



Expert Assessments

BELARUS CHANGE TRACKER

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The regime is intensifying its activities abroad and insulating its political system at home. The democratic opposition continues to be hindered by controversy.



With the economy isolated and in crisis, Belarus is turning to Russia, the UAE and China. A budget deficit has led to a government default and raised taxes.



An anti-war consensus is strengthening public demand for "quietude", while the regime is expanding its control and wages a "silent" war against the diaspora.

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INTRODUCTION.

WHAT IS THE BELARUS CHANGE TRACKER?

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

To address these challenges, our six Belarusian experts produce a quarterly analytical report, the Belarus Change Tracker. The idea behind this product is to record and analyse more general trends in place of observers' usual

focus on individual events and the noise of daily information. The team includes two political analysts, two sociologists and 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".

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

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

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

SUMMARY

The Belarusian authorities have stepped up their international activities. Pushing back against the West's efforts to isolate it, Belarus has used Lukashenka's foreign visits to demonstrate its agency as a foreign policy actor. For the third time in a row, the EU did not include Belarus in a new sanctions package, but the country did fall under the latest US restrictions. Despite the democratic forces' displays of solidarity with Ukraine and resistance to Russia, official Kyiv ignored them while appeasing Lukashenka. The legal and physical "wall" on Belarus's western borders grew even higher, and the efforts of Sviatlana Tsikhanouskaya's team were aimed at offsetting the effects on Belarusian society of the country's isolation.

The authorities have continued to seal themselves off from competition by paving the way for a sweep of the political party field. Other regime trends include growing irritation within the bureaucracy about radical pro-Russia activists and the growing influence in the system of Andrei Shved, the Prosecutor General of Belarus. Disputes continued within the democratic forces, primarily over the creation of a new coalition around the Kalinousky Regiment and still unclear relations between Tsikhanouskaya's Cabinet and the Coordination Council.

Poland's restrictions on border transit have intensified Belarus's economic isolation from the West, but the EU has not expanded its sanctions against Belarus. Belarus continues to seek preferential economic terms from Russia, such as debt restructuring and cheap energy, but has not been paying its debts to private Russian investors, thus confirming its sovereign default. State propaganda continues to focus on the development of economic partnerships with the "Far Arc" countries, but the prospects for trade and investment relations with China are still unclear.

By the end of 2022, Belarus had experienced its worst recession in more than 25 years. The macroeconomic trends that emerged in 2022 persisted in early 2023. In January and February, the authorities continued covering the

budget deficit by increasing formal and informal fees and taxes. The all-round manual intervention by the government in the Belarusian economy, which had emerged earlier, also continued.

There are reasons to believe that public confidence in the regime's institutions continues to grow somewhat. If the Social Conflict Segmentation (SCS) dynamics are not accidental and not related to changes in the sample structure, then it is likely due to consolidation of a sense of stability against the backdrop of the military catastrophe between Ukraine and Russia. Given that much of Belarusian society is insulated from reliable information, the democratic forces' agenda is on the periphery of the information field. The uncertainty surrounding Russia's war against Ukraine overlaps with the anti-war consensus in Belarus, and together they reinforce a demand for stability. This can explain the persistence of the trend towards growing trust towards regime institutions, which the author of this section interprets more as support for a "neutral" status and quietude in contrast to their neighbours' problems. At the same time, one can hardly argue that Belarusian society has lost interest in political change. In Belarus, people are still dissatisfied with the very structure of the Belarusian model of the state and its mutual relations with society. The January-February Chatham House survey found a strong demand for reforms (59% of the urban population), as well as dissatisfaction with pensions, officials, taxes and public services.

The Lukashenka regime continues its repression of Belarusian society despite some seemingly conciliatory rhetoric. The "silent" war against Belarusians abroad, both the leaders of democratic forces and ordinary Belarusians, became one of its targets. The Belarusian authorities are making efforts to expand their control over society and occupy more spaces of public and private life, destroying the last remaining spaces for independent civic activity. Contrary to these efforts, Belarusian civil society continues to function in a dispersed manner.

1

FOREIGN POLICY

The Belarusian authorities have stepped up their international activities. Pushing back against the West's efforts to isolate it, Belarus has used Lukashenka's foreign visits to demonstrate its agency as a foreign policy actor. For the third time in a row, the EU did not include Belarus in a new sanctions package, but the country did fall under the latest US restrictions. Despite the democratic forces' displays of solidarity with Ukraine and resistance to Russia, official Kyiv ignored them while appeasing Lukashenka. The legal and physical "wall" on Belarus's western borders grew even higher, and the efforts of Sviatlana Tsikhanouskaya's team were aimed at offsetting the effects on Belarusian society of the country's isolation.

1.1. THE AUTHORITIES' EFFORTS TO DEMONSTRATE RISING INTERNATIONAL STATUS

The Belarusian authorities had noticeable foreign policy "successes" in the period under review. They intensified high-level diplomatic engagement with other countries, using international visits to demonstrate Belarus's foreign policy agency despite isolation from the West. These visits, among other things, are aimed at compensating for Lukashenka's pariah status in the eyes of Europeans and North Americans.

The most important was Alyaksandr Lukashenka's state visit to China. His previous visit to Beijing took place in 2016. Since then, the Belarusian authorities have sought to organise a return visit by China's Xi Jinping to Belarus. It was originally planned for 2020 but postponed due to the coronavirus pandemic, and has not yet materialised for various reasons.

The very fact of the visit to China affirms the view, popular in the Belarusian media, that claims of China's declining political and economic interest in the Lukashenka regime are, at the very least, exaggerated. Lukashenka sees Beijing as a senior partner through which he can counterbalance his growing dependence on Russia. China, for its part, is ready to continue cooperation despite the crisis in Minsk's relations with the West and the resulting logistical, banking and reputational difficulties.

As well as visiting China, Lukashenka paid his first-ever state visit to Zimbabwe and attended meetings with the UAE's leadership. Although these trips are less significant in terms

of trade, economic or political relations, they are used to show that many states recognise Lukashenka as the official leader of Belarus and underscore this point to those in the international community that dispute his status. Belarusian propaganda even presented the Zimbabwe visit as a real breakthrough.

The same purpose was served by the visit of Hungarian Foreign Minister Péter Szijjártó to Belarus. Although the Hungarian guest refused to meet Lukashenka, his arrival was highly significant because it was the first visit by an EU member state foreign minister to Minsk since 2020. Moreover, at the joint press conference with Belarusian Foreign Minister Aleinik, Szijjártó avoided criticising the Belarusian authorities for the aggression against Ukraine, or for the unprecedented violations of human rights and thousands of political prisoners. Quite the contrary, in fact, since the Hungarian argued that Belarus could once again host peace negotiations between Russia and Ukraine, criticised the EU sanctions policy, and praised investment relations and economic cooperation between Hungary and Belarus.¹

The Apostolic Nuncio, Archbishop Ante Józic,² made a similar statement about Minsk's potential as a venue for peace negotiations again in the future. These words were picked up by Belarusian propagandists and Deputy Foreign Minister of Belarus Ihar Nazaruk, who used this Vatican representative's statement to lobby in favour of such a role for Belarus.³

The EU reinforced these positive trends for the Belarusian regime by once again excluding Minsk from the latest EU sanctions package, even though it continues to contribute to Russia's war of aggression against Ukraine. This was the third sanctions package in a row excluding Belarus, a fact that may indicate an unwillingness on the part of many European countries to increase the pressure on Minsk unless it significantly steps up its involvement in hostilities.

¹ <https://www.belta.by/politics/view/sijjarto-zapadnye-kollegi-budut-menja-kritikovat-za-vizit-v-belarus-no-u-vengrii-drugaja-tochka-zrenija-549965-2023/>

² <https://www.belta.by/society/view/ante-jozich-schitaet-vozmozhnyimi-peregovory-v-minske-po-ukraine-pri-posrednichestve-vatikana-540303-2022/>

³ <https://www.sb.by/articles/nazaruk-o-vykhode-ukrainy-iz-ryada-soglasheniy-s-belarusyu-nashi-ukrainskie-druzya-vybrali-ne-tot-pu.html>

The second reason may be the lack of political incentives in the EU for targeting Minsk and a reluctance to deal with a case secondary to Russia, especially against the background of diametrically different approaches to sanctions strategy among member states. Meanwhile, the US expanded its sanctions against Belarus (further details in the section “Economy: The Foreign Economic Dimension”).

Lukashenka continues to meet and call Vladimir Putin frequently. But after three years during which these meetings were only held in Russia, Putin finally made a visit to Belarus. Putin's visit to Minsk was again accompanied by a clamour of claims that Belarus would soon, under the Kremlin's pressure, join the war or be incorporated into Russia. This, predictably, did not happen. But the trend towards deepening dependence on Russia, mentioned in all previous BCT reports, continues to dominate other foreign policy processes. As part of the implementation of the Union State integration programmes, the Council of the Republic (the upper house of the Belarusian parliament), approved an agreement with Russia providing for the establishment of a supranational tax committee.⁴ The document stipulates “common approaches” to the implementation of “tax policy with regard to indirect taxation” by Belarus and Russia.

Belarus also expanded cooperation with foreign territories occupied by Russia. Agreements signed with the Crimean occupation administration alone for the imports of goods to Belarus exceeded \$2.5 million.⁵

A few days after the February meeting between Lukashenka and Putin, Aslan Bzhania, the de facto leader of unrecognised Republic of Abkhazia, came to Minsk. Unlike the last occasion Belarusian authorities met Bzhania, they did not invent veiled descriptions of his position: he was referred to directly as “President of the Republic of Abkhazia”,⁶ once again confirming the de facto (but not de jure) recognition of Abkhazia as a state. It is noteworthy that the protocol surrounding the visit still officially indicated an inequality between the two leaders' status: although the agenda included a discussion of “interstate” relations, Lukashenka welcomed Bzhania into his office as a subordinate.

1.2. APPEASEMENT OF A CO-AGGRESSOR: THE FRAGILE BALANCE IN RELATIONS BETWEEN THE REGIME AND UKRAINE

There were also some positive trends for the regime in its relations with Ukraine. According to Rikard Jozwiak, Radio Liberty's reporter in Brussels, Belarus was not included in the last two rounds of EU sanctions primarily because of

Ukraine's objections.⁷ Although the Ukrainian Foreign Ministry spokesperson denied this information,⁸ it is noteworthy, as is the absence of any shelling of Ukraine from Belarusian territory since 6 October 2022.⁹

In view of this, Ukraine's public disregard for the Belarusian democratic forces' efforts to establish cooperation looks quite eloquent. While the previous BCT report noted a positive trend in this direction, one can now observe a sharp setback for the Belarus democrats. At the request of Ukrainian diplomats, Sviatlana Tsikhanouskaya was excluded from the list of speakers at a ceremony in Warsaw marking the anniversary of the January Uprising of 1863–1864.¹⁰ Ukraine's position on Western sanctions against the Belarusian authorities actually contradicts the efforts of the United Transitional Cabinet (the Cabinet), which is pushing for tougher sanctions pressure.

The Ukrainian leadership's public statements suggest that, while the Belarusian democratic forces would be more natural partners than the Lukashenka regime (which, after all, is helping Russia's war effort), Kyiv is currently betting on the latter in the expectation that Lukashenka will not send the Belarusian army into Ukraine and thereby formally join the war.

There have been several examples. First, when describing what is happening in Belarus, Ukrainian intelligence officer Vadym Skybytskyi noted that Lukashenka is “trying his best”¹¹ not to get directly involved in the war. “He understands that he is one of Russia's targets. That is why it's difficult for him.” Secondly, Oleksiy Danylov, the Secretary of Ukraine's National Security and Defence Council, explained the ongoing diplomatic relations with Belarus with reference to Ukraine's unwillingness to “provoke the situation regarding certain processes in Belarus.”¹² Finally, Mykhailo Podolyak, adviser to the head of Zelenskyy's Presidential Office, publicly stated that the Ukrainian leadership “sees no sense in developing relations [with the Belarusian democratic movement] because there is no distinct anti-war activity” on the part of the democratic forces.¹³ He cited the

⁴ <https://t.me/pozirkonline/13774>

⁵ <https://t.me/radiosvoboda/56450>

⁶ <https://president.gov.by/ru/events/vstrecha-s-prezidentom-respubliki-abhaziya-aslanom-bzhaniya>

⁷ https://twitter.com/RikardJozwiak/status/1613466506993565698?ref_src=twsrc%5Etfw%7Ctwcamp%5Etweetembed%7Cwterm%5E1613466506993565698%7Cwgr%5Ebcac717897b-494664f9f583de09fb5bdd86f4d50%7Ctwcon%5Es1_&ref_url=https%3A%2F%2Fnashaniva.com%2Fru%2F307417

⁸ <https://www.facebook.com/oleg.nikolenko.50/posts/pfbid-0341beSXTW3AXimZiBUYhatfYCww7werxBGnYszUN3i1yap-qzdFBt7jWuQXggX1fAgl>

⁹ <https://mediazona.by/article/2023/02/25/hajun>

¹⁰ <https://news.zerkalo.io/economics/31279.html>

¹¹ <https://focus.ua/voennye-novosti/546837-pomenyal-ohranu-i-usilil-bezopasnost-lukashenko-znaet-chto-yavlyaetsya-odnoy-iz-celey-rf-gur>

¹² <https://www.radiosvoboda.org/amp/sekretar-rnbo-danilov-pro-frahmentatsiyu-rosiyi/32288126.html>

¹³ <https://www.delfi.lt/ru/news/live/pomosch-litvy-okonchanie-vojnny-i-otnoshenie-k-tihanovskoj-mihail-podolyak-rasskazal-chego-zhdat-v-etom-godu.d?id=92538691>

absence of "large-scale demonstrations near the Belarusian embassies abroad" as an example.

