

BELARUS IN FOCUS:

ANNUAL
REVIEW 2021

AND FORECAST
FOR 2022

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SUMMARY FORECAST FOR 2022

The probability of a sudden collapse of Lukashenka's management model remains, should there be external shocks or mobilisation of society in response to regime actions.



The Belarusian regime will actively try to restore communication with the West, using the topic of regional security as an "entry point".



Expanding the use of online tools by civil society to communicate with sympathisers and maintain contact with their audiences.



The geopolitical impasse and growing pressure from the West and Russia may push the Lukashenka regime to start a dialogue and meet some of the demands of the West, which in turn will make a decision based on the results of its own negotiations with Russia.



"Soft takeover", a partial transfer of some sovereign functions and infrastructure to Russia for "outsourcing", including foreign policy, transport and logistical capabilities, defence and security, etc.



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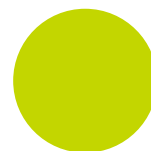
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THE SITUATION
HAS DETERIORATED



THE SITUATION
HAS NOT CHANGED



THE SITUATION
HAS IMPROVED

THE RULING ELITE



2021: IMMERSSED IN DEFENSIVENESS

In 2021 the ruling class failed to restore public confidence in state institutions (although they barely tried). Still, the security forces succeeded in purging the public space of cities of manifestations of the protest movement. The regime relied solely on the siloviki to resolve the political crisis, refusing to negotiate with opponents. Despite attempts to indefinitely defer political reform, Lukashenka was forced to launch a process to amend the constitution in response to the demands of society and the pressure from external players, primarily the Kremlin.

The ruling regime maintained a clear division in society in 2021, hoping to consolidate the state apparatus and the security forces. The latter continued to demoralise advocates of change

and coerce society into political inaction via repression. An "export miracle" and economic growth fuelled the government's economic optimism, contributing to the depoliticisation of public sector workers.

Lukashenka played for time regarding constitutional reform, postponing campaigning to the beginning of 2022, after the defeat of the civil society and the emigration of a significant number of protest activists. However, Lukashenka was still compelled to tinker with the constitutional design despite doubts about its practicality.

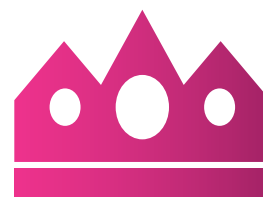
The first president of Belarus is trying to provide himself with comprehensive guarantees and leave himself a wide range of opportunities for the next decade. Even in the event of relinquishing the role of head of state, Lukashenka intends to maintain complete control over the political system by giving the All-Belarusian People's Assembly constitutional status with broad powers to control the siloviki, state policy, and the new president (including provisions for impeachment and rejection of election results). The head of the assembly is envisaged to be Lukashenka, personally.

In 2021, the security forces continued to assert their influence and establish control over all spheres of life. Many positions in the public sector, state apparatus and even pro-government NGOs were assigned to the representatives of the power bloc.

Repression gradually expanded to involve the activists of the protest movement of 2020 and dissidents from broad swathes of society,

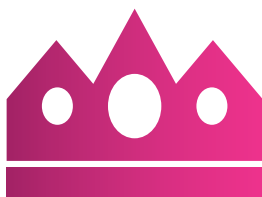


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**THE NUMBER
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INDEPENDENT
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ALMOST 1000
PEOPLE BY THE
END OF THE
YEAR.**



including those previously considered to be Lukashenka supporters: pensioners, large families, public sector labour collectives and civil servants.

The state legalised political persecution of opponents, and criticism of the regime was classified as "extremism". Lawmakers continued to introduce restrictions on the rights and freedoms of dissidents. Compelled ideological loyalty of workers has grown significantly in many areas, including education, culture, and medicine.

The price of political participation and civic activism has steadily increased as repression has expanded. The most visible leaders and committed opponents of the regime, such as Viktor Babaryka and Siarhei Tsikhanouski, have received substantial prison terms, as have members of their teams. The number of political prisoners increased every week and reached unprecedented proportions for independent Belarus – almost 1000 people by the end of the year.

