uje-shesti-oblastey-na-gotovnost-dat-otpor>

8 <https://news.liga.net/politics/news/lvov-nachal-podgotovku-k-vozmognomu-napadeniyu-belarusi-sadovoy>

9 <https://president.gov.by/ru/events/respublikanskiy-seminar-soveshchanie-aktualizaciya-metodov-i-form-raboty-s-naseleniem-na-mestnom-urovne>

10 <https://www.belta.by/president/view/lukashenko-tri-dnja-nazad-ukraina-pytalas-atakovat-belarus-no-my-sumeli-perehvatit-vse-rakety-511488-2022/>

11 <https://president.gov.by/ru/events/torzhestvennoe-sobranie-po-sluchayu-dnya-nezavisimosti-belarusi>

12 <https://www.belta.by/president/view/prezident-belarusi-razgovory-o-priznanii-ili-nepriznanii-lnr-i-dnr-eto-vse-boltovnja-514878-2022/>

13 <https://www.mid-dnr.su/ru/pages/news/doneck-vpervye-posetilo-rukovodstvo-soyuznogo-gosudarstva/>

14 http://presidentofabkhazia.org/about/info/news/?ELEMENT_ID=14690

15 <https://www.belta.by/regions/view/vitebskaja-oblast-i-respublika-krym-planirujut-osenju-zakljuchit-soglashenie-o-sotrudnichestve-513959-2022/>

16 <https://denis-pushilin.ru/news/denis-pushilin-vstretitsya-s-rukovodstvom-brestskoj-oblasti-respubliki-belarus/>

1.3. CABINET FOR THE "MILITANT SCENARIO"

The Conference of Democratic Forces in Vilnius established a transitional cabinet and appointed its first representatives. The appointees and the common conference participants alike have mostly agreed that peaceful ways of confronting the Lukashenka regime have proved ineffective and publicly sought to develop militant scenarios for changing power in Belarus.

However, the call for more militant methods of fighting for regime change in Belarus are discordant with the democratic forces' lack of new resources to realise them. The strategy of battling for power from outside the country requires several things: political support from foreign partners, especially in countries that will host such activities; far more international financial and military-technical assistance; and the recognition of militant means of struggle as legal. In legal terms, this would mean recognising the illegitimacy of not only Lukashenka, but of all current representatives of the Belarusian authorities. At the same time, neither Sviatlana Tsikhanouskaya nor other leaders of the Belarusian opposition have declared a goal of obtaining foreign countries' formal recognition of the cabinet as a legitimate government in exile. Similarly, the democratic forces' reformatting and the establishment of the cabinet did not cause any significant international reaction, even in the most supportive capitals. It is much more the result of internal discussions between different political forces rather than an attempt to restart the democratic forces' international capacity. Therefore, this reconfiguration will hardly affect the established international contacts of Tsikhanouskaya and her entourage.

The conference has also conclusively formalised the transition of the Belarus's democratic forces not only to pro-Ukrainian, but also to expressively anti-Kremlin positions, consolidating a trend described in the previous report. Valer Kavaleuski, the cabinet's representative for foreign affairs, even had to disavow statements of his colleague who said at the conference that "our enemy is not Russia, but those criminals who seized power". Instead, Kavaleuski formulated the position of the cabinet as follows: "Russia is an enemy of Belarusian independence, sovereignty, statehood and national identity."¹⁷

¹⁷ <https://www.svaboda.org/a/31998119.html>

2

DOMESTIC POLICY: MILITARISATION OF GOVERNMENT AND OPPOSITION

The war in Ukraine remains a key driver of domestic political processes in Belarus and the authorities have begun to militarise previously civilian agencies, with the media one of the main targets of repressions. Pro-government and pro-Russian activists play an increasingly prominent role in initiating repressions, which has led to the first and as yet insignificant frictions within the nomenklatura. Most of the democratic forces have consolidated behind Tsikhounouskaya's cabinet, with "second tier" structures and politicians dissociating from it. The recent reconfiguration of the opposition has been accompanied by a radicalisation of its rhetoric and a growing tolerance of more militant methods of political struggle.

2.1. MILITARISATION OF GOVERNMENT STRUCTURES

Against the backdrop of the war in Ukraine, the Belarusian government has moved beyond mere intensification of military exercises involving its armed forces. Alyaksandr Lukashenka has also militarised a number of civilian agencies and trained more people in combat skills, thus preparing them for participation in a potential armed conflict.

In June, the government handed small arms to the Ministry for Emergency Situations, while the training of rescue workers in the agency has included shooting practice. The idea is to distribute weapons only if necessary, which envisages occasions when the emergency officers might be called upon to help the police during "mass disturbances" or to support the army in case of armed conflict.

On 3 June, Lukashenka spoke in detail about his May decision to create a "people's militia". To this end, small detachments of civilians would be set up under "each village's council" and trained in the use of weapons to defend the country as a reserve for territorial defence. Later, the Defence Ministry explained that the militia would be part of the territorial defences and include citizens who were not medically fit for military service but were capable of holding weapons. According to Defence Minister Viktar Khrenin, it is essentially a matter of a several-fold increase in the

number of "defenders of the motherland" available to deter any potential aggressor.

On 25 July, Lukashenka said that all employees of the State Inspectorate for the Protection of Fauna and Flora (about 550 people) should be "re-armed" and trained in shooting so that they could "take up arms to protect their country". As in the case of the Ministry for Emergency Situations, Lukashenka justified his decision by the experience of Ukraine, which, he said, often had to send untrained people to the front. If we ignore the plausibility of Lukashenka's assessments, it is quite telling that Minsk is willing to learn from the mistakes in the defence of another country against Russian invasion, rather than from the mistakes made by the troops of allied Russia.

2.2. MEDIA STILL THE FOCUS OF REPRESSIONS

Repressive activity by the state has persisted for more than two years, but the reporting period saw a clear intensification of repressions against the media, individual journalists and opinion leaders. Even media outlets that have long since abandoned the political agenda or never approached it have fallen under blockades and other forms of pressure. With the exhaustion of the politicised independent media, the authorities have become more active in pursuing all other independent media.

In June, Radio Liberty freelancer Andrei Kuznetschik was sentenced to six years in prison for "setting up an extremist group." Also in June, the heads of a website about cars (abw.by) and another about IT (dev.by) were detained under charges of "extremism". On 13 July, Belsat journalist Katsyaryna Andreyeva was given eight years in prison for "high treason" in addition to her two-year term that was about to expire. On 3 August, her Belsat colleague Iryna Slaunikava was sentenced to five years in prison on two charges relating to "extremism". Kanstantsin Zalatykh, director of the Belorusy i Rynok newspaper, was arrested in May and charged in early June with incitement of hatred (up to ten years in prison). The newspaper's website was blocked in July.

Citydog, a portal on urban life, was also blocked in late August.

One of the last analysts in the country unafraid of commenting in independent media, military expert Yahor Lebriadok, was detained in July on charges of “promoting extremist activities.” His arrest is an element of another repressive trend — increasing restrictions on information about the war in Ukraine and Belarus’s possible involvement (see “Regime and society relations in wartime” section for more detail).

2.3. MOBILISATION OF PRO-GOVERNMENT ASSETS

In the reporting period, the spring trend of involving pro-government activists and propagandists in repressive and other restrictive state actions intensified. These people often take on the role of informal “ideological inspectors”.

In early June, the Kalinouski bar was closed following complaints by state media workers about alleged discrimination against a foreign citizen. In early August, another bar on the same street, Banki Butylki, was closed upon complaints from the same propagandists (Ryhor Azaronak, Andrei Mukavozchyk, Lyudmila Hladkaya and others) for publicly singing an Okean Elzy song in support of Ukraine on its terrace. The singer and the bar owner were arrested on various administrative charges for 30 days. Also in early August, a cinema in Minsk was forced to change the colouring of the seats in the hall because they were yellow and blue, which propagandists interpreted as a reference to the Ukrainian flag.

Between June and August, pro-Russian activist Volha Bondareva, TV host Ryhor Azaronak and several propaganda-oriented Telegram channels denounced the local authorities’ decision to name the library in Astravets after Belarusian philologist Adam Maldzis because of his oppositional views. As a result, the regional executive committee suspended the renaming of the library, and the Ministry of Culture obliged all local authorities to coordinate such decisions with Minsk in the future.

At least five tour guides were detained in August, including Galina Potayeva, the director of the Viapol travel agency. They caught the attention of law enforcers after pro-government activists went on tours disguised as ordinary tourists and published their critical impressions. Propagandists, Azaronak among others, supported these efforts, accusing the tour guides of nationalistic interpretations of history and insufficiently patriotic tour programmes.¹⁸

This upsurge of loyalist public activity obviously consists of two components — the grassroots activism of government

supporters and actions initiated by the state itself, including pickets at the embassies of Western countries, such as the one held at the US embassy in July. A certain amount of unsanctioned activism is confirmed by the public friction in this environment. Examples include a lengthy information attack by pro-Russian activist Volha Bondareva on Sviatlana Varyanitsa,¹⁹ the representative of Belaya Rus’ from Hrodna, Bondareva’s unsuccessful attempts to cancel Philip Kirkorov’s concert in Belarus, and a column by former STV director Kiryl Kazakou criticising unnamed “radical conservative activists” for their failure to move onto a peaceful footing after the “victory in 2020”.²⁰

Almost all of these information campaigns are accompanied by censure of the local governments for their “passivity”. Tellingly, many of these publications are distributed via Telegram channels affiliated with the security agencies. This is the evidence that some security officers share the dissatisfaction of propagandists and pro-Russian bloggers and consider there to be insufficient repressions, condemning the rare manifestations of Belarusian identity still found in various spheres of life — from tourism to the publishing industry, and in the use of Belarusian Latin script on signs and placards in cities. Human rights activists even report cases of detentions for speaking Belarusian.²¹

2.4. DISCONNECTION AND CONSOLIDATION IN OPPOSITION

The initial activation of the “second tier” opposition, observed in the spring, culminated in the summer. The media space was flooded with disputes between the critics and backers of Sviatlana Tsikhanouskaya’s office (OST). In addition to activists united around Valery and Veronika Tsapkala and their Forum of Democratic Forces, the OST came under heavy criticism by Pavel Latushka, Vadzim Prakopyeu and other prominent activists and bloggers for its lack of decisiveness, inclusiveness and transparency. In response, the OST marked the second anniversary of the 2020 election with a major conference in Vilnius, established the United Transitional Cabinet and announced a reform of the Coordination Council (CC) by expanding its membership from the current 30–40 active members to approximately 100, inviting representatives of political structures and NGOs. As announced, the CC is to approve the cabinet as a quasi-parliament, giving additional legitimacy to Tsikhanouskaya’s executive body.

One of the OST’s goals in reconfiguring the democratic forces was to co-opt some of its critics into the common structures (the cabinet and the CC) in order to neutralise the effects of public disagreements, to respond to the

¹⁸ <https://news.zerkalo.io/life/19689.html>

¹⁹ <https://www.the-village.me/village/city/whatsgoingon/292747-yabatka-battle>

²⁰ <https://nashaniva.com/?c-ar&i=296897&lang=ru>

²¹ <https://t.me/viasna96/13212>

demand of some opposition and activists for greater involvement in the process, and to share responsibility for possible future failure.

