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BELARUSIAN YEARBOOK 2026

A collection of survey
and analytics materials on developments
in the Republic of Belarus in 2025

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EDITORIAL FOREWORD

Each year, readers receive a new edition of the *Belarusian Yearbook* — a publication with two flags on its cover: the red-green banner, named the official state flag, and the white-red-white one, identified as the historical or national flag. The temporary halt in the release of these annual volumes was due to circumstances beyond the control of its authors and participants in the project.

Originally, the *Belarusian Yearbook* was conceived as a way to summarize Belarus's progress over the year. Time flows, people work, and the country develops. It is essential to try and analyze the effectiveness of this work and explore potential pathways forward. We must examine how and under what influences the situation within Belarus and its external environment have evolved. Additionally, understanding how specific decision-makers have impacted these changes and the factors that shaped their choices is essential.

In analyzing these processes, we have invariably operated under the presumption of individual innocence. It is almost unfathomable to consider a politician or public figure genuinely acting according to the principle “the worse, the better.” Errors attributed to them by their opponents are often seen as actions motivated by their belief in what benefits the state and society — unless, of course, these mistakes are driven purely by personal interest and gain. Sadly, many individuals tend to assume that their perspective is the only valid one and that the course they support is the sole path to progress, rather than stagnation.

Indeed, it soon became apparent that people's actions do not always promote the country's development; in some cases, they are intentionally aimed at obstructing progress. This is even reflected in the dominant rhetoric of state media. Speakers claiming authority — or often attempting to appear as representatives of it — assert statements like “we have preserved,” “we have protected,” or “we have prevented destruction,” referring to an almost distant past, the Soviet era.

Thirty-five years have passed since the Soviet Union's collapse, and a new generation has arisen that, for well-known reasons, cannot remember that epoch. Nevertheless, the state continues to take pride in surviving on its ruins, which are carefully preserved as the only viable conditions for current and future existence rather as museum artifacts. Instead of a future, young people are offered a time that linguists refer to as the past perfect tense — a distant, bygone age. Initially, the country simply froze in place, and then it began to regress actively. This decline has permeated all areas of life — politics, economics, culture, and sports. Political struggle in Belarus has thus become a battle between the past and the future.

This is precisely why the *Belarusian Yearbook*, which we initially designed to be politically neutral and non-partisan, soon came to be viewed by the authorities and their affiliates as an opposition publication. Their “praise” was frightfully high: two of the project managers, Valeria Kostyugova and the author of these lines, Alexander Feduta, were sentenced to lengthy prison terms. Many of the contributing authors were forced into exile; some faced convictions and imprisonment. A few, including Vitaliy Silitski, Sergey Pankovsky, Oleg Bogutsky, Konstantin Skuratovich, Roman Yakovlevsky, and Boris Tasman, are no longer with us — premature death spared them a similar tragic fate.

A crucial element of our analysis relied on independent opinion surveys, which consequently occupied a prominent

position in our yearbooks. These studies acted as thermometers, enabling us to gauge how quickly and passionately Belarusian society responds to various developments. Independent sociological laboratories in Belarus were among the first to be dismantled. The objective results of their surveys became the concern of security services and the top echelons of power. Fear of those findings only intensified pressure on research centers which refused to serve anyone voluntarily or under coercion. The infrastructure of what is known as “think tanks” was demolished, and within Belarus, their place was filled by imitators who openly displayed their bias.

Nevertheless, the idea of independent analysis of the events unfolding in Belarus and involving Belarusians, as well as the necessity of such analysis, remains real and pertinent. You can break an unflattering mirror, but you cannot erase the distinction between the truth and the new image — whatever the direction of its distortion. Living in self-deception is possible, but eventually, circumstances will evolve in a way that makes the peril of wishful thinking obvious to everyone. At that stage, it becomes impossible to rectify the situation.

This is why we believe it is vital to continue publishing our *Belarusian Yearbook*. Its mission remains incomplete until the diversity of analysis in Belarus is fully restored, which can only occur through the revitalization of all democratic institutions. Independent analysis depends on independent sociology, free media, and the freedom of NGOs and political parties to operate. Belarusian society must have not only an independent evaluation of its actions but also the opportunity to address and correct its mistakes, regardless of their severity or long-term consequences. Accurate diagnosis alone is insufficient — equally important is providing the necessary tools to effectively remedy the situation.

