



Expert Assessments

BELARUS CHANGE TRACKER

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September – November 2022



The regime is stepping up militarisation and preventive repressions, while abandoning any façade of direct democracy. Belarus's gradual loss of sovereignty is accompanied by international isolation and its increasing involvement in Russia's war.



The state has intervened in the economy by imposing strict price controls and the rate of economic decline has slowed. Dependence on Russia continues to grow and attempts to use China as an alternative partner have not been very successful so far.



The effects of the war on government-society relations are weakening. Instead, social optimism, related to the perceived improvement in the economic situation, has increased.

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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 BEROCC and visiting professor at Carlos III University in Madrid; and **Lev Lvovskiy**, BEROCC 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 third edition of the Tracker, public opinion was measured using an online panel. The survey operator is not being disclosed owing to the obvious risks involved when conducting socio-political surveys in Belarus. The first online panel polled

999 respondents from 23-28 November 2022. The sample 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 both cases, the sample was weighted by RIM Weights (Raking) on the grounds of the settlement size, education, gender and age.

While considering our data reliable and valid, we acknowledge that any data collected through surveys in Belarus should be treated with caution. For example, this issue presents data on support for the regime, which we could not cross-check with the second online panel used previously. Therefore, we emphasise the non-representative nature of our sample. The distribution of responses in the sample may be skewed by the context of repression by the Belarusian authorities, which may add to respondents' anxiety about answering sensitive questions. For example, many respondents discontinued the survey when presented with a question about their approval of the activities of Alyaksandr Lukashenka and the Belarusian government. This leads to potential distortion of response distributions in the achieved sample towards 'neutrality', as well as to the washout of neutral respondents who may overreact to sensitive questions. In addition, one should not ignore the nature of online surveys: the more economically and socially-active urban population engages with these far more than other sectors of society, and, as a result, it can be assumed that support for Lukashenka's policies in the sample may differ from the actual level of support.

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

The Lukashenka regime is dragging Belarus ever deeper into Russia's war of aggression against Ukraine, all the while giving Russia further opportunities to increase its military control over Belarus's territory. Belarus has an increasingly toxic reputation and is perceived by international partners primarily as a source of various threats. Outsiders no longer consider Belarus a potential counterpart for cooperation. Growing security risks are forcing neighbouring countries to fence off Belarus with physical barriers, creating a new 'iron curtain'. Several states have recently revised their legal frameworks for cooperation with Belarus, and withdrawn from bilateral agreements. In the meantime, the Belarusian democratic movement gradually continues to institutionalise its diplomatic contacts with the outside world, while isolating the Belarusian authorities.

Throughout the autumn, the authorities moved to dismantle even the weak façade of democratic institutions in the country. The regime's militarisation, which occurred in the summer, and the year-long trend of involving pro-government activists and propagandists in political repressions, have continued. The opposition political structures have become increasingly militarised, but a counter trend — the politicisation of Belarusian military volunteers — is also underway. Conflicts within the democratic movement have also resurfaced, with signs of increasing fragmentation.

As the economy adapts to the new reality, its decline is slowing. At the same time, the economy itself is undergoing qualitative changes: the service sector, including IT, has been hard hit by the current sanctions regime and Belarus's toxicity, while state-dominated sectors, including those directly affected by sanctions, are receiving full government support. The most important trend at present is the ongoing nationalisation of the economy, as resources are still being redirected towards government agencies and quasi-governmental agents. Attacks on private business persist and a recent attempt to freeze, and then to manually control, pricing in the country is the main economic novelty as of the end of 2022.

Belarus's economic dependence on Russia continued to deepen. Both countries embarked on a Union programme to unify indirect taxes. The share of Russia in Belarus's foreign trade exceeded 60%, while the level of exports to Europe remained at a record low. Trade data indicate some

circumvention of sanctions by exporting through Central Asian countries. In contrast to Russia, Belarus is trying to develop economic cooperation with China: exports to China have doubled, and China promises an 'all-weather and all-round strategic partnership'. However, the overall volume of Chinese investments, particularly in the Great Stone industrial park, has declined.

Against this political and economic backdrop, survey data for November 2022 reveals that the public's confidence in the regime has risen. Such dynamics could potentially be explained by the fear factor, the emigration of protest-oriented respondents or fluctuations in the sample population used in the online panels, rather than actual changes in society, but one cannot completely ignore the trend of growing support for the authorities. The indicator of social optimism, linked to the perceived improvement in the economic situation, has increased, while the story of GUBOPiK's infiltration of an oppositional initiative, the Black Book of Belarus, was found to be the most important political scandal for protest-oriented respondents.

In the autumn 2022, the Russia-Ukraine war lost some of its significance as a determinant of the relationship between society and the regime. The latter focused on the domestic agenda, which resulted in a new escalation of repressions, increased control and militarised indoctrination of society, and further colonisation of culture. In turn, in its confrontation with the regime, civil society relied on the promotion of the Belarusian language, culture and history.

1

FOREIGN POLICY

1.1. DESOVEREIGNISATION OF BELARUS

Belarus's deepening dependence on Russia, primarily in the defence sector, remains the key trend in its foreign policy. The number of Russian servicemen in the country has further increased and new justifications are being found for the stationing of the latest contingent of troops. Unlike the grouping deployed to Belarus shortly before the military aggression against Ukraine, which supposedly arrived in order to participate in joint military exercises, the Russian soldiers arriving currently are presented as 'the deployment of a regional grouping of Belarusian and Russian troops'.

During a surprise visit to Minsk by Russia's defence minister Sergey Shoigu, Belarus and Russia signed a protocol amending the 1997 bilateral agreement on joint regional security. No information about the content of changes is currently in the public domain. However, based on amendments¹ earlier proposed by Russia, it can be assumed that the new wording of the agreement will expand the legal framework and enable Russian forces to be stationed in Belarus for longer periods.² The composition of the meeting participants also suggests that they discussed an increase in the military and technical components of cooperation, in particular the production and supply of Belarusian military equipment to Russia.

The Lukashenka regime continues to assist Russia in seizing Ukrainian territory. Following the announcement of partial mobilisation in Russia, some Russian servicemen have been undergoing combat training in Belarus. They, along with those wounded at the front, receive medical care in Belarusian hospitals. Belarus has also significantly stepped up the transfer of its military equipment to Russia, since the latter is suffering from an equipment shortage. In a further gesture of solidarity with Russia, the Belarusian delegation to the United Nations (UN) has voted against

resolutions condemning Russia's annexation of Ukrainian territories³ and on paying reparations to Ukraine.⁴

The autumn saw a surge in the number of illegal migrants that the Belarusian security services were trying to help into EU territory. In September, the focus was on helping migrants to cross the border with Lithuania, and in October the focus shifted to the border with Poland. The flow is far smaller than during the peak of the migration crisis in the autumn of 2021, but, nevertheless, dozens and sometimes more than a hundred attempts to cross the border illegally were recorded daily.⁵

Belarus's neighbours, in response to Russia's increasing control over Belarus and the destructive actions of the Lukashenka regime, have been strengthening their own security by erecting physical barriers along the border. A new, physical iron curtain is already taking shape along all but the eastern border of Belarus. Lithuania and Latvia have erected barbed-wire fences and Poland has erected a concrete wall. Ukraine, in addition to building a wall, has blown up bridges, mined fields and dug ditches.

The countries' legal frameworks regulating relations with Belarus are also under revision. Latvia suspended three bilateral agreements — on the facilitation of mutual free travel of residents in border territories, on mutual assistance in customs matters and on air traffic control. Ukraine has terminated a wide range of agreements, including those concerning: the avoidance of double taxation; cooperation between the ministries of internal affairs; inland waterways navigation; cooperation in the exploration and use of outer space for peaceful purposes; industrial, scientific, and technical cooperation between defence industry enterprises and organisations; cooperation in youth policy; and geodesy, cartography, and remote sensing. Lithuania terminated a cooperation agreement with Belarus's Ministry of Internal Affairs. The Belarusian authorities are also implementing similar steps. They withdrew from an agreement with Poland on mutual recognition of higher education

1 <http://publication.pravo.gov.ru/Document/View/0001202208190011?index=0&rangeSize=1>

2 The previous version of the agreement referred only to the 'deployment of groupings of troops'. Russia's earlier proposals to change the content of the document added 'disposition' and 'placement of military infrastructure facilities of the Armed Forces of the Russian Federation ensuring their operation'.

3 <https://news.un.org/ru/story/2022/10/1433297>

4 <https://news.un.org/ru/story/2022/11/1434732>

5 <https://www.delfi.lt/ru/news/live/efir-delfi-krizis-migrantov-na-vostochnyh-granichah-es-preodolen-ili-vse-vperedid?id=91651989>

certificates.⁶ This is by no means an exhaustive list of international agreements that are no longer in force. The trend towards the unpicking of the legal framework for cooperation with Belarus is observed at all levels, including by regional authorities and local organisations.

The human rights situation in Belarus has affected both the development of inter-state relations and also interactions with international organisations. The International Labour Organisation (ILO) has decided to apply Paragraph 33 to Belarus for systematic violations of workers' and trade union rights. Next year the ILO will consider sanctions against Belarus in an effort to encourage it to change its behaviour.⁷

Belarus is increasingly perceived by international partners primarily as a source of various threats, rather than as a potential counterpart for cooperation. Belarus's toxic reputation reinforces the trend for the country to scale up its relations with unrecognised and occupied territories, as described in the previous Belarus Change Tracker report. In the period under review, one can see this trend intensifying. For the first time since the Russo-Georgian war of 2008, Alyaksandr Lukashenka paid a working visit to Abkhazia (Georgian territory not currently controlled by the government in Tbilisi) and met Aslan Bzhania,⁸ the de facto head of the self-declared republic. In addition, Uladzimir Kukharau, head of the Minsk City Executive Committee, signed an agreement with the Russian occupation administration in Sevastopol on cooperation between Minsk and the occupied Ukrainian city.⁹

1.2. THE DEMOCRATIC MOVEMENT'S RISING INTERNATIONAL STATUS

Against the backdrop of Belarus's tightening ties to Russia and other quasi-state entities under Russian control, the rift between Belarus and European Union (EU) countries continues to deepen. The crisis in relations has reached such lows that even the detention of the EU's chargé d'affaires in Belarus, Evelina Schulz, despite her diplomatic immunity, looks rather mundane against other problems and has not entailed any serious consequences for the Belarusian regime.¹⁰

In response to Sviatlana Tsikhanouskaya's participation in events on the margins of the UN General Assembly, organised by the Estonian delegation to the UN, the Lukashenka

regime reduced its diplomatic presence in Tallinn and demanded that the Estonian Embassy in Minsk reduced its staffing to one diplomatic unit. All the Baltic states' embassies in Belarus are now operating with minimum staffing numbers.