At the same time, full consolidation of the opposition within the new configuration has not been achieved. A group of Valery and Veronika Tsapkala's supporters (Anatoly Kotau, Dzmitry Balkunets, Volha Karach and others) continued attempts to institutionalise their own coalition separately from the other democratic forces. In July, at the 2nd forum in Berlin, they created the National Council of United Democratic Forces with a plan to elect the future "National Council of the Republic of Belarus" as a representative body of 45 members. The parallel creation of two "proto-parliaments" (the National Council and the expanded CC) and the holding of comparable events (forums and conferences) competing for representation is a sign of further disconnection within the opposition. Although most opposition actors supported Tsikhanouskaya's cabinet and considered the Tsapkala group as spoilers and separatists, one cannot deny the role of the "second tier" structures and their months-long criticism of the OST in launching the August reform of democratic forces.

2.5. RADICALISATION OF OPPOSITION

The cabinet was also meant to respond to another demand of an increasingly large part of the democratic forces — a demand to prepare supporters not only for peaceful, but also for forceful resistance to the authorities. On the eve of the Vilnius conference, there were many calls for launching the "people's liberation movement" and creating a Belarusian liberation army on the basis of Belarusian volunteer units fighting in Ukraine.

One of the cabinet's goals was the "de facto de-occupation of Belarus".²² This thesis further develops the spring call by Tsikhanouskaya and Latushka for world leaders to recognise Belarus as an occupied state. In the opposition's eyes, Russia has transformed from a potential mediator in the resolution of the Belarusian crisis (a position shared among the democratic forces until the end of 2021) into a part of the single existential problem for Belarus together with Lukashenka. As a result, it is now obvious to the leaders of the democratic forces that peaceful protest can no longer be viewed as a panacea and the only acceptable form of struggle.

Ultimately, the coalition that created the cabinet was formed by the OST, Latushka's "People's Anti-Crisis Management" and the CC, as well as ByPOL, "Supratsiu" and a volunteer unit "Polk Pahonya", while the largest Belarusian unit — the Kastus Kalinousky Regiment — distanced itself from political structures. The latter three structures support forceful methods and the first two have already organised "direct action" in Belarus. Two former security officers, Pahonya's Valery Sakhashchyk and ByPOL's Alyksandr Azarau, joined the cabinet as representatives for national security and the restoration of law and order. Among other things, Sakhashchyk will train Belarusian combat units abroad, while Azarau is to continue working on the Peramoha (Victory) plan, ByPOL's flagship initiative. According to Azarau, some of recruited and trained volunteers will carry out "special operations". The appointment of two security officers to the cabinet is another clear manifestation of the growing tolerance of democratic forces to the use of non-peaceful methods of political struggle.

²² <https://tsikhanouskaya.org/ru/events/news/d22479169597509.html>

3

FOREIGN ECONOMIC RELATIONS

The summer of 2022 brought no significant changes in foreign economic relations. New sanctions imposed by the EU at the beginning of this period hardly affected Belarus, although the previous sanctions package came into full effect and had a great impact: exports to the EU collapsed by 56%. The decline in exports to the EU and the collapse in trade with Ukraine continue to play a major role in Belarus's current economic crisis, while financial restrictions have led to a technical default. Nevertheless, thanks to successful trade with Russia and a reduction in imports, Belarus had a trade surplus in the first half of this year. There are also the first signs of reorienting the sanctioned goods to new markets, but progress is too small to affect the macroeconomic situation so far.

3.1. BREAKING ECONOMIC TIES WITH THE WEST: SANCTIONS IN FULL FORCE

The EU adopted its sixth anti-war package of sanctions²³ against Russia and Belarus on 3 June, 2022. Belinvestbank, one of the largest state-owned banks in Belarus, became the fourth Belarusian bank to be disconnected from SWIFT. Moreover, several Belarusian companies are under sanctions: Belteleradiocompany, Belaruskali, the Belarusian Potash Company, Inter Tobacco, Naftan, Neman, Beltamozhservice, and Belkommunmash.²⁴ Most of these enterprises were already under sectoral sanctions and their inclusion on the latest sanctions lists can be regarded as a strengthening of the sanctions and effort to prevent their circumvention. Belarusian companies were not included in the seventh package of anti-war sanctions against Russia.

The earlier-adopted EU trade sanctions against Belarus came into full force in June 2022: trading is now prohibited even under contracts concluded before the imposition of sanctions. This immediately affected trade between Belarus and the EU. According to Belarusian statistics, exports

to the EU from Belarus fell from \$451 million in May to \$244 million in June 2022. Eurostat data²⁵ confirms this trend, showing that imports from Belarus to the EU fell from EUR426 million in May to EUR226 million in June 2022. Eurostat, unlike its Belarusian counterparts, does not conceal the data breakdown by sectors

The breakdown clearly illustrates how the sanctions imposed on Belarus work. Figure 1 shows the trade dynamics of some commodities in monetary terms with the dynamics reflected in indices. Average exports in the first half of 2021, before the introduction of sectoral sanctions, supplies a baseline. Exports of petroleum products, which were sanctioned last June, collapsed almost immediately.²⁶ Exports of other goods sanctioned in March 2022, directly after the breakout of war, decreased throughout the spring in almost all commodity groups except for woodworking products — and all exports then collapsed in June. Compared to January 2022, the June exports of woodworking products fell by 80%, petroleum product exports fell by 99%, and metal exports fell by 93%. Exports in the partially-sanctioned sectors producing chemicals, furniture, and plastics and rubber fell by 51%, 40% and 26% respectively. Exports of electricity (-79%), metal products (-64%), and waste processing services (-82%) have been falling despite the absence of formal sectoral sanctions. Total June exports to the EU fell by 56% compared to January, from EUR513 million to EUR226 million per month due to sanctions, the toxicity of trading with Belarusian companies, and financial restrictions.

At the same time, there are commodity groups where exports to the EU continue growing. First of all, food export growth is largely explained by growing prices. Belarus exports EUR40–50 million worth of food to the EU monthly. Moreover, exports of electrical equipment (+26%) and electronics (+33% in June compared to the beginning of the

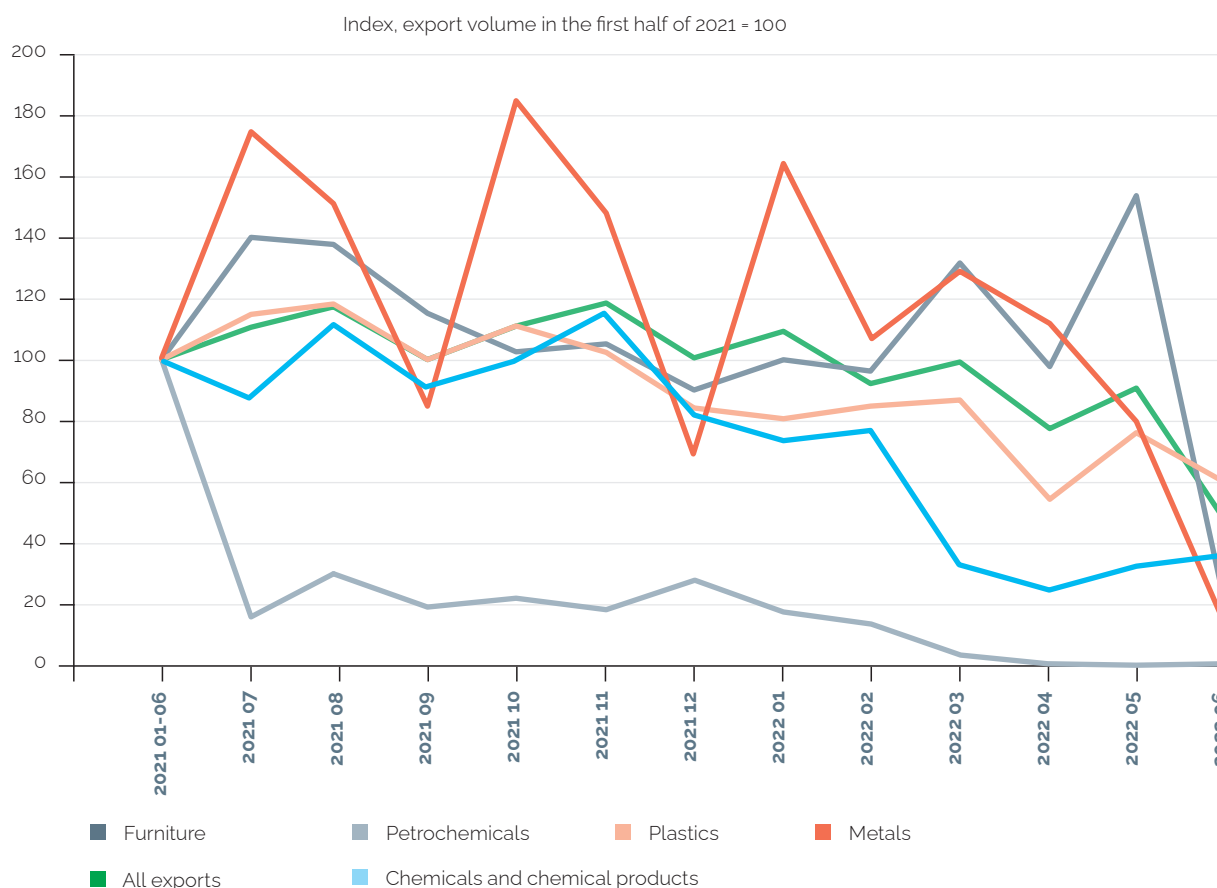
²³ <https://www.consilium.europa.eu/en/press/press-releases/2022/06/03/russia-s-aggression-against-ukraine-eu-adopts-sixth-package-of-sanctions/>

²⁴ <https://news.zerkalo.io/economics/15504.html>

²⁵ <https://ec.europa.eu/eurostat>

²⁶ It is important to note that the Eurostat statistics do not cover Belarusian exports shipped through Rotterdam and other European ports, whereas Belstat considers these commodity flows to be exports to the EU. Exports through European ports most likely continued for some time even after the sanctions were imposed in June 2021.

Figure 1.
Exports from Belarus to the EU, June 2021 — June 2022



year) have been growing, although these bring in slightly less than EUR40–50 million per month in total.

It seems that Belarus-EU trade has already reached the bottom. However, tighter financial restrictions could yet worsen the situation. Despite the fact that almost no new financial sanctions were imposed, European banks have independently worsened the conditions for their Belarusian counterparties. Latvian banks stopped servicing clients in the Russian language and the Swedish bank SEB stopped making transfers related to Russia and Belarus following the practices of its subsidiaries in the Baltic countries. The largest Lithuanian banks have already terminated transactions with Belarus, and the Siauliai Bank which, in particular, services goods transit, will follow their example from 1 September.²⁷ Even Lukashenka had to pay attention to the transactions issue: he said, not for the first time, that money could be carried in suitcases if necessary to overcome the problems.²⁸

²⁷ https://www.baltictimes.com/lithuanian_forin_says_looking_into_russia_s_note_on_payments_for_kaliningrad_transit/

²⁸ <https://www.belta.by/president/view/lukashenko-poruchil-v-blizhajshee-vremja-reshit-problemy-s-provedeniem-platezhej-v-uslovijah-sanktsij-520654-2022/>

At the same time, the rhetoric of Minsk on EU trade has become more positive. At one government meeting, Lukashenka criticised officials for not being active in Western markets.²⁹ He hinted that the EU's current need for energy resources could help circumvent sanctions on petroleum products and stressed the importance of European markets for Belarus. It is unclear whether Belarus will be able to further grow exports to European markets because trade is limited not only by trade sanctions, but also by financial and transport sanctions. However, shifting the focus away from the Russian and Asian markets may be due to the lack of quick success in these markets.