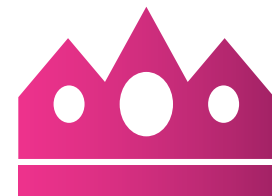
Security forces expanded the persecution of subscribers of independent media channels, social networks, and political commentators. Therefore, the number of potential offenders increased to hundreds of thousands of citizens. The security forces selectively detained dissidents who angered Lukashenka, diminished the influence of independent media, and reduced audiences with repression, persecution, and legal restrictions. However, the ideologues failed to seize the leadership of the independent press and impose their own agenda on social networks and the internet.



Despite a lack of support from civil society due to the defeat of fundraising initiatives and purges of disloyal doctors by the siloviki, the health care system continued to function. However, following covid waves caused difficulties and the contradictory actions of the authorities apparently, led to increased excess mortality (the National Statistical Committee classified the data).

*Painting presented
by the Lukashenka's
security service to
Lukashenka*

The economy's growth convinced the ruling class of the correctness of their policy of support for the public sector, complemented by the loyalty of state-owned companies since the start of the political crisis in 2020. As a result, the ruling class plans to redistribute benefits to the public sector and increase expropriations from private businesses and the population – raising taxes and penalties, confiscations, and worsening competitive conditions.





Lukashenka redirects resources to support the loyalty of the siloviki and state apparatus by reducing social guarantees for the rest of the population. The regime refuses to support incomes and maintain employment levels, it also implements massive layoffs on the state-owned companies, purging them of dissidents.

FORECASTS FOR 2022

The probability of a sudden collapse of Lukashenka's management model remains, should there be external shocks or mobilisation of society in response to regime actions.

The leadership will delay the transformation of the political model until before (and after) the next presidential election.

The role of the security forces within the regime remains high, and the repressions continue with possible relaxations in the second half of the year.

Capital injections into the public sector of the economy with restrictions for the development of the private business (small and medium-sized), reduction in the number of state employees and public sector employees due to political purges.

SECURITY



2021: COMPLETE FAILURE

In 2021 all the negative trends of 2020 were amplified. For the West, Minsk has moved from being a “complex interlocutor” (it was never considered a partner) to a direct "threat" to regional security.

The economic performance of the Belarusian military-industrial complex is not known for sure, as there is a growing tendency to hide financial results data for the defence industry. This, coupled with the inclusion of many such enterprises in Western sanctions lists, allows us to infer that overall, there has been a deterioration in this area. It is evident that without developing new products in demand on the international arms market, it will not be possible to reverse this negative trend. However, the collapse of the sector is not in the cards.

In 2021, a framework was created for law enforcement agency personnel to suppress protests. Therefore, the regime has (theoretically) 2.5 times more manpower at its disposal to quell



THE BELARUSIAN REGIME SEEMS COMPLETELY INCAPABLE OF CALCULATING EVEN THE IMMEDIATE CONSEQUENCES OF ITS ACTIONS AND STATEMENTS, EFFECTIVELY DESTROYING BELARUS' STRATEGIC AUTONOMY IN THE FIELD OF SECURITY.



public discontent. It is evident that, despite the sharp increase in repression, the authorities still lack confidence in their ability to restrain popular protests in the event of their resumption.

The Lukashenka regime lost independence in the field of security and transformed into an instrument of the Kremlin to put pressure on neighbouring states. Specifically, the regime intercepted the Ryanair airliner en route from one EU state to another; blackmailed the EU with illegal migrants; created joint training and combat centres with Russia (one operational in Belarus; two planned in Russia); stated about readiness to return Russian nuclear weapons to Belarus and fight together with Moscow against Ukraine; designated neighbouring EU states as enemies. All this happened amidst the gas crisis in the EU and Russia's December ultimatums to NATO and the United States on a new division of zones of domination in Europe between Moscow and Washington.

Belarus is now established as a source of security threats for neighbouring EU countries and Ukraine. To the delight of the Russian leadership, the West is curtailing its pre-2020 dialogue with Minsk on security matters in favour of addressing Belarusian issues via the Kremlin. Minsk does not yet fully realize this qualitatively different scenario and naively hopes to restore the status quo by softening some of its rhetoric. The Belarusian regime seems completely incapable of calculating even the immediate consequences of its actions and statements, effectively destroying Belarus' strategic autonomy in the field of security. Understanding this will come a little later.