We are grateful to the analysts who generously shared their insights with the *Yearbook* — despite all circumstances, free

from any pressure, including from us. Over the many years since the publication of the first volume, a new generation of political scientists, sociologists, economists, journalists, and philosophers has emerged, guided by fresh approaches and their own perspectives on what and how to analyze. Today, readers have access to not just a single narrative capturing the main trends of the past year, but multiple viewpoints that collectively provide a deeper understanding of what truly happened to the country and its citizens, around Belarus, and in the lives of each one of us. We believe this diversity of perspectives is fundamentally important.

Only external observers with no direct, stable connections to those still living in Belarus might think that life there has come to a halt, that time within the country has frozen. Only those viewing life solely through personal circumstances might believe that the bond between 21st-century emigrants and their homeland has been permanently severed. Belarusians continue to be a united people, even though they live under different laws, flags, and *de facto* under different heads of state. The symbol we placed on the cover of the very first issue of the *Yearbook* — the two national flags — remains relevant; the division within national consciousness has not been overcome by either side involved in the political conflict. However, this division does not mean that Belarusian identity is lost forever. There are not two Belaruses — there is only one, regardless of the markers that may suggest shifts in either direction. There is one Belarusian people.

Therefore, we believe it is impossible to consider the processes occurring within the country and in the temporarily displaced segments of civil society as separate entities. No matter how opinions are promoted that the “diaspora,” “emigration,” “fugitives,” or “deported” — whichever term is used — have no influence on the situation inside Belarus today, it does not mean that this influence will not be palpable tomorrow. While

we cannot say exactly when this “tomorrow” will come, we are certain it is inevitable. Our project continues to speak to all Belarusians, regardless of where they are today or what viewpoints they hold. As analysts, we remain objective in our assessments.

That is what we live by.

Alexander Feduta

STATE AUTHORITIES

PRESIDENTIAL ADMINISTRATION: THE 2020 TRAUMA, PERSONALIZATION OF POWER, AND IMITATION OF ELECTIONS

Valer Karbalevich

Summary

The unresolved “2020 syndrome” remained the dominant influence on the Presidential Administration. Instead of prioritizing the urgent issues and challenges facing the country, the authorities primarily focused on neutralizing perceived or fabricated threats to the regime.

The presidential election became an attempt to break free from this “syndrome” and grant renewed legitimacy to Lukashenko’s rule. He sought a new term, among other reasons, to reaffirm his strength to the public, elites, and himself — portraying himself as the Victor. Yet, his goal was only partially achieved. His victory over artificial, caricatured opponents did not genuinely reflect his political strength.

Trends

- The regime considers brute force a versatile tool for neutralizing threats. The shift of the authoritarian system toward totalitarianism persisted;
- Lukashenko spilled the criticism of the Presidential Administration’s personnel policies into public view;
- Lukashenko’s involvement in the election suggests that the power transition process had either stalled or been entirely removed from the agenda;
- After 2020, the authorities increasingly perceived elections as a threat and danger, developing a fear of the electoral process itself.

Role of the Presidential Administration in the power system

In 2025, the position and function of the Presidential Administration (PA) in Belarus's political system showed no change. Its role has remained consistent throughout all of the 30 years of Lukashenko's leadership. In a sense, the PA can be considered the political core of the Belarusian authority. However, this is only a nominal designation, because in reality, the PA does not craft state policy. It is Alexander Lukashenko himself who formulates it. The primary role of the PA is to serve as the initial link in the chain from Lukashenko to other state institutions.

The PA's competencies encompass the preparation of state documents as well as monitoring their alignment with the overarching policy. In 2025, two directives were issued: Directive No. 11 "On improving the functioning of government and management systems, strengthening executive discipline," on April 2; and Directive No. 12 "On implementing the fundamentals of the ideology of the Belarusian state," on April 9. Within the Belarusian power structure, directives hold the status of top-level state documents. Over the course of 31 years under Lukashenko's leadership, a total of 12 directives have been adopted.

The PA is also tasked with overseeing the implementation of documents, instructions, and both written and oral orders issued by Lukashenko. Last year, this oversight proved to be ineffective, with Lukashenko himself admitting that about one-third of his directives went unfulfilled in 2025.

Additionally, the PA is responsible for personnel policy and organizing political campaigns, including elections (see below).

In mid-2024, the senior PA officials were replaced. The position of the head of Lukashenko's administration had remained vacant for nearly six months since January when Igor Sergeyenko became an MP.