Shortly afterwards, including at Tsikhanouskaya's call, thousands of Belarusians hit the streets around the world for anti-war actions and acts of solidarity with Ukraine. A few days later, an attack was made on a Russian A-50 long-range radar detection aircraft stationed at the Machulishchy airfield near Minsk. BYPOL and Alyaksandr Azarau, a representative of Tsikhanouskaya's Cabinet, claimed responsibility for organising the attack. The plane played a key role for the Russian air grouping in Belarus. The Ukrainian authorities denied any involvement in the attack and expressed no support for the guerrillas' actions.

1.3. AN "IRON CURTAIN" ON THE BORDER AND DWINDLING TREATY RELATIONS

Instead, a significant aggravation of the situation was observed between Belarus and its western neighbours. The main cause is an ongoing border and diplomatic crisis with Poland.¹⁴ The Polish leadership resorted to harsh decisions — first, it closed the Bobrowniki border crossing point in response to the conviction in a Belarusian court of Andrzej Poczobut, a political prisoner and a member of the Union of Poles in Belarus. Then, in response to a Belarusian ban on the movement of Polish trucks through its checkpoints on the borders with Lithuania and Latvia, Poland imposed restrictions at the Kukuryki-Kozłowicz crossing point on any vehicles not registered in the EU and with the European Free Trade Association (EFTA). In parallel, the sides made reciprocal expulsions of diplomats.

To make Polish restrictions more effective, Lithuania arranged for inspections of trucks at the Polish-Lithuanian border.¹⁵ Consequently, trucks not registered in the EU and EFTA (and thus not permitted to pass through Lithuania) were selectively denied entry. Lithuania also closed one of the two functioning railroad crossings on the Belarus-Lithuania border, Stasylos-Benyakoni.¹⁶

These restrictions reinforce a trend described in the previous BCT report: the emergence of a very real "iron curtain" on the Belarus borders. As of 1 January 2023, Belarus's neighbouring countries had erected over 980km of engineering barriers of various types, including 202km of barrier on the Polish side, 553km on the Lithuanian side, 86km on the Latvian side, and 141km on the Ukrainian side.¹⁷

In a related development, countries continue to withdraw from bilateral agreements with Belarus. For example,

Ukraine revoked the Ukraine and Belarus government agreements on the organisation of joint controls at border crossing points.¹⁸ Seven protocols on cooperation between the State Border Committee of Belarus and the State Border Guard Service of Ukraine were terminated. Following this decision, the border agencies are essentially deprived of mechanisms and formats of interaction. They no longer have a separate communications channel, while working groups that used to meet to resolve border issues have ceased to exist. In addition, the simplified crossing points for citizens were closed and Ukraine has abandoned its pilot project of a Zhytomyr-Pinsk contact point. Furthermore, Lithuania renounced its bilateral agreement with Belarus on cross-border cooperation and ceased efforts to ensure the smooth flow of traffic across the border.¹⁹

The democratic forces achieved partial compensations for the effects of Belarus's legal, political, economic and humanitarian isolation on Belarusian society. Poland has agreed to continue to recognise educational certificates and diplomas, even though the Belarusian government has withdrawn from the relevant bilateral agreement.²⁰ The Polish government also intends to set up a working group for supporting Belarusian businesses and creating conditions for their simplified relocation.²¹ Recent issues with Estonian²² and Czech²³ universities were settled, allowing Belarusian students to continue their studies in these countries. At the initiative of Belarusian democratic forces, a special rapporteur was appointed to the Parliamentary Assembly of the Council of Europe (PACE) to prepare a comprehensive report on the problems faced by Belarusians in exile and ways of addressing them.²⁴

One last symbolic achievement for the Belarusian democracy movement was the US President's reference to the struggle of "the leaders of the opposition and the people of Belarus for democracy" during his speech in Warsaw. In her turn, Sviatlana Tsikhanouskaya publicly stated for the first time that Belarus needs to leave the Union State with Russia and withdraw from the Collective Security Treaty Organisation (CSTO).²⁵ The geography of her international visits has also expanded, with Tsikhanouskaya visiting Croatia for the first time and she also spoke at the World Economic Forum in Davos.²⁶

¹⁸ <https://www.svaboda.org/a/32162327.html>

¹⁹ <https://t.me/gpkgovby/2834>

²⁰ <https://t.me/CabinetBelarus/133>

²¹ <https://t.me/pozirkonline/14528>

²² <https://tsikhanouskaya.org/ru/events/news/a3ab-2ca48b9c2b2.html>

²³ <https://tsikhanouskaya.org/ru/events/news/d66ecd-94c9a04a2.html>

²⁴ <https://pace.coe.int/en/news/8955/belarusians-in-exile-an-overlooked-issue-addressed-by-the-parliamentary-assembly>

²⁵ <https://tsikhanouskaya.org/ru/events/news/c96fe3c-83a72bf1.html>

²⁶ <https://tsikhanouskaya.org/ru/events/news/a9e-7eb92442c9b8.html>

¹⁴ https://news.zerkalo.io/economics/32878.html?utm_campaign=share&utm_content=ios

¹⁵ <https://t.me/euroradio/39750>

¹⁶ <https://euroradio.fm/ru/litva-zakryvaet-odin-pogranichnyy-perekhod-dlya-belorusskikh-poezdov-belsat>

¹⁷ <https://t.me/gpkgovby/2680>

2

DOMESTIC POLITICS: RINGFENCING THE POLITICAL SYSTEM, DISPUTES WITHIN THE REGIME, AND FRAGMENTED OPPOSITION

The authorities have continued to seal themselves off from competition by paving the way for a sweep of the political party field. Other regime trends include growing irritation within the bureaucracy about radical pro-Russia activists and the growing influence in the system of Andrei Shved, the Prosecutor General of Belarus. Disputes continued within the democratic forces, primarily over the creation of a new coalition around the Kalinousky Regiment and still unclear relations between Tsikhanouskaya's Cabinet and the Coordination Council.

2.1. FORMATION OF THE OPPOSITION'S "KYIV CENTRE"

A fragmentation of the democratic movement was first observed in the autumn of 2022. The process of fragmentation continued, posing new challenges for organisations formed round Sviatlana Tsikhanouskaya. In particular, the politicisation of the Kastus Kalinousky Regiment (KKR), a unit of Belarusian volunteers fighting in Ukraine, had led to the consolidation of an alternative "Kyiv Centre" among the opposition. The Kyiv Centre represents a more radical alternative to Tsikhanouskaya's United Transitional Cabinet (the Cabinet). In early December, the CyberPartisans initiative joined the KKR, and Dzmitry Shchigelsky, a representative of the "Supratsiu" coalition (which includes the CyberPartisans), became one of the KKR's speakers. In early February, after traveling to Ukraine and meeting Belarusian volunteers on the frontline, veteran opposition politician Zianon Pazniak and his Free Belarus movement also identified themselves as KKR allies. They announced a new future coalition which they labelled as the "Security Council".

On the one hand, the leaders and speakers of this coalition (Zianon Pazniak, Dzmitry Shchigelsky, Pavel Usau and Vadzim Kabanchuk) have emphasised their openness to working with all political forces. On the other hand, they have from time to time criticised Sviatlana Tsikhanouskaya's political structures for a lack of concrete results and what

they consider to be an insufficiently critical attitude towards Russia. Scepticism towards other democratic forces unites members of the new coalition, but so too does their commitment to right-wing, national-democratic views and open support for militant methods of liberating Belarus from the ruling regime. They consider the Lukashenka regime to be an occupation regime.

Tsikhanouskaya's Cabinet functioned through the winter with no noticeable internal conflicts. Tsikhanouskaya herself also avoided falling out with the relatives of political prisoners, after a group of those relatives advocated lobbying for a more flexible approach from the West towards negotiations with Minsk over the release of political prisoners.²⁷ Despite differing views about negotiation tactics, the Cabinet and the initiative proposing a more flexible approach — led by Tatsiana Khomich, Aliaksandr Lojko and Sviatlana Matskevich — largely refrained from criticising each other. One reason for this amicable disagreement was the appointment of Volha Horbunova as the new Cabinet representative for social issues, which included taking up the issue of political prisoners. Horbunova is a moderate, as are the relatives of political prisoners behind the proposals, and she supported a revision of the democratic forces' tactics owing to the failure to achieve any significant results for two and a half years.²⁸

9 February marked six months of the Cabinet's existence. It had promised to complete a reappointment of "ministers" and win their approval by the Coordination Council (CC) after six months, and it failed in this pledge.²⁹ The CC instead expanded its membership to include new delegates from civil society and self-nominated candidates, but, as of late February, it had not reached an agreement

²⁷ <https://reform.by/objavleno-o-sozdanii-obedinenija-rodstvennikov-i-byvshih-politzakljuchennyh>

²⁸ <https://nashaniva.com/ru/306588>

²⁹ <https://www.delfi.lt/ru/news/live/svetlana-tihanovskaya-obyavila-o-sozdanii-obedinennogo-perehodnogo-kabinetu.d?id=90939827>

with the Cabinet on the rules regulating their relationship. For example, there was no agreement about whether one person should be able to combine positions on the Cabinet and the CC, or about the CC's role in approving nominations to the Cabinet. The first problem was somewhat resolved by the only person holding a post in each, Pavel Latushka (Tsikhanouskaya's deputy in the Cabinet), resigning from the CC at the end of February.³⁰ But his departure was accompanied by a scandal: Latushka accused the Coordination Council of drifting towards a greater compromise on negotiations with Lukashenka, something the CC itself denies.³¹

Another less visible example of the opposition's fragmentation was the separation of the Pospolite Ruszenie initiative from its founders — the power "ministers" in the Cabinet, Alyaksandr Azarau and Valery Sakhashchyk. This "patriotic and sports" organisation, which consists of local cells known as choragiews, was presented as an important achievement of the Cabinet's first months of work, namely the formation of the opposition's own combat units. However, as eventually became clear, Ruszenie had no stable financing and, according to the movement's Sergey Kedysko, this prompted its decision to become autonomous.

These centrifugal tendencies are barely visible to the general public, especially inside the country (further details in the section "Trends in Public Opinion"). However, while Belarusians still follow such structural transformations within the opposition, the fragmentation and the accompanying disputes are likely to lead to their declining interest in these processes.

2.2. RINGFENCING THE AUTOCRATIC POLITICAL SYSTEM

In February, Aliaksandr Lukashenka signed several important laws ringfencing the political system and seeking to legally remove opposition and civic activity from the public sphere. The new laws cover the All-Belarusian People's Assembly (ABPA), political parties and public associations, the foundations of civil society, and amendments to the Electoral Code. Innovations in the ABPA law and the updated Electoral Code were discussed in the previous BCT issue as vivid examples of the drift towards more entrenched autocracy; they serve to filter out anything that might foster democratic tendencies.

Amendments to the law on political parties augment this trend since they create a legal basis for the liquidation of most parties. This is, apparently, likely imminent because all opposition parties will be required to "re-register" during the spring and summer of 2023. The existence of parties

opposed to the incumbent regime is virtually impossible for two reasons: an increased threshold of minimum party membership (from 1,000 to 5,000) and the requirement to act in line with the course set out at the ABPA.

The loyalist Belaya Rus' association has announced the establishment of a political party, intended to occupy the role of a "party of power", and its inaugural congress was held in March. However, this does not yet suggest a new trend — the growth of the political significance of parties within the current Belarusian regime. The forthcoming cleansing of the party space and the creation of a central pro-government party is not accompanied by elements of a proportional electoral system, which would give the surviving parties new levers for political participation. Amendments to the Electoral Code signed by Lukashenka retain the majoritarian system for both parliamentary and local elections. There is consequently no indication that the role and place of either Belaya Rus or other permitted parties will fundamentally differ from the role and place of today's little-known pro-government parties.

2.3. MITIGATION OF REPRESSIONS?

Two initiatives put forward this winter suggest that the authorities are increasingly willing to experiment with their repressive policies. First, in late December and early January, they launched a "ten-fold compensation" scheme for donations (further details in the section "Domestic Economy"): those who donated to foundations that were later deemed "extremist" after the 2020 protests were invited to pay a sum ten-times larger to a state charity.³² Those who refused to pay were threatened with criminal charges for financing extremism, while some who agreed to pay were promised that no criminal charges would be brought against them.³³ Such commercialisation of repressions discloses both the authorities' desire to capitalise on the opportunity of arresting thousands of wealthy people (although, by February, the "scheme" was extended from IT specialists to people in less profitable professions), and their unwillingness to provoke a mass emigration of potential victims fearing arrest.