It is also worth noting that, despite the bellicose rhetoric of Minsk, in 2021 previously announced purchases of Russian aviation equipment (4 Mi-35 helicopters and Su-30SM fighters with a total value of up to USD 250 million) were not followed through. Moscow continues with its long-term strategy of declining to reinforce Belarusian defence potential.



FORECASTS FOR 2022

The Belarusian regime will actively try to restore communication with the West, using the topic of regional security as an "entry point".

To mitigate the visibility of critical dependence on the Kremlin, the regime will make attempts to secure symbolic gestures from China in the field of defence cooperation (receiving military-technical assistance, visits of Chinese military commanders, joint combat training events).

The Belarusian military-industrial complex will continue to stagnate at best.

The repressive nature of the regime will continue.

CIVIL SOCIETY AND POLITICAL PARTIES



2021: RELOCATION,
STRUCTURAL STRENGTHENING
IN EXILE AND DEVELOPMENT OF
ONLINE SERVICES

In 2021, democratic forces made successful diplomatic contacts with Western capitals, but mainly due to the scandalous actions of the Lukashenka regime. Repression and emigration of activists have significantly weakened the protest movement within the country, but a single democratic agenda remains in demand within the society. Relocated media and NGOs have resumed their activities in exile and developed online services, but their audience is declining due to the restrictive actions of the authorities. Political parties have limited public activity and suspended cooperative projects inside Belarus due to fears of reprisals.

President Joe Biden), as well as democratic forces (Coordination Council, National Anti-Crisis Management) representatives' meetings with Western leaders, preserved the democratic agenda in communication with international organisations, Western capitals and Minsk.

However, the complete delegitimisation of the regime at the international level has not been achieved, and despite an extensive campaign by the political exiles, the allocation of IMF funds to Minsk and cooperation between the Norwegian Yara company and Belaruskali were not halted.

Tsikhanouskaya tried, with some success, to exert influence on Belarusian-Russian relations against a background of growing contradictions between the Lukashenka regime and the Kremlin. However, an attempt to initiate negotiations between the democratic forces and the Lukashenka government with the mediation of the EU (Austria) failed.

Along with the delay in resolving the political crisis, tensions have increased amongst exiles with criticism from some opposition representatives of the overall democratic agenda and the position of the leading centres (Sviatlana Tsikhanouskaya's office, National Anti-Crisis Management) on the international sanctions as well as the negotiations with the regime.

In 2021, the fundraising initiatives supporting victims of repression and civil society continued, but the funds gathered gradually decreased. Nevertheless, these initiatives adapted their activities to the needs of society in supporting the repressed, exiles and the protest movement



**A SINGLE
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in Belarus, facilitated by the strengthening of horizontal ties in the diaspora and emigrant actions around the world to draw attention to the situation in Belarus.

The influence of civil society and independent media on the domestic political agenda gradually decreased along with their audience (mainly due to regime repression). However, the civil society agenda predominated on social networks and the Internet. The idea of new elections as the most acceptable way to resolve the political crisis remains the leading position in society (53%).

Sviatlana Tsikhanouskaya's office, National Anti-Crisis Management, "Honest People", and "Rabochy Rukh" continued to communicate with representatives of the state apparatus, members of election commissions and employees of state-owned companies but were unable to achieve a critical level of support for protest mobilisation in 2021.

Nevertheless, the democratic forces created a broad coalition (Sviatlana Tsikhanouskaya's office, Coordination Council, National Anti-Crisis Management, "Honest people", ZUBR, "Golos") to promote a unified strategy of action for the referendum, mobilise supporters of change, and support the political engagement in society.

Political emigrants ran several successful projects in cities around the world (specifically in Warsaw, Vilnius and Kyiv) to unite the diaspora, maintain ties between emigrants, develop the national identity, and mobilise in support for change. The IT sector remained



Source: Sviatlana Tsikhanouskaya's YouTube channel

involved in the civil society projects helping many NGOs and media organisations to resume work after relocation.

*Sviatlana
Tsikhanouskaya's
New Year address*

Despite a joint mobilisation plan for Freedom Day, democratic forces failed to regain control of the streets of the capital. With a few rare exceptions, street actions and backyard events ceased by the end of the year.