3.2. SANCTIONED GOODS BEING TRADED THROUGH LOOPHOLES

More than half a year has passed since the beginning of the war and the imposition of tough sanctions. Belarusian producers of sanctioned goods are already demonstrating

²⁹ <https://www.belta.by/president/view/lukashenko-o-torgovle-s-es-beshenstvo-politikov-uzhe-uhodit-na-zadnij-plan-biznes-est-biznes-517839-2022/>

their first successes in reorienting to new markets and in resolving issues of transit and sourcing components. The most striking example of this is in oil refining. Although Belstat does not publish most of the data on sanctioned industries, the state of the industry can be assessed indirectly by data on salaries and financial standing. Over the summer, these figures improved significantly after the dire situation in the spring. The improved situation is confirmed by statements from industry officials reporting to Lukashenka³⁰ who have said that the Naftan refinery broke even again in July.³¹ Even though it is unlikely that oil refining is on the same scale as before, the refineries' current output is clearly sufficient for them to break even and for the gasoline price in the domestic market not to be further increased.

International trade data provided by UN Comtrade³² do not yet allow us to understand where the main exports of petroleum products have been diverted to. According to these statistics, petroleum products were supplied to Ukraine even after the war started, although the volume dropped rapidly and amounted to only \$19 million in May versus \$249 million in January. There is an increase in supplies to Uzbekistan, but the June exports of petroleum products to this country is too small to explain the new data, amounting to only \$2.6 million. The only possible explanation is a significant increase in supplies to Russia, which has also stopped disclosing its foreign trade data.

Supplies of potash fertilisers have also been getting back on track. According to the Russian newspaper Kommersant, Belarusian potash is now being shipped through Russian ports.³³ It is proposed that two million tons will be shipped through Russian ports by the end of 2023. In addition, about 120 thousand tons are now being supplied to China by railway. In total, Belarus will be able to supply about three million tons of fertilisers in 2023 or only a quarter of the usual volume. Kommersant also reports that the Belarusian manufacturer is having to offer heavy discounts of 30–50%. As fertiliser prices remain high on world markets, potash fertiliser sales are likely to continue being profitable even with higher transit costs and factoring in the discounts. According to UN Comtrade, in addition to China, Belarusian fertilisers are being supplied to Brazil, India and Indonesia.

The Belarusian woodworking industry has also been trying to find new markets.³⁴ Deliveries to China, Azerbaijan, Turkey and Uzbekistan keep growing, although these exports are tenfold less than the usual supplies to the EU. For example, only \$3 million worth of wood was delivered to Uzbekistan in June. Prices also have to be reduced and transport costs to Asian countries are much higher.

Despite the efforts to reorient trade towards the Far Arc countries, the share of Belarus's trade turnover with countries outside the EU and outside the CIS remains approximately the same as a year ago: at 19.8%. However, such figures mean that Belarus has partially managed to offset the drop in its potash trade. China is now Belarus's second most important trading partner (or the third if we consider the EU countries as a single counterparty): China has dislodged Ukraine from second position and has 6.8% of the trade turnover now.

3.3. BELARUSIAN GOVERNMENT ALLOWED TECHNICAL DEFAULT

On 28 June, the Belarusian government and National Bank adopted a joint resolution on foreign debt settlements. This document, in particular, allows foreign public debt repayments to be made in Belarusian rubles even if the debt is denominated in another currency. State propaganda tried to present this decision as a political measure against a hostile West. Statements by the Minister of Finance, however, made it clear that this was a forced step. Moreover, it benefits the holders of Belarusian bonds. The Ministry of Finance had already faced problems with coupon payments even before the National Bank fell under EU sanctions. If wire transfers forwarded to Citibank by the manager of Belarusian bonds went through without obstacles, then some payments from Citibank to other banks, where the accounts of the bond holders were placed, did not go through. This was both due to the implementation of sanctions and, in some cases, due to over-compliance. The Ministry of Finance proposed a scheme: payments would be made in Belarusian rubles through a dedicated account in Belarusbank. Naturally, such payments violated the terms and conditions of the bond issue. Despite this, the decision afforded investors at least some opportunity to get the money due to them.

After the first payment in Belarusian rubles was made, the consequences quickly followed. On 29 June Citibank Group refused to be an executor for Belarusian bonds. The Moody's³⁵ and Fitch³⁶ rating agencies announced that Belarus had a selective (limited) default, stating its technical inability to repay the debt. The Ministry of Finance challenged these decisions by calling them 'subjective'.³⁷ After a short pause, the S&P agency also announced a selective default of Belarus on debt in foreign currencies and a complete default on the issue of Eurobonds, the coupon for which had been paid in Belarusian rubles.

³⁰ <https://www.belta.by/president/view/besperebojnaja-rabota-neftehimicheskogo-kompleksa-lukashenko-prinjal-s-dokladom-glavu-belneftehima-520964-2022/>

³¹ <https://t.me/c/1327396052/1353>

³² <https://comtrade.un.org/>

³³ <https://www.kommersant.ru/doc/5446036>

³⁴ <https://news.zerkalo.io/economics/17306.html?c>

³⁵ <https://www.moody.com/credit-ratings/belarus-government-of-credit-rating-806356891#:text=foreign%2Dcurrency%20debt-,constitutes,-a%20defaultMOODY%27S>

³⁶ <https://www.fitchratings.com/research/sovereigns/fitch-downgrades-belarus-to-rd-18-07-2022>

³⁷ https://www.minfin.gov.by/ru/public_debt/pressreleases/6ac112dafeg24815.html; https://www.minfin.gov.by/ru/public_debt/pressreleases/aa2994b401d3429e.html

The technical default that took place did not affect the current state of the banking and foreign exchange markets in Belarus. This is not surprising given that Belarus is de facto cut off from international financial markets after the events of August 2020, while the sanctions introduced in 2021 and early 2022 legally consolidated the effects. However, some consequences of the default are still possible. Contracts for financial obligations of Belarusian banks or state-owned enterprises may stipulate special terms and conditions in the event of a default on government bonds, such as an increase in the interest rate or a requirement for immediate debt repayment. A default, even a technical one, leaves a long stain on the record and, even if the steps to lift sanctions are clear, it will not be possible to restore the country's image after the default without comprehensive structural reforms.

3.4. ENGAGEMENT WITH RUSSIA SLOWLY DEEPENING

Despite the absence of demonstrative steps in the economic interaction between Belarus and Russia, interactions are slowly but surely deepening and thus increasing the dependence of the Belarusian economy, but also allowing Belarus to live through sanctions less painfully.

The volume of trade with Russia continues to grow. At their meeting, the two countries' prime ministers could not agree on a trade turnover figure: Belarus's Raman Galovchenka said bilateral trade totaled \$20 billion for the first six months of the year and Russia's Mikhail Mishustin said it was \$18 billion.³⁸ If Belstat is to be trusted, Russia's share in Belarusian trade has grown to 58%. Both the reduction in turnover with the EU countries and the growth of trade with Russia played their role: exports to Russia grew by 23% in the first half of the year, while imports from Russia grew by 4.4% during the same period. Belarus recorded a positive trade balance for the first half of 2022 thanks to the growth of exports to Russia.

Unfortunately, the lack of data from both Belarus and Russia makes it difficult to assess whether the growth in exports to Russia is only due to an increase in prices or stems from an increase in physical export volumes too. Rising prices could play an important role in revenue growth, as dairy and meat products account for a significant share of exports, and prices for these were rising throughout the first half of the year. The Food and Agriculture Organization of the United Nations (FAO) has recorded a decline in food prices since July and, if this trend continues, export revenues generated by trade with Russia may also decline. Also, due to the concealment of data, it is impossible to understand whether this increase in exports is due to the reorientation of the sanctioned products, such as petroleum products, or reflects the success of import substitution.

So far, no shining examples of import substitution have been covered in the media, although there has been a lot of talk about the potential of import substitution. On the contrary, the Belarusian truck manufacturer MAZ is losing its positions in the Russian market, yielding to Chinese competitors. MAZ sales in Russia fell by 31% in seven months of the year.³⁹ The MAZ case vividly illustrates how, in times of crisis, consumers revise their usual models and switch to more competitive products, and it will be difficult for Belarus to compete with China in many segments of the Russian market.

The import substitution programme has begun to take shape. Belarus is going to create 14 import-substituting industrial facilities. These will focus on the production of components, primarily for agricultural and logging equipment. The first seven projects could be "worked out" by the end of this year.⁴⁰ These unhurried plans indicate that import substitution is not a matter of tomorrow or even the day after tomorrow. Another issue is funding. While Russia confirms its willingness to help to fund the projects, the announced amount is rather small, ranging from \$1.3 to \$1.5 billion, depending on the source. This is unlikely to be sufficient to implement all 14 projects and, of course, it will not be enough to compensate Belarus for the losses caused by sanctions, which Prime Minister Golovchenko estimates at \$16 billion. So far, no interstate agreements have been signed on the matter and it is very likely that all the funding will be channeled as private loans.

Cooperation in other areas has also been developing gradually. Belarus has finally secured the opportunity for its banks to participate in Russia's public procurement procedures as guarantors.⁴¹ Such a decision will greatly simplify Belarusian enterprises' access to public procurement in Russia. Belarus and Russia seem to have agreed to build a seaport and several seaport terminals on the Baltic Sea.⁴² However, there are still no official documents and final agreements, and the very construction of the port, according to various estimates, may take two to three or four to five years. It also looks like Belarus will issue bonds on the Russian financial market: five issues of Belarusian bonds denominated in rubles have been listed on the Moscow Stock Exchange.⁴³ Belarus, inevitably, is only becoming more and more dependent on Russia and Russian markets.

³⁸ <https://news.zerkalo.io/economics/20736.html>

³⁹ <https://reform.news/324562-maz-snizil-prodazhi-v-rf-na-31-po-itogam-semi-mesjacev>

⁴⁰ <https://news.zerkalo.io/economics/18051.html#c>

⁴¹ <https://news.zerkalo.io/economics/17868.html#c>

⁴² <https://www.dw.com/ru/belarus-postroit-port-v-severo-zapadnoj-chasti-rossii/a-62781629>

⁴³ <https://www.interfax.ru/business/855973>

4

DOMESTIC ECONOMIC TRENDS

The key domestic economic trend in Belarus during the summer of 2022 was a further decline in GDP accompanied by a significant reduction in real incomes in sanctioned sectors. In response, the government continued to take measures to conceal information and create a rosier picture in the news. In addition to verbal interventions, representatives of the economic bloc focused their efforts on trying to address the challenge of a growing budget deficit. In this regard, the two main strategies were raising taxes and turning on the “money printing press”.