A second important development in this context was the creation of a commission led by Prosecutor General Andrei Shved and tasked to deal with political emigrants and encourage their return. Prospective returnees should first of all notify the authorities of anything and everything that the authorities may hold against them, show their readiness to repent for their actions, publicly apologise, pay "damages", and, upon return to Belarus, comply with the laws and "actively perform their civic duty". If these conditions are met, those who have not committed serious crimes (as defined by the authorities) are promised a guarantee

³⁰ <https://euroradio.pl/ru/pavel-latushko-ukhodit-iz-koordinacionnogo-soveta>

³¹ <https://news.zerkalo.io/economics/33407.html>

³² <https://devby.io/news/donaty-spiski>

³³ <https://news.zerkalo.io/life/32862.html>

of non-prosecution. Given the lack of trust in the government's ability to fulfil its promises, and the commission's composition of odious security officials and propagandists who advocated mass repression, so far there has been no visible mass return of political emigrants taking advantage of the offer.

It is too early to interpret these two schemes as the beginning of some sustained mitigation of repressions. So far, this prompts only one tentative conclusion: if these initiatives continue, the beginning of 2023 could mark the beginnings of increased flexibility in repressive policies, which had only become stricter in the two years after 2020.

2.4. THE BUREAUCRACY RESISTS PRO-RUSSIA ACTIVISTS

Activities by pro-government and pro-Russia activists did not stop during the winter, but frictions intensified between the most ardent activists and less overtly pro-Russia members of bureaucracy. In December, on the initiative of the propagandist Vadzim Gigin, bookstores began removing books about certain periods of Belarusian history, as well as products from publishers closed down by the authorities in recent months.³⁴ Also in December, in response to complaints from pro-Russia and pro-government activists, the Council of Ministers banned Halloween celebrations in educational institutions and other events that contradict "the traditional values of the Belarusian people".³⁵ The Communist Party of Belarus has joined the chorus of pro-government voices, proposing the renaming of Kalinousky Street in Minsk — ironically named so under the Communist rule in the 1960s.³⁶ In December, according to media reports, Lukashenka endorsed the demands of activists seeking the removal of the Belarusian Latin alphabet on street signs, where it is used to transliterate national place names.³⁷

However, on at least two occasions in the winter, the targets of such complaints resisted demands. This demonstrates growing discomfort with the activities of these "ideological inspectors" at various levels of the state and bureaucracy. In December, the Hrodna Municipal Cultural Centre complained to Lukashenka about the cancellation of its New Year performance following a complaint by local pro-Russia activist Olga Bondareva. In February, Bondareva and several other pro-government bloggers and Telegram channels, including those affiliated with the security agencies, castigated MP Ihar Marzalyuk for his proposals to expand the scope of the Belarusian language.³⁸ Bondareva even

complained to the Prosecutor's Office.³⁹ In response, Mr Marzalyuk turned personally to Prosecutor General Shved, demanding that his office deal with "pseudo-patriots" whom he equated with opposition "extremists".⁴⁰ State media published Marzalyuk's statements and some TV programmes actively discussed the topic, indicating growing irritation with these activists within the ideological leadership and in Lukashenka's administration.

These conflicts clearly demonstrate how the Belarusian political system, long reliant on political demobilisation and bureaucratic discipline, has found it difficult to tolerate the "foreign body" of radical pro-regime activists which emerged in the wake of suppression of 2020 protests.

2.5. PROSECUTOR GENERAL'S GROWING INFLUENCE

The above examples reveal another minor trend — the increasing bureaucratic weight of Andrei Shved, Prosecutor General of Belarus. After working on an ideologically important criminal case investigating the "genocide of the Belarusian people" during World War II, Shved has become the de facto supervisor of all the regime's repressive activities, or at least their legislative part.

When Lukashenka announced an amnesty of political prisoners in 2022, Shved openly opposed the proposals and the amnesty was eventually carried out in line with the Prosecutor General's wishes. Of course, Lukashenka hardly made the decision under pressure from Shved, but it is quite telling that the Prosecutor General was not shy about his disagreement with the dictator. Now it is Shved who is chairing the commission on the return of political emigrants, and it is Shved who people are turning to for protection: both sides in the dispute between bureaucrats and pro-Russia activists, for example, have appealed to Shved.

His influence extends well beyond these spheres: at a meeting on 6 February, Lukashenka instructed Shved to arrange a meeting with the security forces about the results of their work.⁴¹ The Prosecutor General was therefore given an opportunity to influence the meeting directly, thus weakening the positions of potential competitors from other security agencies for Lukashenka's favour. At a similar meeting in April 2022, Lukashenka criticised other security officials, including the Minister of Internal Affairs and the leadership of the Investigative Committee, as a direct consequence of materials provided by the Prosecutor General's Office.

³⁴ <https://nashaniva.com/ru/306565>

³⁵ <https://news.zerkalo.io/life/28798.html>

³⁶ <https://reform.by/kommunisty-belarusi-predlozhi-mingorispolkomu-pereimenovat-ulicu-kalinovskogo-i-zakryt-nochnye-gej-kluby>

³⁷ <https://news.zerkalo.io/life/29916.html>

³⁸ <https://nashaniva.com/ru/310911>

³⁹ <https://news.zerkalo.io/economics/33217.html?tg>

⁴⁰ <https://www.belta.by/society/view/marzaljuk-my-dolzhen-ukrepljat-nash-sotsium-a-ne-razryvat-ego-551853-2023/>

⁴¹ <https://news.zerkalo.io/economics/32013.html>

3

FOREIGN ECONOMIC RELATIONS

Poland's restrictions on border transit have intensified Belarus's economic isolation from the West, but the EU has not expanded its sanctions against Belarus. Belarus continues to seek preferential economic terms from Russia in the form of debt restructuring and cheap energy commodities. At the same time, Belarus has not been repaying debts to private Russian investors, thus confirming its de facto sovereign default. State propaganda continues to focus on the development of economic partnerships with "the Far Arc" countries, but the prospects for developing trade and investment relations with China remain unclear.

3.1. DETERIORATING ECONOMIC RELATIONS WITH THE WEST AND A FRAUGHT SITUATION AT THE STATE BORDERS

In February 2023, Poland announced the closure of the Bobrovniki border crossing with Belarus.⁴² Tit-for-tat responses followed: Belarus banned Polish trucks from entering Belarus through Lithuanian and Latvian border crossings, and Poland in its turn banned non-EU-registered trucks from passing through the only border crossing open to trucks⁴³ (for further details see the section "Foreign Policy"). After these decisions, there were only two operational border crossings between Belarus and Poland: one for cars and the other for trucks. Queues, tens-of-kilometres long, formed at the Belarus-Poland and Belarus-Lithuania freight border crossings⁴⁴ (the queues decreased later as traffic stayed away). And the Polish authorities continue to reiterate that, if necessary, they are ready to close the remaining border crossings.

Concurrently, Lithuania has been tightening its border crossing requirements. Trucks with Belarusian, Russian or other non-EU number plates have been inspected more thoroughly. Meanwhile, the constant discovery of illegal imports (primarily cigarettes) in the railway traffic arriving from Belarus forced Lithuania to close the railway

border crossing, which did not have any X-ray scanners.⁴⁵ That border crossing used to channel a small share of the contraband flow, but following a report by investigative journalists⁴⁶ about the smuggling the sanctioned products from GrodnoAzot, Lithuania contemplated a complete moratorium on Belarusian goods' transit via the Lithuanian railways.

Although blanket closure of the state borders is not on the agenda as yet, the steady trend towards tightening transit conditions cannot but worry the Belarusian authorities. Transit has always been an important part of the Belarusian economy: the country's railways and roads carry trade flows in both directions between the EU and Russia or China. Belarus had earned handsome profits on transport services: the net trade balance of transport services used to reach \$1.8–2 billion in good years. Moreover, its favourable location on the main transit route into the EU used to make Belarus attractive for Chinese investments. In recent years, the political "toxicity" of Belarus and the transport sanctions it is under have reduced cargo turnover significantly, by 25% in 2022 for example, and the trade balance in transport services has fallen — though it is a still substantial \$1.3 billion. Closure of the land borders with the EU would not only deprive Belarus of a large share of its transport services export revenue, but would also jeopardise much of its trade that is still afloat.

Economic relations with the West have not been deteriorating on all fronts, though. The EU did not include Belarus in its recent expansion of sanctions, timed to coincide with the anniversary of the war in Ukraine: the EU simply extended the sanctions imposed on Belarus a year earlier by another year.⁴⁷ There were many rumours and speculations about possible sanctions against Belarus, or indeed their easing, prior to the EU's announcement. In particular, it was suggested that Ivan Halavaty, the CEO of Belaruskali, and

⁴² <https://news.zerkalo.io/economics/32266.html>

⁴³ <https://news.zerkalo.io/economics/33013.html>

⁴⁴ <https://news.zerkalo.io/economics/33602.html>

⁴⁵ <https://news.zerkalo.io/economics/32871.html>

⁴⁶ <https://investigatebel.org/ru/investigations/how-belarusian-fertilizer-company-get-banned-nitrogen-into-europe-through-straw-companies>

⁴⁷ <https://www.consilium.europa.eu/en/press/press-releases/2023/02/27/belarus-eu-prolongs-restrictive-measures-for-a-year/>



Mikhail Gutseriev, a Russian oligarch building a new potash plant in Belarus, could be exempted from sanctions in order to reduce the shortage of fertilisers on the global market. This did not happen and both Gutseriev and Golovaty are still on the sanctions lists. There was also a hypothesis about tougher sanctions on the import of certain goods from the EU to Belarus: today, restrictions on the import of some high-tech goods are more significant for Russia, and Belarus could be used to circumvent such restrictions. However, such a "synchronization" of sanctions on Belarus and Russia has not happened yet either.

The intention to "synchronize" sanctions may be because trade data shows a significant increase in EU exports to Belarus after a collapse in early 2022. As Figure 1 shows, exports from the EU to Belarus were 130–145% of the 2019 average. According to Eurostat, the EU exported €1.309-billion worth of goods to Belarus in Q1-2022, and this climbed to €2.335 billion in Q4-2022. The key contributor to growth was goods in the export category "Machinery and Transport Equipment", which grew from €480 million in Q1-2022 to €1.058 billion in Q4-2022. Taking into account the state of the Belarusian economy, the fall in household retail demand and especially the collapse of investment demand, such an increase in purchases of European equipment can be explained by its onward

re-export, including parallel imports to Russia. On the other hand, Belarus is not unique: as seen in Figure 1, Georgia, Kazakhstan and Turkey all increased their imports from the EU even more significantly. If Belarus, due to trade sanctions or transit closures, loses its ability to serve as a transit hub for circumventing sanctions, it will easily be replaced by other countries in the region.

The US has imposed new sanctions restricting Russia and Belarus from importing electronics and consumer equipment, including a prohibition on luxury goods exports to the two countries.⁴⁸ The range of goods that fall under the definition of luxury has been expanded considerably: for example, there are now bans on exports of smartphones priced over \$300 or refrigerators priced over \$700. Such measures are designed primarily to stop the import of equipment that can subsequently be "cannibalised" with individual parts — chips in particular — used in other industries. This will hardly affect the consumer market significantly, since many products are easily substituted by Chinese or local products. On the other hand, if the import of,

⁴⁸ <https://www.federalregister.gov/documents/2023/02/27/2023-03927/implementation-of-additional-sanctions-against-russia-and-belarus-under-the-export-administration>

let's say, an iPhone into Belarus was not challenged previously due to parallel imports being allowed, the threat of secondary sanctions from the United States will make many intermediaries think twice under the latest changes to the sanctions regime.

3.2. RUSSIAN ECONOMIC SUPPORT: BELARUS'S AMBITION GROWS

Belarus continued trying to make the most of its relationship with Russia in the winter of 2022–2023. At the same time, Russia, according to Belarusian Prime Minister Galouchenka,⁴⁹ is firmly linking the development of relations to the integration progress. The trade turnover between Russia and Belarus reached a record-breaking \$50 billion in 2022, primarily due to rising prices, but possibly due to the re-export of European goods through Belarus, too. The Belarusian authorities also refer to an increase in the supply of Belarusian trucks, TV sets, metal structures, and tyres. But these statements are questionable. For example, MAZ (a Belarusian truck manufacturer) has been losing its Russian market share to Chinese competitors,⁵⁰ and the CEO of Belshina (a Belarusian tyre manufacturer) is the subject of a criminal investigation in Belarus for selling underpriced products to Russia.⁵¹

The coming of a new year always adds momentum to economic negotiations between Russia and Belarus, and late 2022 was no exception. After Putin and Lukashenka met, new agreements were announced on gas supplies, in particular on the price for the next three years. The details of the agreements were not disclosed, but Belarusian manufacturers were promised that the prices they paid for gas would remain unchanged⁵² (as usual, this statement turned out to be not entirely true).⁵³ Low energy prices are undoubtedly one of the cornerstones of the relative resilience of the Belarusian economy amidst sanctions. In addition, Belarus has begun to talk about a new round of loan restructuring; this time "non-state loans" from Russian financial institutions are the focus of discussions.⁵⁴ Most likely, this implies loans from the Eurasian Development Bank: a significant source of loans for Belarus, but one which is not formally Russian.