Attacks on the law by the security forces and the regime's attempts to resolve the political crisis by force led to increased support among those who support the decisive actions against the ruling class. Cyber partisans continued to interfere with the communication infrastructure (and revenues) of state institutions and state-owned companies as well as organise campaigns to identify and demotivate law enforcers and officials by publishing scandalous records and materials.

Political organisations within Belarus periodically tried to resume contacts with their sympathisers via educational courses ("Greens", BSDP





(Hramada), “Together”) and support for local initiatives (“For Freedom”, “Our Party”, Belarusian Christian Democracy).

In contrast to the contradictory position of the state institutions, the civil society and democratic forces developed and promoted a single agenda on COVID-19, which resonated with the position of doctors and the health care system.

FORECASTS FOR 2022

Mobilisation of supporters of change for a protest vote in the referendum with possible aggravation of confrontation by the security forces.

Unravelling of the unified democratic agenda, strengthening of the position of those who criticise sanctions and ultimatums to the regime

Expanding the use of online tools by civil society to communicate with sympathisers and maintain contact with their audiences.

Suspension of public activities of political organisations within Belarus with possible revival after the referendum.

BELARUS- WEST RELATIONS



2021: THE BELARUSIAN CRISIS HAS BECOME A GLOBAL PROBLEM

2021 was characterised by the growing confrontation in relations between Belarus and Western countries. The forced landing of the Ryanair aircraft on May 23rd constituted an inflexion point that elevated the conflict between Minsk and the West to a qualitatively new level and fixed the Belarusian crisis as a problem on the global agenda. Western elites were united in their perception of Belarusian actions as a threat to regional (and even international) security leading to the phased introduction of sanctions. Lukashenka attempted to force the EU and the United States into direct dialogue with his regime by provoking a migration crisis to undermine regional stability. Under these conditions, Western countries increasingly began to turn to Russia to find a joint solution to the Belarusian problem.





FOR THE FIRST TIME IN THE RECENT HISTORY OF BILATERAL RELATIONS, WESTERN ALLIES INTRODUCED SECTORAL SANCTIONS IN RESPONSE TO THE ACTIONS OF THE BELARUSIAN REGIME.



The first half of the year was primarily defined by simmering tension between Minsk and Western capitals, which could not align on a common strategy to address the Belarusian crisis. Consequently, the first three packages of EU sanctions were largely symbolic, inspiring confidence in the Belarusian authorities that the West would prove unable to act decisively and in concert.

The forced landing of a Ryanair plane at Minsk National Airport on May 23rd and the arrest of Raman Pratasevich, an opposition activist and blogger, crossed the Rubicon and made the normalisation of relations almost impossible. Belarus' image as a source of regional stability was wholly overturned, leading Western countries to conclude that the Lukashenka regime threatens regional and global security and secures Belarus' reputation as a pariah country and global problem.

The second half of the year was marked by a rapid escalation of tensions between Minsk and Western capitals. For the first time in the recent history of bilateral relations, the EU, the United States, the United Kingdom and other Western allies introduced sectoral sanctions (Package 4) in response to the actions of the Belarusian regime, signalling a transition to a joint and uncompromising strategy towards the Belarusian crisis. This implies a progressive increase in pressure on the Lukashenka regime until several demands are met: stop violence against civilians, release all political prisoners, halt all political trials, start a dialogue with society, hold new presidential elections under supervision of the OSCE and other international organisations.



Source: Sviatlana Tsikhanouskaya's Telegram channel

In response, the Belarusian regime followed a twofold strategy, clearly not expecting such solidarity among the Euro-Atlantic allies. On the one hand, Lukashenka constantly escalated regional tension and rhetorically toyed with talk of war in an attempt to force Western capitals to enter into direct dialogue, lift sanctions and recognise Lukashenka's legitimacy.

Meeting of Sviatlana Tsikhanouskaya with US president Joe Biden

The escalation of the migration crisis on the Belarusian-European border in October-November led to technical dialogue with the EU but did nothing to legitimise the regime in the eyes of the West and served only to accelerate the adoption by Western capitals of a new (5th) package of sanctions, and development of a 6th package.

