

# BELARUS IN FOCUS:

ANNUAL  
REVIEW 2022

AND FORECAST  
FOR 2023

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# **SUMMARY FORECAST FOR 2023**

**Structured preparation for the parliamentary, local council, and the National People's Congress elections with the activation of GoNGOs and opposition parties loyal to the regime.**



**Minsk made a firm political bet on Russian military victory, anticipating that this would create additional opportunities in relations with the West as an ally of the winner. There will be no change of this position until unambiguous indications of imminent Russian military defeat appear.**



**Democrats will have limited participation in campaigning for the elections of members of the parliament, local councils, and the All-Belarusian People's Assembly.**



**The point of no return in relations with the West has been passed, so the pressure on the Lukashenka regime will continue until basic Western demands are met, regardless of the dynamics of the Russian-Ukrainian war.**



**The probability of the direct participation of Belarusian armed forces in the conflict remains low, as does the likelihood of mobilisation in Belarus. Meanwhile, Lukashenka will support the Kremlin as much as possible with rhetoric.**



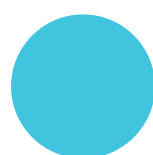
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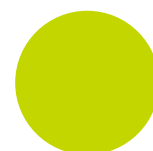
## COLOR KEY



THE SITUATION  
HAS DETERIORATED



THE SITUATION  
HAS NOT CHANGED



THE SITUATION  
HAS IMPROVED

# THE RULING ELITE



## 2022: A REACTIONARY REGIME CONSOLIDATES AROUND LUKASHENKA



In 2022, the Belarusian establishment partially restored public trust in state institutions with populist policies and repression of opponents against the background of the Russian invasion of Ukraine. The uniformed agencies retained control of civilian agencies, strengthened ideological control of the public sector and budgets, and restored Soviet practices of cultivating loyalty from the population. The government and the National Bank kept the economy from collapsing despite sanctions and the loss of exports to Ukraine and the EU, with the slow decline in living standards judged by the majority as an acceptable price for not involving the Belarusian army in the Ukraine war.

Restoration of public trust in state institutions came at the expense of:

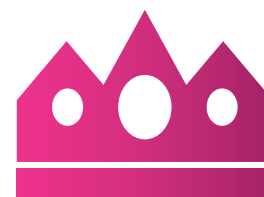
- gradual consolidation of the state apparatus and the population around Lukashenka against the background of the war in Ukraine,
- the avoidance of direct participation of the Belarusian army in the aggression on Ukrainian territory.
- populist price regulation measures, which, however, significantly destabilised trading conditions.
- maintenance of high levels of employment and activity for state-owned companies, and stability in the financial and currency markets, despite the economic recession and sanctions.
- suppression of independent media with a thorough purge and gradual criminalisation of the consumption of alternative news sources.

The regime consolidated power and the state sector around the autocratic leader, strengthening the personality cult and postponing the transformation and development of other state institutions.

Legislative and political changes intensified in the second half of the year once the first President of Belarus had strengthened his personal position and regained the trust of the population. Previously, under the pressure of circumstances, Lukashenka spoke vaguely



**THE REGIME  
CONSOLIDATED  
POWER AND THE  
STATE SECTOR  
AROUND THE  
AUTOCRATIC  
LEADER,  
STRENGTHENING  
THE PERSONALITY  
CULT AND  
POSTPONING THE  
TRANSFORMATION  
AND  
DEVELOPMENT  
OF OTHER STATE  
INSTITUTIONS.**



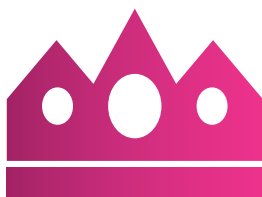


*Independence Day meeting at the Palace of Independence. July 2nd, 2022. Image: [president.gov.by](http://president.gov.by)*

about transforming the personalist regime into a more collective government with redistribution of power; however, actual reform fell victim to procrastination.

Consolidation of public trust around the autocrat was ensured by redistributing funds from the middle class in favour of the uniformed agencies, state employees and the state sector of the economy.

Lukashenka strives to maintain a high state presence in the economy. The number of beneficiaries of state redistribution is decreasing but remains large. The most significant recipients of state benefits are



pensioners (about 2.4 million) and state employees and public sector workers (about 1.6 million or about 38% of those economically active citizens).

Despite benefits and large-scale redistribution, the rate of public sector employment decrease will decrease year by year, as will the number of pensioners, partly related to an increase in mortality due to covid (for which the authorities concealed the statistics), increasing the pensionable age and a reduction in pension guarantees.