This move played into the hands of the Belarus's democratic movement. It contributed to further institutionalisation of the democratic movement's diplomatic contacts with the outside world and increased their political weight. In response to the above conflict, Estonia decided to appoint a diplomat in Vilnius tasked with establishing cooperation directly with Tsikhanouskaya's Cabinet.¹¹

This trend of institutionalised ties is also evident in the democratic movement's relations with other countries. A 'mission of the democratic forces of Belarus' was opened in Belgium as a symbolic embassy, providing space and support to Belarusian organisations and diaspora representatives.¹² Lithuania invited Tsikhanouskaya's Cabinet to take charge of coordinating the lists of visitors from Belarus to the Belarus sanatorium in Lithuania owned by the Belarusian state.¹³ The Nobel Committee refused to invite the Belarusian Ambassador to Sweden to Ales Bialiatski's prize-giving ceremony and invited Tsikhanouskaya instead.¹⁴ In the Council of Europe, a Contact Group on Belarus was established to cooperate with the Belarusian democratic forces and civil society.¹⁵ This decision is unique in many respects because the Council of Europe will not have a parallel cooperation with the de facto Belarusian authorities. Contacts of the Belarusians with the Council of Europe will be realised exclusively through representatives of civil society.

The democratic forces are also making progress on the Ukrainian track. A group of Ukrainian MPs introduced a draft resolution recognising Belarus as temporarily occupied by Russia — a status that Belarus's democratic movement is seeking for Belarus in the international arena.¹⁶ Valer Kavaleuski, the representative of the United Transitional Cabinet for foreign affairs, held his first press conference in Kyiv. One month later, Kavaleuski and Alina Koushyk, the Cabinet's representative for national revival, visited Ukraine and met a group of Ukrainian MPs and officials from the Ministry of Culture. Sviatlana Tsikhanouskaya had meetings with Oleksiy Arestovych,¹⁷ adviser to the head of the

⁶ <https://www.delfi.lt/ru/abroad/belorussia/belarus-razorvala-soglashenie-s-polshej-o-priznanii-vysshego-obrazovaniya-i-ucheniyh-stepenej.d?id=g1604993>

⁷ <https://t.me/viacorka/1323>

⁸ <https://president.gov.by/ru/events/poseshchenie-istoricheskikh-mest-severo-vostochnogo-poberezhya-chernogo-morya-i-vstrecha-s-aslanom-bzhaniya>

⁹ https://belarus.mid.ru/ru/press-centre/news/sevastopol_i_minsk_podpisali_soglashenie_o_sotrudnichestve/

¹⁰ <https://nashaniva.com/ru/298845>

¹¹ https://news.zerkalo.io/economics/23855.html?utm_campaign=share&utm_content=ios

¹² <https://reform.by/333545-v-brjussele-otkrylas-missija-demokraticheskoj-belarusi>

¹³ <https://www.delfi.lt/ru/news/politics/mid-litvy-lechit-belorusov-v-sanatorii-belorus-mozhno-po-odobreniyu-ofisatihanovskoj.d?id=g1528891>

¹⁴ <https://nashaniva.com/ru/301900>

¹⁵ <https://www.coe.int/en/web/portal/-/secretary-general-opens-first-meeting-of-contact-group-on-belarus-with-democratic-opposition-representative-tsikhanouskaya>

¹⁶ <https://www.pravda.com.ua/rus/news/2022/10/22/7373056/>

¹⁷ <https://tsikhanouskaya.org/ru/events/news/a40db-f811671bca.html>

Ukrainian Presidential Office, and Petro Poroshenko,¹⁸ former President of Ukraine. However, in communicating with the Ukrainian authorities, the Cabinet now faces a rival — the Kalinousky Regiment, which has announced plans to transform itself into a political force. Its representatives are also having meetings with Ukrainian MPs and regional authorities, building up their political capital and claiming the right to represent the Belarusian people in their dialogue with Ukraine.

For the time being, the communication between the Ukrainian authorities and the Belarusian democratic movement does not seem to signal a willingness on Ukraine's part to build sustainable, mutually beneficial cooperation. It is more likely that the sudden intensification of contacts is a reaction to Lukashenka's actions, such as the deployment of a regional Belarusian-Russian grouping, which have irritated Ukraine.

¹⁸ https://twitter.com/poroshenko/status/1594424131084222472?s=20&t=h7o12xTP8ELZmoT_uQpScg

2

DOMESTIC POLITICS: ENCAPSULATION OF POWER AND SIGNS OF OPPOSITION FRAGMENTATION

Throughout the autumn, the authorities moved to dismantle even the weak façade of democratic institutions in the country. The regime's militarisation, which occurred in the summer, and the year-long trend of involving pro-government activists and propagandists in political repressions, have continued. The opposition political structures have become increasingly militarised, but a counter trend — the politicisation of Belarusian military volunteers — is also underway. Conflicts within the democratic movement have also resurfaced, with signs of increasing fragmentation.

2.1. THE DRIFT AWAY FROM ANY PRETENCE OF DEMOCRACY

Legislative initiatives in the wake of last spring's constitutional amendments, as well as the authorities' accompanying rhetoric, reveal a new trend in the evolution of the Belarusian regime — a gradual rejection of even those 'decorative institutions' that pretend to embody the popular will.

On 25 October 2022, the authorities published a bill 'On the All-Belarusian People's Assembly' (ABPA) and amendments to the Electoral Code for 'public discussion'. The regime has abandoned the direct election of ABPA delegates. Of the 1,200 delegates, about 450 will represent all branches of power, about 350 will represent local councils and about 400 will represent 'civil society'. The first 'section' of 450 delegates will comprise MPs, members of the government, the president, judges of the Supreme and Constitutional Courts, and the heads of local executive committees. The second 'section' will comprise delegates from local councils of different levels, who will be elected to the ABPA by the oblast councils. Delegates of the third 'section' will be selected by major pro-governmental public associations (such as the Federation of Trade Unions of Belarus, Belaya Rus, or BRSM) to be determined by the Ministry of Justice.

Some pro-government commentators, including Alyaksandr Shpakouski and Petr Petrouski, have discreetly criticised the bill for refusing to represent 'ordinary people'. In response, Lukashenka said on 8 November that it was

a conscious decision and that there would be no further reconsideration. According to Lukashenka, the ABPA was intended as a body for professionals, whereas ordinary voters can be represented in parliament and indirectly influence the ABPA's composition through 'civil society' and other elected representatives.

The authorities also decided that the ABPA would be able to contribute to impeachment decisions, impose martial law in the event of the president's 'inaction' and overturn acts of all other government bodies excluding the courts (that is, presidential decrees and parliamentary laws).¹⁹ Even more unprecedented is the decision to grant the ABPA the right to annul the results of the presidential election, deeming them 'illegitimate' at its own discretion, without any other formal grounds. Within five days of the official announcement of the election results, the ABPA, comprising bureaucrats and their nominees, will be able to de facto veto the people's choice just because its delegates do not like him or her. Formally, they can do this several times after every re-run election until the desired candidate wins.

The amendments to the Electoral Code are mostly cosmetic, but they still show the authorities' willingness to ensure that election commissions have few opportunities of causing the regime any anxiety. In particular, the time for observer registration will be reduced. Furthermore, polling stations will no longer be opened abroad, where one could reasonably expect large-scale protest voting due to the significant political emigration after 2020. The authorities will prohibit people from removing ballots from polling stations or photographing them, which will further complicate the recording of falsifications. The turnout threshold for parliamentary elections will be abolished, effectively relieving the election commissions of a 'duty' to falsify voter turnout as well as the result, especially in the face of potential calls by the opposition to boycott all future election campaigns under Lukashenka. By trying to facilitate the work of election commissions and the falsification

¹⁹ <https://www.belta.by/president/view/kak-izmenitsja-rabota-pravitelstva-i-normativnaja-baza-belarusi-lukashenko-ozvuchil-svoji-trebovanija-533701-2022/>

of results, the authorities apparently want to reduce the likelihood of events similar to those in 2020, when many commissions, faced with public pressure, decided to count votes fairly.

The official rhetoric confirms that all these planned restrictions on ostensible democratic procedures are part of a general trend. Lukashenka repeatedly stated — at the end of August and in October — that the government should have changed the Constitution so that the president, rather than being directly elected, would be chosen by the All-Belarusian People's Assembly so as not to provoke destabilisation in society. This reflects a clear change in the Belarusian regime's 'philosophy': until recently, Lukashenka consciously cultivated his noninstitutional, 'popular' legitimacy and a direct connection between him and the electorate. But now, the involvement of the masses in politics, even in the controlled settings of the Belarusian electoral system, is considered a potential threat, and the authorities are dismantling the nominal institutions of democracy. Lukashenka did not rule out that he might revisit the issue of abandoning elections entirely.²⁰

2.2. PRO-GOVERNMENT ACTIVISM NORMALISED

The involvement of pro-government activists and propagandists in repressions and pressure on government opponents, described in previous issues of the Belarus Change Tracker, increasingly looks like a new normal for the Belarusian regime. In October and November, pro-governmental organisations in Hrodna held pickets outside the Polish consulate. State media harassed Western diplomats and interfered in their memorial ceremonies in Lida in September and in the Kurapaty woods in November on the anniversary of execution of over a hundred Belarusian cultural figures.

Following complaints by pro-Russian activist Olga Bondareva, the museum in Staryja Darohi (Minsk oblast) removed busts and commemorative plaques honouring several 19th and 20th-century Belarusian cultural and political figures, including Kastus Kalinouski and Larysa Hienijus. In Hrodna, officials removed a billboard advertising headphones, which Bondareva described as 'LGBT propaganda', and cut down Halloween decorations, which she viewed as 'satanic'. There were numerous complaints by propagandists and calls in pro-government Telegram channels criticising certain radio stations. In response, radio stations in Hrodna and Homiel fired staff members who aired birthday greetings to a Russian journalist, Yury Dud, previously known for his criticism of the Belarusian authorities, and cancelled Belarusian Fashion Week because some of its organisers supported the 2020 protests. Meanwhile, Alyaksandr

Shpakouski, through a social media post, instigated the prosecution of the owner of a company that helped Belarusians with legalisation in Romania and Poland.

It is not always possible to distinguish between cause and effect and determine when officials act on activists' agitation, or when, on the contrary, the state uses activists to imply popular discontent and to create a pretext for repressions. In any case, the consolidation and normalisation of this practice approximates the Belarusian regime to the Soviet one, when many repressive decisions were preceded by campaigns of harassment in newspapers and imitation of indignation by the working masses or professional associations (such as writers' unions).

2.3. THE POLITICISATION OF MILITARY BODIES AND THE MILITARISATION OF POLITICAL ONES

In early September, the Kastus Kalinouski Regiment (KKR) of Belarusian volunteers announced its plan to nominate political representatives. By October, the KKR had formed a ten-member Sojm (Council), with Vadzim Kabanchuk, deputy commander of the KKR, who had been active in the Belarusian opposition in the 1990s and early 2010s, becoming the regiment's public speaker. The KKR outlined two objectives for its political activities: first, the representation of Belarusian volunteers and, potentially, the entire Belarusian diaspora in Ukraine and, secondly, a forceful change of power in Belarus.