Belarus is in no hurry to repay its debts to private Russian investors either. Back in 2022, in light of the sanctions imposed on the National Bank of Belarus, a decision was

made on a special procedure for Belarusian Eurobond repayments: now repayments can only be received in Belarusian rubles from a dedicated bank account in Belarus-bank. Russian investors turned out to be the main holders of Belarusian Eurobonds, and when \$800-million worth of bonds were redeemed in February 2023, Russian investors were unable to collect the \$500 million owed to them.⁵⁵ Impediments are associated both with the need to open a Belarusian ruble account and with the execution of all documents for receiving payments. We can safely assume that other investors have been facing even more challenges, which means that the Belarusian default can no longer be considered a technical one.

3.3. LUKASHENKA'S VISITS ARE EVIDENCE OF THE IMPORTANCE OF "THE FAR ARC" COUNTRIES

Belarus continues to send strong signals that its efforts to refocus economic ties are reliant not only on Russia. Two state visits — to China and Zimbabwe — and several meetings in the UAE were heavily promoted in state propaganda, with the emphasis placed primarily on economic prospects. However, the reality does not match the media picture. For example, in recent years trade between Belarus and Zimbabwe has been hovering in the range of \$20–30 million. Even the declared value of the newly-signed agreements, \$200 million, is not an impressive figure in macroeconomic terms, and such agreements are not always implemented. According to the Zimbabwean media, Lukashenka may have agreed to build a lithium mining plant in Zimbabwe.⁵⁶ Still, if these reports are correct and the plan is carried through, the macroeconomic effect for Belarus is unlikely to be significant. Trade with the UAE has been unimpressive as well: Belarusian exports to the UAE totaled \$45 million in 2021. However, the UAE may be of interest as a potential source of investment. In addition, the UAE is an important channel to circumvent sanctions: this is something that European regulators and the United States have been paying attention to already.⁵⁷ For example, the Vitsebsk Regional Executive Committee reported a 97-fold increase in exports to the UAE, up to \$2.4 billion.⁵⁸ This incredible growth was achieved through exporting sanctioned oil and wood products.

Everything is more complicated in case of China. On the one hand, the development of economic relations with China slowed significantly after 2020.⁵⁹ The progressive

49 <https://www.belta.by/economics/view/partner-nomer-odin-rossija-golovchenko-nazval-glavnyj-prioritet-v-rabote-navneshnem-konture-551761-2023/>

50 <https://www.kommersant.ru/doc/5748309>

51 <https://www.belta.by/president/view/generalnyj-direktor-oao-belshina-nahoditsja-v-sledstvennom-izoljatore-550257-2023/>

52 <https://news.zerkalo.io/economics/28720.html>

53 <https://news.zerkalo.io/economics/32486.html>

54 <https://news.zerkalo.io/economics/28766.html>

55 <https://www.kommersant.ru/doc/5844491>

56 <https://reform.by/litievij-sled-lukashenko-v-zimbabwe>

57 <https://www.ft.com/content/fca1878e-g198-4500-b888-24b17043c507>

58 <https://vitebsk.gov.by/special/ru/gorod-ru/zelenaja-ekonomika-i-sozdanie-sovmestnyx-proizvodstv-mogut-stat-perspektivnymi-napravlenijami-v-28691/>

59 <https://www.ipg-journal.io/ru/rubriki/vneshnjaja-politika-i-bezopasnost/o-chem-molchat-minsk-i-pekín-1631/>

isolation of Belarus from EU markets has appreciably reduced its value as a trade hub in Chinese eyes. The development of the Great Stone technology park, a joint Belarusian-Chinese project, has stalled. On the other hand, the volume of trade between the two countries increased in 2022. In particular, exports from Belarus to China amounted to \$1.6 billion: this is still an insignificant figure against the backdrop of trade volumes with Russia or the lost markets of Ukraine and the EU, but still, it is, macroeconomically, a tangible volume at least. Most of the exports are food (\$500 million; this growth is primarily due to price increases) and potash (about \$900 million). Despite transit impediments, potash exports to China have even managed to increase with the help of container railway deliveries.⁶⁰ However, Belarus has failed to reorient its sanctioned woodworking products onto the Chinese market: supplies have increased in value by only 10%,⁶¹ which may even mean a drop in physical volumes given the rise in prices.

No specific results of Lukashenka's visit to China are known, but the effect of the concluded agreements is estimated at \$3.5 billion.⁶² However, as Belarusian First Deputy Prime Minister Snapkau warned, this effect will not be seen overnight. Investments are the key interest of Belarus: about 20 new investment projects have been announced. In addition, there has been an announcement about the drafting of a free trade agreement: once signed, it will allow Belarus to increase its food supplies, and this will send a serious and positive signal to Chinese investors.

⁶⁰ https://myfin.by/stati/view/cto-proishodit-s-kalijnym-eksportom-belarusi-i-skolko-zarabatyvaut-konkurenty?utm_source=tgnews&utm_medium=social&utm_campaign=post

⁶¹ <https://www.belta.by/economics/view/eksport-produksii-derevoobrabatvujuschej-promyshlennosti-belarusi-v-knr-za-proshlyj-god-vyros-pochti-552991-2023/>

⁶² <https://www.belta.by/economics/view/sovokupnyj-ekonomicheskij-effekt-ot-belorusko-kitajskih-dogovorenostej-otsenivaetsja-bolee-chem-v-35-553190-2023/>

4

THE DOMESTIC ECONOMY

In late 2022, Belarus experienced its worst recession in more than a quarter of a century. Macroeconomic trends that took shape in 2022 continued into early 2023. In January and February, the authorities, as before, covered the budget deficit through increased formal and informal fees and taxes. A trend of comprehensive and manual state interventions in the economy, apparent prior to the reporting period, has also continued.

4.1. RECESSION CONTINUES INTO THE NEW CALENDAR YEAR

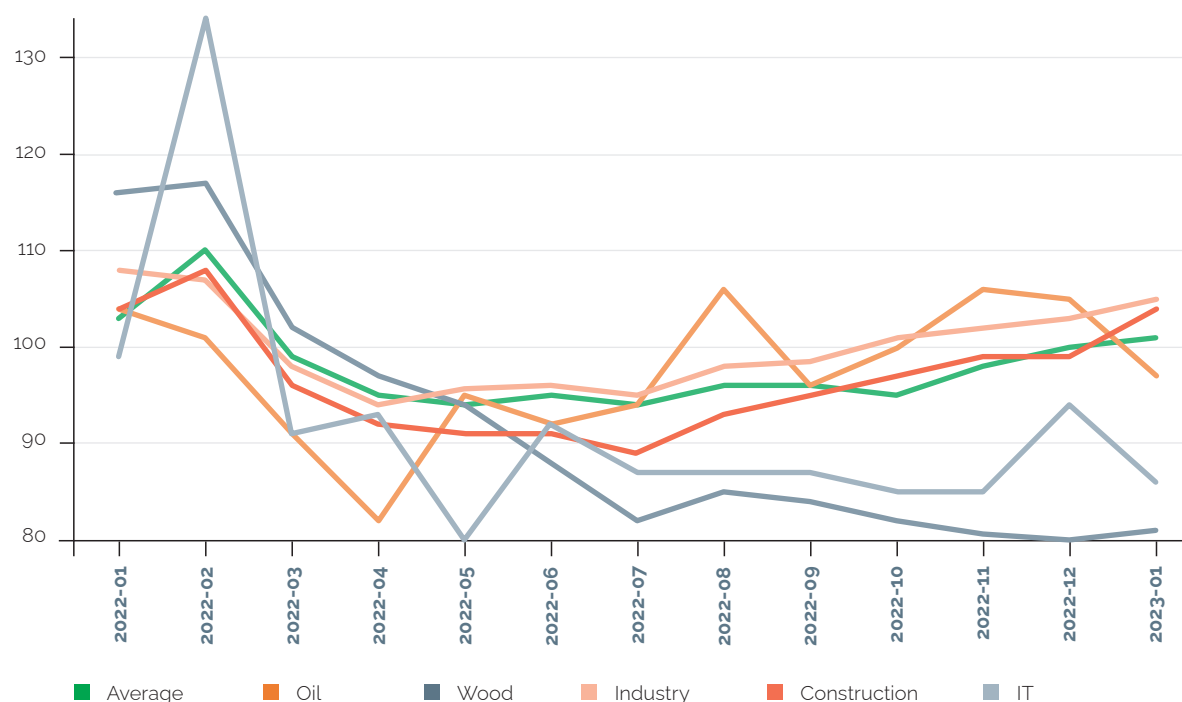
In 2022, the GDP of Belarus decreased by 4.7% in real terms. This is the biggest annual drop since 1995, which was the last year of the recession caused by the Soviet collapse and resulting economic restructuring. Only two sectors of

the economy grew in 2022: the agriculture, forestry and fisheries sector grew by 4.4%, with most of the growth in agriculture, and mining was another successful sector, adding 2.7% year-on-year.

The growth "anti-leaders" were predictable. The transport, trade, and construction industries saw GDP decrease in real terms by 16.8%, 12.4%, and 11.4% respectively. The ICT sector joined them in terms of decline in real value, but primarily in the second half of the year: it fell by only 2.2% in 2022 overall. This is explained by the fact that, unlike other sectors, the ICT sector continued growing for several months after the war started.

Inflation, one of the key challenges in mid-2022, slowed significantly in Q3-Q4 and amounted to 12.8% in 2022. This achievement was due to a combination of factors: slowing

Figure 2.
Changes in real wages versus the corresponding months in 2022 (average for the economy as a whole and by individual sector)



Source: Belstat

global inflation, draconian government price controls, supply chains adjusting to the initial sanctions shock, and a persistent reduction in domestic consumption. However, individual excesses were also recorded against the backdrop of a general decline in inflation. It was in this context that the Minister of Antimonopoly Regulation and Trade was embarrassed for the second time in six months by the issue of cucumber pricing. In January 2023, he tried to explain the sharp rise in cucumber prices to \$5–6 per kilogram as a result of high gas prices in Europe.⁶³

The slowdown in inflation, coupled with a traditional and abrupt increase in nominal wages in December, led to the rate of wage decline in November being more than halved, and, by late December, real wages even exceeded last year's wages by a modest but positive 0.6%.

The trends shaped in the last months of 2022 continued into January 2023, as expected. GDP in January, in real terms, had decreased by 5% year-on-year. The three "anti-leaders" were now the transport, trade, and ICT sectors, with real declines amounting to 19.6%, 12.1%, and 13.2% respectively. The construction sector was not merely displaced from its role as a leading driver of decline, but it also showed a small, positive performance.

The ICT sector, for many years a driver of the economy, continues falling, showing monthly performances between –10% and –14% compared to the corresponding periods in the previous year. As before, the only significant positives recorded in January were in the agriculture and mining sectors, where real value-added growth amounted to 2.6% and 2.9% respectively. Inflation, as in late 2022, showed a downward trend, a consequence of which being that wages increased by 1.6% in January 2023 year-on-year in real terms.

Figure 1. Changes in real wages versus the corresponding months of 2022 in the economy on average and in individual sectors

4.2. "SCRAPING THE BARREL": NON-TRADITIONAL FISCAL POLICIES

As indicated in previous issues of the Belarus Change Tracker, the government's economic recovery plans focus on expansive fiscal and monetary policies. The Eurobond default, as well as the deferment of public debt repayments, agreed with Russia, turned out to be insufficient measures to bridge the budget deficit and to increase public investment in a contracting economy. In this regard, the trends towards a loose monetary policy and the search for creative ways to replenish the state

budget continued and developed in the period November 2022–February 2023.

A law was adopted at the very end of 2022 providing for a number of changes in taxation.⁶⁴ In particular, it stipulated an 11% increase in the recently introduced tax on the first apartment owned and a 19% land tax increase.

The excise tax on cigarettes will gradually increase by 120% over the course of the year, and the excise tax on alcohol is planned to increase by more than 130%. The fee for owning a dog will increase by 19%.

The law provides for an income tax increase from 18% to 20% and a twofold online gambling tax increase. In addition, a number of tax incentives are expected to be canceled in 2022, and all temporary tax increases introduced a year earlier will be retained.