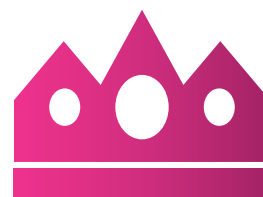
Throughout 2022, the regime's security forces depoliticised society, deterred supporters of change from social and political activism, and demotivated the protest movement with repression (arrests, criminal cases, harsh court sentences with long prison terms), extending persecution to the families of activists of the pro-democracy movement.

Throughout the year, a punitive operation against demonstrators in 2020 was conducted to deter the future mobilisation of street protests. By the end of the year, over 2,000 activists of the protest movement were officially listed as extremists and terrorists.

The Belarusian establishment limited regime critics' political, civil, and social rights with fines and property confiscation, and legislators significantly strengthened repressive legislation. By the end of the year, the authorities moved to deprive Belarusians of their citizenship for "extremist activities", which amounts to any active civil position or criticism of the Lukashenka regime.



**THE BELARUSIAN  
ESTABLISHMENT  
LIMITED REGIME  
CRITICS'  
POLITICAL, CIVIL,  
AND SOCIAL  
RIGHTS WITH  
FINES AND  
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CONFISCATION,  
AND LEGISLATORS  
SIGNIFICANTLY  
STRENGTHENED  
REPRESSIVE  
LEGISLATION.**

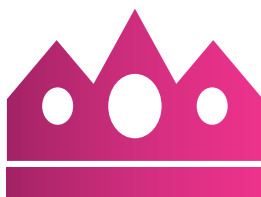




*Image generated by Midjourney*

Similarly, a comprehensive purge of civil society took place, revoking legal registration for over 1,000 non-profit organisations, liquidating all independent trade unions and prosecuting trade union leaders.

The Belarusian establishment declined to ease repression, despite initially discussing amnesty for some political prisoners before National Unity Day in September. In the last quarter, the authorities intensified persecution of opponents in advance of the new electoral cycle.





# FORECASTS FOR 2023

Minsk made a firm political bet on Russian military victory, anticipating that this would create additional opportunities in relations with the West as an ally of the winner. There will be no change of this position until unambiguous indications of imminent Russian military defeat appear.

Continue to direct the economy with further populist interventions by Lukashenka to improve his personal approval ratings.

Consolidating the influence of regime security forces at the expense of technocrats; high inflation and significant public sector subsidies are likely.

Structured preparation for the parliamentary, local council, and the National People's Congress elections with the activation of GoNGOs and opposition parties loyal to the regime.

# SECURITY



## 2022: THE COLLAPSE OF THE REGIONAL SECURITY SYSTEM



**The West considers Minsk to be an integral part of the Russian military machine. The Belarusian regime bet heavily on a Russian military victory in Ukraine but did not intend to participate directly in the war.**

The most significant event in 2022 was the Russian invasion of Ukraine, which became the largest interstate military clash in Europe since 1945.

Contrary to popular claims, there was no objective evidence in 2022 that the Kremlin pressured Minsk to become directly involved in the aggression against Ukraine, nor was there any detectable preparation of the Belarusian

army to enter the war. The practical actions and public statements of the Lukashenka regime were unequivocally supportive of Russia, but the lack of involvement of the Belarusian army currently satisfies (relatively) both the West and Kyiv.

Meanwhile, the Belarusian regime has attempted to duplicate its 2014 foreign policy success by offering to act as an intermediary for negotiations between Kyiv and Moscow to end the war. Alternatively, Minsk aims to be recognised as an independent party in peace negotiations (without being a party to the hostilities). Such efforts are coordinated with the Kremlin.

Belarus abandoned its official nuclear-free status.

Hopes were voiced for the involvement of extra-regional players (India and China) in Eastern European security matters.

At the end of 2022, Minsk announced its intention to increase the military budget by more than one and a half times.

Although the financial performance of the Belarusian military-industrial complex in 2022 is unknown, it can be assumed that Russia has become its main customer. This reversed the trend of recent years when Belarusian military products fell under Russian import substitution. The growth of Russian consumption has probably compensated for reduced demand in other markets.



**BELARUS  
ABANDONED  
ITS OFFICIAL  
NUCLEAR-FREE  
STATUS.**



# FORECASTS FOR 2023

Minsk made a firm political bet on Russian military victory, anticipating that this would create additional opportunities in relations with the West as an ally of the winner. There will be no change of this position until unambiguous indications of imminent Russian military defeat appear.

Minsk will position itself as an independent actor, ready to help prevent a direct clash between Russia and NATO, and continue attempts to act as a joint organiser of Russian-Ukrainian peace talks.