Lukashenko took so long to choose because, within the Belarusian political hierarchy, the head of the PA is effectively the second most powerful figure after the ruler himself. It is crucial that this official combine political loyalty with strong managerial skills.

Additionally, the new head of the Presidential Administration faced a highly important task: to ensure the successful conduct of the 2025 presidential campaign with a guaranteed outcome.

On June 27, 2024, Dmitry Krutoi was appointed head of the PA. This choice was not surprising, as there are few influential figures within Lukashenko's circle who possess the necessary managerial capabilities. Krutoi had climbed the career ladder through roles such as minister of economy, first vice prime minister, deputy head of the PA, and ambassador to Russia.

Lukashenko once remarked at a meeting that the Belarusian embassy in Russia functions as the second government of Belarus. Its head — the ambassador — is effectively the second-in-command of the government, and in case of Krutoi, the more so because he retained the powers of a vice-premier. Given his prominent status, the new PA head was tasked with overseeing Belarus's policy toward Russia, giving him a better chance to secure Moscow's support in Lukashenko's upcoming re-election campaign.

Meanwhile, the reappointment of Natalia Petkevich as first deputy head of the Presidential Administration came as a surprise. Responsible for ideology, she had fallen out of favor after mishandling the 2010 presidential campaign. However, now Petkevich has an opportunity to redeem herself.

The overarching factor shaping Belarusian politics remained the unresolved "2020 syndrome." The trauma inflicted on the leadership by the protests was so profound that it fostered a psychological complex within the ruling elites. Consequently, they began to interpret every issue through the lens of regime security. Lukashenko saw threats everywhere. Consequently,

all policies focused on neutralizing real or fabricated threats, rather than addressing pressing issues and challenges facing the country.

The regime's uniform approach to threat neutralization was brute force. The authoritarian rule continued to evolve into a totalitarian system. Not only was the opposition dismantled as an institution and civil society structures shattered, but dissent as a fundamental principle was also criminalized. A classic police state took shape, with security forces becoming the central pillars of the political system. A comprehensive purge of the public sector was conducted, dismissing all individuals deemed disloyal. Contrary to many expectations, political repression did not wane. The regime's consolidation relied heavily on the ideological narrative of "people's unity," which entailed uniting Lukashenko's supporters, repression, and marginalizing all dissenters – effectively excluding them from the concept of "the people."

Personnel policy

As noted above, one of the primary responsibilities of the Presidential Administration is the recruitment and appointment of personnel, including placing officials in high-ranking positions. However, in 2025, for the first time during Lukashenko's rule, this function of the Administration was called into question. The criticism of the PA's personnel policy was voiced publicly. Essentially, Lukashenko expressed a lack of confidence in the PA leadership's handling of this aspect of state policy.

Following the presidential election, the government, as mandated by the Constitution, resigned, and according to the applicable procedure, the newly elected president was to form the new executive body. Traditionally, this task falls to the Presidential Administration.

However, this time, things unfolded differently. For the first time in history, Lukashenko announced during a meeting with his authorized representatives that a commission would be established to propose candidates for the new government.¹ Later, in a meeting with Natalya Kochanova, the chair of the Council of the Republic, Lukashenko again mentioned the unusual commission and revealed that Dmitry Krutoi, the head of the Presidential Administration, had been appointed as its chair.

If the commission had genuinely operated and made decisions, it would have been logical to review its findings and proposals before finalizing the composition of the new government. However, no such process appears to have taken place. There is no available information about the commission's work or any reports being presented to Lukashenko. It remains unclear whether the commission was actually established, whether it was functioning, or what the true purpose of that game was.

On November 20, during discussions on personnel matters, Lukashenko openly expressed his dissatisfaction with the work of PA Head Krutoi. He stated: "There must be no voluntarism. You can't do whatever comes to your mind, whether you're a presidential aide, head of the Administration, or anyone else. We need to consult before proposing any appointments. This way, we won't be shuffling this deck every year or every two or three years."²

So, what does Lukashenko suggest in order to address this issue? He proposes: "We need to strengthen this area within the

¹ «Встреча с доверенными лицами на прошедших президентских выборах.» *Президент Республики Беларусь*, 04 Feb. 2025, <https://president.gov.by/ru/events/vstreca-s-doverennymi-licami-na-prosed-sih-prezidentskih-vyborah>.