Tax rates for individual entrepreneurs and self-employed workers will increase by between one and a half and two times.^{65,66} Although the gas price for the Belarusian state remained at the level of last year in Russian rubles, the gas price for most companies and individual entrepreneurs increased by 9.7%, and it increased by between 1% and 4% for households.^{67,68}

In addition to novelties in the Tax Code, the government came up with another creative way of replenishing the state budget in January 2023: forcing the population to make "voluntary" donations. After the Christmas holidays, mass media outlets started increasing their reporting about IT workers being summoned to the KGB "for a talk". State security (KGB) officials were accusing the IT workers of financing protests by showing them evidence of their donations to various Belarusian (pro-opposition) organisations and foundations. Although most of these donations did not formally breach the laws of Belarus, the KGB officers suggested that the IT workers "repented" and "voluntarily" donated sums ten times larger than their original donations, and these "voluntarily" donations should be transferred to the bank accounts of any state charitable organisation.⁶⁹

The frequency of these messages in mass media increased. By the end of January, not only IT workers⁷⁰ — who are traditionally considered wealthy people in Belarus — but

⁶³ <https://sputnik.by/20230211/mart-obyasnil-pochemu-ogurtsynynche-takie-dorogie-eto-vas-udivit-1072174556.html>

⁶⁴ <https://pravo.by/document/?guid=12551&p0=H12200230&p1=1&p5=0>

⁶⁵ <https://neg.by/novosti/otkrytj/chtto-izmenitsya-v-nalogovom-kodekse-v-2023-godu/>

⁶⁶ <https://1prof.by/news/ekonomika-i-biznes/v-belarusi-utverdili-izmeneniya-v-nalogovyj-kodeks-na-2023-god-skolko-pridetsya-platit-po-schetam-ip-i-fizliczam/>

⁶⁷ <https://news.zerkalo.io/economics/32486.html>

⁶⁸ <https://news.zerkalo.io/economics/33203.html>

⁶⁹ <https://devby.io/news/donaty-chtto-izvestno>

⁷⁰ <https://news.zerkalo.io/life/32862.html>

also the employees of other less profitable sectors were summoned to the KGB “for a talk”. Those affected were individuals who donated to charitable foundations through Facebook in 2020–2021.

According to various unconnected reports, the minimum and most usual contribution required by the KGB in late February was \$500 from “ordinary” people and \$1,000 from IT workers. According to Andrey Strizhak, Head of BYSOL, it could be that the KGB has contacted more than 66,000 people in this way,⁷¹ and the amount of funds saved by the state could be tens of millions of US dollars.

As far as monetary policy is concerned, the National Bank of Belarus continued to adhere to a previously described trend: any decrease in the rate of inflation is immediately followed by a reduced key interest rate so that the real interest rate always stays in the slightly negative range.

As anticipated by previous issues of the Belarus Change Tracker, the trend towards an expansive fiscal and monetary policy is likely to continue in the medium term since it is the only source that can provide short-term economic growth, in theory at least.

4.3. STATE INTERVENTIONS IN THE ECONOMY

Another trend described in previous editions of the Belarus Change Tracker, increasing manual control of the economy, has developed further. This time, the state has focused special attention on foreign companies operating in Belarus. A law was secretly adopted in January 2023 allowing the expropriation of property from such companies⁷² and for their transfer to external management; the list of the companies restricted from selling their ownership shares was expanded from 193 to 1,849 firms.⁷³

The change has been a response to occasional attempts by foreign investors to extricate themselves from Belarusian assets. Previously, companies that were not on the list were simply sent a signal (as was the case with the SYNEVO laboratory chain and the McDonald's franchisee in Belarus), but now there could be more severe consequences for attempting to exit the Belarusian market. For example, Olvi, the Finnish brewery, was hit with an unprecedented \$12 million fine just a few months after the business owners announced that they were contemplating selling the company.⁷⁴

There are several grounds and reasons to apply such measures to foreign companies. First, the government wants to minimise potential damages to the economy if foreign investors leave Belarus. Restricting the sale of ownership shares allows the government to prevent the sale of the enterprises “for scrap”. If the investor simply stops the business activity of an enterprise, the state will be able to transfer the firm to external control and keep operations ongoing. Such a policy is particularly painful for those Lithuanian investors who used to be active in the country prior to 2020 and are now keen to exit but cannot.⁷⁵ Second, the pool of potential buyers for businesses consists mainly of Russian entrepreneurs because of the ever-increasing “toxicity” of Belarusian assets in the West. Given that the Belarusian regime's dependence on Russia has already been increasing at a faster pace, Lukashenka apparently wants to avoid transferring unnecessary levers of influence to any representatives of the eastern neighbour.

In 2023, as in the past, the government is combatting price increases by using non-market methods. Despite the relative stabilisation of inflation, Lukashenka is still actively engaged in addressing the question of product pricing. Fines and criminal cases supported the new price control system in October–November 2022,^{76,77} and a public campaign was added to these response measures in January 2023. Lukashenka sent a new, clear message to his “power vertical” and also to businesses by expressing outrage at the high salaries of the senior managers and owners of some retail chains.⁷⁸

⁷¹ <https://euroradio.fm/ru/kak-udalit-fb-chtoby-siloviki-ne-uznali-o-donatakh-strizhak>

⁷² <https://news.zerkalo.io/economics/29772.html>

⁷³ <https://www.belta.by/economics/view/sovmin-rasshiril-spisok-inostrannyh-investorov-kotorym-zaprescheno-otchuzhdaniya-svoih-aktsov-v-belarusi-547244-2023/>

⁷⁴ <https://nashaniva.com/ru/311402>

⁷⁵ <https://www.delfi.lt/ru/news/economy/v-belarusi-zastryali-sotni-litovskih-kompanij-chast-rabotaet-i-ischet-vozmozhnosti-uhoda.d?id=92685067>

⁷⁶ <https://news.zerkalo.io/economics/30739.html#c>

⁷⁷ <https://news.zerkalo.io/economics/32345.html>

⁷⁸ <https://news.zerkalo.io/economics/32532.html>

5

TRENDS IN PUBLIC OPINION

There are reasons to believe that public confidence in the regime's institutions continues to grow somewhat. If the Social Conflict Segmentation (SCS) dynamics are not accidental and not related to changes in the sample structure, then it is likely due to consolidation of a sense of stability against the backdrop of the military catastrophe involving Ukraine and Russia. Given that much of Belarusian society is insulated from reliable information, the democratic forces' agenda is on the periphery of the information field. The uncertainty surrounding Russia's war against Ukraine overlaps with the anti-war consensus in Belarus, and together they reinforce a demand for stability. This can explain the persistence of the trend towards growing trust towards regime institutions, which the author of this section interprets more as support for a "neutral" status and quietude in contrast to their neighbours' problems.

5.1. AN UPDATED APPROACH TO SURVEY SAMPLING AND INTERPRETATION

Our study is based on an online panel. This means that the distributions of responses in our sample *may differ significantly from those of the urban population of Belarus*. The sample is subject to shifts and may be affected by both opt-in bias (a self-selection effect) and the sample composition differing from the general population (comprising all Belarusian citizens). Also, the BCT sample was previously constructed on a quota basis, which could bring certain distortions into the data. For example, if a man of 18–24 years responded to an invitation to participate in the study after we had already recruited the "required" number of men aged 18–24, then he had no chance to take the survey.

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

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

From this survey wave onwards, BCT surveys will not claim to be representative of Belarusian society; they only reflect trends recorded in the online panel. The logic of the BCT survey is that significant changes or trends in wider society will be reflected in the survey's baseline population of 70–100,000 panellists, hence random selection of a small sample of, say, 1,000 respondents and a weighting of the sample according to the online panel's structure should also reflect these changes.

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

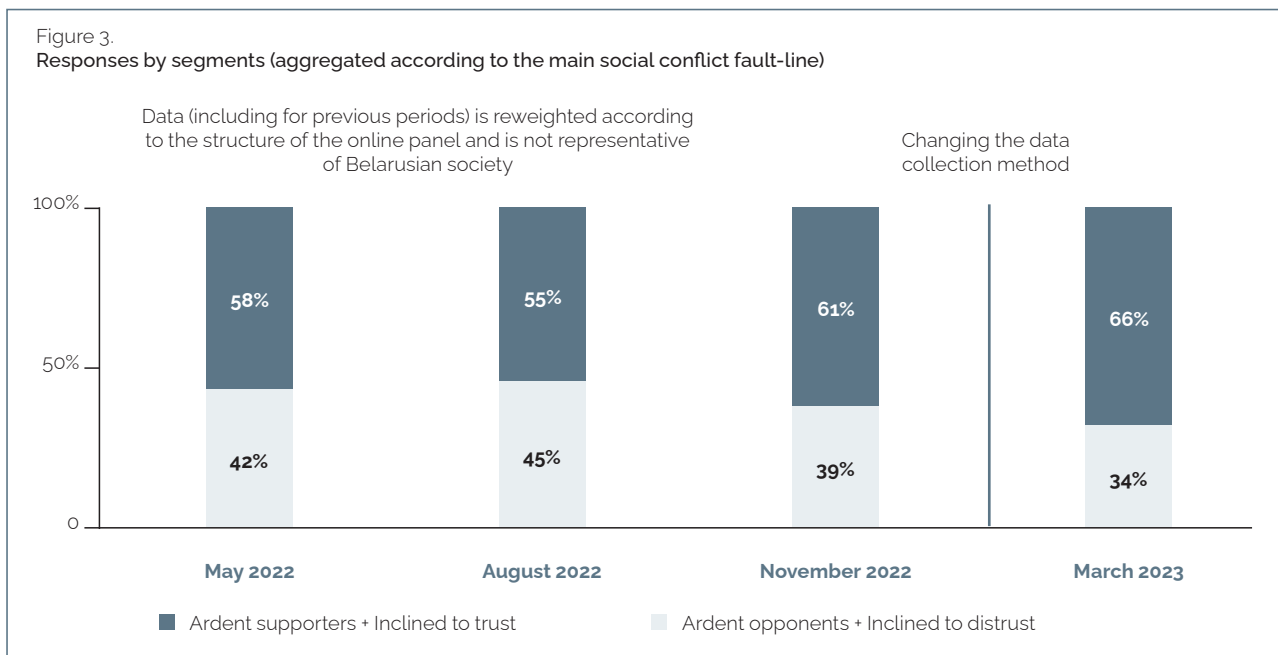
5.2. SOCIAL CONFRONTATION: POTENTIAL INCREASE IN SUPPORT FOR THE REGIME

There are reasons to believe that previously observed growth of public confidence in the regime's institutions continues. **The Social Conflict Segmentation (SCS)**⁷⁹ shows a significant increase in the size of those segments that tend to feel confidence in state institutions and government supporters, and increased distrust of non-state institutions and government opponents.

In the new wave of the survey, we could capture the effect of the fear factor in the SCS by using a special question.⁸⁰ It appears that **ardent opponents** of the regime are slightly more likely to drop the questionnaire or give more half-hearted answers if they think the polling organisation is associated with the state, whereas **moderate opponent** give answers that classify a relatively small proportion of them as **moderate supporters**. At the same time, there are reasons to believe that the

⁷⁹ 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>.

⁸⁰ The wording of the special question: "Research in Belarus is carried out by various institutions. Do you think that the organisation conducting this research is likely connected, or likely not connected, to the Belarusian state?"



fear effect is significantly higher in the current wave than before.

The "social desirability effect" is also quite interesting: for about 4–5% of respondents inclined to trust the regime, participation in the survey is a political statement — if such respondents think they are being interviewed by a non-governmental organisation, their answers become more "pro-regime". One can assume that a "non-governmental" polling organisation is perceived as an "enemy" for this segment.

This situation indirectly points at the polarisation present in society.

5.3. SOCIAL SENTIMENT: DEPOLITICISATION FOR SOME, PRESSURE ON OTHERS

If the SCS dynamics are not accidental and not related to changes in the sample structure, then trends are likely due to Belarusians consolidating round a sense of stability against the backdrop of the war between Ukraine and Russia.

Compared to November 2022, one can observe changes in all social sentiment indices.

How do groups on either side of the basic social conflict see the situation? To answer this question, a Social Sentiment Index (SSI)⁸¹ has been used.