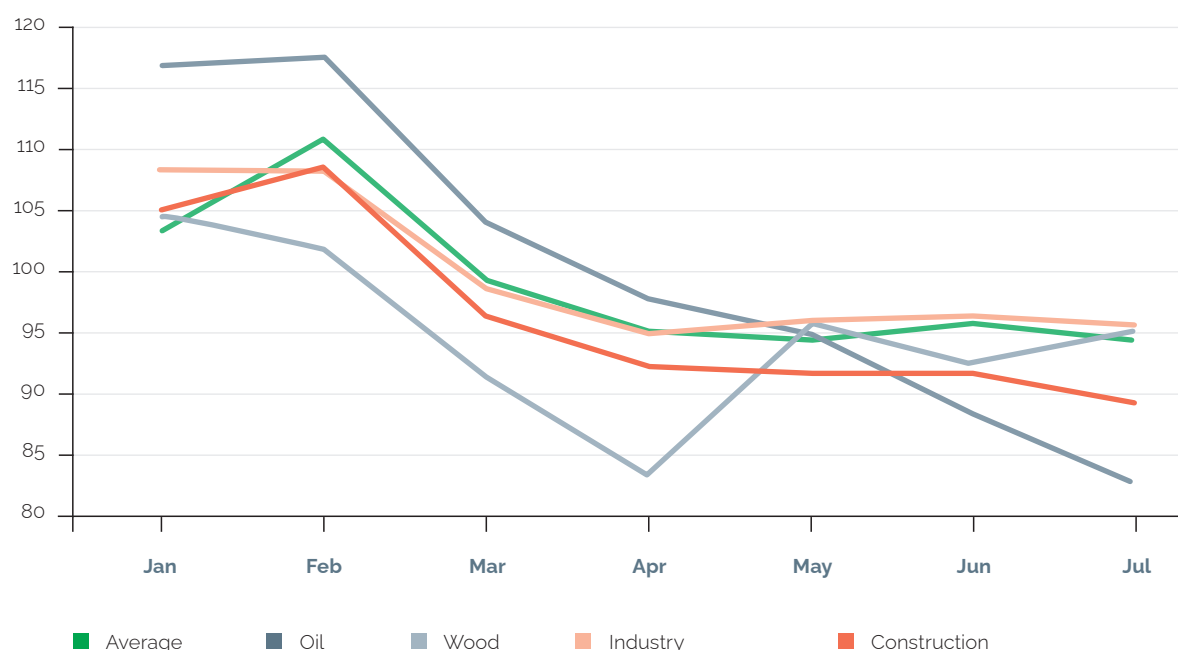
4.1. GDP CONTINUES TO DECLINE

GDP has fallen for seven months in a row. The GDP change during the first eight months of 2022, compared to the

corresponding months of 2021, amounted to: +2.7% in January; -0.4% in February; -3.3% in March; -6.5% in April; -8.6% in May; -7.8% in June; -10.1% in July; -3% in August. Accordingly, we can cautiously posit that the Belarusian economy has already “hit rock bottom”. The volatility observed in July and August can largely be explained by the later harvest period in 2022. Without the contribution of agriculture, the July and August values were -8% and -6.5% respectively.

The agriculture sector made the most severe negative contribution to GDP in July, shrinking by more than 20% compared to July 2021. But already in August the annual growth in this sector was 26%. The transport sector has become a stable “anti-leader” in recent months, showing a drop of 20–27% in May-August compared to the corresponding months of last year.

Figure 2. Average real wages versus the same month of the last year for people employed in oil refining, logging, industry and construction sectors



Source: Belstat

The growth indicators in the IT sector have undergone the biggest qualitative change. This small but rapidly growing sector provided up to half of the annual GDP growth in the stagnant Belarusian economy in 2009 through to 2019. After the outbreak of a full-scale war in Ukraine, many companies announced their partial or complete relocation away from Belarus, but the sector continued to show a steady 8% growth even when the situation in other sectors of the economy began to deteriorate. June was the first month in a long time when the growth of the IT sector turned out to be modest, at only 1%, followed by an unprecedented drop of over 8% in July. In August, the information and communication sector, which includes IT, again showed a drop of 3.2%. Although monthly GDP data is highly volatile, there is reason to believe that the current period may be the end of the IT sector growth era.

Another important qualitative change is the aggravated fall in average real wages. In July 2022, this indicator decreased by 5.9% compared to July 2021, while in February it was 10.7% higher than a year earlier.

The fall in real incomes was uneven and primarily concerned workers employed in the sanctioned sectors of the economy, as well as health workers who lost their COVID-19 allowances. Workers employed in the forestry and wood-working sectors, as well as in the production of chemical products, led the losses in income: their July wages were 17% less on average than a year ago. In IT, the highest paid sector, real wages in July were also 13% lower than last year, but this decline may be explained by the relocation of highly paid employees to other countries. The salaries of health workers who lost their COVID-19 allowances decreased by 8%. Meanwhile, the salaries of construction workers fell by 11%. This category of workers stands out in particular because, unlike other sectors leading the real wages decline, the construction sector depends mainly on internal factors such as the economic expectations of the population and the availability of lending.

In July wages of oil sector workers in real terms decreased by 5.2% compared to the previous year, which, however, is relatively positive news for this group of professionals, since their real wages had decreased by 17% in April.

4.2. CONCEALMENT OF INFORMATION AND VERBAL INTERVENTIONS

Another trend described in our earlier report continued through the summer: the concealment of data and efforts to shape a positive economic news agenda. In July, the Ministry of Finance stopped publishing data on budget execution and removed information for the previous months of 2022 from its web resource.⁴⁴ Finance Minister Yury Se-

liverstov said in an interview that the information was removed because it was used for "all sorts of insinuations."⁴⁵ Belstat stopped publishing detailed export statistics in the same month.⁴⁶ In August, the National Bank stopped publishing details about the structure of its forex reserves after it became known that the country's gold and forex reserves had decreased by more than 10% since the beginning of the year.⁴⁷

Along with data concealment, government officials continue pushing hard to shape a positive news agenda. In early August, a week before the July statistics reporting a double-digit drop in the GDP were released, Prime Minister Roman Golovchenko gave a lengthy interview about record exports to Russia, an unprecedented increase in the profitability of enterprises, a one-and-a-half-fold reduction in the share of unprofitable enterprises and unprecedented foreign investments.⁴⁸ Earlier, responding to a journalist's question about the five-month fall in the economy, Deputy Economy Minister Yaroshevich said the economy could not fall, and economic forecasts were "not the paramount thing."⁴⁹ In another interview, Yaroshevich urged people not to judge the economy by its GDP, but to pay attention to the record-breaking foreign trade balance, and he noted that the Belarusian economy was "gaining stability."⁵⁰

If officials let slip about negative factors, then this information soon disappears from official sources. This is exactly what happened with National Bank Chairman Pavel Kallaur's statement that the number of bad debts in the banking sector reached its "limit." This quote appeared on the website of Belta, the state-owned news agency, on 4 August, however, the news was "corrected" later as identified by mismatches between the webpage text and the articles referring to it.⁵¹

4.3. TAX INCREASE

Despite the concealment of information about the budget deficit, it certainly continues to grow.⁵² The government

⁴⁵ <https://smartpress.by/news/26943/>

⁴⁶ <https://reform.by/317023-belstat-pohozhe-eshhe-silnee-sokratil-publikaciju-jeksportnyh-dannyh>

⁴⁷ <https://news.zerkalo.io/economics/19308.html?tg>

⁴⁸ <https://www.belta.by/economics/view/golovchenko-nemotrija-na-sanktsii-ekonomika-demonstriruet-istoricheskivysokie-kachestvennye-517797-2022/>

⁴⁹ <https://news.zerkalo.io/economics/16454.html?tg>

⁵⁰ <https://reform.by/326620-zamministra-jekonomiki-predlozhilne-sudit-ob-jekonomike-po-cifram-vvp>

⁵¹ Belta: <https://www.belta.by/economics/view/kallaur-pochitret-vydavaemyh-v-strane-kreditov-lgotnye-517107-2022/> Euroradio: <https://euroradio.fm/ru/kallaur-sdelal-zayavlenie-o-situacii-s-neplatezhesposobnymi-predpriyatiami>

⁵² According to Finance Minister Yury Seliverstov, the deficit amounted to BYN 1.9 billion in July, while the plan for 2022 provided for a deficit of BYN 4.1 billion.

⁴⁴ <https://news.zerkalo.io/economics/17698.html>

continues following the pathway of increasing taxes since it is unable to attract significant foreign (including Russian) loans and unwilling to cut spending. The recent and excessive emission of Belarusian rubles has become another way of patching up a hole in the budget (see details below).

The trend of raising certain taxes emerged at the beginning of the 2020 political crisis. In 2020–2021 several changes occurred: the preferential VAT rate on children's goods was cancelled; the income tax for the IT sector employees, the excise tax on cigarettes, the tax on parking lots and floor space of business centers were all increased; and a transport tax was introduced.

The outbreak of the war in Ukraine and the effective beginning of sanctions coincided with the introduction of new fees and the authorities' activities aimed at increasing tax revenues noticeably intensified. A tax on owning the first apartment was introduced in January 2022; a special fee for advertisers was introduced in March; the VAT on data transmission services was increased for mobile operators and internet providers in May; VAT was introduced for foreign online stores in July; and fees were introduced for gardeners and mushroom pickers. Furthermore, in August, the procedure for crossing the Belarusian state border by road changed, which resulted in new fees introduced; the excise tax on alcohol increased in April; and it is planned to sharply increase an excise tax on cigarettes in December.⁵³

The logic behind most of the new taxes is based on a general principle of taking money from those who have it and not touching anyone else. It is assumed that people who own apartments and cars, and even more so those who work in the IT sector, have "extra" money, which means that the social tension resulting from the introduction of taxes for these people will be minimal. However, the effect of such taxes is also often insignificant. According to the calculations of the Minister for Taxes and Levies Serhei Nalivaiko, the expected budget revenue from the introduction of the tax on the first apartment will only be 45 million Belarusian rubles.⁵⁴

A few small taxes can only partially patch up the growing hole in the budget and so the government has started talking about increasing the key taxes. Taxes for individual entrepreneurs were already increased — depending on the type of their business activity — in January, with the increase ranging from 100% to 300%. Deputy Minister for Taxes and Levies Ihor Skrinnikov said in July that the

ministry was discussing a further increase in the tax burden on individual entrepreneurs.⁵⁵

The Business Union of Entrepreneurs and Employers reported in July that the government was also considering raising VAT, one of the key taxes, from 20% to 23%.⁵⁶ The publication later disappeared, but it is likely that in the current context such an increase in the tax, which provides up to a third of budget revenues, is quite probable.