² «Доклад Главы Администрации Президента Дмитрия Крутого.» *Президент Республики Беларусь*, 20 Nov. 2025, <https://president.gov.by/ru/events/doklad-glavy-administracii-prezidenta-dmitria-krutogo-1763629963>.

Presidential Administration. I don't even know how — I'll leave that to you... Maybe [establish] some kind of council or something.”³

Lukashenko's instruction reflects a bureaucratic cliché — a standard response by an official to a problem: to strengthen, to increase, to expand, and to deepen. And, as with the challenge of forming the new government, to create a commission to tackle the matter.

Another example is the longstanding Commission for Pardons under Lukashenko, chaired by Deputy Head of the Presidential Administration Olga Chupris. In 2022, a migrant readmission commission was established, led by former prosecutor general Andrei Shved. Last year, its scope was expanded to include advising Lukashenko on the possible release of political prisoners. In essence, Shved's commission duplicates the functions of Chupris's commission. Once again, this raises the question: is this a sign of distrust in the structure led by the deputy head of the Presidential Administration?

Moreover, these examples highlight that procedures grounded in the Constitution and laws are being disregarded; they appear to hold little real significance in Belarus. Everything seems to depend solely on the will, desire, and often the whim of a single individual. This is a clear manifestation of a personalistic regime in its purest form.

Presidential election

The presidential election took place on January 26, 2025. Each Belarusian presidential campaign has its unique characteristics. The 2025 election, however, was notably the most uneventful in the country's history. Lukashenko justified the lack of

³ Ibid.

excitement by claiming that, unlike in the United States, there is no need for spectacle.

The main objective of that election, from the authorities' perspective, was to move beyond the so-called "2020 syndrome." They sought to demonstrate that something odd had occurred at the previous election – some anomaly, absurdity – and that everything was returning back to normal.

Lukashenko ran for another term not only for practical reasons but also to prove – perhaps even to himself – that the syndrome had been overcome. It was an opportunity to demonstrate his strength to society and the elite, and to present himself as the Victor.

Furthermore, Lukashenko's participation indicates that the transition of power was put on hold, postponed, or perhaps even taken off the agenda altogether.

However, the goal of demonstrating "Victory" was only partially realized. Following 2020, the authorities began to view elections as a threat and a source of danger, developing a deep-seated fear of the electoral process itself. For Lukashenko, the word "elections" became associated with revolution, coup, and protests rather than simply voting. Naturally, within this logic, the authorities treated the election as a military operation, fearing the ghosts of 2020. Lukashenko frequently referenced his opponents – whom he called "fugitives" – at nearly every meeting, thereby amplifying their perceived agency and influence.

To suppress any protests, the entire state apparatus was mobilized – not just security forces. Opposition participation was blocked, voting abroad was canceled, and invitations to OSCE/ODIHR observers were arranged in a way that ensured their rejection. The composition of election commissions was kept secret, as was the strength of the opposition's initiative groups. Lukashenko had imprisoned his main opponents or forced them into exile.

The regime's insecurity was further reflected in the decision to hold the presidential election six months earlier than the constitutional term, which stipulates a five-year presidential mandate. An election conducted only four and a half years after the previous one is legally classified as an "early election," which is only permissible if the current president is unable to perform his duties for some reason. The authorities offered no explanation for the need to hold the election prematurely, nor did they justify Lukashenko's decision to run again, despite his numerous promises not to seek another term.

Most likely, Lukashenko aimed to swiftly "turn the page" in his relationship with the West by scheduling the election ahead of the usual timeline. As part of this strategy, he pardoned 115 political prisoners and announced plans for further releases. The objective was to have the West recognize his regime, thereby legitimizing Lukashenko and delegitimizing Sviatlana Tsikhanouskaya. This was significant because it would allow him to argue to Western politicians that, even if they viewed her as an elected president, her five-year term had ended with the new election. Lukashenko's participation in Ukraine peace negotiations would also depend on Western recognition of his legitimate authority.

The propaganda campaign under the slogan *Nado!* (You Must) initially started as a flash mob, seemingly encouraging Lukashenko to run in the election. Over time, it evolved into the central slogan of the entire presidential campaign, emphasizing obligatory support for the incumbent leader. The slogan carried a coercive undertone, effectively mandating participation and stripping away any semblance of voluntary choice — even at the level of official propaganda. This presidential election marked a pivotal turning point, reflecting the regime's development and transition into a new phase.