The Belarusian regime will actively promote the message that considering the interests of Russia, failure to commence peace negotiations soon may lead to another round of escalation in terms of geography and participants engaged and the destructiveness of the weapons employed.

The possible deployment of Russian nuclear weapons in Belarus will continue to be used for propaganda purposes. We can expect actions indicating such deployment to Belarusian territory, but it is not automatic that such a transfer will take place in reality.

Minsk's attempts to involve the largest Asian states in regional affairs will be fruitless, but the regime will use them as a pretext to intensify and expand bilateral cooperation.

The Third Southern Command of Belarusian Ground Forces is likely to increase in strength by 10-12% and receive new and upgraded weapons.

Exports of Belarusian defence products and services to Russia will increase significantly. This will mitigate the effect of Western sanctions on the Belarusian military-industrial complex.

The public anti-Western and anti-NATO rhetoric of the Lukashenka regime will continue. In parallel, attempts will be made to engage in bilateral dialogue with individual Western countries under the pretext of the need to prevent military escalation in Europe as a whole. These efforts will not yield tangible results.

The likelihood of Belarus's direct involvement in the Russian military campaign cannot be accurately assessed. Minsk seeks to avoid such an eventuality, but the determining factors remain largely unknown and will be beyond the control of the Belarusian regime.

# CIVIL SOCIETY AND POLITICAL PARTIES



**2022:** POLITICAL  
ORGANISATIONS AND  
CIVIL SOCIETY: ANTI-WAR  
MOBILIZATION, DIPLOMATIC  
SUCCESSSES, AND DECLINING  
PROTESTS



Democratic forces and civil society succeeded in seizing certain foreign policy functions from Minsk and partially delegitimising the Lukashenka regime in the international arena. The protest movement adopted an anti-war character stance in the wake of the Kremlin invasion of Ukraine and continued to successfully monitor military activity on Belarusian territory despite systematic repression. Political parties and democratic organisations continued to organise online events for sympathisers despite the unfavourable conditions for progressive developments.

The restrictive measures of the regime continued to diminish the audience for democratic forces. The Tsikhanouskaya Cabinet responded with increasingly strong rhetoric, but this did not contribute to the expansion of the audience.

Democrats led by Tsikhanouskaya initiated a partial mobilisation of supporters in February during the referendum. To a large extent, the trigger for protest activity was the Kremlin's military invasion of Ukraine a few days before the plebiscite.

Tsikhanouskaya's cabinet and other civil society Initiatives continued to communicate with supporters of change domestically through online media and self-publishing. However, their influence on the Belarusian information agenda has decreased significantly.

Cooperation between the IT sector and civil society cooperated to maintain connections between activists forced to relocate, developing online services such as [eHealth](#). At the end of the year, the "[New Belarus](#)" platform was launched for testing, aspiring to evolve into a digital alternative to the state and expanding functionality to fulfil political tasks.

Reputational damage from media scandals had a negative effect on the credibility of the democratic movement. Issues included questionable personnel policies, such as the representative for defence and national security, Valery Sakhshchyk, holding Russian citizenship and allegations of fraud regarding Tatsiana Zaretskaya, the representative for finance and economy. The safety of activists was also questioned due to a GUBAZIK



**THE RESTRICTIVE MEASURES OF THE REGIME CONTINUED TO DIMINISH THE AUDIENCE FOR DEMOCRATIC FORCES. THE TSIKHANOUSKAYA CABINET RESPONDED WITH INCREASINGLY STRONG RHETORIC, BUT THIS DID NOT CONTRIBUTE TO THE EXPANSION OF THE AUDIENCE.**





**AT THE  
INTERNATIONAL  
LEVEL, HUMAN  
RIGHTS  
DEFENDERS  
HAVE ACHIEVED  
SIGNIFICANT  
SUCCESS,  
CONFIRMED BY  
THE AWARD OF  
THE NOBEL PEACE  
PRIZE TO ALES  
BIALIATSKI, THE  
FOUNDER OF THE  
HUMAN RIGHTS  
CENTRE "VIASNA",  
ALONGSIDE  
ACTIVISTS FROM  
RUSSIA AND  
UKRAINE.**



agent infiltrating the “Black Book of Belarus” project and general transparency of activities. However, the criticism has had a positive effect on transparency and communication with civil society.

Democrats retained influence in Western capitals and their interactions with Minsk. The democratic leader of Belarus, Sviatlana Tsikhanouskaya, attended numerous meetings with Western leaders, promoting the civil society agenda: delegitimization of the Lukashenka regime, sanctions, and Western support for civil society and the repressed. Democrats managed to distance, in the eyes of Western society, the Belarusian population, from the complicity of the Lukashenka regime in the Kremlin’s aggression in Ukraine. This made it possible to prevent or partially cancel many restrictive measures against Belarusians by European countries.