4.4. MONEY ISSUE

The government of Belarus has repeatedly resorted to issuing excessive volumes of money as a way of dealing with the budgetary crisis, and the country even had the highest inflation rate in the world for some time. In his recent speech, Alyaksandr Lukashenka suddenly recalled how he had ordered the "switching on of the money printing press" in the past and he noted the policy had been successful.⁵⁷ Prime Minister Golovchenko also said that in the situation it was necessary to lower interest rates on loans to stimulate the economy better.⁵⁸

In 2014, a team led by Pavel Kallaur took over the leadership of the National Bank of Belarus, promising to stop the practice of directed lending and excessive emission to achieve macroeconomic stability and low inflation in particular. It appears that these promises are consigned to history and the National Bank is increasingly inclined towards quantitative easing and money issuance.

Accordingly, the National Bank has injected more funds into the banking system of Belarus, increasing funding from a little over three billion Belarusian rubles to a little over five billion Belarusian rubles in the first two quarters of 2022. Against this backdrop, the liquidity of the banking system reached a multi-year high of five billion Belarusian rubles in June. These funds appear to have been placed with banks to enable them to continue their lending activities and the directed lending practice in particular.

Kallaur, most likely, remains an adherent of a tight monetary policy and has leveraged such a measure as excessive money issue only when other options were exhausted. In particular, judging by his statements, the practice of forcing banks to issue loans to insolvent state-owned enterprises, as well as accepting "junk" securities instead of debt repayments, has reached its ceiling, and any further introduction of such approaches threatens

⁵³ <https://news.zerkalo.io/economics/12023.html>;
<https://news.zerkalo.io/economics/9586.html>;
<https://news.zerkalo.io/economics/19998.html>;
<https://news.zerkalo.io/economics/15250.html>;
<https://news.zerkalo.io/economics/13275.html>

⁵⁴ <https://horki.info/news/19213.html>

⁵⁵ <https://news.zerkalo.io/economics/17593.html>

⁵⁶ <https://news.zerkalo.io/economics/18592.html>

⁵⁷ <https://news.zerkalo.io/economics/20372.html>

⁵⁸ <https://www.belta.by/economics/view/golovchenko-dlja-stimulirovanija-potreblenija-nuzhno-suschestvenno-snizit-protsentnye-stavki-po-517806-2022>

the banking system stability. In his speech, Kallaur also mentioned loose monetary policy as a new priority and noted that 30% of the loans issued in the country were already concessional and that they were issued at a negative real interest rate.⁵⁹

Another issuing channel is Development Bank bonds. In January 2020, the National Bank adopted a special resolution allowing the Development Bank to issue bonds worth of 2.6 billion Belarusian rubles.⁶⁰ A new resolution increased the amount to five billion Belarusian rubles in late August.⁶¹ It can be assumed with a high degree of probability that this means a hidden money issue and not the market placement of securities.

59 <https://euroradio.fm/ru/kallaur-sdelal-zayavlenie-o-situacii-s-neplatezhnesposobnymi-predpriyatiyami>

60 <https://pravo.by/document/?guid=12551&po=C22200030&p1=1>

61 <https://pravo.by/document/?guid=12551&po=C22200538&p1=1>

5

TRENDS IN PUBLIC OPINION

It is highly likely that the Lukashenka regime has exhausted its available resources endeavouring to increase trust among the politically-neutral segments of society. Despite this, the conflict is, or has already been, transformed from a confrontation between groups divided by political preferences into a social confrontation. There has been a paradigm shift in the acceptability of militant means of political struggle — from its complete rejection early in the revolution to broad approval of militant methods today. The leaders of the democratic forces in Belarus are responding to the demand of the protest-minded part of society by relying on the use of force.

5.1. SOCIAL CONFRONTATION: THE NEW PLATEAU

After the growth of trust in the Lukashenka regime among “neutral” respondents, observed in the previous trimester, the social conflict lost momentum. The **Social Conflict Segmentation (SCS)**⁶² classification shows no significant changes in the structure of society in terms of people's confidence in state and non-state institutions, as well as between supporters and opponents of government.

In May 2022, the balance of the two broad groups of society, on the one hand **ardent supporters** of the regime and those **inclined to trust**, on the other hand **ardent opponents** of the regime and those **inclined not to trust**, was split approximately 48/52. In August 2022, the balance had **not changed significantly**. It is important to understand that being included in the segment of those inclined to trust (or even the ardent supporters) **does not necessarily mean support for Alyaksandr Lukashenka, especially not electoral support**. Rather, it is a question of supporting the Belarusian system (more on this later).

It can be assumed that the lack of change suggests a certain exhaustion of natural opportunities for the growth of support for Lukashenka and the institutions serving his interests. As before, society is divided, roughly in half, with clearly marked “poles” — magnets for attracting “neutrals” on the spectrum of political confrontation.

⁶² For a detailed description of the SCS methodology, see the previous issue of the Belarus Change Tracker (<https://library.fes.de/pdf-files/bueoros/ukraine/19338.pdf>).

The degree of political polarisation remains high. The Bogardus social distance scale was used to measure the degree of confrontation.

The data in the graph is sorted in descending order (reducing social distance) for the **ardent opponents**.

As one can see, the social and political groups which **ardent opponents** of the regime feel an affinity with are beyond the line of tolerance for those **inclined to trust** and for the **ardent supporters**. It can be assumed that the confrontation is losing its exclusively political nature and becomes increasingly social.

5.2. SOCIAL SENTIMENT: HAS A CEILING BEEN REACHED?

How do groups within the social conflict see the situation in the country? To answer this question, the Social Sentiment Index (SSI) has been used.⁶³

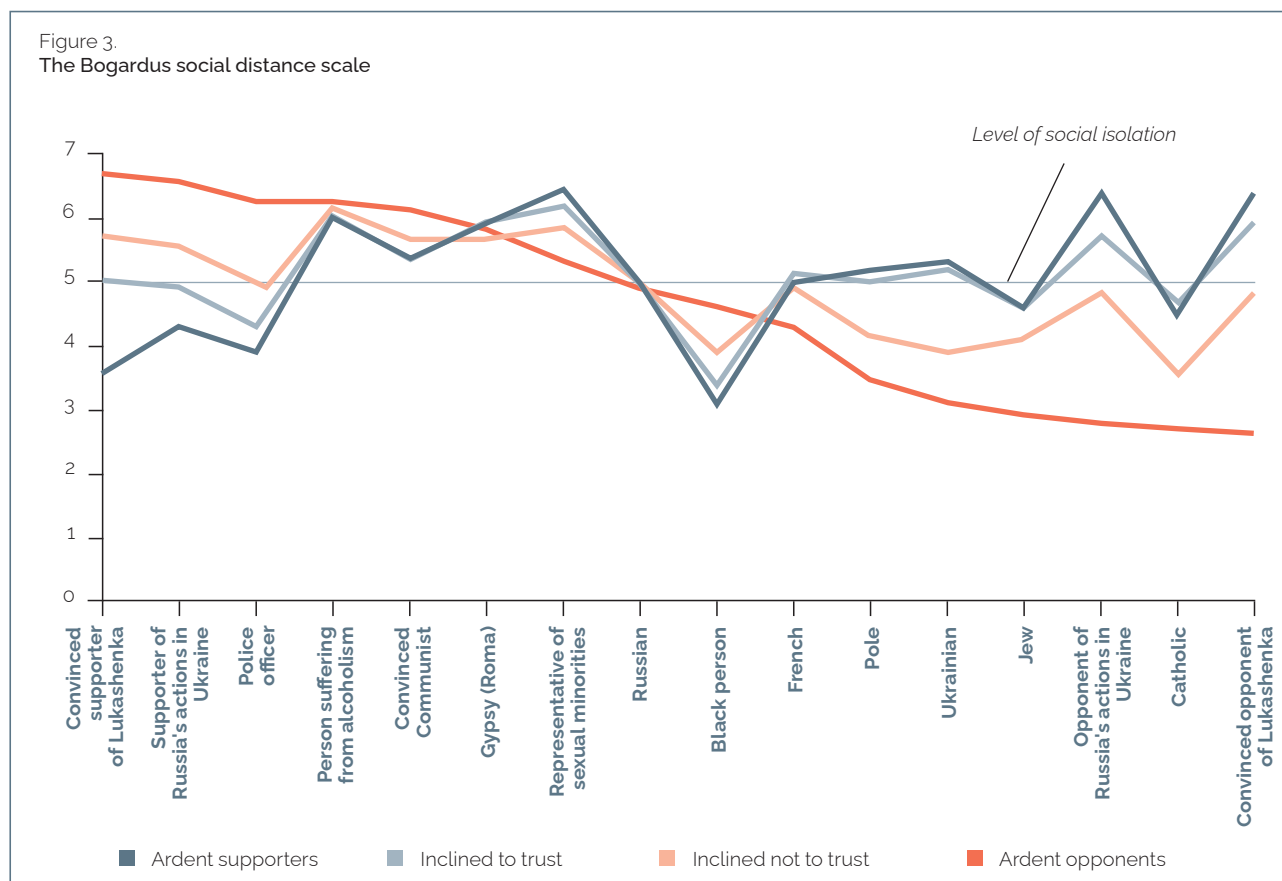
The SSI reflects the vector of political, economic and public concerns of Belarusians. The SSI varies over a range from 0 to 200, where values below 100 indicate the prevalence of negative appraisals.

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.

⁶³ The full methodology is described here: <https://www.levada.ru/obnovlennaya-metodika-izmereniya-indeksa-sotsialnykh-nastroenii-isn/>; the study questionnaire includes questions A2–A13.

Figure 3.
The Bogardus social distance scale



Compared to May 2022, both the general SSI and partial indices have somewhat reduced, with the family and situation index showing the largest fall, suggesting that the contribution of personal and family situation to social optimism has begun to decline.

Looking at the Social Sentiment Index through the prism of SCS, one notices that all index scores for **ardent supporters** and those **inclined to trust** are not significantly different from the 2022 indices overall, while index scores for those **inclined not to trust** and **ardent opponents** are falling across all indices.

This suggests two conclusions.