After the failure of the migration blackmail campaign and in response to the new sanctions,



**THE
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Minsk retaliated with threats of a new migration crisis (this time using Afghan refugees) and various measures to penalise Western businesses and exploit gas shortages by interdicting transit pipelines.

On the other hand, the Belarusian regime signalled a desire to normalise relations. Minsk tried to establish communication channels with some Western countries (Austria, the Vatican, Hungary, Turkey, Finland), seeming to speculate on threats to the independence of Belarus from Russia. However, unlike in prior cases, the West ignored these overtures. Russia is looking for a solution to the Belarusian problem in a broader geopolitical security agreement. It has become apparent that the West no longer regards Lukashenka as the guarantor of Belarusian independence, as was typical in 2008-2010 and 2014-2020.

Under these conditions, the Belarusian regime tried to balance the pressure from the West and Russia by pivoting to more distant foreign policy, principally deepening the strategic partnership with China. For this reason, at the end of the year, Minsk attempted to initiate contacts at the highest level with Beijing. The increasing toxicity of the Belarusian regime under growing Western sanctions pressure, as well as the actions of the Belarusian authorities, created risks even for Chinese investors and called into question the logic of China's work with Belarus within the framework of the Belt and Road Initiative, in which Belarus constitutes a logistics and industrial hub, as well as a springboard for entering Western markets.

FORECASTS FOR 2022

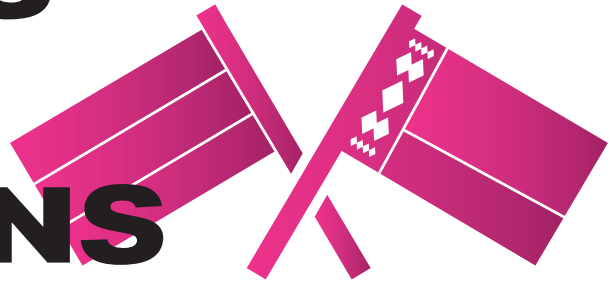
Relations between Belarus and the West will continue to deteriorate, and Western sanctions pressure on the Lukashenka regime will intensify, particularly after the February referendum on the new constitution.

Belarus' international standing will continue to decline. The Belarusian crisis and its solution will be an issue in negotiations between Russia and the United States/NATO on a geopolitical deal on security guarantees.

The geopolitical impasse and growing pressure from the West and Russia may push the Lukashenka regime to start a dialogue and meet some of the demands of the West, which in turn will make a decision based on the results of its own negotiations with Russia.

The breakdown of negotiations and Russia's aggressiveness may open a window of opportunity for a new round of multi-vector policy of the Belarusian regime.

BELARUS- RUSSIA RELATIONS



2021: GAME OF PRESIDENTS: SEASON 2

In 2021 Belarus oriented itself firmly towards Russia. Belarusian-Russian integration developed in the areas of constitutional reform, economic integration, and military cooperation, all with Russian economic support. Lukashenka managed to avoid major concessions, whilst Russia provided limited support for the Belarusian regime. Behind the facade of major integration negotiations, a tendency towards “soft erosion” of Belarusian sovereignty has emerged.

Communication between the governments of Russia and Belarus was unprecedentedly active in 2021, amidst a wholesale collapse in other Belarusian foreign relations. Lukashenka and Putin were in contact dozens of times and met on at least six occasions. Superficially, 2021 seemed relatively conflict-free, but behind a facade of forced rapprochement, tortuous and tense political bargaining was taking place.

By late 2020, three strategies to ensure Russian support materialised for Lukashenka:

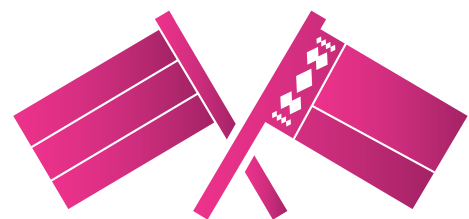
- a) constitutional reform, which would guarantee Russia continuity and expansion of influence via diversification of political power after Lukashenka's departure.
- b) unification, implying convergence of economic policy, and harmonisation of tax and customs legislation, etc. within the framework of the so-called “Union State.”
- c) a military alliance closer than the Collective Security Treaty Organisation (CSTO).