In parallel, the United Transitional Cabinet of Sviatlana Tsikhanouskaya (the Cabinet), has begun to prepare Belarusians for 'special operations' in case of a violent scenario of power change. The ByPOL initiative, led by Cabinet member Alyaksandr Azarau, and a new organization 'Pospolite Ruszenie'²¹ formed by another Cabinet member, Valery Sakhashchik, proceeded by setting up 'choragiews' (sports and patriotic clubs) in Vilnius and Polish cities with large Belarusian communities. Belarusian emigrants joining the choragiews receive tactical, firearms and medical training. It is difficult to estimate the scale of these initiatives, but media reports show dozens of people undergoing such training and Cabinet representatives speak of 800 people enrolled in the choragiews.²²

The development of the opposition's more militant wing has given the Belarusian security services reason to step up the regime's own militarisation. On 12 October 2022, the Ministry of Internal Affairs conducted a 'counter-terrorism' exercise in Jelsk, simulating the town's liberation from saboteurs. The authorities stressed that it was about preparing for provocations by armed oppositional groups. Also, in

²⁰ <https://www.belta.by/president/view/lukashenko-pri-prinjatii-konstitutsii-zrja-ne-risknuti-predlozhit-ljudjam-izbirat-prezidenta-na-vns-521140-2022/>

²¹ Pospolite ruszenie is a name for the mobilisation of armed forces during the period of the Kingdom of Poland and the Polish-Lithuanian Commonwealth.

²² <https://www.youtube.com/watch?v=b1AdfPoBnhc>

October, as part of the ideological work in this area, Lukashenka sent the heads of the security agencies to enterprises to explain the military risks posed by the Belarusian opposition.

In November, the authorities decided to create another special unit within the Internal Troops to combat 'extremism',²³ and to expand the network of police training schools.²⁴ In addition, the authorities intensified measures that could be viewed as preparations for mobilisation: in autumn, conscripts and reservists were summoned en masse to military enlistment offices 'to update the records'. The substantial increase in spending on law enforcement agencies in the 2023 budget also fits with the trend of militarisation, as spending is set to increase from 1.8 to 2.8 billion roubles for defence and from 3.1 to 4 billion for law enforcement. This is an unprecedented single increase in spending in this area for Belarus, and it is most likely due not only to increased expenditure on the already serving uniformed personnel, but also in anticipation of a significant increase in their numbers next year.

2.4. THE OPPOSITION: NO MORE CONSOLIDATION, A RETURN TO FRAGMENTATION

The consolidation of the democratic movement, that culminated in the formation of the Cabinet in August, has virtually stalled. Although there were no major splits in the opposition institutions, October and November were marked by multiple media scandals and reports of disagreements. The politicisation of the KKR has led to some competition in dealings with Ukraine (see the section «The democratic movement's rising international status») and criticism of the Cabinet and its individual members by the KKR.

Tatsiana Zaretskaya, the Cabinet's finance 'minister', resigned from her post in early November. Her departure was accompanied by a spate of critical media publications questioning her business reputation and the quality of the vetting used in the recruitment process. A second problem emerged back in September, when another 'minister', Sakhashchyk, turned out to have Russian citizenship; a fact Tsikhanouskaya's office was unaware of. In October, ByPOL lost one of its co-founders, Aлег Talerchyk, who cited politicisation of the initiative as the reason for his departure, as well as his unwillingness to sign a non-disclosure agreement, which he thought restricted his freedom of expression. Finally, November saw a renewed public discussion

of the scandal whereby a GUBOPiK²⁵ agent infiltrated the Black Book of Belarus (BBB) initiative. This opposition project had once been part of the Infopoint media network, founded by Franak Viachorka, a senior advisor to Tsikhanouskaya. The management of the BBB, Infopoint and Viachorka himself had to make excuses and explain why, in the time since the agent was exposed in July 2021, no one had warned the thousands of Belarusians who were providing information to the BBB that they might be at risk from this security lapse.

While not all of the above problems can be considered the responsibility of Tsikhanouskaya or her Cabinet, they create the impression of constant scandals in the opposition. This demotivates parts of the protest electorate that are otherwise still interested in the activities of the democratic movement and its goals.

²³ <https://www.belta.by/society/view/karpenkov-rasskazal-kakie-zadachi-budut-vypolnjat-sozdavaemye-vo-vnutrennih-vojskah-spetspodrazdelenija-536148-2022/>

²⁴ <https://www.belta.by/society/view/sovershenstvovanie-struktury-vnutrennih-vojsk-i-litsei-mvd-po-vsej-strane-kubakov-rasskazal-o-534710-2022/>

²⁵ The Main Directorate for Combating Organised Crime and Corruption. This unit took on a central role in fighting against the political opposition after 2020.

3

FOREIGN ECONOMIC RELATIONS

The economic dependence of Belarus on Russia continued to grow throughout the autumn. The countries started implementing the Union Programme for the Unification of Indirect Taxes. The share of Russia in Belarus's foreign trade seems to have exceeded 60%. At the same time, exports to Europe remain at a record low despite growing exports of some items, and the fact that trade data point to some circumvention of sanctions by exporting through Central Asian countries. Belarus has been trying to develop economic cooperation with China to counterbalance trade with Russia: exports to China have doubled, and China has been promising 'an all-weather and all-round strategic partnership'. However, Chinese investments, particularly in the Great Stone technologies park, have declined.

3.1. ECONOMIC RELATIONS WITH THE WEST REMAIN AT A LOW LEVEL

The EU did not introduce any new economic sanctions against Belarus in autumn 2022. Only the United States was active in this regard: it blocked the use of Russian and Belarusian Special Drawing Rights (SDRs)²⁶ and imposed sanctions on Svetlogorskkhimvolokno²⁷ for supplying military products to Russia. SDRs are a security issued by the IMF; as of July 1, there were about \$1.4 billion of such securities in the foreign exchange reserves of Belarus. However, these sanctions are unlikely to change the situation with the liquidity of this part of the provisions, since Belarus was clearly unable to convert them into foreign currency before now.

Exports to the EU continued to decline in the summer and autumn. According to Eurostat,²⁸ exports from Belarus to the EU were 60% lower in September 2022 than a year ago. In general, export revenues decreased by €1.37 billion over the first nine months of 2022. The main items with reduced export volumes are, as before, sanctioned goods: wood-working products, petroleum products, chemicals, metals

and plastics. At the same time, supplies of food and electricity continue to grow: Belarus earned €400 million and €290 million from these respectively in the same nine months. Lithuania, which refused to import electricity from Russia in May, is the key importer of electricity. There is practically no trade between Belarus and Ukraine with the exception of minor petroleum product exports. Although the mechanism of such exports is not clear (even the transportation itself is extremely complicated and involves transit either through the EU or through Russia), Ukraine bought Belarusian petroleum products worth \$20–30 million every month until July 2022.²⁹

Belarus seems to be re-exporting sanctioned goods to the EU in roundabout ways. Such schemes are clearly seen in woodworking. Wood imports from Belarus to the EU decreased by almost €400 million in the first three quarters of 2022. At the same time, there is an increase in imports of wood products to the EU from other Eurasian Union (EAEU) countries, in particular from Kyrgyzstan and Kazakhstan (see Table 1). The real profitability of shipping wood from Central Asia to the EU is doubtful even at current high prices, and there were almost no supplies from Kyrgyzstan and Kazakhstan a year ago. However, even if we assume that the entire increase in wood supplies from other EAEU countries is explained by Belarusian wood supply schemes, we still have to conclude that it only amounts to about €15 million exports, hardly offsetting the loss of €400 million.

As for chemical products, a sharp increase in imports to the EU from Uzbekistan is suspicious, but it is more difficult to argue that this is Belarus, and not Russia, using a loophole to maintain exports. Moreover, it is impossible to analyse metals, plastics and petroleum products similarly: growing imports from other EAEU countries could simply be explained by the fact that these countries, who are also producers of these commodities, have replaced Belarus and Russia in the EU market.

The trend of deteriorating relations with the West has been fuelled by the actions and sentiments in Belarus. First of

²⁶ <https://www.congress.gov/bill/117th-congress/house-bill/6899/all-info>

²⁷ <https://home.treasury.gov/news/press-releases/jy0981>

²⁸ <https://www.eea.europa.eu/data-and-maps/data/external/eu-trade-since-1988-by.1>

²⁹ <https://comtrade.un.org/data/>

Table 1.
Changes in imports to EU, January-September 2022, EUR

	Wood and woodworking	Chemistry
Growth of imports into EU from:		
Armenia	39,911	-335,608
Kyrgyzstan	3,002,143	230,946
Kazakhstan	11,711,408	52,344,800
Tajikistan	109,653	-48,585
Uzbekistan	170,423	140,069,483
Total growth of imports from EAEU	15,033,538	192,261,036
Decrease in imports into EU from Belarus	-395,664,997	-593,950,305

Source: Eurostat

all, this has affected foreign investors and brands. Lukashenka personally banned the exit of Swedish investors from the Synevo medical labs network, while threatening investors who wanted to leave the country with nationalisation of their assets.³⁰ The exodus of the McDonalds franchise from Belarus has become a symbol of breaking ties with Western consumer culture, which, however, state media propagandists, government officials and even Lukashenka himself have commented on with approval.³¹

3.2. ECONOMIC DEPENDENCE ON RUSSIA AGGRAVATES

Statistics on trade between Belarus and Russia remain classified, but Belarusian officials constantly brag about successful exports to Russia. According to the Minister of Industry Petr Parkhomchik, exports grew by 34% or by \$4 billion over the first nine months of 2022.³² Such growth against the backdrop of falling exports to the EU and Ukraine led to an increase in the share of the Russian market in Belarusian exports from 41% last year to 53% in the first three quarters of this year. Considering that the key changes in the trade structure happened in the spring and summer, we can safely assume that Russia's share in exports will near 70% in the last quarter of the year.

The mechanisms behind this rapid growth in exports to Russia remain unclear due to a complete lack of public data. Despite the constant rhetoric about import substitution, no high-profile cases of import substitution have emerged (it is possible that they are not being disclosed). The Eurasian Development Bank (EDB),³³ which may have

access to classified data, focuses in its reviews on the price factor and the devaluation of the Belarusian ruble against the Russian ruble as drivers of export growth, noting that physical volumes may even decrease. However, in addition to price advantages, Belarus can also increase its exports by satisfying the needs of the Russian army. This may involve exports of both weapons and components, as well as related products such as military uniforms, fuel and food.

Import substitution still remains the key item on the agenda of economic negotiations between Belarus and Russia. A long-promised import substitution loan was finally documented,³⁴ and funding of almost \$1.7 billion will be allocated in Russian rubles, channeled through the Development Bank and Belarusbank, to finance twelve projects.³⁵ The well-known projects are primarily about microelectronics, lighting equipment and bearings. At the same time, Russia finally ratified an agreement on refinancing Belarusian debts:³⁶ the \$1.4 billion that Belarus was due to repay to Russia by April 2023 has had its repayment term extended to 2033.

The integration of the two countries has also been deepening at the institutional level. As part of the implementation of the Union programmes, an agreement has been signed on a Unified Indirect Taxation System.³⁷ It unifies approaches to indirect taxes, thus removing many of the existing VAT loopholes. Furthermore, the document provides for the introduction of the Unified Indirect Tax Administration System as early as 2023. Such a system theoretically allows the tracking of every transaction between

³⁰ <https://reform.by/338121-sovmin-zapretil-prodavat-sinjevo>

³¹ <https://news.zerkalo.io/economics/26433.html>

³² <https://www.sb.by/articles/parkhomchik-dolya-rossiyskogo-rynka-v-eksporte-tovarov-uvlichilas-41-do-57-protsentov.html>

³³ https://t.me/eabr_bank/307

³⁴ https://t.me/government_by/573

³⁵ <https://www.belta.by/economics/view/krutoj-raskryl-podrobnosti-realizatsii-proektov-s-rossiej-po-importozamescheniju-na-15-mlrd-529248-2022/>

³⁶ <https://reform.by/337760-rossija-dala-belarusi-otsrochku-povyplate-dolga>

³⁷ <https://www.nalog.gov.by/news/14704/>

the countries, increasing transparency, but also depriving Belarus of the ability to hide its data.