Tsikhanouskaya’s cabinet consolidated their diplomatic success and created additional tools for influencing Western public opinion and leadership, such as the “People’s Embassies” initiative of the National Anti-Crisis Management.

Democrat rhetoric towards the Belarusian ruling class gradually intensified in response to the refusal of the Lukashenka regime to engage in dialogue, increased repression, and persecution of dissenters. However, this did not expand the receptive audience.

A significant share of civil society communications involved human rights issues and opposition to repression; however, many





Belarusians have already begun to forget about the events of 2020 and return to everyday affairs. Nevertheless, at the international level, human rights defenders have achieved significant success, confirmed by the award of the Nobel Peace Prize to Ales Bialiatski, the founder of the human rights centre “Viasna”, alongside activists from Russia and Ukraine.

*Flowers at the Embassy of Ukraine in Minsk, February 2022. Image from the Facebook page of the Ukraine's Ambassador to Belarus Ihor Kizim*

In August, Tsikhanouskaya’s office held the “New Belarus” conference, aiming to ease tension in the democratic movement by updating the coalition decision-making structure and integrating popular pro-democracy initiatives within the framework of the United Transitional Cabinet.





*Natallia Pinchuk, Ales Bialiatski's wife, delivers his Nobel Lecture. Oslo, 10 December 2022. A YouTube screenshot.*



The creation of the Tsikhanouskaya Cabinet, supplementing the activities of the National Anti-Crisis Management led by Pavel Latushka and the initiatives of ex-military forces, increased confidence in the democratic movement. The cabinet began training personnel to respond to any democratic changes in Belarus; however, the influence of the proto-government on the domestic situation is insignificant and consistently countered by regime security forces.

Valery Tsapkala's team consolidated some strong critics of Tsikhanouskaya's Office within the Forum of Democratic Forces. However, they did not have the resources to organise an

alternative popular plebiscite and redistribute influence.

Volunteers from Kalinoŭski's regiment maintained their distance from the mainstream democratic movement and attempted to establish an independent political base. This drew criticism from a large part of civil society, although the trust of the supporters of change in the volunteers remained high.

The influence of the Coordination Council on the democratic agenda gradually diminished. After the "New Belarus" conference in August, it was decided to carry out another reform of the representative body of Belarusian society and to integrate a wider range of civil society initiatives into its activities.

Following the Kremlin's aggression in Ukraine, a decentralised anti-war movement was organised on the territory of Belarus with partial coordination with initiatives of ex-military forces and Cyber Partisans. Despite regime attempts at prevention, military activity was monitored throughout the year, tracking the movement of military equipment.

Guerrilla actions on Belarusian railways slowed the movement of military equipment, which was especially important during the Russian army invasion launched from Belarusian territory.

The positions of the democrats regarding the war resonated with the anti-war sentiments of the country's population. However, due to the purge of independent media, the news cycle was partially filled with Russian propaganda with the active help of Belarusian ideologues who replicated Kremlin narratives.



**DESPITE REGIME ATTEMPTS AT PREVENTION, INCLUDING DETENTIONS, ARRESTS, AND CRIMINAL CASES AGAINST ACTIVISTS, RUSSIAN MILITARY ACTIVITY WAS MONITORED THROUGHOUT THE YEAR, INCLUDING THE MOVEMENT OF MILITARY EQUIPMENT.**





**THE POSITIONS OF  
THE DEMOCRATS  
REGARDING  
THE WAR  
RESONATED WITH  
THE ANTI-WAR  
SENTIMENTS OF  
THE COUNTRY'S  
POPULATION**

Various civil society initiatives have organised a large-scale campaign to support Ukraine since the first days of aggression. However, domestically, the volunteer movement faced a brutal response from the security forces, which intensified with each month of the war. Nevertheless, political migration has created a developed infrastructure of support for Ukraine and assistance to Belarusian volunteers.

With difficulty, democrats managed to influence the Ukrainian leadership and somewhat improve the negative attitude of Ukrainian society towards Belarusians. Civil society has strengthened communication with Kyiv in an attempt to demarcate the Lukashenka regime and Belarusian society.

Democrats, led by Sviatlana Tsikhanouskaya, condemned Kremlin aggression in Ukraine and intensified criticism of the complicity of the Lukashenka regime. However, pro-European rhetoric has made it difficult to communicate with significant sections of Belarusian society who hold favourable sentiments towards Russia.



Income for crowdfunding initiatives decreased in a year of progressive anti-democratic reaction, decreasing international attention to the situation in Belarus, and activist fatigue from the long confrontation with the Lukashenka regime.