On December 23, the Central Election Commission (CEC) of Belarus registered five presidential candidates: Alexander

Lukashenko, Oleg Gaidukevich, Sergei Syrankov, Hanna Kana-patskaya, and Alexander Khizhnyak. Among them, three candidates represented registered political parties.

The pre-election process was a complete sham. For instance, the collection of signatures in support of the candidates was orchestrated. Very few people approached individual pickets in the cities, and there were no reports of initiative group members going door-to-door to gather signatures.

Meanwhile, the selection of several candidates other than Lukashenko was aimed at giving the false impression that this election was no different from those in the past. Essentially, everything remained familiar: multiple contenders would collect signatures, appear on Belarusian Television (BT), and the ballot would feature numerous names.

Having sparring partners and spoilers for Lukashenko during the presidential elections is nothing new. Typically, Sergey Gaidukevich played this role. However, there was a different plan for him — he was kept in reserve in case Lukashenko's genuine opponents unexpectedly withdrew their candidacies during the campaign. Such a scenario would have left Lukashenko as the sole candidate, potentially disrupting the narrative the authorities had crafted. In that case, Gaidukevich could have served as a manufactured alternative to maintain the illusion of competition.

In the 2025 campaign, however, the spoilers took on a different role. They were intended to appear as Lukashenko's opponents while simultaneously endorsing the existing regime and its policies. In other words, they ran for president to support the sole, irreplaceable leader. While this practice is common in some Central Asian countries, it was a completely new experience for Belarus.

However, the authorities failed to develop a clear strategy for how to present these candidates or integrate them into a new narrative for the election campaign. The problem arose when

the regime itself inadvertently introduced a contradiction: by allowing several additional candidates into the straightforward, somewhat primitive Nado! campaign — focused on the cult of personality of Lukashenko — they unleashed a virus. This resulted in a dissonance — a paradox: totalitarian regimes do not permit any form of pluralism, not even superficial diversity or variability. There is only one nation and one leader. As a result, ordinary citizens struggled to understand the underlying logic. If Lukashenko's candidacy is portrayed as the only viable choice within the propaganda-driven rhetoric of political unity and cohesion, then by definition, no genuine alternative can exist. The presence of other candidates in this system is therefore nonsensical. Additionally, the public was well aware that many individuals had been punished in 2020 for supporting alternative contenders.

It is no coincidence that Lukashenko himself admitted, “people are somewhat reluctant to sign in support of another candidate.”⁴ To manage this awkward situation and implement the original plan involving multiple presidential contenders who needed to gather signatures, the authorities were forced to resort to coercion, mobilizing the state apparatus to support these other candidates. From an outsider's perspective, all of this appears quite comical.

Regarding the substance of Lukashenko's so-called “pre-election program,” it remains straightforward and unpretentious. No significant changes are anticipated; the government intends to continue with its existing policies. New external threats have emerged — Western adversaries and their satellites are attempting to embroil Belarus in a conflict — making constant mobilization essential. Nonetheless, Lukashenko positions

4 «Лукашенко уже собрано более 700 тыс. подписей.» БелТА, 14 Nov. 2024, <https://belta.by/president/view/za-lukashenko-uzhe-sobrano-bolee-700-tys-podpisej-675333-2024/>.

himself as the guardian of peace and security, assuring citizens they can sleep peacefully.

During visits to regional communities, his promises and plans appeared more pragmatic. His visions for the future often echoed reflections on the past — such as the revitalization of land reclamation projects and similar initiatives.

Lukashenko began celebrating his election victory as early as election day, January 26, during a press conference with the media. He continued to express his jubilation on February 4, after the official results were announced (according to the Central Election Commission, he received 86.82% of the votes), during a meeting with his authorized representatives. He did not hide his satisfaction, perhaps relieved that the mass protests of 2020 had not recurred: “The election went quietly and peacefully. They [opponents] are still wandering around with their mouths open, wondering how this was possible... Overwhelming support — unprecedented in history... Be sure that more than 90% of the population unequivocally supports us.”⁵

How much of these claims are strategic PR, and how much genuine confidence is there in this so-called “overwhelming support”? Does Lukashenko truly believe he has once again become the “people’s president,” as he styled himself in the 1990s and 2000s?