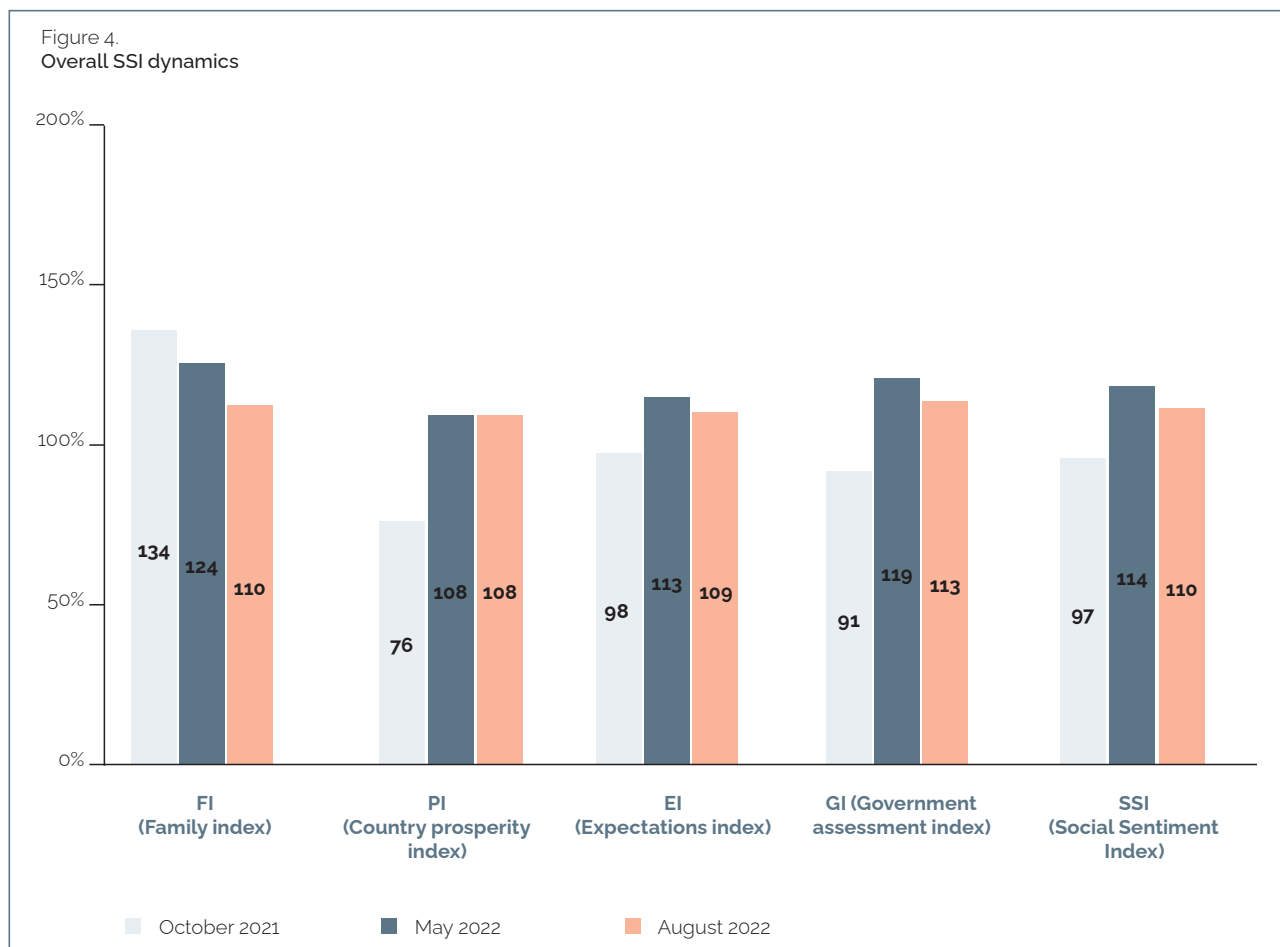
1. The reserve of available public support for the Lukashenka regime among neutral segments of society has probably been exhausted. The lack of social optimism among those **inclined to trust** and negative dynamics across all indices among those **inclined not to trust** show that "neutrals" believe that either the state apparatus is unable to improve the situation any further (in a broad sense), or that a continuation of the current policy will make the situation worse. The rally round the flag effect noted in the previous Belarus Change Tracker is unlikely to repeat. In this context, the declining support for Russia's actions in Ukraine documented by Chatham House re-

searchers is particularly important.⁶⁴ Given the link between the growing trust in the Lukashenka regime and fear of war described in the previous study, one can reasonably assume that in order to maintain support for his policies among "neutral" segments of society, Lukashenka will increasingly have to distance himself (and his country) from the war in Ukraine.

2. The confrontation is becoming (or has already become) not so much a conflict of political groups but a broad social confrontation. One can now observe a confrontation between two very broad population groups, those included and excluded from the Belarusian system. The system in this case can be understood as a set of connected power relations or practices and resource distribution practices, as well as incentives carried out by or on behalf of the state. Inclusion into the system is defined by an individual's feeling, whether he/she considers himself a beneficiary of the system or not.

Let us look at the differences in SSI by SCS groups. There is a huge difference in the way the system's work is perceived. In addition, the family situation index (FI) among **ardent supporters** and those **inclined to trust** is lower than

⁶⁴ "How Belarusians' views on the war have changes over six months (poll conducted 4–21 August 2022)," <https://belarus-polls.org/wave-11>



all other indices; at the same time, FI is higher among **ardent opponents** and those **inclined not to trust**. This suggests that in their hopes and expectations, the former focus more on the system than on themselves and their families.⁶⁵

Taken together, these indicate how groups view the system's work and whether they feel it benefits them: about half of society does not see itself as included in the system. Earlier Chatham House research⁶⁶ also touches on this issue and captures a pre-existing imbalance of inclusion in the system (the "Hardcore protesters" roughly correspond to **ardent opponents**, and "Lukashenka's base" — to **ardent supporters**).

In this context, particularly interesting are the observations of political scientist Vladimir Pastukhov who, in September 2020, predicted the transformation of the Belarusian social structure into a non-traditional class structure based on specific forms of affiliation with the country's ruling system.⁶⁷

To describe the new arrangement, he introduced the concept of a "megaclass", which is opposed to the traditional understanding of the class structure.⁶⁸

This framework provides reasonable argument that the political confrontation in Belarus is being transformed into a social confrontation, avoiding fixation on socio-demographic differences between segments and the widespread rhetoric about the non-inclusion of the working class in the structure of 2020 protests.⁶⁹ Within the same megaclass, an IT specialist can stand next to a factory worker; they can both be included in the system and be opposed by similar IT specialists and factory workers who are not included in the system.

The confrontation can therefore be interpreted as one between the interests of the intra-system megaclass seeking

⁶⁵ This interpretation was offered by Marina Krasilnikova in the article "Integral Indicators of Social Well-being" in the journal *Vestnik Obschestvennogo Mneniya*, <https://www.levada.ru/sites/default/files/vom1.pdf>

⁶⁶ "Belarusians' views on the political crisis" (Chatham House, poll conducted 1–10 November 2021), <https://belaruspolls.org/wave-6>

⁶⁷ <https://novayagazeta.ru/articles/2020/09/14/87084-revoljutsiya-othodit-s-belorusskogo-vokzala>

⁶⁸ "Mega" in this case means that new classes overlap with the previous, traditional class structure, which is blurred and changeable in Belarus. Pastukhov introduces this as an ad hoc concept and for narrative purposes, but it seems to be a good enough metaphor to explain the social conflict in Belarus.

⁶⁹ See, for example, Gapova, E. (2021). "Class, Agency, and Citizenship in Belarusian Protest." *Slavic Review*, 80(1), 45–51. <https://doi.org/10.1017/slr.2021.21>; Oksana Shelest. "Belarusians are ready for a long struggle. Sociologist on protesters' sentiment," *Deutsche Welle*, 2020 August 26, <https://bit.ly/3BUZb4S>

Figure 5.
Differences in SSI by SCS

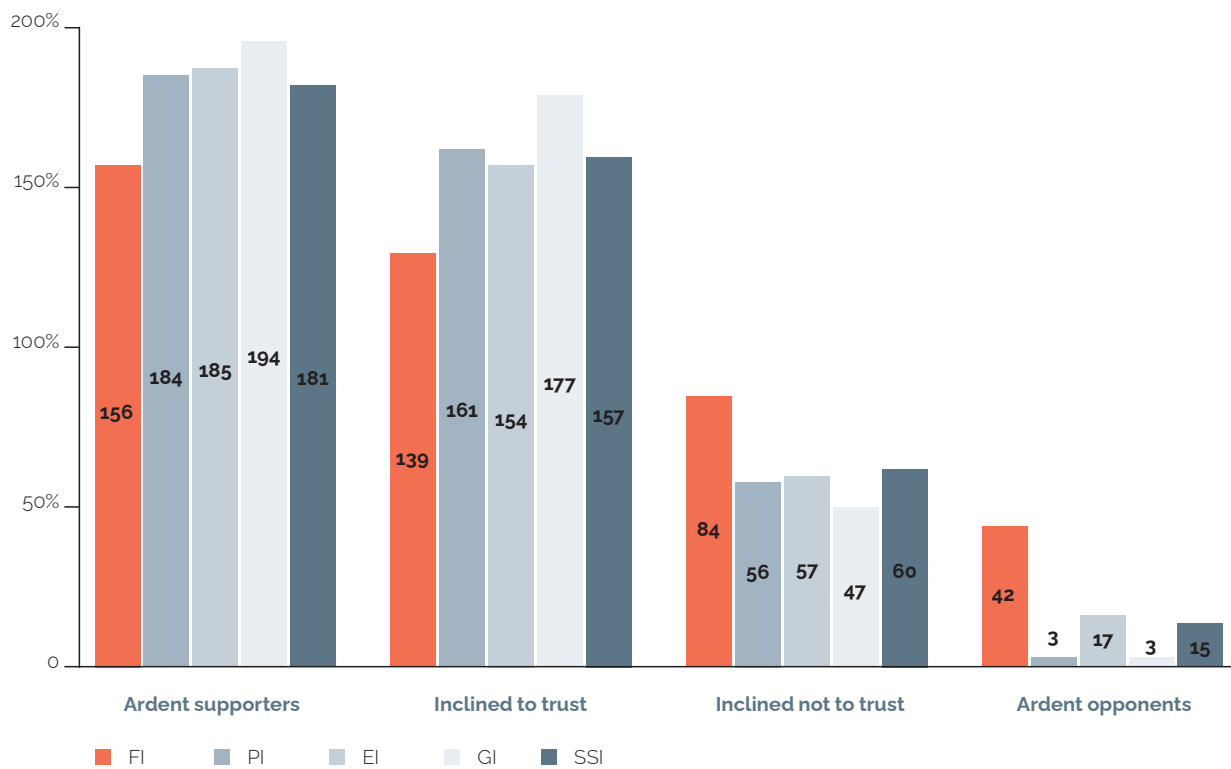
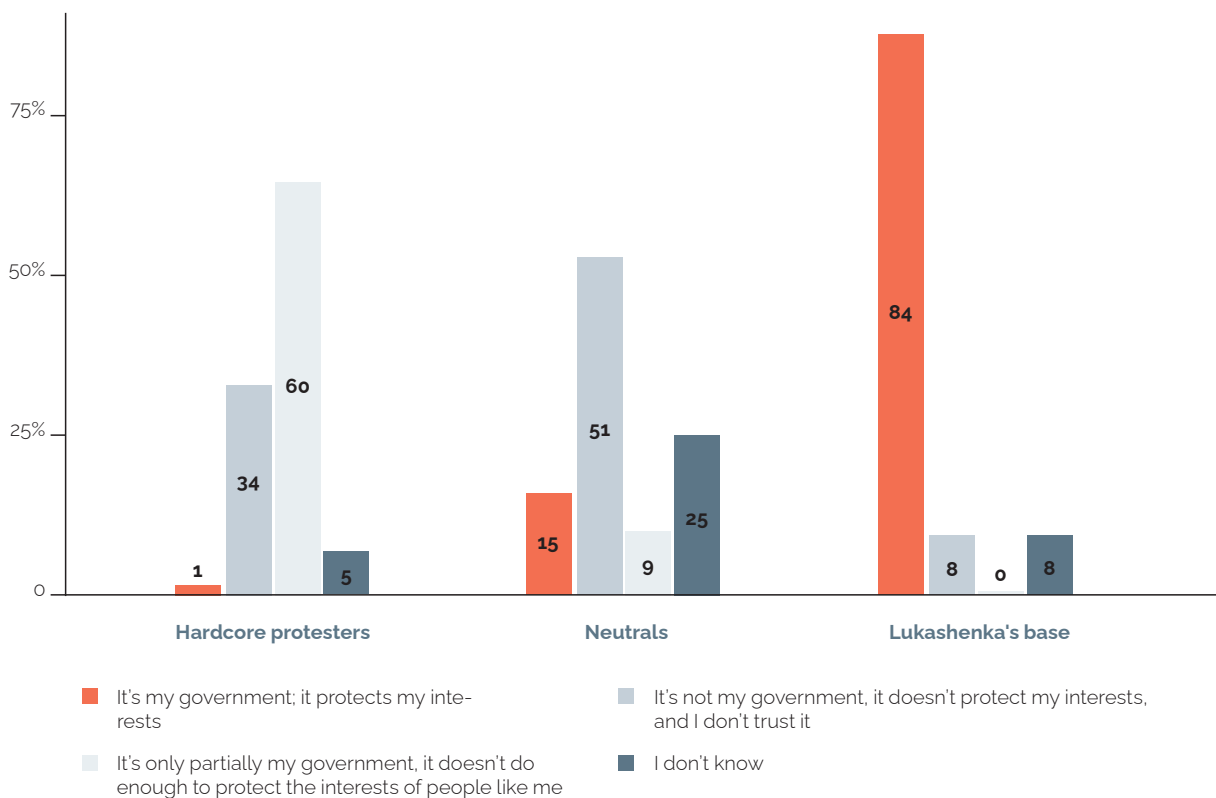