# FORECASTS FOR 2023

In response to regime repression, ultimatum positions will predominate among democratic activists and the coalition.

New alliances of critics of the coalition will form and attempt to redistribute influence; however, the leadership of Sviatlana Tsikhanouskaya will remain.

Increasing the influence of independent media and democratic forces will be part of the agenda in case of high-profile initiatives by the ruling class.

Democrats will have limited participation in campaigning for the elections of members of the parliament, local councils, and the All-Belarusian People's Assembly.

# BELARUS- WEST RELATIONS



**2022: LITTLE PROSPECT OF  
NORMALIZATION: THE POINT  
OF NO RETURN HAS BEEN  
PASSED.**



If the Belarusian regime began the year making efforts to return relations with the West to business as usual (on its own terms), complicity in the Russian aggression against Ukraine constituted a point of no return. The West has solidified its perception of the Lukashenka regime as a co-aggressor and intensified pressure. However, to avoid direct participation by the Belarusian army, Western countries have so far granted Minsk some manoeuvring room by maintaining separate Belarusian and Russian sanctions strategies. Toward the end of 2022, Minsk attempted to reposition itself in a “peacekeeping” role. At best, these initiatives by the Belarusian regime were treated with suspicion, and at worst, they were perceived by Western

## **countries and Ukraine as a strategic disinformation campaign to facilitate Russian preparations for a new invasion from Belarusian territory.**



In 2022, the fourth and fifth packages of Western sanctions took full effect against Belarus, including targeted restrictions on the oil, potash, tobacco, banking, and logistics sectors.

Despite this, the Belarusian regime was initially optimistic about resetting relations with Western countries on its own terms. With the help of mediators from the Vatican, the Order of Malta, and Italy, Belarusian diplomacy attempted to strike a bargain with the West, trading a constitutional referendum for lifting sanctions. The international situation aided these efforts by temporarily diverting Western attention from Belarus and towards the political crisis in Kazakhstan in early January and the continued escalation of tension between Russia and Ukraine.

Having gained attention from the West, Minsk pivoted to demonstrating military-political loyalty and usefulness to the Kremlin. The “Allied Resolve-2022” joint exercises provided Minsk with a helpful distraction from the constitutional referendum scheduled for February 27<sup>th</sup>. By mid-February, the increasing numbers of Russian troops on Belarusian territory prompted the United States and its Western allies to begin preparations for a new package of sanctions against Belarus for facilitating Russian military threats. The anti-Ukrainian rhetoric of Lukashenka led to a ban on the transportation of mineral fertilisers from Belarus by Ukrainian railways from February 16<sup>th</sup>, following a similar decision by Lithuania on February 1<sup>st</sup>.





**IN APRIL, AS THE FAILURE OF THE RUSSIAN BLITZKRIEG BECAME EVIDENT WITH THE RETREAT OF RUSSIAN TROOPS FROM NORTHERN UKRAINE, THE BELARUSIAN AUTHORITIES ADJUSTED THEIR POSITION TO DISTANCE THEMSELVES FROM THE CONSEQUENCES OF THE RUSSIAN INVASION.**

Although Belarusian Armed Forces did not participate in the Russian invasion of Ukraine on February 24<sup>th</sup>, Minsk allowed Russian troops to use Belarusian territory and airspace, prompting further intensification of western sanctions. Some Western states, such as France, made specific efforts to head off direct Belarusian participation by facilitating an agreement between Minsk and Kyiv to the effect that Ukraine will avoid missile strikes against Belarusian territory so long as the Lukashenka regime does not directly participate in Russian aggression. The attempts of the Belarusian side to play the role of a “peacemaker”, organising the first three rounds of negotiations between Russia and Ukraine in late February/March, were discounted by Western countries.

The West began to impose sanctions immediately and develop new restrictions, tightening sectoral sanctions, disabling Belarus’ access to the international financial system, restricting access to Western markets, and a technology embargo.

In April, as the failure of the Russian blitzkrieg became evident with the retreat of Russian troops from northern Ukraine, the Belarusian authorities adjusted their position to distance themselves from the consequences of the Russian invasion. Minsk stated its intention to participate in the Russian-Ukrainian negotiations in Istanbul and demanded security guarantees from the West for itself and Ukraine.



In response to a letter from Vladimir Makei, the Belarusian Foreign Minister, on April 9<sup>th</sup>, the West listed a number of conditions for a return to dialogue: the release of all political prisoners, meaningful engagement with Belarusian society,



new elections under international supervision, and the cessation of support for Russia's war in Ukraine.