A unified approach to indirect taxation entails a major bonus for Belarusian oil refining. The two Belarusian oil refineries will obtain access to the negative excise tax (in fact, this is a subsidy from the Russian budget). This excise compensates for losses in oil refining resulting from the tax maneuver. Access to the negative excise tax will make Belarusian petroleum products competitive on the Russian market. Perhaps this will not ensure a full recovery of the previous export volumes, but in any case, this will have a positive effect on both the oil refining sector and export revenues. The negative excise tax revenues have already been included in the budget for next year: the Ministry of Finance of Belarus plans to receive about \$670 million.³⁸

The development of economic cooperation with Russia is helping Belarus to resolve pressing economic challenges, but at the same time, the growing dependence on Russia threatens the country's future. The economic authorities have been trying to find options, and they invariably look to China.

3.3. CAN COOPERATION WITH CHINA SUCCEED?

Economic relations with China developed rapidly until 2020. Exports of Belarusian goods to China were growing, but most importantly, China financed many investment projects in Belarus. The 2020 protests and subsequent sanctions significantly reduced China's interest in Belarus as part of the Belt and Road Initiative, but trade continued to develop.

Belarus managed to double its exports to China, reaching \$1.3 billion in the first three quarters of 2022.³⁹ China has become the second most important export market for Belarus. In the past, the main share of exports to China was potash fertilisers, the export of which has been significantly hampered since February 2022. The latest data from China on Comtrade for March 2022 still shows that Belarus's main export commodity was potash: \$108 million out of \$172 million in the March 2022 exports. Other export items are meat, milk, pulp and wood. Prices for many of these commodities have risen during the year, and Belarus could most likely increase the supply of some commodities, especially wood. However, it is unlikely that this rise in prices and the increase in volumes would be enough to not only compensate for the interrupted supplies of potash, but also to double exports. It is likely that potash supplies to

China are maintained as much as possible, and China is the destination for almost the entire volume of production that Belarus still manages to transport with the help of the Russian Railways.

Lukashenka met Chinese premier Xi Jinping during the Shanghai Cooperation Organisation summit in Samarkand on 15 September 2022. They signed a declaration on the establishment of an 'all-weather and all-round partnership'.⁴⁰ The declaration, in particular, contains a promise to further develop economic relations. The development of the Great Stone technologies park, which was supposed to become a magnet for Chinese high-tech investments, was also mentioned separately.

Meanwhile, things are not going very well in the Great Stone itself. Export growth rates are still too low for such an ambitious project. The investment situation deteriorated sharply after 2020, and the subsequent sanctions and the involvement of Belarus in the Russia-Ukraine war have made Chinese investors even more sceptical. Foreign direct investment decreased by 48% in the first three quarters of 2022.⁴¹

Belarus managed to negotiate loan repayments to China in yuan,⁴² although the loans had originally been denominated in US dollars. Repayment of loans in yuan is unlikely to ease the burden on the Belarusian economy: Belarus has a trade deficit with China, meaning that there is no inflow of yuan into the country, especially against the backdrop of falling Chinese investments in the country. This means that yuans will still have to be bought with another currency. However, Belarus can technically repay loans in yuan (as well as repayments in Russian rubles in the case of Russian loans) in contrast to repayments in US dollars, which correspondent banks are refusing to channel through them. Such an agreement is not so much a concession, then, as the only chance for China to receive loan repayments.

³⁸ <https://www.belta.by/economics/view/vyplaty-povneshnemu-dolgu-i-refinansirovanie-ministr-finansov-oplanah-na-2023-god-531360-2022/>

³⁹ <https://www.sb.by/articles/parkhomchik-dolya-rossijskogo-rynka-v-eksporte-tovarov-uvlechilas-41-do-57-protsentov.html>

⁴⁰ <https://www.belta.by/politics/view/belarus-i-kitaj-ustanovili-otnosheniya-vsepogodnogo-i-vsestoronnego-strategicheskogo-partnerstva-524039-2022/>

⁴¹ <https://www.belstat.gov.by/ofitsialnaya-statistika/makroekonomika-i-okruzhayushchaya-sreda/statistika-malykh-territoriy/osobyie-ekonomicheskie-zony/operativnye-dannye/>

⁴² <https://www.belta.by/economics/view/belarus-budet-rasschityvatsja-za-kitajskie-dollarovye-kredity-v-juanjah-522280-2022/>

4

DOMESTIC ECONOMY

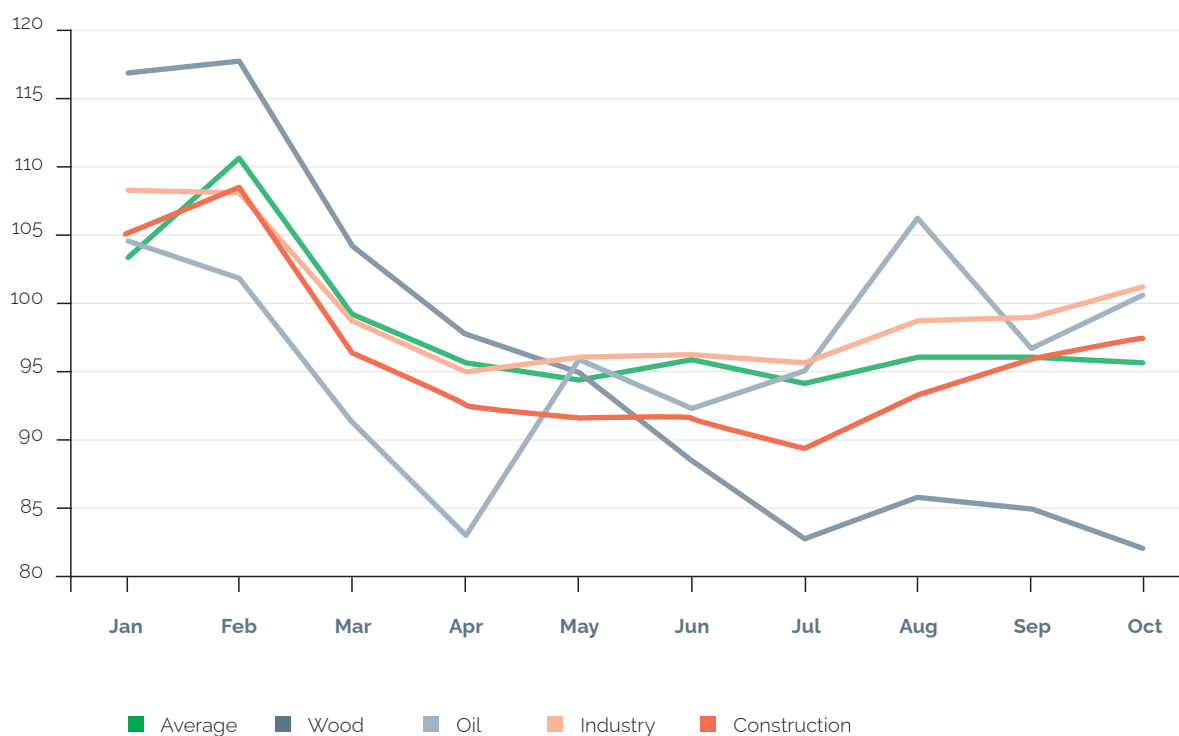
As the economy adapts to Belarus's new international situation, the pace of its decline is slowing down. At the same time, the very structure of the economy is changing qualitatively: the service sector (including IT industries) is having a hard time under the current sanctions and the toxicity of Belarus, while state-dominated industries — in particular, those directly affected by sanctions — enjoy the government's full support. The most important current trend continues to be the economic interventionism: resources, as before, are redirected to government agencies and quasi-state agents, attacks on private businesses continue and the main economic novelty in late 2022 has been an attempt to freeze, and then manually control, pricing in the country.

4.1. RECESSION SLOWS DOWN

The Belarusian economy has been in recession for nine months. GDP growth rates, compared to the corresponding month last year, were as follows: January (+2.7%), February (-0.5%), March (-3.4%), April (-7.6%), May (-8.7%), June (-8.3%), July (-10.6%), August (-2.8%), September (-3.1%) and October (-4.7%).⁴³ It can therefore be said that the economy of Belarus has been gradually adapting to the shock caused

⁴³ Some of the monthly data has changed compared to those presented in the previous editions of the Belarus Change Tracker. The given figures correspond to new data on the second (updated) GDP estimate in Q2-2022 produced by Belstat.

Figure 1.
Real salaries relative to the same month a year ago for those employed in oil processing, lumber cutting and processing, industrial production and construction



Source: Belstat

by sanctions and the loss of Ukraine as a foreign trade partner, and the rate of GDP decline has been stabilizing. A small GDP decline in August and September, compared to August and September of the previous year, was mainly due to a good harvest. The GDP decline in October consequently reflects the overall situation in the economy more precisely.

In 2022, the most unusual behavior was in the agricultural sector. On the one hand, this year's harvest was record-breaking, but, on the other hand, it was harvested later than in 2021. As a result, after the sector's decline in July by 53.3% year-on-year (YoY), there was a 77% growth (YoY) in August and a 26% growth (YoY) in September. In October, the effect of a strong harvest, as expected, came to naught, and the sector contributed -0.3% to the overall GDP growth.

The IT sector's decline, which emerged in previous quarters, continued through the autumn. In August the decline had slowed (3.2%, YoY), and this was replaced by an acceleration in September and October: the figures amounted to 6.4% (YoY) and 8% (YoY) respectively. Against this backdrop, the outflow of IT specialists continued: medium and large IT companies have lost over 14,300 employees since the beginning of the year.⁴⁴ Considering that the total number of employees of medium and large enterprises in the IT and Information Services sector fluctuated around 52,000 people in 2021, this figure indicates an unprecedented contraction of the sector.⁴⁵ Moreover, the data on the reduced number of specialists neglects the fact that some IT company employees who live abroad sometimes continue to be registered in their Belarusian offices for the sake of saving on taxes.

The trade and transport sectors have been growth 'anti-champions' in recent months: they fell by 20.5% (YoY) and by 15.7% (YoY) respectively in September, and fell by 15% (YoY) and by 18% (YoY) respectively in October.

The rate of decline in real wages also stabilised. In September, the decline was 4 % (YoY), and it was 4.5% (YoY) in October. Figure 1 shows the change in real wages in key sectors of the Belarusian economy. The strongest decline is still observed in the forestry and woodworking sector. The best situation is in the industrial production and oil refining sectors where real wages have reached the previous year's levels. This outcome appears to have been achieved through command-driven wage increases in these state-dominated sectors, as well as through circumvention of oil sanctions. A slight improvement in average salaries in the construction sector is most likely due to layoffs, as the situation in the sector remains unfavorable.

⁴⁴ <https://reform.by/340021-ottok-ajtishnikov-zamedlilsja-v-oktjabre-s-nachala-godu-on-prevysil-14-tysjach>

⁴⁵ In the first instance, Belstat only publishes data on enterprises employing more than 16 people.