Figure 6.
Agreement with statements about the government, by segments, Chatham House



to consolidate the status quo, as opposed to the interests of the extra-systems megaclass, oriented towards the system's radical reformatting and its own inclusion in the system.

At the moment this conflict is rather latent, primarily due to the lack of access to the tools of violence for wide groups of **ardent opponents** and those **inclined not to trust**.

5.3. A PARADIGM SHIFT IN THE METHODS OF POLITICAL STRUGGLE

In 2020, public opinion in Belarus was noted for its commitment to peaceful protest methods and the overthrow of the Lukashenka regime. Specifically, in the first months of the protest, 75% believed that protests should be peaceful, with half of these respondents supporting exclusively peaceful protests, and only 4.5% thought that the protest should proactively use force.⁷⁰

To investigate how the idea of a violent protest would be perceived, we developed an experimental model based on the "imagined acquaintance" method⁷¹ developed by the Kyiv International Institute of Sociology (KIIS). KIIS researchers used this methodology to measure the share of Ukrainians ready to make territorial concessions to Russia to end the war.

The sample was randomly divided into 2 parts, with one group answering a direct question and the other group answering a "projective" question.

Direct question

A conference of Belarusian democratic forces "New Belarus" was held in Vilnius on 7–9 August. One subject of discussion was the removal of Alyaksandr Lukashenka from power by force.

Would you support or not support such a proposal?

Projective question

The next question will be somewhat unusual. We are going to ask you to imagine someone you know. It could be your mother, your friend, your brother or anyone else you know. When answering the next question, please think of this person.

A conference of Belarusian democratic forces "New Belarus" was held in Vilnius on 7–9 August. One of subjects of discussion was the removal of Alyaksandr Lukashenka from power by force.

Do you think the person you envisioned would support or not support such a proposal?

A comparison of the results enables a more precise delineation of the distribution of support for forceful overthrow of Lukashenka among neutral segments, as well as more accurate picture of the existing public opinion norms within the SCS groups. The respondent's agreement with the statement is interpreted as approval of the proactive use of force to overthrow the Lukashenka regime.

The distribution of responses to the projective question differs significantly from that for the direct question. There has been a complete paradigm shift among opponents of the regime: the overwhelming majority of **ardent opponents** would support such a proposal. Meanwhile, this is the only segment in which the projective option received a lower percentage of responses — this is probably due to the inertia of the "old" protest narrative, which to a certain extent marginalised supporters of "forceful" proactive methods.

For those **inclined not to trust**, the difference between direct and projective questions can be interpreted as:

- Either the result of the reducing effect of social desirability (in this case, the "fear factor", through reduced sensitivity of the question. Less "courageous" segments may simply be more honest in their answers, taking advantage of the anonymising effect of the projective question);⁷²
- Or a sense of a new normative framework for public opinion.

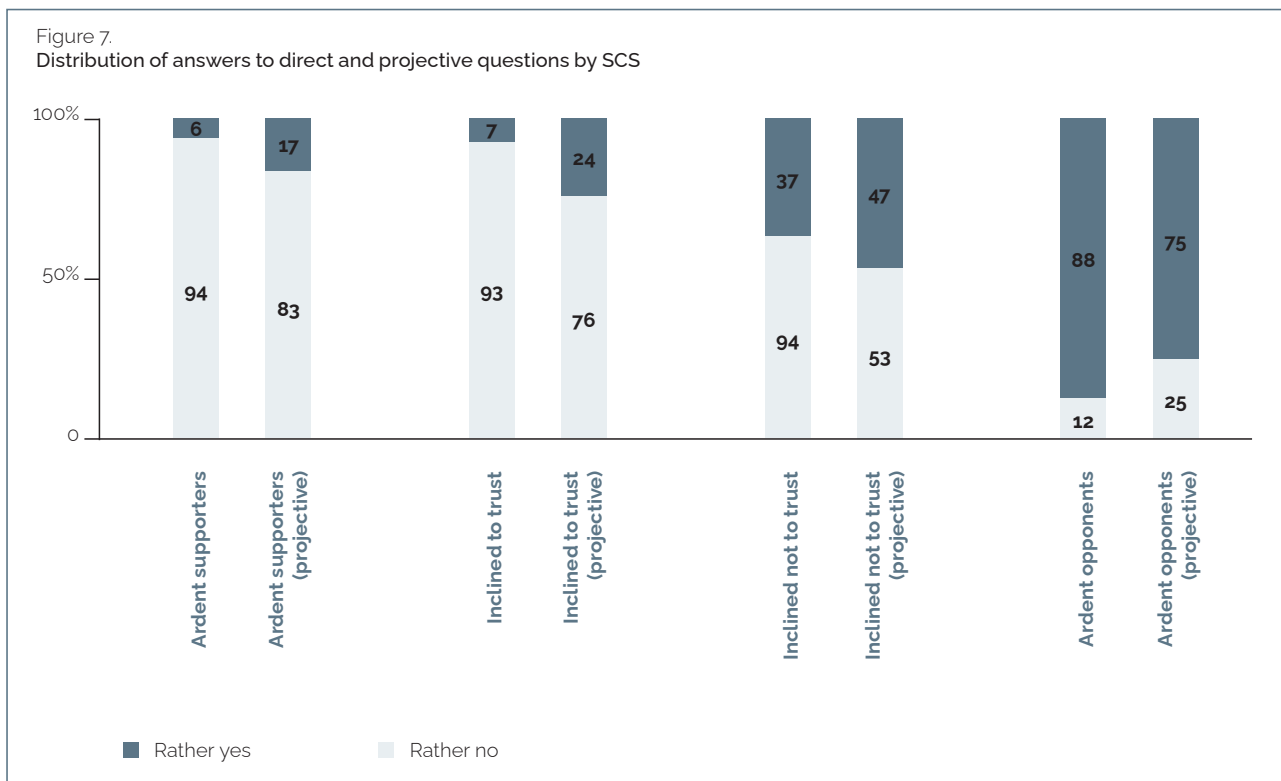
For the Ardent supporters, the difference between answers to the direct and projective question most likely expresses suspicion, mistrust of acquaintances, or the search for class enemies and betrayal.

Two years after the onset of the Belarusian revolution, the division of society by inclusion or non-inclusion in the Belarusian system is aggravated, or at the very least, remains unchanged. While the Lukashenka regime, which largely builds its legitimacy on the machinery of violence and repressions, alienates half of Belarusian society which is outside the system and the demand for militant methods

⁷⁰ "Belarusians' views on the political crisis" (Chatham House, poll conducted 22–28 September 2020), <https://belaruspolls.org/wave1-5>

⁷¹ "Dynamics of readiness for territorial concessions for the earliest possible end to the war" (KIIS, poll conducted 6–20 June 2022), <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1124&page=1>

⁷² Regarding the segments less affected by the sensitivity of the question, see the study "Belarusians' views on the political crisis" (Chatham House, poll conducted 1–10 November 2021), <https://belaruspolls.org/wave-6>



of political conflict resolution is growing within this group. In such a situation, the inclusion of two *siloviki* in Sviatlana Tsikhanouskaya's cabinet looks like a logical reaction to the demand of the out-of-system part of the society which numbers millions of Belarusians.

6

REGIME AND SOCIETY RELATIONS IN WARTIME

Despite the withdrawal of most Russian troops from Belarusian territory, the war has remained the key factor in government-society relations through the summer. It sets the basic directions for the expansion of the regime's repressions, determines the trajectory of the authorities' attempts to "reformat" civil society institutions, and shapes efforts to appropriate any expressions of national-cultural phenomena and processes. However, Belarusian society has already adapted to the repressions and developed its own ways of both existing in such conditions and resisting them.

6.1. MILITARISATION OF REPRESSION

The link between the repressions and the war became particularly vivid in the wave of detentions and searches that swept through the southern territories of Belarus in July. These are the regions where tens of thousands of Russian soldiers were previously stationed before their entry into Ukraine and from where the shelling of Ukraine continues. This is regularly reported by Belarusian Hajun, which aggregates information through reports "from the ground".

On 13 July, eight people were detained in Ivanava and more than twenty in Drahichyn in the Brest region. In the second half of the month detentions occurred in Khoyniki, Naroulia, Mazyr and Zhlobin (all in the Gomel region), as well as in Pruzany and Pinsk (Brest region). Violence and abuse were used during the arrests; some detainees were kept in custody, while others were fined. Human rights activists have no information as to whether these detainees have been previously involved in any administrative or criminal proceedings. Formally they were fined and arrested for subscribing to "extremist" channels and disseminating information from them. However, it can be assumed that the increased attention to the southern regions was aimed at intimidating those who could provide information to independent media about Russian troop manoeuvres and/or the actions of Russian aircraft, if not directly at finding those who actually did this (people are given real sentences of several years in prison for providing information on the movement of Russian troops to independent media; there

is already a precedent for those sharing such materials being charged with high treason).⁷³

The second war-related trend in repressions is the demonstrative persecution of Belarusian volunteers fighting on the side of Ukraine. The trend began back in 2014 and the persecution only affects those who are fighting for Ukraine or are preparing to join the ranks of the Belarusian volunteers (those fighting on Russia's side are left alone). Second, the persecution has clearly become preventive: according to Henadz Kazakevich, First Deputy Minister of Internal Affairs, over the past year GUBOPIK officers have prevented the departure of several dozen young men who "succumbed to the idea of false assistance to Ukrainians spread by radical Telegram channels and promises of easy money in the ranks of the nationalist battalions."⁷⁴ All materials on the detainees have already been submitted to the relevant authorities and several trials have already been held with some individuals sentenced to several years in prison.