In early June, amidst attempts by the Belarusian regime to find ways to mitigate sanctions, such as lobbying through the UN for a transit scheme for Ukrainian grain in exchange for access to Baltic ports for Belarusian potash fertilisers, the EU and other Western countries introduced the sixth package of sanctions against Belarus and Russia, tightening sectoral economic restrictions.

Despite the failure of bargaining with political prisoners under the guise of a large-scale amnesty (but without the release of political prisoners) in exchange for easing sanctions, Minsk offered the West a previously successful “commodity”; assistance in the field of regional security by keeping the Belarusian army out of the war against Ukraine, non-recognition of the September “referendums” in occupied Ukrainian territories, mediation between Russia and Ukraine, and assistance with global food security.

Efforts to establish direct communication channels with the West failed, prompting Minsk to further escalation, including rhetorical and practical support for Russian aggression against Ukraine, insulting European leaders, restrictions on Western investors in Belarus, accusing the West and Ukraine of imminent aggression, nuclear blackmail (the deployment of Russian nuclear weapons on Belarusian territory), and threatening to launch missile strikes against command centres in neighbouring NATO countries and Ukraine.

Despite a strengthening Russian military presence and the possible resumption of an





**FOLLOWING THE SUDDEN DEATH OF VLADIMIR MAKEI ON NOVEMBER 26TH, SERGEI ALEINIK, A PROFESSIONAL DIPLOMAT WITH CONNECTIONS IN THE WEST, WAS APPOINTED AS THE NEW FOREIGN MINISTER, CREATING THE IMPRESSION THAT THE REGIME WOULD CONTINUE ITS LINE OF FOREIGN POLICY MANOEUVRING.**

offensive from the north, the Belarusian regime avoided inclusion in the seventh and eighth packages of sanctions adopted by the EU and the Western Allies in July and October, respectively. This was not so much due to secret diplomatic efforts but to the lack of consensus within the EU. Some countries did not want to tighten the sanctions noose around the neck of the Belarusian regime to leave room for manoeuvre regarding potential direct participation in the war.

Following the sudden death of Vladimir Makei on November 26<sup>th</sup>, Sergei Aleinik, a professional diplomat with connections in the West, was appointed as the new Foreign Minister, creating the impression that the regime would continue its line of foreign policy manoeuvring. That amounts to avoiding direct involvement in the Russian-Ukrainian war and proposing that Russian-Ukrainian negotiations be held in Minsk with the mediation of the Vatican. In this way, Minsk hopes to protect itself from future retaliation by Ukraine and Western allies.

Meanwhile, thanks to the lobbying efforts of the Tsikhanouskaya Office and the Joint Transitional Cabinet in Ukraine and the West, Belarus has come to be seen as an important strategic element without which the war cannot continue. Consequently, the key to undermining Russia's military efforts is to remove Belarus from the Russian sphere of influence.

However, judging by the numerous visits of Russian military officials, new regional security agreements, and joint combat and operational training activities, Minsk does not plan to abandon its role as a Russian military bridgehead.



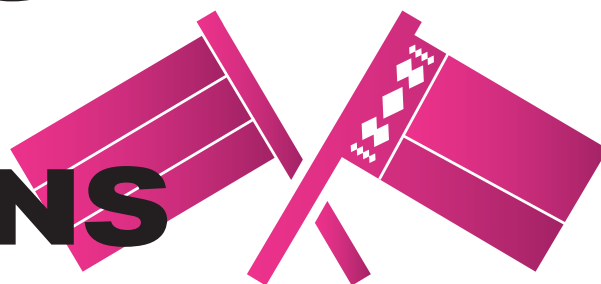
# FORECASTS FOR 2023

The point of no return in relations with the West has been passed, so the pressure on the Lukashenka regime will continue until basic Western demands are met, regardless of the dynamics of the Russian-Ukrainian war.

If the Belarusian army enters into a direct conflict with Ukraine on the side of Russia, the de-occupation of Belarus from Russian troops and regime change in Minsk will become a strategic priority not only for the Belarusian opposition in exile but also for Kyiv and Western allies.

The geopolitical position of Belarus and relations with the West will depend on the outcome of the Russian-Ukrainian conflict, the first outlines of which will become evident in 2023. Victory for Ukraine and the strategic defeat of Russia will cause Belarus to fall out of the Russian sphere of influence and will open up the prospect of better relations with the West at the institutional level.