It is doubtful he harbors any illusions about widespread popular affection. What he calls a “normal compromise with the people” was achieved at the expense of forcing around half a million Belarusians to emigrate and sending tens of thousands to prison. The supposed “unity” was maintained through unprecedented repression, comparable to Stalinist times. There is

⁵ «Встреча с доверенными лицами на прошедших президентских выборах.» *Президент Республики Беларусь*, 04 Feb. 2025, https://president.gov.by/ru/events/vstreca-s-doverennymi-licami-na-prosed-sih-prezidentskih-vyborah?utm_source=chatgpt.com.

nothing “original” about this election; such electoral processes are characteristic of all authoritarian regimes.

It’s no coincidence that Lukashenko’s inauguration was scheduled for March 25 — on Freedom Day — carrying symbolic significance as a display of his victory over political opponents.

However, the legitimacy of this victory is highly questionable. In previous elections — aside from 2020 — Lukashenko managed to defeat serious challengers through various means. This time, he secured victory primarily over fabricated, somewhat caricatured figures, which does not reflect genuine political strength.

Conclusion

The process of the Lukashenko regime evolving toward a new, more overtly totalitarian form, along with the accompanying totalitarian tendencies, has been closely overseen by the Presidential Administration. Political repression and violence — broadly defined — have become the main tools for consolidating power. The escalation of Lukashenko’s cult of personality and the personalization of authority have objectively contributed to a decline in the status of all state institutions, including the Presidential Administration itself.

The presidential election, conducted as a complete sham of the electoral process, failed to heal the wounds left by 2020. Efforts to incorporate Lukashenko’s formal opponents into a new electoral narrative were ultimately futile. The outcome of the vote served primarily to forcibly legitimize the existing regime.

As long as Lukashenko remains in power, it is likely that the political system will stay fundamentally unchanged. The president will continue to consolidate power by replacing the functions of other government institutions — particularly the Presidential Administration, which he distrusts. Genuine change can only occur after Lukashenko leaves office.

GOVERNMENT'S STAFF SHUFFLE: NEW POSITIONS FOR OLD FACES

Olga Evseeva

Summary

In 2025, Belarus experienced a formal government renewal, while the existing management framework remained intact. Following the presidential election, Alexander Lukashenko conducted a limited personnel reshuffle, appointing Alexander Turchin as the new prime minister and transferring former premier Roman Golovchenko to the role of the governor of the National Bank. Throughout the year, officials were repositioned, economic policy controls were tightened, and the distinctions between government agencies gradually blurred. At the same time, competition among influential elite groups intensified.

Together, these developments underscore a key characteristic of the Belarusian political system: the consolidation of Lukashenko's personal authority over the state apparatus, even as formal institutions of power remain in place.

Trends

- Predominantly symbolic controlled rotation of elites;
- Cementing personalization of governance, with Lukashenko's instructions playing a central role in the economy;
- Erosion of institutional boundaries and blending of functions across various government agencies;
- Rising intra-system competition fueled by personnel reshuffles and redistribution of authority.

New prime minister, same old vertical

The year 2025 began with the formal conclusion of the presidential electoral cycle. On January 26, Lukashenko was declared

the winner once again, securing 86.8% of the vote. The election did not trigger any significant upheavals for the regime and marked the start of a formal reshuffle within the executive branch.

However, these changes were largely symbolic. Lukashenko himself referred to the new cabinet as the “new old government.”¹ Most officials retained their positions, and the key appointments primarily represented a rotation rather than a genuine renewal of the elite. Of the 42 government members, more than *thirty* were simply reappointed.

Official rhetoric emphasized the notion of a “succession of generations” in leadership. State media highlighted efforts to rejuvenate the government, yet the average age of ministers remained around 49, and gender parity was virtually unchanged — men still accounted for over 90 % of the cabinet.²

The most notable personnel development of 2025 was the appointment of Alexander Turchin as Belarus’s new prime minister. Officially, this move was framed as part of a broader effort to renew the government following the presidential election and as a key element of the so-called “generational shift.” In reality, Turchin’s appointment underscored how Belarusian public administration balances cautious personnel rotations with the tight personal control that Lukashenko maintains over the executive branch.

Turchin exemplifies the Belarusian administrative elite, bringing a diverse range of experience within the state apparatus. He previously served in the Ministry of Finance and regional authorities. In 2015, he became an aide to the president and an inspector for the Gomel Region. A significant milestone in

1 «Кадровые назначения в новый состав Правительства.» *Президент Республики Беларусь*, 03 Mar. 2025, <https://president.gov.by/ru/events/kadrovye-resenia-po-formirovaniu-ekonomicheskogo-bloka-pravitelstva>.