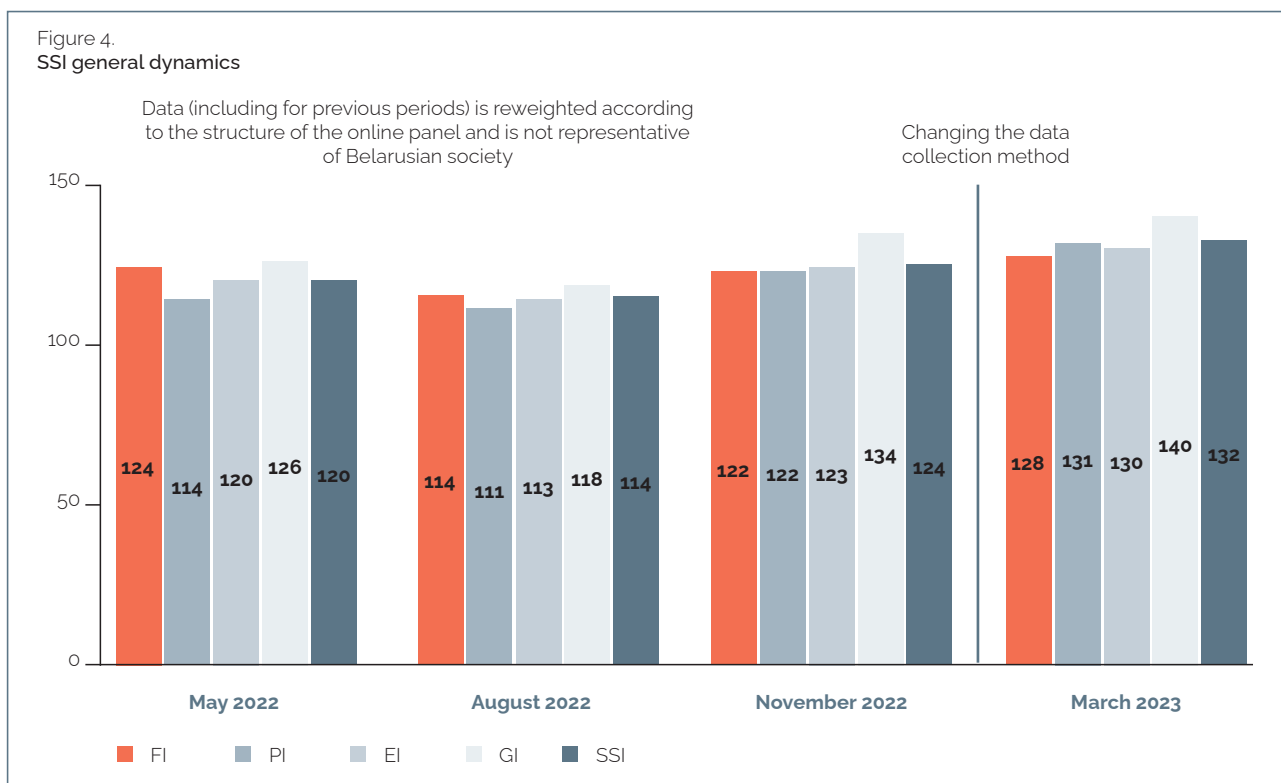
⁸¹ The full methodology is available at: <https://www.levada.ru/obnovlennaya-metodika-izmereniya-indeksa-sotsialnykh-nastroenii-isn/>; the study questionnaire includes questions A2–A13.

The SSI measures political, economic and social 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.

Compared to our previous SSI for November 2022, all social sentiment indices have increased slightly, with a particularly noticeable growth of PI. This points at growing optimism in Belarusian society about the current state of the country's economic and political situation.

Two segments are driving this trend: **ardent supporters** (PI growth from 186 to 193) and **moderate opponents** (PI growth from 68 to 83). Whereas the former continue to "rally round the flag", a trend described in analysis of the first BCT data from spring 2022, the latter seem to have withdrawn from engagement with the Belarusian political agenda. For example, 13% of **moderate opponents** believe that there was an amnesty of those convicted for 2020 protest activities, while 56% find it difficult to answer. For comparison, as many as 67.5% of **ardent opponents** believe that there was no amnesty and only 25% find it difficult to



answer. It is likely that the topic of the war, combined with some economic improvements (for further details see the section "Domestic Economy"), outweigh the political rationales for pessimism for **moderate opponents**.

The growth of the other indices, albeit less significant, is probably a continuation of a trend that emerged with the onset of Russia's full-scale invasion — the strengthening of Belarus's image as a country not facing a catastrophe like the one ongoing in Ukraine.

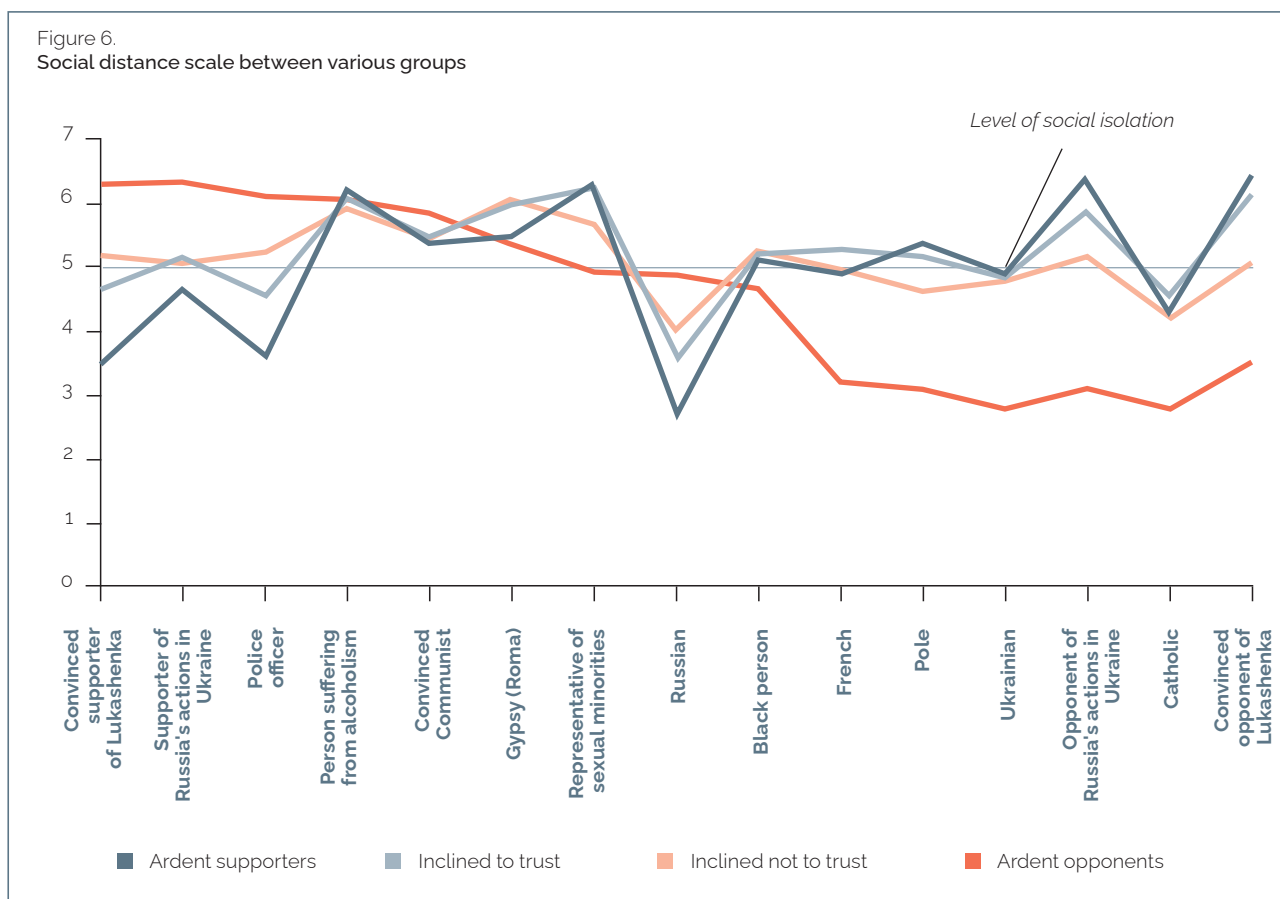
The demand for stability and quietude is also reflected in attitudes towards Western sanctions against Belarus. The

preference for a foreign policy favouring neutrality, as noted by Chatham House, is another example of this demand.

At the same time, one can hardly argue that Belarusian society has lost interest in change. In Belarus, people remain dissatisfied with the Belarusian model of the state and its relations with society. Chatham House's survey for January-February 2023 found a demand for reforms (59% of the urban population), and dissatisfaction with pensions, officials, taxes and public services.⁸²

⁸² <https://belaruspolls.org/wave-14>

Figure 6.
Social distance scale between various groups



Representatives of the **ardent opponents** segment are the only advocates of increased sanctions pressure on Belarus: for them, diffusing the situation is the least desirable option, probably because they are still reliving the experience of 2020.⁸³ In a situation of tougher repressions (see sections "State and Society Relations", "Domestic Politics"), **ardent opponents** constitute the part of society subjected to the increased pressures.

For about a year now, quite serious inter-group hostility has persisted between the regime's apologists and its irreconcilable opponents. To measure the degree of confrontation we used the Bogardus social distance scale. An average score above 5 is interpreted as social rejection and isolation of one group by another.

One should have another look at the ostensible mitigation of repressions described in the Domestic Politics section. This process is led by the most odious among Lukashenka's **ardent supporters**, with whom the **ardent opponents** have the greatest social distance. In this context, "mitigation of repressions" looks more like a new format of pressure on an unruly part of society, rather than a genuine attempt by the regime to defuse the situation.

⁸³ https://newbelarus.vision/wp-content/uploads/2022/12/Collective-Trauma_CNI_Research.pdf

5.4. ASSESSMENT OF THE UNITED TRANSITIONAL CABINET ACTIVITIES

In this reporting period, one can observe a trend that has already existed for several years. Given the isolation of much of Belarusian society from non-regime sources of information, the democratic forces' agenda is on the periphery of the information field.

Only about 7% in the sample know well about Sviatlana Tsikhanouskaya's United Transition Cabinet,⁸⁴ despite its formation being a very important event for the democratic forces. Even with the limitations described in the first paragraph of this section, it is safe to say that the Cabinet is quite an obscure body to the overwhelming majority of Belarusians. In fact, even in the most knowledgeable segment — **ardent opponents** — about one-third find it difficult to answer the question about the Cabinet's achievements ("results"), while another 26% think that there are no results, and 37% think that there are results which are "rather positive" or "definitely positive".

⁸⁴ The wording of this question was: "In August 2022, Sviatlana Tsikhanouskaya announced the creation of the United Transitional Cabinet. Do you know it well, have you heard anything about it, or are you hearing about the United Transitional Cabinet for the first time?"

Figure 7.
Awareness about the Cabinet, by SCS

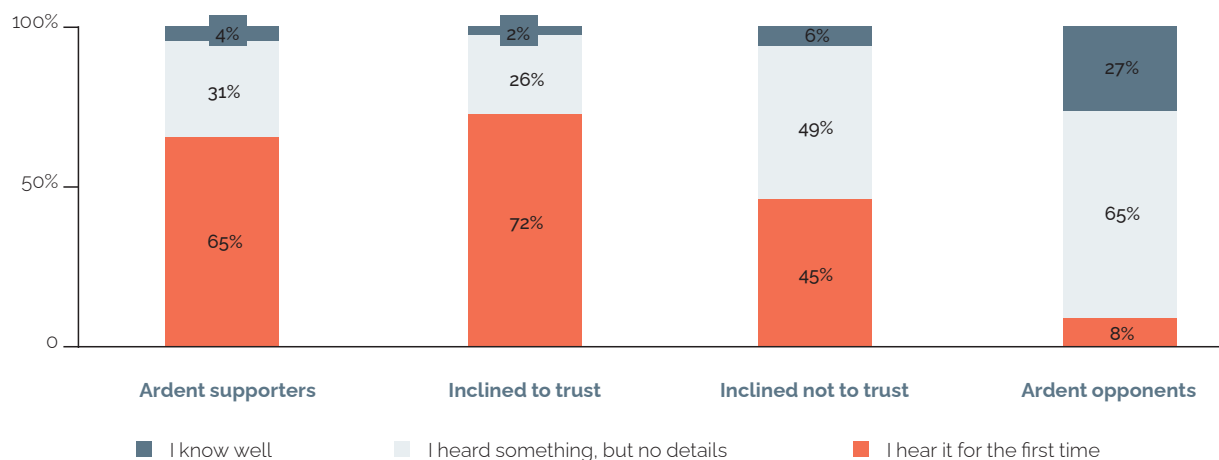
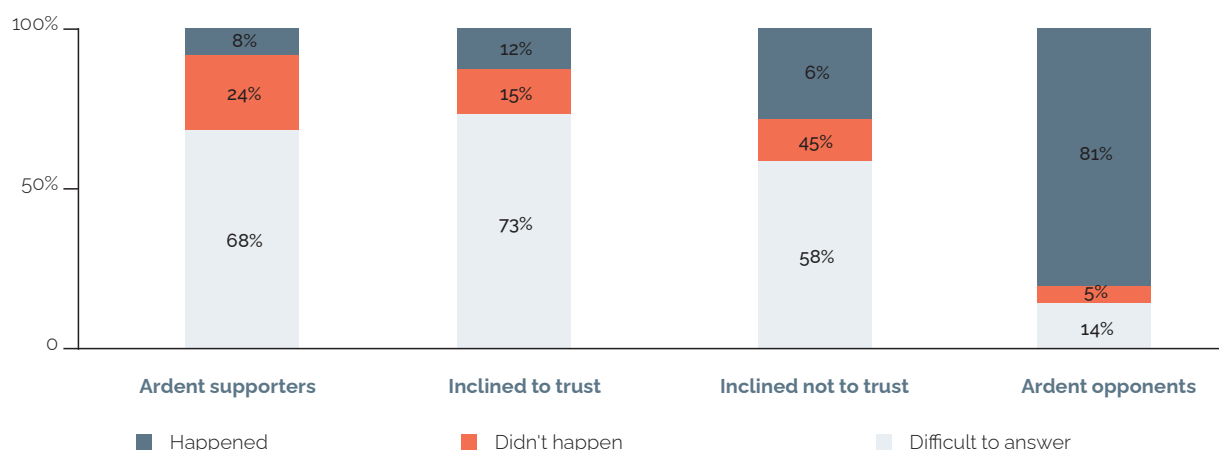


Figure 8.
Awareness about repressions for pro-Ukrainian stance, by SCS



If these information "bubbles" are not broken, one can assume that the dynamics described in the previous BCT issue will persist: only **ardent opponents** will be aware of the democratic forces' agenda.