6.2. PERSECUTION OF FAMILY MEMBERS

The increasing repressive pressure on the families and relatives of the Kalinousky Regiment fighters can be considered a third trend. And this harassment is carried out in the most demonstrative way: state television has talked about tapping the phones of relatives of the fighters; a propaganda video was shot with the mother of one Belarusian volunteer, Vasil Parfiankou, in which she was forced to denounce her son (later she and her daughter would be arrested); and a cousin of Vadzim Kabanchuk, the deputy commander of the Kalinousky Regiment, was arrested.

The persecution of relatives of political activists is not limited to volunteers fighting on the Ukrainian side. For example, the authorities searched the apartment of Siarhei Bulba, the founder of the White Legion (the right-wing movement that existed in the 1990-s), and interrogated his mother and his sister; searches were arranged in the home

⁷³ <https://t.me/belsat/82851>

⁷⁴ <https://nashaniva.com/?c=ar&i=296083&lang=ru>

of the mother of Anton Matolka, a popular blogger and the founder of the Belarusian Hajun project, and the parents of journalist Alina Bolbas. Sometimes, as in the case of Bolbas, who had left Belarus, the story does not end with just a search and the arrest of the relatives. During the summer, in addition to Vadzim Bolbas, they arrested Mikhail Lupanosau (brother of Stanislau Lupanosau, former lieutenant colonel of GUBOPIK), Sviatlana Herasimovich (mother of the singer Dakota), and Alena Latushka (wife of political prisoner Anatol Latushka, brother of Pavel Latushka).

The authorities continue to arrest people both for participating in the 2020 protests and for expressing solidarity with Ukraine. The practice of bringing new charges or handing additional prison terms to activists and well-known Belarusians (both those who are still in prison, such as Siarhei Satsuk, editor-in-chief of **Ejednevnik** newspaper, Pavel Belavus, the founder of the sbybal.ru shop, and the singer Miriam Herasimenka, and also those who have already served their first terms, such as Hrodna musician Ihar Banzer and activist Andrei Halavyrin) remains in place. In addition to torturous prison conditions, political prisoners suffer from additional pressure exerted by prison administrators.⁷⁵

As a result, despite the gradual release of political prisoners convicted in 2020 and 2021, at the end of August the number of such prisoners recognised by human rights activists exceeded 1,300.⁷⁶ According to the Institute for Crime & Justice Policy Research,⁷⁷ Belarus is the clear European "leader" by the total number of prisoners with 345 inmates per 100,000 population.

6.3. PACIFICATION AND MILITARY CONTROL OF THE PROFESSIONAL SPHERE

The government's course taken in 2021, which sought to destroy professional communities, has led to its logical outcome — the total elimination of the independent trade union movement in Belarus. In July, the Supreme Court stopped the activity of the remaining five independent trade unions. The declaration of the court decision stated that since 2020 the activity of independent trade unions had become politicised and that their members participated in "destructive activity and unauthorised mass actions and distributed extremist products."⁷⁸ In addition to the Belarusian independent trade unions, the authorities also decided to make claims against foreign professional organisations of Belarusians. For instance, the Belarusian KGB recognised the non-profit Professional Union of Belarusians in Britain as an extremist formation.

⁷⁵ <https://spring96.org/ru/news/108606>

⁷⁶ <https://t.me/viasna96/13458>

⁷⁷ <https://www.prisonstudies.org/map/europe>

⁷⁸ <https://d2ros1pmhg5xrd.cloudfront.net/a/31948104.html>

It should be noted that the pressure on the professional sphere affects both formal structures and informal professional communities as such. In Belarus, they have almost established conditions for some special spheres, which can be described as substitution of the professional's freedom of conscience with his/her obligation to the state. It means that a professional in Belarus either has, in the best-case scenario, to act in strict conformity with the ideological requirements, or otherwise emigrate or risk a prison term.

Such conditions have already been created for journalists, humanities scholars and social scientists, for the legal community and a number of other professional spheres. Meanwhile lawyers will face particular scrutiny by the authorities for their online activities and media interviews. Such responsibilities are now assigned to the heads of legal aid centres,⁷⁹ outside of which the practice of law is prohibited.

Meanwhile, a new "Code on Culture" has been adopted to control the activities of cultural workers. According to its provisions, musicians now have to agree their repertoire not only for concerts, but also for simple performances in bars.

The law enforcement agencies have also been given control over the educational sphere: this year, in addition to the Ministry of Culture and the Ministry of Sport, a resolution on the curriculum for secondary schools was approved by six "uniformed agencies" — the Ministry of Internal Affairs, the Ministry of Defence, the Ministry for Emergency Situations, the Investigation Committee, the State Border Committee, and the State Committee of Forensic Medicine. In light of this, the introduction of compulsory school uniforms and the requirement to shape "a positive attitude [towards] and persistent motivation to serve in the armed forces and other state security bodies" in students looks quite logical.⁸⁰

6.4. DE-BELARUSIZATION AND "WARS OF MEMORY"

There is an ongoing pressure on the national, Belarusian-speaking culture ranging from restrictions on the use of the Belarusian language in everyday life (see "Domestic policy" section) to the systematic destruction of institutions supporting Belarusian literature. Measures have included the liquidation of book publishers that traditionally publish books in Belarusian, for example Yanushkevich, Goliaths, and Limarius, and the inclusion of the ByProsvet Telegram channel, which supports Belarusian samizdat, in the list of extremist materials.

⁷⁹ <https://pravo.by/document/?guid=12551&po=W22238510&p1=1&p5=0>

⁸⁰ <https://adu.by/ru/homepage/obrazovatelnyj-protsess-2022-2023-uchebnyj-god/obshchee-srednee-obrazovanie-2022-2023/3780-instruktivno-metodicheskie-pis-ma.html>

While discriminating against everything which is Belarusian, they continue to put pressure on the Belarusian-speaking activists, especially those in prison. The refusal to name a district library after the outstanding Belarusian linguist Adam Maldzis is paradigmatic of this logic. Other examples include rebranding of the capital city's basketball club Tsmoki-Minsk into simply "Minsk", the refusal to use Belarusian as the language of promotion, and ignoring the 140th anniversary of Yanka Kupala's birth. Kupala, a canonical figure in Belarusian literature, is the author of "Zhyve Belarus!" (Long Live Belarus!), which has become a slogan for nationally-oriented Belarusians.

The militarisation and pursuance of total control over the cultural sphere came through the appointment of retired police major-general Mikalai Cherginets, who writes exclusively in Russian, as head of the "social-political council" at the pro-government Writers' Union. This body is supposed to "help writers understand the political situation and prevent books that are harmful to education, psychology and ideology."⁸¹ The Ministry of Education is also engaged in censorship and has demanded that higher education institutions vet textbooks for "the distortion of the historical memory and truth."⁸²

Other examples of de-nationalisation of Belarus's history and the promotion of the Soviet-Russian doctrine of remembrance as the only acceptable one include the demolition of burial sites where soldiers of the Krajowa Army are interred⁸³ (at least 10 instances from June to August)⁸⁴ and the inclusion of the "World War II genocide of the Belarusian people" thesis,⁸⁵ supervised by the General Prosecutor's Office,⁸⁶ into the educational system, where a special course is being developed,⁸⁷ and the cultural heritage, where a monument is planned. In addition, this trend has a repressive dimension: a criminal case was opened against two online media organisations, Flagstok and Zerkalo,⁸⁸ under the criminal article for "denial of genocide of the Belarusian people."⁸⁹

⁸¹ <https://t.me/euroradio/32284>

⁸² <https://www.the-village.me/village/culture/culture-news/292427-uchebn>

⁸³ For reference: In total, there are about 550 resting places of Polish soldiers, participants of the popular uprisings, in the Grodno region.

⁸⁴ See: <https://news.zerkalo.io/cellar/17245.html?c>; https://news.zerkalo.io/life/17711.html?utm_source=news.zerkalo.io&utm_medium=news-bottom-block&utm_campaign=relevant_news

⁸⁵ <https://www.belta.by/society/view/shved-rossija-i-strany-latinskoj-ameriki-sodejstvujut-rassledovaniju-genotsida-belorusskogo-naroda-521149-2022/>

⁸⁶ <https://www.prokuratura.gov.by/ru/media/sobytiya-i-meropriyatiya/o-provedenii-obshche/>

⁸⁷ <https://newgrodno.by/society/genocid-2/>

⁸⁸ https://d2q29d4n5pyko1.cloudfront.net/news_/life/20514.html?tg; <https://www.belta.by/incident/view/ugolovnoe-delo-vozbuzhdeno-po-faktu-otritsanija-genotsida-belorusskogo-naroda-na-dvuh-internet-resursah-520710-2022/>

⁸⁹ <https://humanconstanta.org/o-genocide-belorusskogo-naroda-pravovoj-obzor-novogo-zakona/>

6.5. CIVIL SOCIETY "UNDER OCCUPATION"

The regime's resort to liquidation of civil society organisations and repressions against activists in various spheres has not yet produced the desired result — Belarusian civil society is still alive, although in a rather shabby condition. The survival of civil society, both institutional and informal, is provided by at least three factors:

- **The belief in civil society's moral superiority over the regime and its imminent victory.** Such conclusions are prompted by research⁹⁰ into the politically-active part of Belarusian society: the post-2020 protesters do not think that the Belarusian revolution is over and lost, nor do they do not regret their participation in the protests; they view the 2020 events as fateful for Belarusians as a nation.
- **The accumulated experience of survival and resistance to the regime** under the extreme conditions in the past two years: civil society organisations either work from abroad, or have adapted to working in Belarus "silently". Despite having lost some of their participants, the less formally organised civil society structures, primarily local communities and communities formed around independent organisations and projects,⁹¹ are continuing to function.
- **The use of network interactions and digital communications platforms.** This dispersed format of operating unites structures/initiatives on different sides of the state border and provides maximum security for cross-border projects. Examples include Belarusian Hajun and Cyberpartisans.

Actually, this last, digital factor, could yet form the basis for building proto-institutions and an ecosystem for a new democratic Belarus. This was the message conveyed by Pavel Liber when announcing the launch of his new product under the working title "Digital Belarus" in autumn 2022.⁹²

⁹⁰ <https://newbelarus.vision/2020-god-dlya-belarusov/>

⁹¹ <https://newbelarus.vision/praktiki-samoorganizacii/>

⁹² <https://www.dw.com/ru/cifrovaja-belarus-kak-belorusy-strojat-virtualnoe-gosudarstvo/a-62781236>

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Expert Assessments

BELARUS CHANGE TRACKER



The Belarusian regime is deepening dependence on Russia and institutionalising relations with Russian-occupied territories in Georgia and Ukraine. There is an ongoing militarisation of both the Belarusian authorities and the democratic forces.



Economic recession endures, despite Russia's support and efforts to enter new markets, due to severed ties with the West and Ukraine. Real wages are tumbling. The combination of budgetary deficit and financial default is forcing the Belarus government resort to money issue and tax increases.



The Lukashenka regime has most likely exhausted resources endeavouring to increase trust among the politically-neutral part of society. The regime's policy has led to a significant demand for a forceful struggle against the government in the protest part of society.