4.2. ECONOMIC INTERVENTIONISM

In the autumn of 2022, several episodes stand out as part of a trend towards strengthening the role of the state in the economy. The government has tightened administrative control over prices, and it has decided to use public investment to ensure the future 'recovery' of the economy.

At a 6 October meeting with the economic branch of the government, Alyaksandr Lukashenka ordered a ban any price increases in Belarus. The relevant directive was published in the evening of the same day, effective immediately.⁴⁶ This measure had not been announced in advance and took all producers and retailers in Belarus without exception by surprise. Citizens were invited to contribute to the new system for limiting price growth by reporting violations of the directive to the competent authorities. As of 18 October, seventy such violations had been discovered, thirty-four criminal cases opened and twenty entrepreneurs arrested.⁴⁷

Within two weeks, officials close to Lukashenka and who understood the danger of such steps convinced him to soften the policy measure. As a result, the decision to freeze prices completely was replaced by a new state regulation system on 19 October.⁴⁸ The new system involves the monitoring of prices for 370 categories of goods that more or less comprise the entire consumer basket in Belarus. In addition, a network of committees (local and central) has been set up to evaluate the 'fairness' of entrepreneurs' requests for price increases, as well as to approve prices for new products entering the market.

Naturally, the document regulating the new system does not provide an objective definition of what constitutes a 'fair' price, which, in turn, makes local committees practically incapacitated: officials that are members of the committees are no less afraid of criminal prosecution for 'unfair' price increases than entrepreneurs are.

The basis of the new price control system derives from production costs and several types of price premium ceilings. The system seemed simple on the surface, but it proved to be so convoluted that the Ministry of Antimonopoly Regulation and Trade (MART) needed to provide several rounds of explanations. When giving one of these explanations, Minister Alexei Bogdanov could not answer a question about when tomatoes and cucumbers turn from vegetables into salads (prices for vegetables are controlled by the authorities, and prices for salads are not limited by the authorities). The confusion with unfinished legislation forced some small businesses to close for a while in order to avoid fines and criminal prosecution.

⁴⁶ <https://president.gov.by/ru/documents/direktiva-no-10-ot-6-oktyabrya-2022-g>

⁴⁷ <https://news.zerkalo.io/economics/24209.html>

⁴⁸ <https://news.zerkalo.io/economics/24378.html>

As a result, some products have started disappearing from stores, but at the same time, prices have stopped rising. As a result, annual inflation slowed to 15.2% in October.⁴⁹ It should also be noted that the populist measure to freeze prices has achieved its short-term goal: a survey conducted by BEROC found that 63% of urban residents approved of this step by the authorities.⁵⁰

Economists recognise that such administrative price regulation can work in the short run: being afraid of criminal liability, producers and retailers will supply goods at old prices for some time. But in the medium and long run, such a policy will inevitably lead to bankruptcies of enterprises and a shrinking product range. However, the repeal of the Decree of 6 October indicates that at least some members of the government understand basic economic principles, which means that we can expect a gradual relaxation of the current policy of administrative price regulation in the future.

In late September, Prime Minister Roman Golovchenko spoke about the government's plans for 2023. According to the prime minister, the government expects a 3.8% GDP growth, and the main growth driver should be a 22.3% growth of fixed asset investments.⁵¹ Such a specific forecast, especially against the backdrop of the negative investment climate in Belarus, suggested that Golovchenko was referring to state investments.

This hypothesis was confirmed in late November, when the 2023 draft budget was published. The document provides for both an increase in the budget deficit, and an increase in tax revenues and the public debt ceiling.⁵² The logic behind the new budget entails transferring the maximum amount of funds to the state, which will work on recovery investments.

The previously indicated trend of pressuring business people and individual entrepreneurs has also been maintained under the same paradigm of interventionism. There are proposals that would deprive them of the opportunity to apply the simplified taxation system and also raise taxes regardless of the type of an individual entrepreneur.⁵³ Senior managers of large retail chains, such as Sosedo (Neighbours) and Ostrov Chistoty (Cleanliness Island), as well as the owner of the A-100 company, were also detained in the autumn.⁵⁴

The trend towards more interventions in the economy is likely to continue in Belarus for a long time. Ideas that one can overcome the fundamental laws of the economy by intimidation, unsecured money printing, redirection of funds and verbal interventions are clearly held by many representatives of the current Belarusian government.

⁴⁹ <https://news.zerkalo.io/economics/24805.html>

⁵⁰ <https://www.beroc.org/monitoring/>

⁵¹ <https://reform.by/335203-golovchenko-utverdil-rost-vpv-2023-godu-na-3-8-realnyh-dohodov-naselenija-na-4>

⁵² <https://officelife.media/news/38629-defitsit-bolee-3-mlrd-opublikovan-proekt-byudzheta-belarusi-na-2023-god/>

⁵³ <https://reform.by/328946-ip-hotjat-polnostju-otmenit-uproshhenku-i-podnjat-nalogi>

⁵⁴ <https://news.zerkalo.io/life/22975.html>; <https://officelife.media/news/37552-zaderzhan-top-menedzhment-krupnogo-belorusskogo-retylera-sosedo/>; <https://www.the-village.me/village/city/news-city/293315-centner>

5

TRENDS IN PUBLIC OPINION

Survey data for November 2022 reveals that the public's confidence in the regime has risen. Such dynamics could potentially be explained by the fear factor, the emigration of protest-oriented respondents or fluctuations in the sample population used in the online panels, rather than actual changes in society, but one cannot completely ignore the trend of growing support for the authorities. The indicator of social optimism, linked to the perceived improvement in the economic situation, has increased, while the story of GUBOPiK's infiltration of an oppositional initiative, the Black Book of Belarus, was found to be the most important political scandal for protest-oriented respondents.

5.1. RESERVATIONS CRITICAL TO THE INTERPRETATION OF THIS SECTION

The following study is based on an online panel. This means that the distribution of answers in our sample may differ significantly from the Belarusian urban population more generally. The sample varies between survey rounds and may be affected by the following factors: opt-in bias, the non-representativeness of the sample composition (which differs from the general population of Belarus in some factors potentially related to the subject of the study), and the quota nature of the sample. These limitations mean that the Belarus Change Tracker does not claim to present a fully correct representation of Belarusian society.

In the past, to monitor the dynamics of social conflict segments we collected data using an additional online panel, but we were unable to do so this time.⁵⁵ Accordingly, we cannot claim with a high level of confidence that changes in society have caused the dynamics [trends] observed across social conflict segments, since other factors may play an explanatory role. However, one cannot ignore the potentially notable changes in public opinion that are indicated by this study. Moreover, it is possible to identify trends within specific social groups (segments).

Below are estimates of changes in the size of segments, distinguished by trust in the regime, and a Social Sentiment

⁵⁵ Due to budget limitations and a lack of time at the end of the year

Index. We have provided potential explanations for the observed dynamics. *When interpreting the information in this report (especially on the Segments of social conflict), the authors urge readers to focus on trends rather than on values or segment sizes, keeping in mind the limitations described in this subsection.*

5.2. SOCIAL CONFRONTATION: POTENTIAL INCREASE IN SUPPORT FOR THE REGIME

The growth of trust in the Alyaksandr Lukashenka regime, which was observed in May and then stalled in August, has resumed in November. **The Social Conflict Segmentation (SCS)**⁵⁶ shows a significant increase in the size of those segments that tend to feel confidence in state institutions and government supporters and distrust of non-state institutions and government opponents.

Aside from random changes in the sample structure, this effect could be explained by the respondents' fear of participating in the survey. Repression in Belarus is on the rise, and one can be punished for harmless actions (see Section 6 for more details).

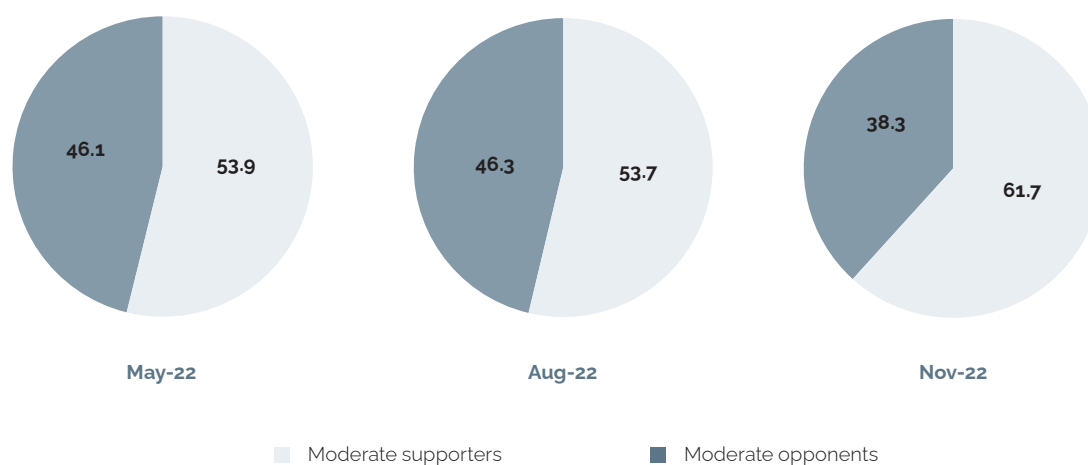
The dropout rate⁵⁷ of participants amounted to 26.9%, and almost half of those who failed to complete the questionnaire stopped answering when they saw the first politics-related question. The average dropout rate on the panel providing data is around 12%. In contrast to this version, however, it should be noted that a similar dropout rate was observed in the previous wave of the Belarus Change Tracker, with no growth dynamics in the pro-regime segments.

The changing society could be another explanation of the observed dynamics. The most probable factors leading to rising trust in the regime include the slowdown in the economic decline and the Belarusian army staying out of the

⁵⁶ For a detailed description of the SCS methodology, see the first issue of the Belarus Change Tracker, <https://library.fes.de/pdf-files/bueros/ukraine/19338.pdf>.

⁵⁷ Percentage of respondents who started the questionnaire but did not finish it as a percentage of all respondents.

Figure 2.
Dynamics by aggregated Segments of social conflict



Russia-Ukraine war, in contrast to the partial mobilisation in Russia that started in late September.

5.3. SOCIAL SENTIMENT: HAS A CEILING BEEN REACHED?

One possible explanation for the latest findings on levels of trust in the regime is therefore an increase in optimism based on economic stabilisation. But how do groups on either side of the social conflict see the situation in the country? To answer this question, the Social Sentiment Index (SSI)⁵⁸ has been used.

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.

⁵⁸ The full methodology is described here: <https://www.levada.ru/obnovlennaya-metodika-izmereniya-indeksa-sotsialnykh-nastroenii-isn/>; the study questionnaire includes questions A2-A13.

Compared to August 2022, all index components have increased. This points to a certain growth of social optimism in Belarusian society.

The Belarus Change Tracker team has no particular reason to question the accuracy of the Social Sentiment Index, as its growth occurs against the increase in the Consumer Confidence Index (CCI) recorded in BEROC's regular monitoring.⁵⁹ The latter gives an insight into the future development of household consumption and savings and is based on respondents' current assessments and forecasts about their own financial situation and the state of the economy, as well as their propensity to buy durable goods.