# BELARUS- RUSSIA RELATIONS



## 2022: THE UNION STATE WENT TO WAR



The Russian-Ukrainian war and the change in the geopolitical status of Belarus constitute one of the most striking realignments of the situation in Eastern Europe over the past three decades. The transformation of Belarus into a Russian military-strategic platform is one of the most obvious aspects of the current situation, alongside Russia becoming the primary transit conduit for Belarusian goods. Belarus' increasing dependence on Russia is quite obvious, and the counter perspective is positively amusing: a vast country ends up depending on a small one as its only ally. The final outcome has yet to be determined. Much – if not all – will depend on the success of the Ukrainian army in the winter and spring military campaigns of 2023.

Following a short [“peacekeeping” operation](#) under the auspices of the CSTO in Kazakhstan at the beginning of 2022, the Belarusian and Russian

leaders were playing war games; however, the decision to invade was not apparent when the “Allied Resolve” military exercises began on February 1<sup>st</sup>. The preparations of Russian troops along the Ukrainian border were noted by Western intelligence, as was Lukashenka’s rhetoric about returning Ukraine to the “bosom of true faith”, but many military experts assessed the likelihood of a Russian attack on Ukraine as low. The war began “unexpectedly” – in the sense that almost all wars start this way – suddenly.

From the very beginning, the “special military operation”, characterised by Lukashenka as “preventive”, defined the basis of Belarusian-Russian relations rigidly and unambiguously.

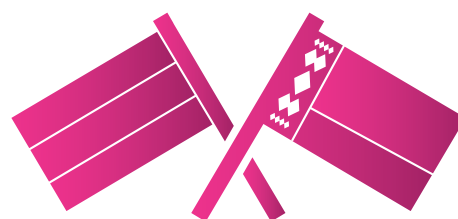
First, Belarus was nominated as Russia’s most loyal and consistent ally in its attempts to build a “Russian world.” From the territory of Belarus, missiles were launched at the cities of Ukraine, and Belarusian military-strategic infrastructure was utilised by Moscow at will, mostly without coordination with Minsk.

In exchange, the Belarusian regime, under pressure from Western sanctions, ensured continuing economic, political, and moral support from the Kremlin. Given the exigencies of warfare, economic support in monetary terms was somewhat reduced. To address financial issues, Lukashenka travelled to Russia at least ten times and hosted Russian governors and other high-ranking officials in Minsk even more frequently.

Issues of political reform, perceived by many as critical (including in the context of Russian-Belarusian relations), faded into the background as the “special military operation” took centre



**FROM THE VERY BEGINNING, THE “SPECIAL MILITARY OPERATION”, CHARACTERISED BY LUKASHENKA AS “PREVENTIVE”, DEFINED THE BASIS OF BELARUSIAN-RUSSIAN RELATIONS RIGIDLY AND UNAMBIGUOUSLY.**





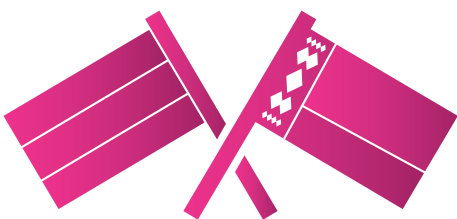
**BELARUS' STATUS AS A TROUBLE-FREE TRANSIT ZONE IS FINISHED. MOST BELARUSIAN EXPORTS, INCLUDING PETROLEUM PRODUCTS AND POTASH FERTILISERS, HAVE BEEN REDIRECTED TO THE EAST.**

stage. All external players, including Russia, forgot about the referendum held in Belarus on February 27<sup>th</sup>.

Belarus' status as a trouble-free transit zone is finished. Most Belarusian exports, including petroleum products and potash fertilisers, have been redirected to the east. The vast expanses of Russia now replace Belarus's small and convenient territory as the conduit for delivery to end users. The numerous meetings between Lukashenka and officials from Russian port cities (Primorsky Krai, Murmansk, Leningrad Region, etc.) testify to this. Exports to the Russian Federation by the end of 2022 are likely to constitute an absolute record, exceeding USD 20 billion (typically, USD 12-13 billion per year). However, analysts from the Eurasian Development Bank [note](#) that these metrics are supported by exchange rates and do not correlate with the physical shipment volumes.

Against this background, 28 economic integration programs, pompously ratified by Lukashenka and Putin in November 2021, naturally faded into the background and mutated into urgent import substitution in response to Western sanctions. Almost nothing was heard about the union programs in 2022, although in November, several high-ranking officials [said they](#) were 50% ready.

However, everyone from heads of state to deputy ministers discussed import substitution at every opportunity. A loan of RYB 105 billion from Russia to Belarus was [agreed](#) upon to facilitate this strategy, enabling the replacement of critical imports in most sectors of the "union state", including the agro-industrial complex, food industry, pharmaceuticals, the automotive industry, machine tools, the IT sector, and even space research.