These options are not mutually exclusive; there has always been a shifting emphasis between them. After the Sochi summit in September 2020, constitutional reform was the priority, but integration came to the fore at the beginning of 2021. On November 4th, 2021, the integration roadmaps were signed, and the topic slid back down the priority list such that two months after, no further progress was made.

In March, Lukashenka presented his future strategy, emphasising the militarisation of Belarus and military cooperation with the Russian Federation to form an anti-western axis; such collaboration was on the agenda throughout the year. Minsk gradually escalated conflict with the West in such a way as to simultaneously aggravate relations between the West and Russia. In the summer of 2021, the regime employed a new tactic – escalation of the migration crisis on the western borders of the Union State. It was a desperate attempt to open communication channels with the



**BEHIND THE
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**TRANSIT MEANS
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West and unblock the “geopolitical pendulum”, aspiring to improve its negotiating positions in bargaining with Russia.

Lukashenka was reluctant to address constitutional amendments. He confirmed his interest in political reform in March, but no significant steps were taken. Nevertheless, after the "disclosure" of a failed assassination attempt on Lukashenka, he issued a decree to the effect that in case of his inability to exercise the powers of the president, those functions would be transferred to the Security Council with the simultaneous introduction of a state of emergency. Such a measure is expected to ensure that the power block retains its position during any transition period and that political alignment with Russia is preserved.

On closer examination, constitutional reform (transit of power) and integration are interconnected. Transit means a transition from a personal regime to a regime with fewer dictatorial powers, and for this reason, it is unacceptable for Lukashenka. He preferred to play for time and consolidate the existing state of affairs in the course of the constitutional referendum-2022. Institutional changes through union programs and deeper integration do not suit Minsk because they strengthen private economic power following Russian constitutional templates. Finally, close military cooperation resulting in the Belarusian army operating as a de facto arm of the Russian armed forces does not accrue benefits in other areas (for example, on energy resources or loans). On the contrary, Russia believes that ensuring the security of Belarus and strengthening its army requires a return from Belarus, if not financial, then in terms of the harmonisation of economic policies.

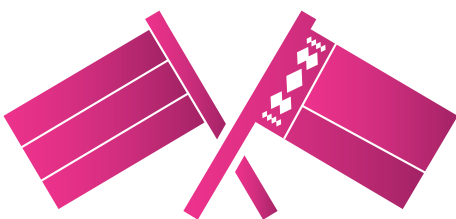




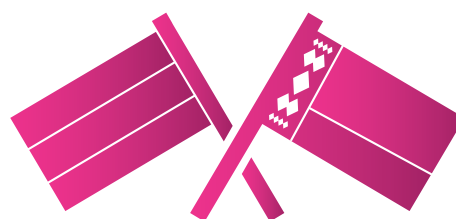
Image by kremlin.ru

The overall outcomes of 2021:

1. The announced agreement on the unification of the gas markets of Russia and Belarus, which is planned to be signed before December 1, 2023, looks tempting, but the final conditions that will be set for such a “merger” of gas markets (it is also planned to create a single oil and electricity market) are not completely clear. Western sanctions are an obstacle to such initiatives. In 2021, Belarus failed to achieve significant concessions on energy: in 2021, it bought gas at the price of the previous year, in 2022 - at the cost of 2021 (USD 128.5 per 1,000 cubic meters). The situation with gas transit is worse: the surplus of transit capacities arising from the commissioning of the Nord Stream-2 pipeline is covered by Belarus. In Q4 2021, gas transit through the Belarusian pipe decreased from 9 to 2 billion cubic meters.

2. According to Putin, credit resources for Belarus from September 2021 to the end of 2022 should total USD 630-640 million. This amount does not inspire Lukashenka. In the first

*An informal meeting
of Vladimir Putin and
Aliaksandr Lukashenka.*





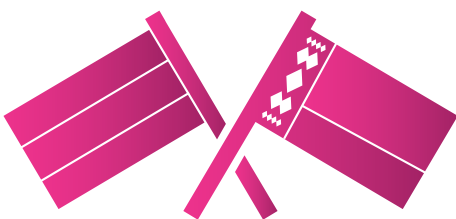
**TRANSPORT
AND
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half of the year, Belarus initiated negotiations aiming to attract USD 3 billion; by the end of the year, the request increased to USD 3.5 billion but has not yet found a response. In late 2021, during a meeting with Lukashenka, Putin queried, “Why do you need money if everything is fine in your economy?”