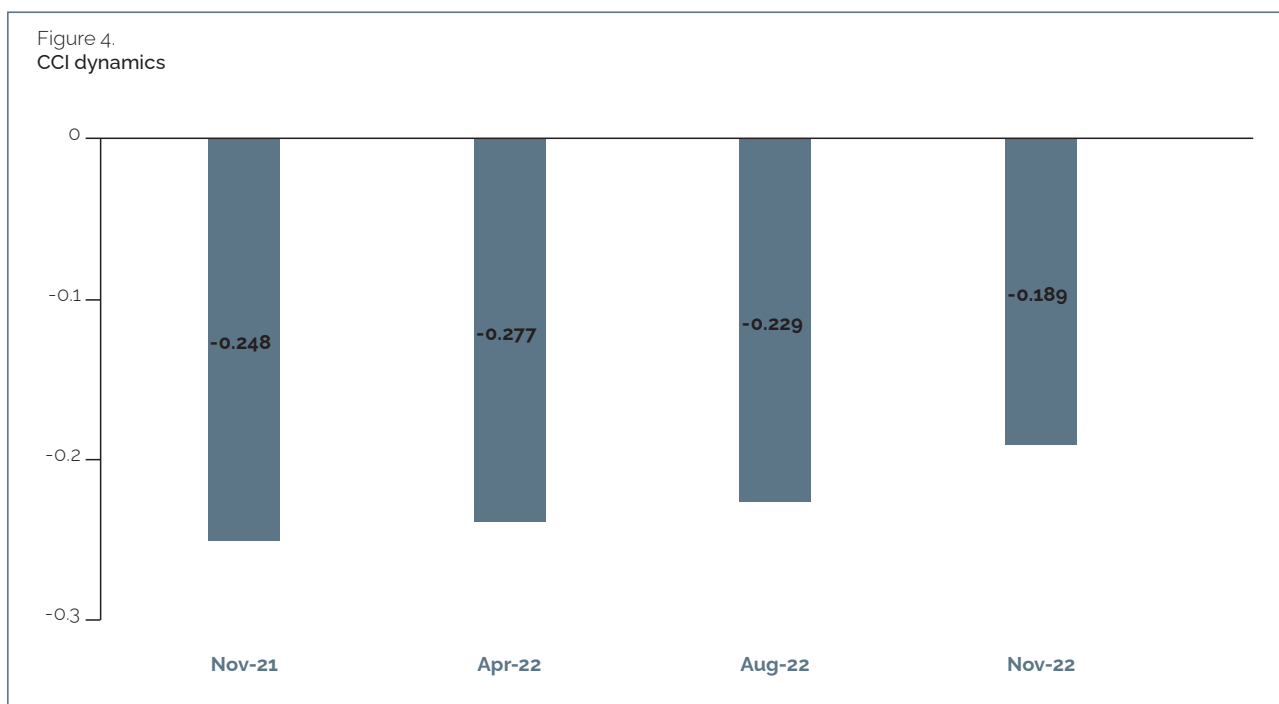
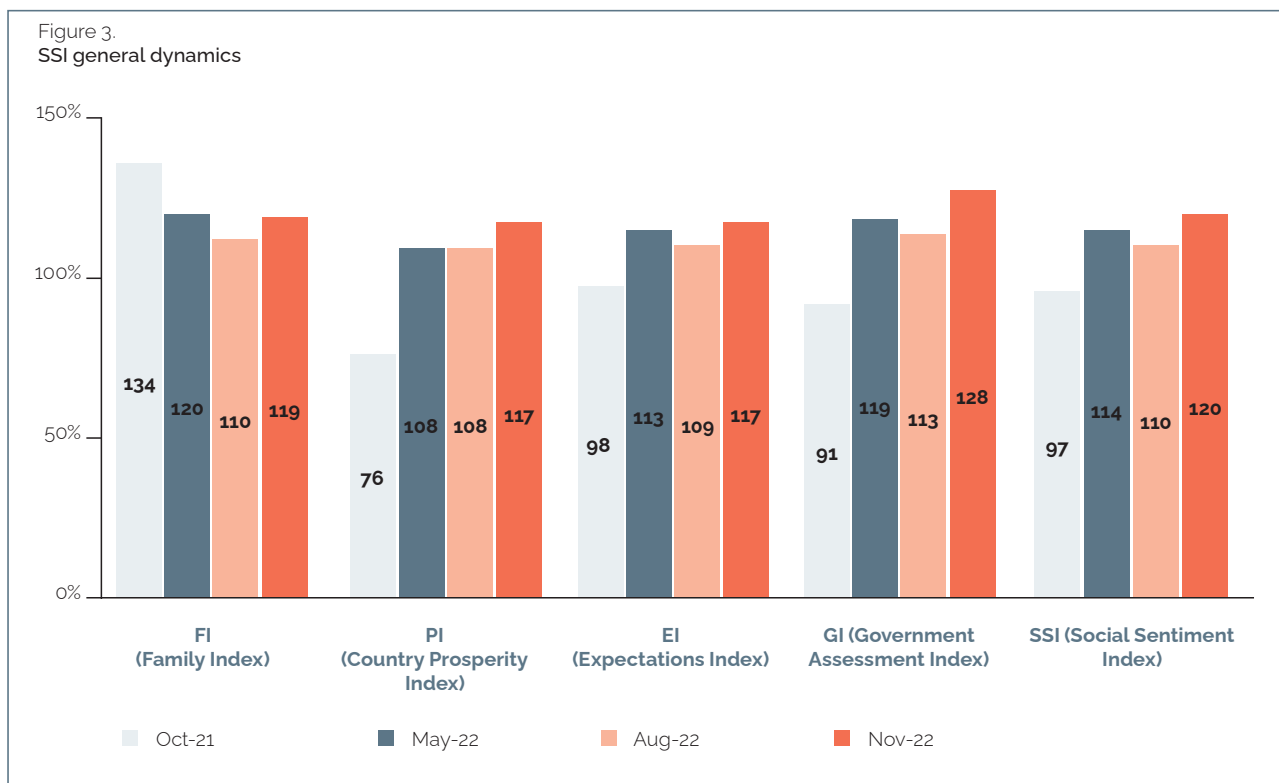
The main driver of the growth of both indices was the segment labelled **ardent opponents**. Social optimism in this segment is the lowest and appears to have some potential for improvement.

Can an improvement in the economic situation be attributed to increased confidence in the regime's institutions? It is quite likely. Both supporters and opponents of the regime identify economic problems as the most important and their strongest concerns.⁶⁰ A (perceived) improvement in the economic situation also increases social optimism. According to BEROC's monitoring, the trend of falling incomes is no longer observed, and this is not due to rising prices or the exchange rate of the rouble, because the researchers have controlled for these factors.⁶¹ Moreover, there is every reason to believe that the decision to freeze

⁵⁹ BEROC presentation, 12 December

⁶⁰ Belarusian Identity in 2022, <https://library.fes.de/pdf-files/bueros/belarus/19770.pdf>

⁶¹ BEROC presentation, 12 December

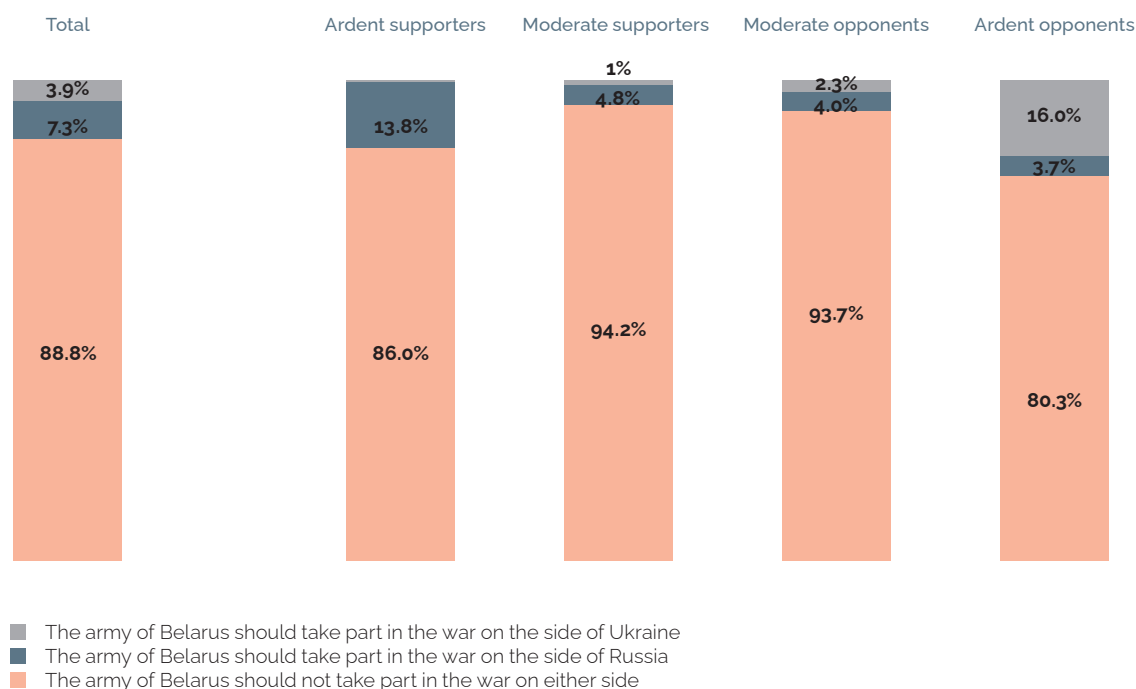


prices, following a call by Lukashenka, has gained wide approval in society. Specifically, 81% of respondents have heard about the price freeze in Belarus, 67% consider it an important event and 63% approve of the decision (according to BEROC; for more detail see Section 4). Such high-profile news concerning the economy serves to improve the image of the state as a reference point on which people pin their hopes and expectations.

5.4. PERCEPTIONS OF THE WAR

Although Belarusian society is deeply divided in various spheres, from values to politics, there are several topics that unite the overwhelming majority of Belarusians. Consensus exists, for example, in the conviction that the Belarusian army needs to stay as far away from the war in Ukraine as possible.

Figure 5.
Assessment: What action should the Belarusian army take?



As one can see, the overwhelming majority within segments sympathetic to either Russia or Ukraine (**ardent supporters** and **ardent opponents** respectively) share the opinion that the Belarusian army should remain neutral. The overall level of support for the Belarusian army's invasion in Ukraine on the side of Russia amounts to 7%, which is generally comparable with the results of other studies using different methods (Chatham House⁶² and Andrei Vardomatski from BAW).⁶³

The regime's rhetoric, which focuses on non-engagement in direct military action, falls on well-prepared ground. And although, as Pavel Slunkin argues, Lukashenka has hardly any influence on war-related processes,⁶⁴ Belarus's non-participation in the war, multiplied by the perceived economic stabilisation, may translate into increased confidence in the regime and its institutions.

5.5. PERCEPTIONS OF SIGNIFICANT EVENTS IN OCTOBER AND NOVEMBER

Another important trend observed throughout the monitoring period is the ongoing social and informational isolation

⁶² <https://belaruspolls.org/wave-11>

⁶³ <https://euroradio.fm/en/belarusians-answer-questions-about-war-ukraine>

⁶⁴ <https://www.eurointegration.com.ua/articles/2022/11/28/7151374/>

of almost all segments (other than **ardent opponents**) from the democratic movement's information agenda.