2 “Public Administration News Digest № 95”, *Bipart*, 2025, https://bipart.eu/picture/library/new_d_mar-apr_2025_1_0.pdf.

his career was his role in Sergey Rumas's government. Between 2018 and 2019, Turchin led the Central Office of the Council of Ministers and served as first deputy prime minister. During this period, he gained a reputation as a relatively liberal official, open to business interests.³

His name was linked to advocating for the decriminalization of certain economic offenses, efforts to ease pressures on entrepreneurship, and a supportive attitude toward developing the IT sector. Following the government reshuffle in 2020, Turchin served as head of the Minsk City Executive Committee for over five years.

Despite his prominence, Turchin's appointment did not lead to significant shifts in the country's economic policy. He publicly emphasized that the government had no intentions of implementing radical reforms. The limited moves to relax price controls were met with critical comments from Lukashenko.

Shortly after Turchin's appointment, another politically significant event occurred: a new role for the former prime minister, Roman Golovchenko. He did not exit the political scene or fall out of favor. On the contrary, Golovchenko was appointed governor of the National Bank of Belarus. This move was somewhat unexpected: Golovchenko lacked experience in banking, unlike his predecessor Pavel Kallaur. Kallaur had led the central bank for over ten years and was widely regarded as successful — an assessment shared by both independent and pro-government experts. Therefore, Golovchenko's appointment seemed to be driven more by political considerations than by professional expertise.

Nevertheless, this type of personnel rotation is typical of Lukashenko's approach to staffing: officially, a key figure leaves the government, but in reality, they often maintain considerable

³ “Якія праблемы грамадства мог бы вырашыць Турчын, калі б ён быў лібералам у цэнтры сістэмы? І ці мог бы?”, *Наша Ніва*, 12 Mar. 2025, <https://nashaniva.com/363511>.

influence and high status. Lukashenko removed Golovchenko from the prime minister's office without giving the impression of a political defeat or an intra-elite conflict. Furthermore, this appointment allowed Lukashenko to install a manager personally loyal to him, rather than an independent technocrat, at the helm of the financial regulator.

To address the lack of specialized experience in the new National Bank governor, Alexander Egorov was appointed as the first deputy governor. Egorov brings banking sector expertise, having previously led the Belarusian Development Bank and worked on economic issues within the Presidential Administration. His responsibilities include providing institutional and technical support to the new leadership of the National Bank and ensuring the stability of monetary policy management.

Nonetheless, the political message behind this appointment remains central. It is less about enhancing the independence of the central bank and more about integrating it more closely into the power structure. Lukashenko explicitly conveyed his expectation that the new leadership of the central bank would actively influence commercial banks and coordinate financial policy with the government. In this context, Egorov serves more as a technocratic counterbalance to Golovchenko's political leadership: offering professional expertise within the institution while the National Bank itself acts as a tool for executing the regime's economic strategy, as directed by the Presidential Administration.

Rotation without renewal

In 2025, alongside major personnel shifts such as the appointment of a new prime minister and governor of the National Bank, several other government reshuffles took place across various sectors. These affected both economic departments and social

and administrative agencies. Most of these changes were modest in scale and adhered to the traditional Belarusian practice of managed personnel rotation within the political system.

The economic bloc of the government did not undergo a radical overhaul. Nikolay Snopkov remained the first deputy prime minister and continued to supervise economic policy. Finance Minister Yuri Seliverstov was reappointed to his previous role. Artur Karpovich was appointed as minister of antimonopoly regulation and trade, Dmitry Kiyko assumed leadership of the Ministry of Taxes and Duties, and Yuri Chebotar became minister of economy. These shifts primarily involved rotations and promotions of officials already within the government, rather than the introduction of new managers from outside the system.

Denis Moroz was appointed as new minister of energy, having previously served as deputy minister. His predecessor, Aleksey Kushnarenko, was reassigned as the chairperson of the Minsk Regional Executive Committee. Such movements between central and regional levels of authority continue to be a common feature of Belarusian public administration.