For example, let us review the assessment of knowledge about detentions of people for having a pro-Ukrainian stance.

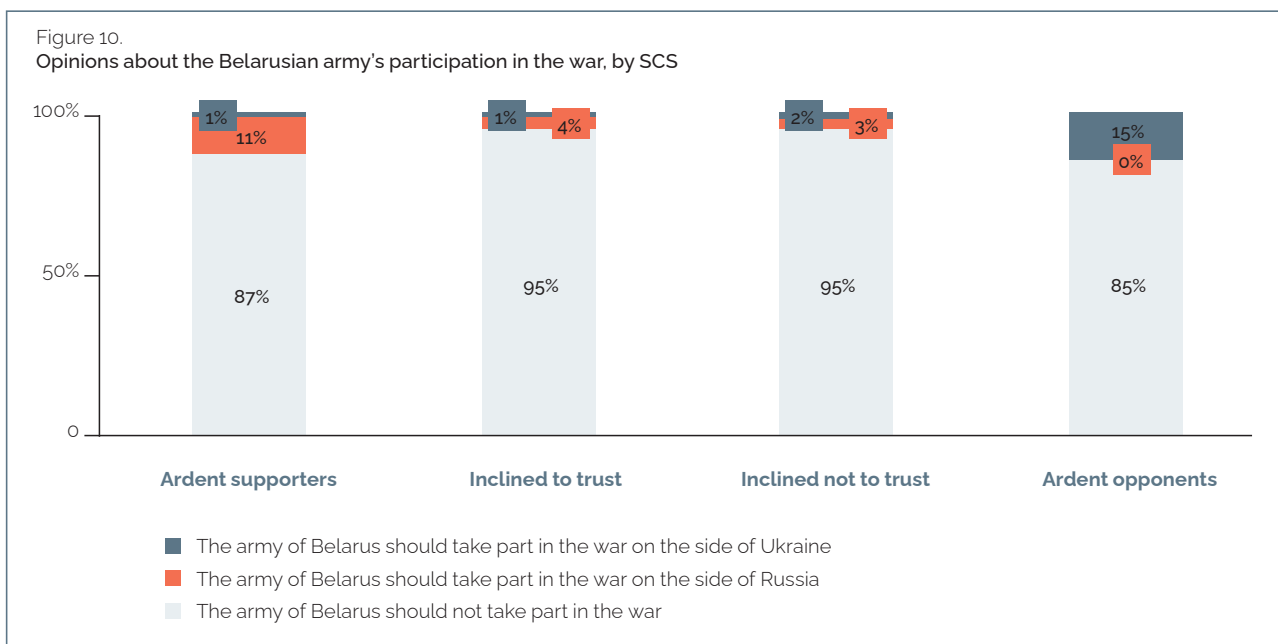
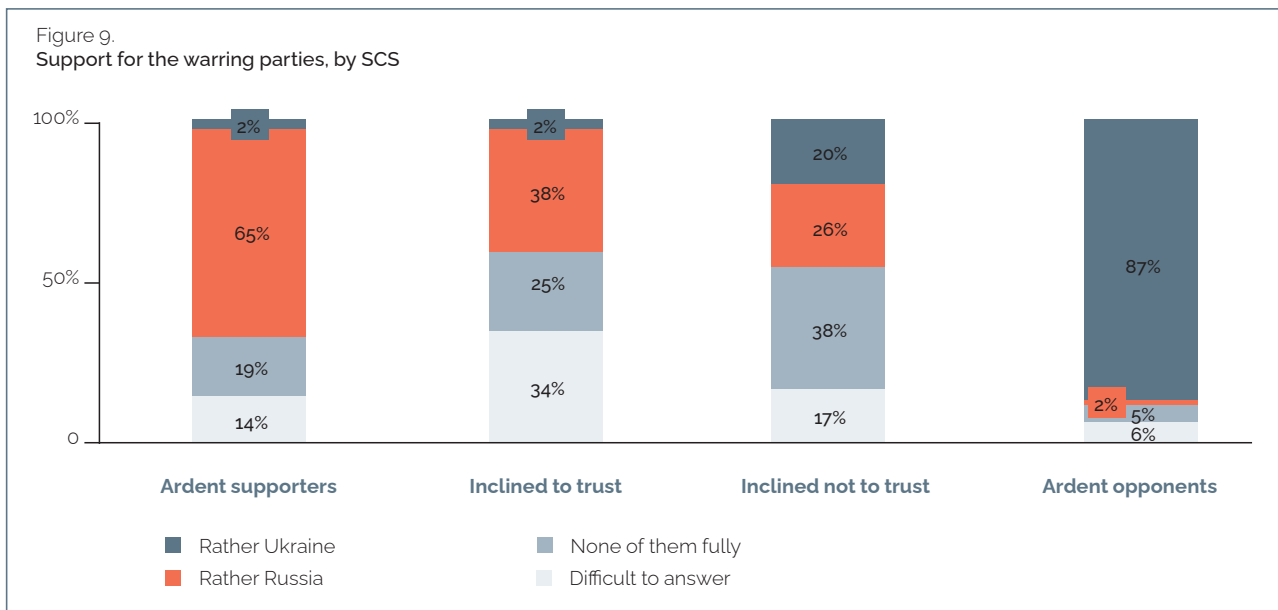
As one can see, only **ardent opponents** are deeply immersed in an information bubble that fully covers the repression.

At the same time, at least 55% in the sample know about the detentions and dismissals of people for participating in the 2020 protest events (this figure may be even higher, because the segment of **ardent supporters** tends to give politicised answers, thereby "whitewashing" the Belarusian regime). It can therefore be assumed that the public is fairly knowledgeable about the regime punishing its opponents.

5.5. ONE YEAR OF THE WAR

Russia's full-scale invasion of Ukraine has added a new layer to the socio-political confrontation in Belarus. The author is not surprised by the distribution of support for the warring parties by SCS: support for Ukraine is strongly associated with mistrust in the regime's institutions, while support for Russia is associated with trust in these institutions.

The segment of **ardent opponents** finds itself socially isolated, occupying the socially undesirable position (in discourse promoted by the Belarusian regime) of support for Ukraine. However, this isolation is not absolute, and **ardent opponents** have consensus with other segments about the non-participation of the Belarusian army in the war. The conviction that the Belarusian armed forces do not need to join the war is the thread that runs through the entire Belarusian society, regardless of political orientation.



At the same time, "passive" support for Russia is typical for segments that tend to trust the state.

The distribution of opinions on whether Russia made a mistake by attacking Ukraine is rather self-evident.⁸⁵

At the same time, despite the strong connection between trust in the regime's institutions and support for Russia in Ukraine, there are many people even among **ardent supporters** and **moderate supporters** who believe that it

⁸⁵ The wording of the question was: "On 24 February 2022, Russia began a new phase of military action in Ukraine. How much do you agree or disagree with the following statement: Russia made a mistake by starting a new phase of military action against Ukraine?"

was a mistake to launch the war. That is, there is no dominant position in Belarusian society regarding support for Russia in the war. Moreover, one can assume that the current support is largely based on the established ideas of some Belarusians that Russia is a strong player and a world power able to compete with the leading countries of the West — not only militarily, but also in the technological, cultural and other spheres.⁸⁶

The two segments that tend to view Russia favourably and feel a kind of commonality with its cause very rarely agree with claims that Ukraine is winning the war.

⁸⁶ <https://belaruspolls.org/wave-12>

Figure 11. Respondents' agreement with the statement that Russia made a mistake by attacking Ukraine, by SCS

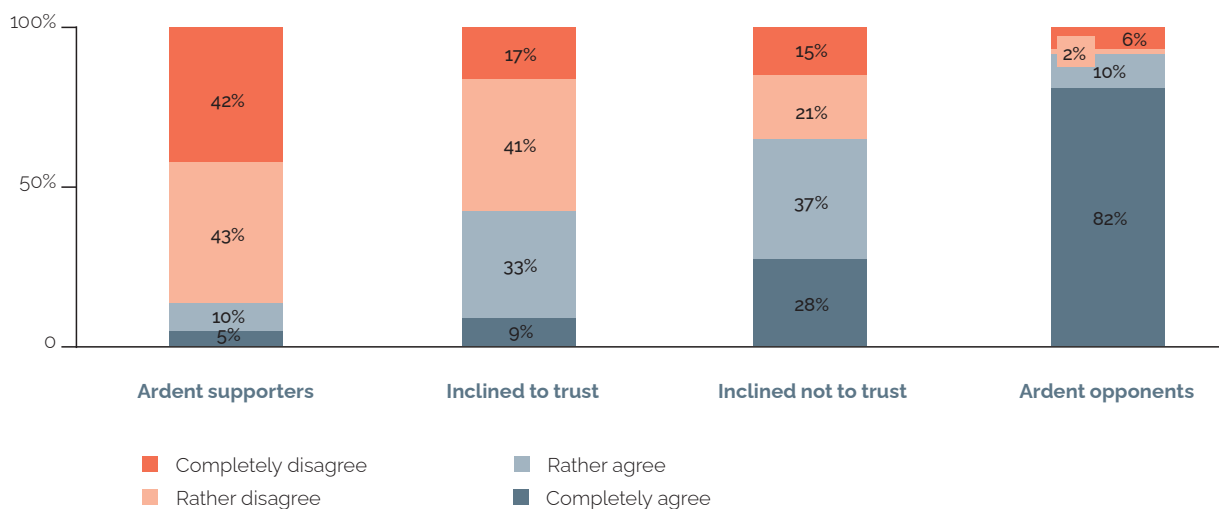
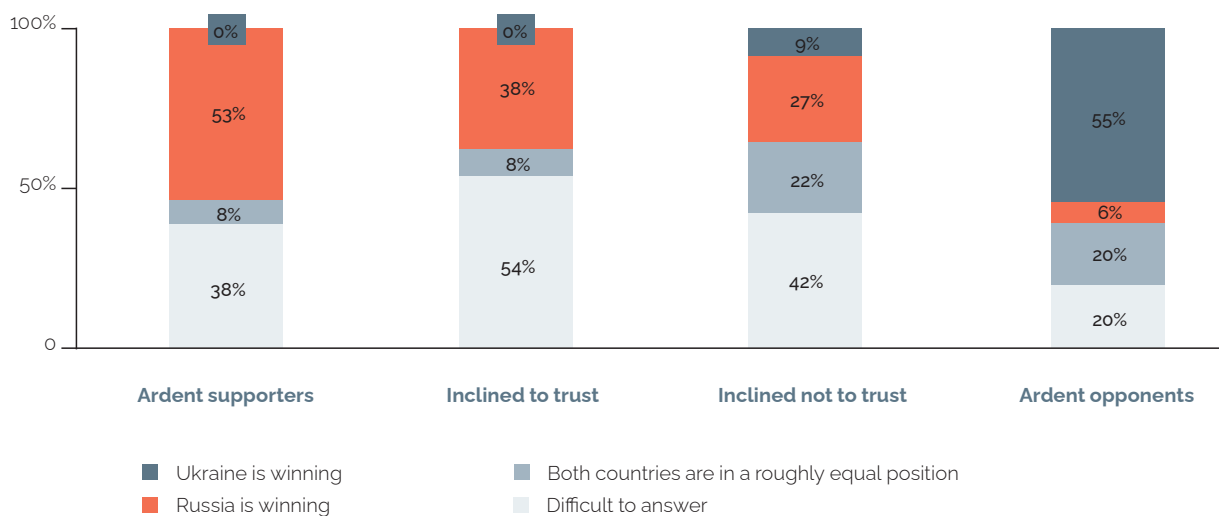


Figure 12. Perceptions of which side is winning the war, by SCS



While studying foreign policy preferences, experts at Chatham House point to a strong correlation between media consumption and idealised perceptions of Russia.

Despite its involvement in the war, Belarus is neither a battlefield nor a “supplier” of soldiers. For most Belarusians, knowledge of the war are mediated through media consumption. In a situation when Belarusians do not consume information from independent Belarusian sources,⁸⁷ and at the same time actively share the above perceptions of Russia, one can observe the following picture: the major-

ity of society cannot say with certainty that the initiative in the war is on the Ukrainian side, even despite the significant military successes of the Armed Forces of Ukraine. Indeed, a large part of society is not very clear about who is winning the war.

It can be assumed that this state of affairs creates a situation of uncertainty, in which it is absolutely unclear what is happening — who is winning and who is to blame for starting the conflict,⁸⁸ from which there is absolutely no

87 <https://belaruspolls.org/wave-14>

88 <https://www.dw.com/ru/issledovanie-belorusy-ne-schitajut-svoju-stranu-souchastnicej-vojny-v-ukraine/a-61597441>

way out (the overwhelming majority of Belarusians believe that the war will definitely last more than a year longer).⁸⁹ Uncertainty overlaps with the anti-war consensus, strengthening the demand for peace. This can explain the persistence of growing trust in regime institutions, which the author interprets more as support for a "neutral" status and quietude against acute awareness of neighbouring countries' problems.