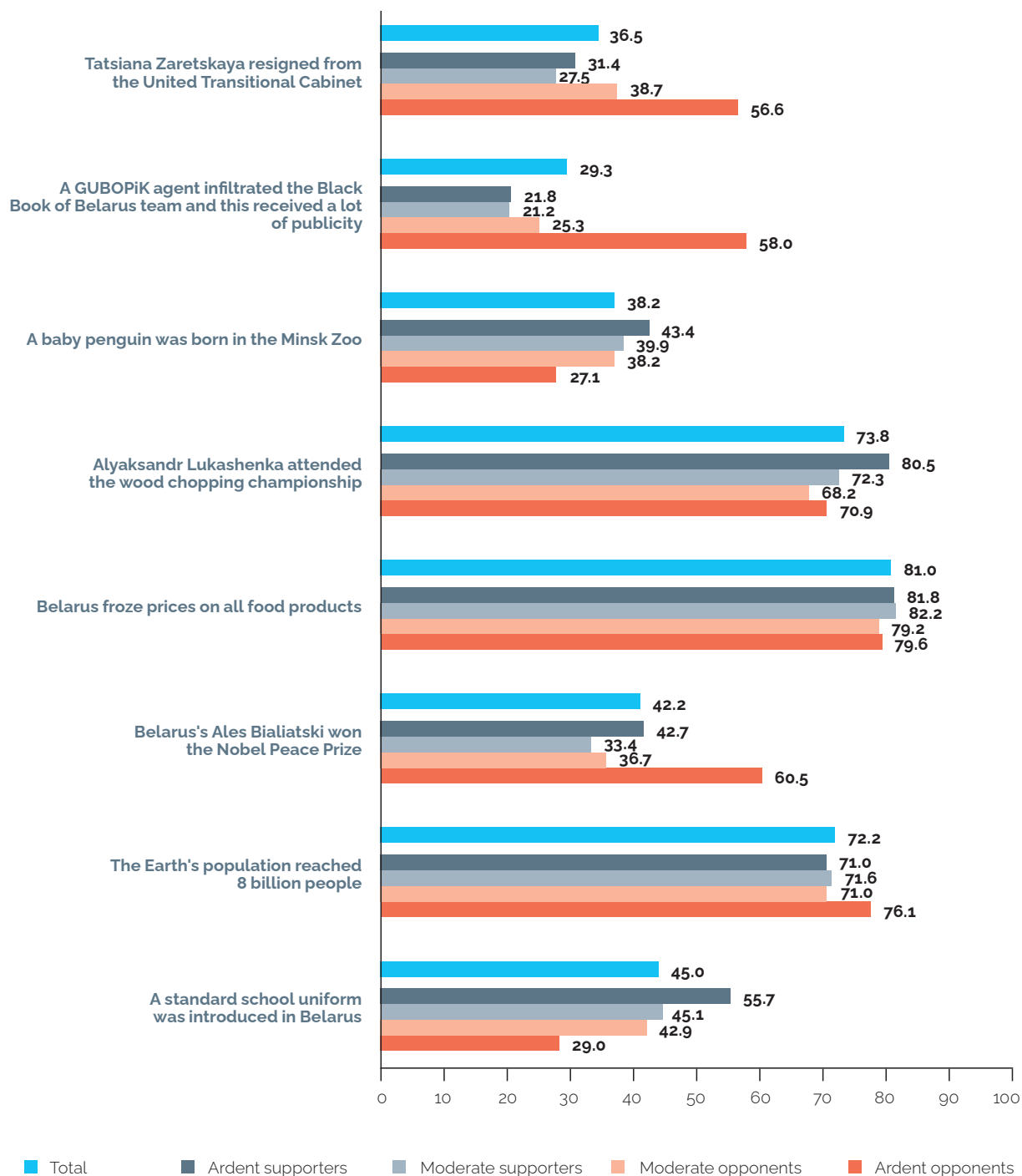
The researchers listed several events for respondents and asked them which occurred in October-November 2022. Those respondents who thought that the events had taken place in this two-month period were then asked to assess the events' importance.

The distribution of answers within groups shows that only **ardent opponents** are aware of the democratic movement's agenda or events related to the opposition. Even the award of the Nobel Peace Prize to Ales Bialiatski was known to fewer than half of respondents in other segments. At the same time, the regime's news agenda reaches absolutely everyone — most respondents had heard about the price freeze, for example, or about Lukashenka chopping wood.

Judging by the assessment of the importance of the events, one can only guess the damage caused to the democratic forces by important (for **ardent opponents**) scandals around Tatsiana Zaretskaya's resignation from the United Transitional Cabinet and the infiltration of a GUBOPiK agent into the Black Book of Belarus (BBB) project. While the Zaretskaya scandal hardly attracted much attention (in October 2022, only 11% of protest-minded Belarusians were aware of it)⁶⁵ and is rarely perceived as important (it was considered about as important as the birth of a baby

⁶⁵ <https://narodny-opros.net>

Figure 6.
Knowledge of events



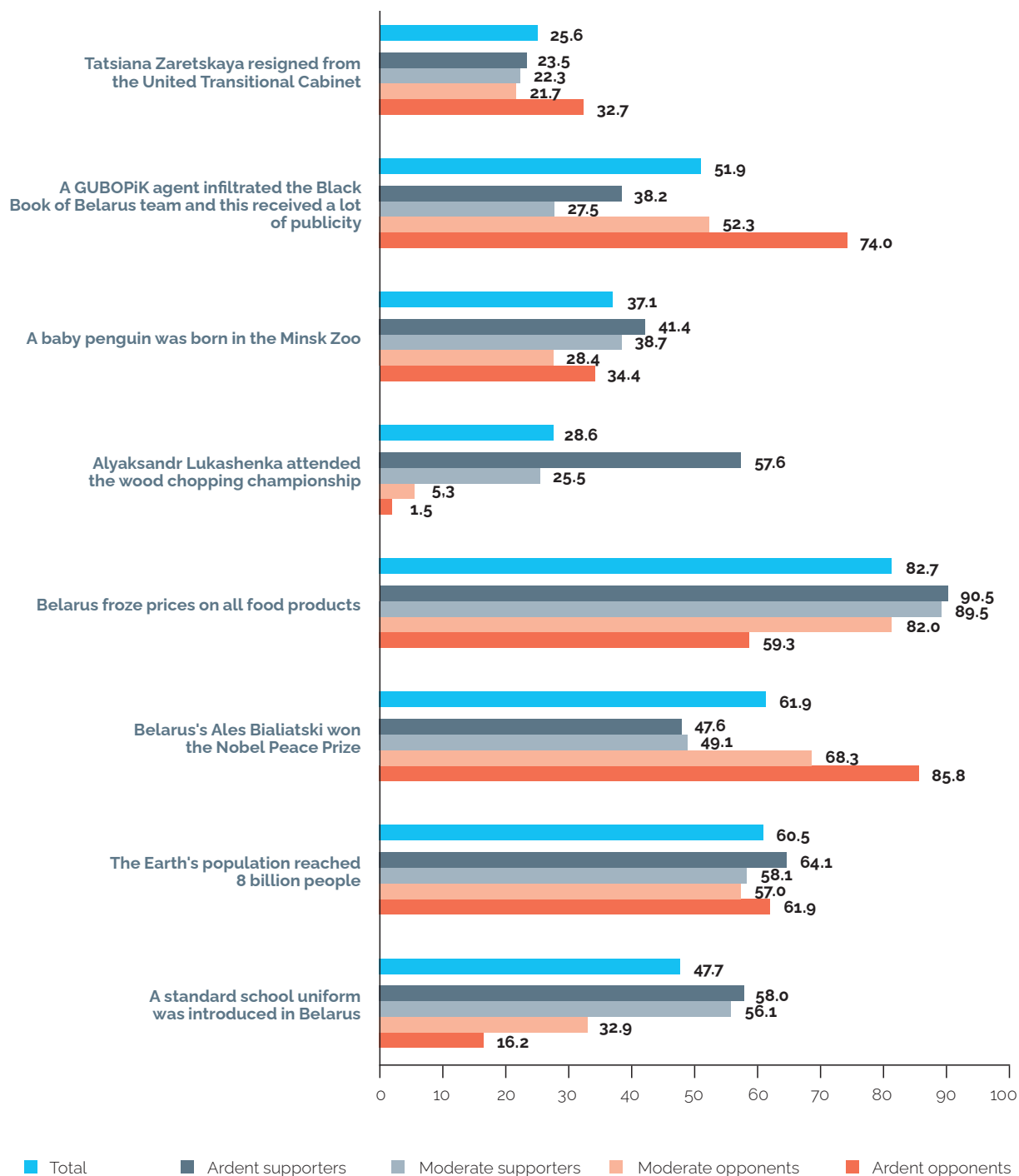
Source: answers to the question "Here are several events. Which ones do you think occurred in October-November 2022?"

penguin in the Minsk Zoo), then the BBB case is perceived as a very important event and is probably a serious blow to the democratic movement's reputation.

While the trends described in this section could well be explained by the fear factor, the emigration of protest-minded respondents or fluctuations in the sampling

structure within the online panel rather than by changes in society, one cannot completely disregard the growing support for the authorities. This phenomenon probably does exist in Belarusian society. In light of this, the author of the section acknowledges that the conclusion made in the previous Belarus Change Tracker, that public trust in the regime had reached a ceiling, was hasty.

Figure 6.
Perception of the event's importance



Source: answers to the question 'Please tell how important or unimportant you think these events are in general'

6

STATE AND SOCIETY: REPRESSION, PRESSURE, CONTROL

In the autumn of 2022, the Russia-Ukraine war lost some of its significance as a determinant of the relationship between society and the regime. The latter focused on the domestic agenda, which resulted in a new escalation of repressions, increased control and militarised indoctrination of society, and further colonisation of culture. In turn, in its confrontation with the regime, civil society relied on the promotion of the Belarusian language, culture and history.

6.1. A NEW ROUND OF REPRESSIONS INSTEAD OF AN AMNESTY

Expectations of an amnesty as a possible signal of the regime's reconciliation with the 'protesters' were wide of the mark. Instead of releasing political prisoners, the regime began a new round of repressions, as confirmed by many indicators. Specifically, the number of politically motivated detentions documented by human rights defenders increased (compared to an average of 100–120 monthly detentions in the summer, the figure in the autumn was three and a half times higher). Accordingly, the number of politically motivated trials was higher in the autumn — an average of 145 per month against a monthly average of 84 earlier in 2022.

The severity of criminal punishments also increased. While previous average monthly cumulative sentences were around 125–127 years, then in September the figure skyrocketed to 412 years, and to 426 in October. This increase is linked to the unprecedentedly large sentences handed down in several high-profile cases in the autumn.⁶⁶

Increasingly more new prisoners are recognised as 'political' by human rights groups. In the summer an average of 87 new political prisoners were listed each month, rising to more than 110 in the autumn months and hitting a record of 139 in November. At that, the share of women among political prisoners is also increasing. In the autumn, it

reached 26%, compared to 24% in the previous months (for reference, the proportion of women on the regime's 'extremist list' does not exceed 20%). The rate of Belarusians' inclusion in extremist lists has also increased in this period. If earlier the lists were supplemented with tens of names at a time, then now they include hundreds of names. The low point so far was 28 October, when the regime added 625 people to the list of extremists in a single day (as of 25 November, the list contains 2,059 names).