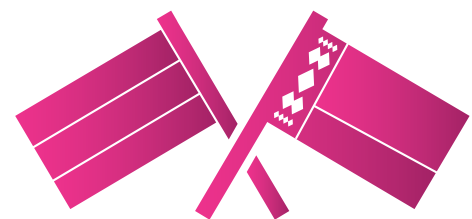




An impressive number of projects have been announced, though none have delivered tangible results yet, prompting Lukashenka to report a slowdown in the implementation of import substitution. In contrast to the replacement of critical exports, transit export substitution is developing rapidly - with impressive distances to Russian port terminals: about 800 km to St. Petersburg, 1650 km to Azov, 2150 km to Murmansk, and 9950 km to Vladivostok.

*Belarusian delegation at talks between Lukashenka and Putin. Palace of Independence, Minsk, February 19th, 2022*

However, it cannot be argued that nothing has been achieved in the “union building” field. On the contrary, in 2022, Belarus and Russia concluded many deals and departmental and intergovernmental agreements. In particular, the draft Treaty on the General Principles of Taxation on Indirect Taxes (VAT and Excise Taxes) between Belarus and Russia was adopted. Moreover, a transition to the use of the Russian rouble in mutual settlements was announced, and the distribution of import duties on the external border of the EAEU was settled. However, there was no word from either side about a single currency.





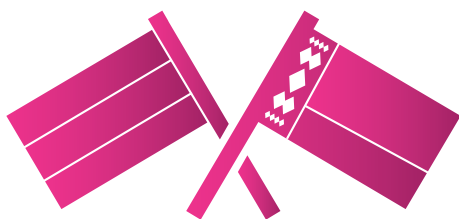
**THE FORMAT OF ANY BELARUSIAN PARTICIPATION IN THE “SPECIAL MILITARY OPERATION” DEPENDS ENTIRELY ON THE COURSE OF THE HOSTILITIES IN UKRAINE.**

Belarusian-Russian relations can develop quite successfully without the “union state” political programme”. Integrated institutions remain fiction, while presidential dictatorship remains all too real. Consequently, no decisions about “integrated”, “union”, or “single” (such as a customs space) can be made without the personal approval of Lukashenka and Putin.

One of the most discussed topics of 2022 was the possibility of Belarus’ direct involvement in the Russian adventure in Ukraine. According to many experts and politicians, Putin is exerting severe pressure on Lukashenka. Do the two dictators want to deploy Belarusian troops to Ukraine? Do they disagree about this?

There was much less debate about whether such a step would be feasible. By the end of 2022, Russian losses in Ukraine amounted to at least double the strength of the Belarusian army in personnel terms and three or four times in terms of equipment. According to the Treaty on the Limitation of Conventional Arms, the defensive potential of the Belarusian army amounts to 100 thousand servicemen, 1800 tanks, 2600 armoured vehicles, 1615 artillery systems, and 260 aircraft. The economy of Belarus is simply unable to maintain this load, so the offensive potential of the Belarusian Armed Forces is limited.

How can Belarus assist Russia’s military aggression? 1. Artillery support (shelling of Ukrainian cities). 2. Riot police with shields and batons.



This means that the format of any Belarusian participation in the “special military operation” depends entirely on the course of the hostilities in Ukraine.



# FORECASTS FOR 2023

The probability of the direct participation of Belarusian armed forces in the conflict remains low, as does the likelihood of mobilisation in Belarus. Meanwhile, Lukashenka will support the Kremlin as much as possible with rhetoric.

Import strategy failures will manifest in 2023. This is inevitable because Belarus has a very high level of imports (66.6% of GDP) and because the schemes are devised by politicians and officials rather than engineers, economists, businessmen, or investors who specialise in import substitution.

Due to failures to replace critical imports, it is almost inevitable that the discussion of implementing the 28 union programs will intensify. By the end of 2023 they will likely be 99% “ready”, and only political decisions will remain. In particular, Belarus and Russia will return to the discussion of a single currency.

There will be renewed debate over energy prices. Lukashenka will push the idea of a full-fledged common energy market – Russia will resist.

A new Russian loan of USD 1.5-2.0 billion will be discussed in the first half of the year. Granting the loan is a foregone conclusion, but the presentation remains unknown – it may be either for import substitution or compensation for Western sanctions.

Export substitution will remain a key topic for Lukashenka, who will demand access to the “best” terminals in the ports of the Russian Federation and preferential railway tariffs.

Lukashenka has always been able to manipulate the “historical memory” of the “Russian people”. In 2023 he will likely intensify his activities in this regard and make several special gifts to the “Russian world”. Memorials to Suvorov and Nakhimov may follow a third monument to Alexander Nevsky.