⁸⁹ Data provided by Ryhor Astapenia, the head of the Belarusian initiative at Chatham House

6

STATE AND SOCIETY RELATIONS: CONTINUED REPRESSIONS AND THE DRIVE FOR TOTAL STATE CONTROL

The Lukashenka regime continues to repress Belarusian society despite some seemingly conciliatory rhetoric. The “silent” war against Belarusians abroad, both the leaders of democratic forces and ordinary Belarusians, became one of its targets. The Belarusian authorities are making efforts to expand their control over society and occupy more spaces of public and private life, destroying the last remaining spaces for independent civic activity. Contrary to these efforts, Belarusian civil society continues to function in a dispersed manner.

6.1. NO END TO REPRESSIONS

In the winter, the authorities stepped up their “conciliatory” rhetoric towards opponents but there was no abatement to repressions. Participants of the 2020 protests continue to be detained, any displays of anti-war sentiment or solidarity with Ukraine are persecuted, and reposts of independent “extremist” media materials remain grounds for arrest.

All the previous trends in repressions persist. These include “khapsun” (mass detentions), arresting entire families or close relatives of regime opponents, and “carousel verdicts”.⁹⁰ Courts continue to hand down prison sentences of ten years or more to the regime’s opponents. Prison administrations still exert pressure on convicts (in fact, it is torture).⁹¹ In many cases, this leads to severe and even life-threatening health consequences.

“Cleansing” continues among Belarusians who are disloyal to the ruling regime. State enterprises and organisations dismiss workers according to lists provided by the law enforcement agencies. People on these lists are not only dismissed from their previous jobs, but also face problems with any future employment. Particular attention is paid to specific professions: the legal profession is being purged of lawyers who have defended political prisoners in the

past; they are being taken into custody and sentenced to long prison terms. Media representatives are also under pressure: arrests of journalists are common, as is the blocking of media outlets and their being designated “extremist”. The clergy has also been in the government’s spotlight.

There are, perhaps, only two new trends. First, a new practice is the “sale of indulgences” for participation in 2020’s events. This describes the practice whereby the security forces demand compensation several times larger than the size of donations paid in the past to various solidarity funds — in return for a guarantee of non-prosecution (further details in the section “Domestic Economy”). Second, the authorities have begun to conduct trials in absentia in cases where the accused are outside Belarus. This practice was deliberately introduced into court proceedings in order to legally formalise the prosecution of the leaders of the Belarusian democratic forces who were forced to leave the country.

6.2. “SILENT” WAR AGAINST THE DIASPORA

The practice of trials in absentia and the prospect of depriving Belarusians convicted of “extremism” of citizenship are the tools used to fight the Belarusian diaspora. This constituted a separate “activity area” for the regime in the reporting period.

One of the first steps in this direction was the recognition of diaspora chat rooms as “extremist materials”. The first victim was the Telegram chat room “Belarusians of Wroclaw CHAT”. Later, an Instagram page of the Belarusian diaspora in Austria was also recognised as extremist, followed by the chat room “BelPoznan Naviny + Vazhnaye”.

Another step was towards the loss of rights of Belarusian citizens who left the country. The regime began discussing options for restricting emigrants’ right to free medical care.⁹²

⁹⁰ Where a first sentence is followed by a second, and when that concludes a third sentence is handed down. The pattern can be repeated as often as the authorities chose.

⁹¹ <https://spring96.org/be/news/110927>

⁹² <https://euroradio.fm/ru/minzdrav-planiruet-ogranichit-besplatnyu-medicinu-dlya-chasti-belorusov>

Meanwhile, a draft resolution cancelling military service deferment for Belarusian students attending foreign universities can be interpreted as a preparation for the restriction of the right to receive an education abroad. The following “innovations” should be interpreted in the same way, namely: (a) the requirement to inform state authorities about obtaining a residence permit or other document issued by a foreign country that entitles to benefits and other advantages (such as the “Pole’s Card”);⁹³ (b) schools collating lists of students who went abroad in the last few years.

The authorities have also raised consular fees for a number of services available to Belarusian citizens at Belarusian diplomatic missions abroad. Also, there are cases of consulates and embassies unreasonably delaying the provision of services and making often impossible demands. There are instances of refusing consular support to Belarusians abroad, such as the refusal of the Belarusian embassy in Berlin to fulfil its obligations in relation to a Belarusian citizen who died in Germany.⁹⁴

Finally, the number of Belarusians detained by security forces upon their return from abroad, more often than not from Poland, is growing. In view of this, Lukashenka’s proposal to regime opponents who have left Belarus to “repent and return”, widely publicised by propagandists, can only be interpreted as an ultimatum to capitulate in an undeclared war against both Belarusian emigrants and the part of Belarusian society discontented with the regime.

6.3. EXPANSION OF CONTROL IN THE COUNTRY

Continuing some of the trends described in previous BCT issues, the regime’s determination to expand the spheres of everyday life under its control and reach deeper into more public and private spaces became particularly visible in the winter.

In Belarus, the compilation of informal lists of unreliable citizens is a traditional instrument of such control. During the reporting period it became known that these blacklists include not only musicians and candidates for workplace dismissal of those who have shown sympathy for protests (see above). The authorities have also secretly compiled lists of potentially “undesirable” citizens; these include, among others, shooting enthusiasts⁹⁵ and Ukrainian natives working in government bodies.⁹⁶

Sometimes, instead of specific “lists of unreliaables”, the decisions to ban or permit an action will be made by specially appointed people. This practice has recently been introduced in Belarusian banks: the assigned law enforcement officers assess, from a loyalty standpoint, whether certain company owners are worthy of being granted loans.⁹⁷

The control system is being set up transparently and in line with legislative novelties. Two legal acts deserve special attention in this regard, namely amendments to the Law on Psychological Assistance and the Council of Ministers Resolution No. 31 of 31 January 2023 on the Functioning of the Information System. The first document provides law enforcement officers with much easier access to confidential information held by psychologists; the second document (especially due to the accompanying Presidential Decree No. 368⁹⁸ of 18 October 2022) institutionalises the surveillance of citizens online, which reaches a fundamentally new level.⁹⁹ The regime’s “guard dogs” have been granted virtually unlimited possibilities for online surveillance, and they can obtain and compare any public or private telecommunications data with data held by the online services.

The authorities’ capabilities for watching and controlling the population are not limited to these means. The Lukashenka regime is also encroaching into other spheres of private life. One example is citizens’ health. From 1 January 2023, the Ministry of Health introduced mandatory medical examinations of all Belarusian citizens, irrespective of age, the presence of disease, or the willingness of citizens to undergo examination.

Another example concerns marriage and family relations, namely the right to divorce. At the plenum of the Supreme Court on 22 December 2022, it was announced that the courts would be responsible for reconciling spouses, “and this is not a right, but a very strict obligation of the court, which is constantly tightening.”¹⁰⁰

Taken separately, these measures may indeed serve good purposes, but together they create a system of total control in which every citizen is restricted in their bodily, mental and behavioural independence.

Civil servants have the hardest time in maintaining any independence. Their loyalty attracts extra attention from the regime. Over the winter, the authorities strengthened its control in two ways: by making state employees wear a badge identifying them as a civil servant and passing a law that allows for the death penalty for treason.

⁹³ Law of the Republic of Belarus dated January 5, 2023 No. 242-Z “On Amending the Law of the Republic of Belarus “On Citizenship of the Republic of Belarus”

⁹⁴ <https://reform.by/vlasti-minska-sobirajut-informaciju-ob-ukraincah-rabotajushhih-v-gosstrukturah>

⁹⁵ <https://t.me/motolkohelp/29195>

⁹⁶ <https://reform-by.cdn.ampproject.org/c/s/reform.by/vlasti-minska-sobirajut-informaciju-ob-ukraincah-rabotajushhih-v-gosstrukturah/amp>; <https://nashaniva.com/ru/307867>

⁹⁷ <https://d367rzjs5oyeba.cloudfront.net/311403>

⁹⁸ “On the interaction of telecommunication operators, telecommunication service providers and owners of Internet resources with bodies carrying out operational-search activities”

⁹⁹ <http://belhelcom.org/ru/news/pravozashchitniki-probuyut-borotsya-s-ukazom-368-kotoryy-vyvodit-slezhku-na-besprecedentnyy>

¹⁰⁰ <https://news.zerkalo.io/life/28906.html?c>

Given all of the above, it is easy to agree with those experts who say that the Belarusian state is rapidly drifting towards totalitarianism.

6.4. DIFFERENT CIVIL SOCIETIES DEVELOP IN THEIR OWN WAY

After years of efforts, the authorities have finally completed their building of a legal framework for a "state-owned" civil society. A number of legislative acts have been adopted, including key laws on civil society, on political parties, and on the All-Belarusian People's Assembly (ABPA). They are all formulated in the same spirit that implies the elimination of the last legal sanction for any social, public, or civil activity (further details in the section "Domestic Politics"). There is nothing new in this. The news laws simply describe the status quo in which civil society organisations are effectively banned,¹⁰¹ and in which even a small meeting of neighbours about setting up a home for stray cats resulted in a 15-day prison sentence.¹⁰²

In the meantime, independent civil society continues to develop and function in a dispersed, non-hierarchical fashion. In Belarus, civil society is only possible in the most concealed form, where information about the organisation's activities does not leak out, or where the people responsible for communications are outside Belarus and keep the identities of their colleagues a secret.

The most famous organisations of this kind are Belarusian Hajun and the Community of Railway Workers of Belarus. Having their organisational nuclei abroad, both organisations track Russian troops on the territory of Belarus.

At the end of February, ByPOL (an organisation of former Belarusian security officers) made a noise and reminded people of its existence. Its representative Aliaksandr Azarau claimed responsibility for a joint action with the members of the Peramoha plan; together they sabotaged a Russian A-50 long-range radar detection aircraft stationed at the Machulishchy airfield.¹⁰³

The main activities of the known civil society organisations are facilitated by the Belarusian diaspora. Compared with the previous reporting periods, in winter there was an increase in attempts to create new projects and organisations. The most notable are the Community of Relatives and Former Political Prisoners, the Association of Belarusian Veterans (who fought for Ukraine), the Independent Film Academy, and the Institute of Belarusian Books.

At the same time, research¹⁰⁴ shows that public and civic activities among Belarusian emigrants are largely carried out without formal links to any organisations and projects. Instead they comprise individual and spontaneous acts. This suggests that there is still unclaimed potential of the diaspora that can increase the opportunities for the institutions of Belarusian civil society.

¹⁰¹ Please note that at the end of 2022, over 1,160 organisations were liquidated in Belarus, 751 of them forcibly so.

¹⁰² <https://news.zerkalo.io/life/33423.html?tg>

¹⁰³ <https://belsat.eu/ru/news/26-02-2023-eto-byli-belarusy-oni-uzhe-za-granitsey-rossijskij-samolet-v-machulishhah-atakovali-s-dronov>

¹⁰⁴ <https://news.zerkalo.io/life/33423.html?tg>

TECHNICAL ANNEX

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

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

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

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

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

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

FEAR FACTOR

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

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

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

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

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

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

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

Table 1.

Main indicators of data collection

	Number of people	Percentage
A1. Invitations sent out	25,000	
A2. Those who started to fill out the questionnaire	1,491	
A3. Those who did not pass the screening section of the questionnaire	96	
A4. Those who dropped out of the survey after the screening section	390	
A5. Those who completed the survey	1,005	
Response rate (A2/A1)		5.96%
Dropout rate (A4/(A2-A3))		27.96%

Table 2.

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

Age group	Invitations sent out	Those who completed the survey	In the panel structure (target for re-weighting)	In the structure of urban residents with internet access
18–24	29%	9%	11%	10%
25–34	35%	22%	26%	22%
35–44	23%	34%	29%	22%
45+	13%	35%	33%	45%
Gender				
Male	57%	46%	31%	44%
Female	43%	55%	69%	56%
Region				
Brest oblast	14%	13%	14%	12%
Vitebsk oblast	12%	12%	12%	12%
Gomel oblast	15%	15%	15%	14%
Hrodna oblast	11%	9%	11%	10%
Minsk oblast	14%	12%	15%	10%
Mogilev oblast	12%	11%	11%	11%
Minsk city	22%	30%	22%	31%

SEGMENTS OF SOCIAL CONFLICT

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

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

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

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

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

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

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Expert Assessments

BELARUS CHANGE TRACKER



The regime is intensifying its activities abroad and insulating its political system at home. The democratic opposition continues to be hindered by controversy.



With the economy isolated and in crisis, Belarus is turning to Russia, the UAE and China. A budget deficit has led to a government default and raised taxes.



An anti-war consensus is strengthening public demand for "quietude", while the regime is expanding its control and wages a "silent" war against the diaspora.