Detentions in the autumn had several peculiarities. First, they continued the trend described in previous editions of the Belarus Change Tracker, whereby the relatives of political prisoners and those fighting against the regime are persecuted. In addition, a new trend of detaining entire families (or pairs of relatives, like two brothers or a father and a son) is taking shape. Second, there is a new trend of 'corporate' detentions, whereby the regime apprehends employees of the same company, irrespective of its profile.⁶⁷ Third, there is a growing repression against certain professional groups, from clergy to truck drivers.

Moreover, repressions against the legal profession and the media have reached a new level. In the first case the widespread disbarment has been complemented by the criminal prosecution of lawyers defending people in high-profile political cases. As for independent media, not only those writing about politics, but also neutral media specialising, for instance, in sports or economics have been subjected to persecution. In this latter regard, see cases against Pressball, Blizko.by and the online edition Bobruisk Kurier. Recent repressions have included charges of facilitation of extremist activities against individuals giving interviews to those independent media outlets designated 'extremist'.

There is an ongoing practice of imposing new (repeat) charges or awarding additional prison terms to detainees. People in detention continue to be humiliated, suffering from cruel conditions, while prison administrations, as before, exert additional pressure on political prisoners.

⁶⁶ The Avtukhovych case, the 'case of ten', the Busly Liaciac case, the BelaPAN case and others.

⁶⁷ For example, cash couriers of Belgazprombank and Inkasservis, employees of Belagro company, staff of the National Academy of Sciences of Belarus organisations, and others.

6.2. THE REPRESSIVE MACHINE STEPS UP ITS PREVENTIVE FIGHT AGAINST 'DISSIDENTS'

In the autumn, the significance of the war factor began to subside, and the authorities shifted the focus of repressions to exert greater control over what was happening inside the country and the preventive fight against dissenters.

- On 18 October, Alyaksandr Lukashenka signed a special decree⁶⁸ granting the KGB and the Operative-Analytical Centre under the Presidential Administration a right to direct access to the databases of any internet resources in Belarus. In the long run, this gives the regime the ability to conduct mass and indiscriminate surveillance of citizens' online activities.
- A draft law has been finalised⁶⁹ allowing people to be deprived of citizenship acquired at birth. This practice will prospectively be applied even to people living outside of Belarus. The possibility of remote conviction was adopted earlier and has now been tested — in September, the Investigation Committee opened a special trial against several opposition figures who had left Belarus;⁷⁰ in November, a similar trial was initiated against members of the United Transitional Cabinet. It was announced that this format for prosecution would apply to economic offences as well as political ones.
- The regime clearly wants to reign in the rights of Belarusian citizens who have residence privileges in third countries. The draft law 'On Citizenship' suggests that Belarusians with dual citizenship could potentially have their rights and freedoms restricted, and that those who have obtained a residence permit from any third country will have to inform the Ministry of Internal Affairs or the Ministry of Foreign Affairs. Although this bill has not yet been adopted, certain measures have already been taken to enforce it, such as compiling lists of people with a 'Pole's Card' and holding "precautionary" talks with them.

6.3. MANUAL CONTROL OF 'OWN PEOPLE'

The strengthening of the preventive component in the fight against dissent and the drift towards total control are not limited to the regime's opponents. It also applies to the

⁶⁸ On Interaction of Telecommunication Operators, Telecommunication Service Providers and Owners of Internet Resources with Operational Investigative Bodies.

⁶⁹ On Amendments to the Law 'On Citizenship of the Republic of Belarus'.

⁷⁰ The list includes Aliaksandra Herasimienka, the Olympic champion and former head of the Belarusian Sports Solidarity Foundation, Alyaksandr Opeikin, the head of the BSSF, and Dmitri Solovyev, a human rights activist.

pillars of the regime — officials, law enforcement officers and state employees.

On 1 September, a new law on civil service entered into force. Experts note that its provisions tighten control over both active civil servants and members of the reserve of executive personnel. Civil service management is switched to a 'manual mode'.⁷¹ One example is the recommendation to Belarusian officials not to visit countries where Lukashenka is not recognised as president of Belarus; in cases of disagreement, such officials are encouraged to resign.

On 12 October, a draft law on amending the laws concerning the introduction of biometric documents passed its first reading. Based on the provisions of this act, foreign travel by members of various law enforcement agencies will be subject to special regulations. It is expected that officers will be obliged to submit biometric passports to the personnel services of relevant government agencies.⁷²

By tightening control over officials, the regime expects them to do the same to their subordinates. At a meeting on personnel issues on 3 October, Lukashenka demanded that 'movement of the labour force' rules be developed at executive committees. Their purpose is to ensure control over any transfer of managers and specialists. The trend of ever-more total control and management is gaining momentum and increasingly leading to dehumanisation and transformation of the so-called 'state person' into a cog in the state machine.

It is from this perspective of treating people as cogs that Lukashenka's recent demand for the mobilisation of all 'to fight the harvest' should be viewed. Similarly, Natalia Kachanova's remarks about the compulsory allocation of students to job placements regardless of whether the state paid for their education⁷³ fall within the same paradigm. Although not directly related to the pillars of the regime, several other acts follow the same logic, namely the draft law on regulation of volunteer activity, the decree on certification of tour guides and measures to suppress any discontent or initiative (for example, the regime's instant and harsh reaction to a spontaneous strike by individual entrepreneurs).

6.4. INDOCTRINATION AND MILITARISATION IN THE EDUCATION SECTOR

1 September marked the beginning of a new school year, and the regime predictably devoted much attention to the education system, focusing on several areas.

⁷¹ <https://daoewxjjsasu2.cloudfront.net/post/ryabova-gossluzhashhie-i-ranshe-ne-byli-osobo-svob/187196/>

⁷² https://lentafeed.com/@dw_belarus/6085/

⁷³ <https://reform.by/337928-kochanova-minobrazovanija-postavlena-zadacha-raspredeijat-vseh-vypusknikov>

First, the role of the private sector in the secondary education system has been almost entirely eliminated. The process began following an accident with a private school student, which prompted Lukashenka to demand that the licensing of education provision be introduced 'as of yesterday'. As a result, almost all private schools in Minsk (there were more than thirty) were closed. To prevent any further private initiatives in education, Lukashenka signed a new law on licensing of schools and pre-schools, which provides for enhanced control over the formation of a healthy and 'ideologically stable' personality in students.⁷⁴

Second, the authorities accelerated the ideological priming of the entire system of education, from universities to kindergartens,⁷⁵ and from the curricula to students' leisure time. The 'ideological-patriotic education' is acquiring bizarre forms including: Lukashenka's open lecture on 1 September, with obligatory attendance of all students; a compulsory all-Belarusian dictation on national unity; and 'optional' ideology-oriented courses that are actually compulsory. There are also other initiatives, such as a KGB-sponsored competition dedicated to Dzerzhinsky and the Stalinist-styled game 'Enemy of the People'.

Third, there is an increasing militarisation of education with the involvement of the police and prosecutors. For instance, the Minister of Internal Affairs (MIA) now supervises military and patriotic clubs for children and works to establish MIA lyceums in all regions of Belarus, while the Prosecutor's Office is organising classes in pre-schools on the genocide of the Belarusian people.

All these changes point at the increasing tendency to replace education with an ideological upbringing. Innovations aimed at tracking the level of patriotism follow this trend, including updated school diplomas with grades for behaviour. Admission to university now requires having demonstrated trustworthiness during schooling,⁷⁶ and job placement after graduation will primarily consider the ideological stability of the graduate.

To 'motivate' children to follow the state ideology, law enforcement agencies have begun organising excursions to penal colonies, where school students can ask questions to both prison officers and inmates (according to reports from Jelsk and Vawkavysk). And in Kobryn, security officers with dogs conducted a preventive raid in the dormitory of a Minsk college. These cases are not singular. There are reasons to believe that law enforcement visits to student dormitories to check mobile phones may become a new routine practice.

⁷⁴ <https://president.gov.by/ru/events/aleksandr-lukashenko-podpisal-zakon-o-licenzirovani>

⁷⁵ Natalya Kachanova said that educators in kindergartens and teachers in schools should also serve as ideologists.

⁷⁶ Work in public associations like BRSM and participation in different patriotic events.

6.5. INTENSIFICATION OF CULTURAL CONFRONTATION

In addition to repressions per se, the regime is taking other steps in the ideological and cultural sphere. Naturally, prohibitive measures remain the top priority, ranging from pre-emptive censorship (banning performances, exhibitions, festivals and the distribution of films) to a relentless struggle with what already exists. The main aim of such action is, gradually, to destroy everything associated with Belarusian history, culture and symbols. These remain the biggest irritants for the regime in the ideological and cultural space. Even a hint of endorsing the Pahonya⁷⁷ or decorating anything in colours indirectly recalling the white-red-white combination are severely punished. The Lukashenka regime has officially equated the 'Zhyve Belarus' slogan, in use since the early 20th century, to Nazi symbols.⁷⁸

Instead of Belarusian culture, literature and historiography, the authorities are increasingly promoting elements of the 'Russian world', emphasising spirituality, Orthodoxy and Russian-Soviet history. Apart from cross processions on cars or the planned monument to Alexander Nevsky in Minsk, these include more systemic changes such as the Minister of Education's initiative to involve the Orthodox Church in the teaching of students in all schools.⁷⁹

In addition to political and civic initiatives to counter both the Lukashenka regime and the 'Russian world', the use of the Belarusian language is expanding — at least in independent media and the protest-minded parts of Belarusian society. This trend emerged after the start of a new phase of the Russia-Ukraine war. It has grown stronger, manifesting itself in the transition of the Belarusian media, which used to broadcast exclusively in Russian, to the Belarusian language (full, as in *Tribuna*, or partial, as in *Zerkalo*). Some surveys also show that entire professional groups have begun using more Belarusian in their communications.⁸⁰

Promotion of the Belarusian language is consistent with the idea of developing an independent Belarusian culture and popularising Belarusian history. For these purposes, the diaspora organises commemorative and cultural events. Examples of commemorative events have included the 'night of the executed poets', Roman Bandarenka Memorial Day, the restoration of a monument to Frantsishak Alyakhnovich and fundraising to beautify the grave of Klawdziy Duzh-Dushewski. There have also been cultural events from exhibitions to film festivals.

⁷⁷ National Emblem of Belarus.

⁷⁸ If accompanied by the raised right hand with open palm.

⁷⁹ <https://edu.gov.by/news/prioritnaya-zadacha-obedinit-intellektualnye-i-dukhovnye-sily-v-voprosakh-vospitaniya-podrastayushch/>

⁸⁰ <https://devby.io/news/aitishniki-mova>

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Expert Assessments

BELARUS CHANGE TRACKER



The regime is stepping up militarisation and preventive repressions, while abandoning any façade of direct democracy. Belarus's gradual loss of sovereignty is accompanied by international isolation and its increasing involvement in Russia's war.



The state has intervened in the economy by imposing strict price controls and the rate of economic decline has slowed. Dependence on Russia continues to grow and attempts to use China as an alternative partner have not been very successful so far.



The effects of the war on government-society relations are weakening. Instead, social optimism, related to the perceived improvement in the economic situation, has increased.