3. Transport and logistical dependency on Russia is an inevitable side-effect of the significant tensions with the West. Russia profited from Belarusian isolation regarding overfulfilling plans to redirect Belarusian oil products to Russian ports. Belarusian fertilisers may follow oil in taking the Northern Sea Route. After the start of the air blockade, Belarus became an adjunct to Russian airspace with the illusory hope that the Russian Federation would compensate for the losses of Belavia.

4. The thesis about a single defence space and joint defence against external threats is nothing new, given that a “joint defence centre” already exists and joint exercises are being conducted.

5. Other arrangements. Creating a common payment space and integrating currency systems are enshrined in the integration roadmap but remain a pipe dream in reality. The negotiators admit that they are not yet ready for such a transition. Many other agreements regarding the harmonisation of the tax system, equal rights and opportunities for citizens of the Russian Federation and the Republic of Belarus in the economic and social spheres within the framework of the State Union, a unified industrial policy, unrestricted access to government procurement and government orders, etc. appear to be mere declarations.



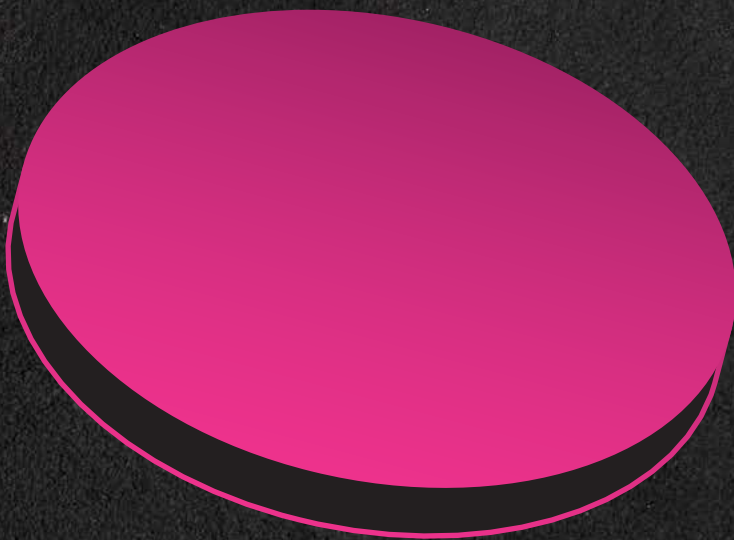
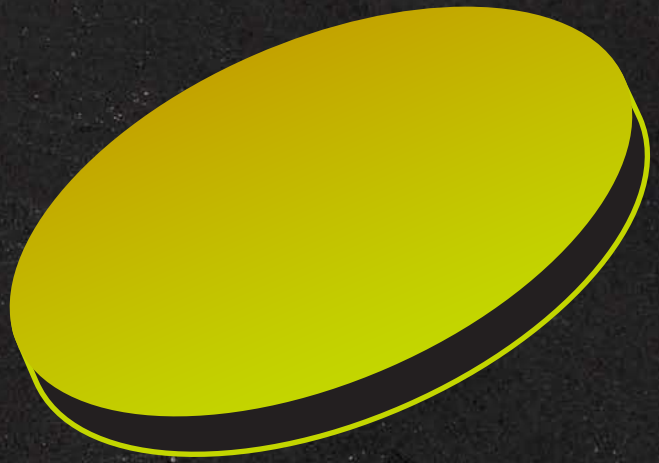
FORECASTS FOR 2022

Relatively high involvement of Russia in Belarusian affairs.

A sharp decline in the export transit value of Belarus and, accordingly, the lowering of the importance of the transit-based negotiation arguments in disputes with Russia.

“Soft takeover”, a partial transfer of some sovereign functions and infrastructure to Russia for “outsourcing”, including foreign policy, transport and logistical capabilities, defence and security, etc.

Constitutional referendum-2022 does not prevent subsequent haggling over the implementation of the union programs.



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