Meanwhile, personnel reshuffles also occurred in other parts of the government. One of the most notable decisions was the appointment of Natalya Petkevich as deputy prime minister for social affairs. Many experts interpret her return to the government as an effort to strengthen social sector management amid economic challenges. Petkevich was granted broader powers and began overseeing education, healthcare, and cultural policy.⁴

Vladimir Karanik, who previously served as minister of health during the COVID-19 pandemic and later led the Grodno Regional Executive Committee, was appointed deputy prime minister. However, after only ten weeks, he was reassigned as

⁴ «Наталья Петкевич о задачах на посту вице-премьера.» *Pravo.by*, 22 May 2025, <https://pravo.by/novosti/obshchestvenno-politicheskie-i-v-oblasti-prava/2025/maj/88829/>.

chair of the presidium of the National Academy of Sciences. This move can be viewed as a demotion, highlighting Belarus's flexible personnel policy: officials, even those who make mistakes, rarely exit the public sector entirely; instead, they are often swiftly transferred to different roles.

Changes also impacted the government's central office. Valery Vakulchik, a former KGB chief and aide to Lukashenko for the Brest Region, took the position of head of the secretariat of the Council of Ministers. The appointment of security officials to civilian administrative roles has become increasingly common since the events of 2020. This trend underscores another persistent feature of Belarusian politics: the growing influence of the security apparatus within the state management system.

Alongside these decisions, additional reshuffles occurred among deputy ministers and department heads. These changes were seldom accompanied by public explanations and generally represented routine administrative rotations within the government hierarchy.

Overall, the personnel reshuffles of 2025 reveal that the fundamental structure of personal relations in high places remains stable. Shifts of officials between various positions are used to create an illusion of change, maintain system controllability, and simultaneously prevent the emergence of independent influence centers within the elites.

National Bank versus Council of Ministers: a new power configuration

By autumn 2025, signs of intra-systemic competition had become increasingly evident. Notably, relations between the new Prime Minister Alexander Turchin and the former head of government Roman Golovchenko, who now leads the National Bank, garnered attention.

Lukashenko ordered the central bank to create a special working group to analyze the economic situation. Led by Golovchenko, this group reports directly to the president. This effectively creates a parallel center for economic policy assessment outside the government. Later, Golovchenko was also appointed head of the working group responsible for preparing the country's socio-economic development plan for the next five years — a task traditionally handled by the Council of Ministers.

Overall, the gradual erosion of the functions of state institutions emerged as a defining trend of 2025. Lukashenko increasingly delegates tasks beyond the traditional scope of various agencies. For example, diplomatic negotiations with the United States are now handled by the head of the KGB, the prosecutor's office has assumed additional roles in ideology and education, and the police have taken on oversight of certain economic issues.

Simultaneously, the impact of various commissions and working groups created directly under the president has increased. This approach enables bypassing formal institutions and reinforces personal control over the state apparatus.

Conclusion

The developments of 2025 suggest a straightforward conclusion: the structure of personal relations within the Belarusian authorities remained largely unchanged despite numerous personnel shifts. The new government is more “new” in appearance than it is in substance. Most officials either retained their positions or transitioned to other roles within the existing system.

The appointment of Alexander Turchin as prime minister did not bring about a significant shift in the country's economic or political trajectory. His scope for independent decision-making

remains limited, despite his reputation as a relatively flexible and pragmatic manager.

Throughout the year, there was a clear erosion of the roles played by formal state institutions. Decision-making increasingly occurs outside traditional authority frameworks, primarily through special commissions and working groups that report directly to the president.

At the same time, competition within the elites is getting more fierce. An example is the situation surrounding Prime Minister Turchin and Governor of the National Bank Golovchenko, where some economic decisions are increasingly made outside the government. This internal rivalry does not indicate controlled “pluralism,” but rather reflects Lukashenko’s personal trust in Golovchenko.⁵

The events of 2025 demonstrate that the Belarusian administrative model remains resilient and largely unchanged. Personnel reshuffles are used to maintain control over elites and showcase government activity rather than implement genuine reforms.

⁵ «Технократы под давлением: карьерные траектории и государственный контроль в экономических министерствах Беларуси.» *Vipart*, 2025, https://bipart.eu/picture/library/econom_bloc_final_rus.pdf.

PARLIAMENT: SECURITY OFFICIALS, IDEOLOGY, AND THE WESTERN FRONT

Tatsiana Chulitskaya

Summary

In 2025, the Belarusian National Assembly (parliament) solidified its role as an auxiliary institution under a personalist regime. The newly assembled parliament, created following the 2024 “elections,” maintains a sense of continuity but is progressively made up of more members from security forces and the state’s ideological structures.

Legislative activities continue to be primarily technical and carry repressive connotations, while the parliament is gradually being leveraged as a means for ideological rallying, integration of loyalists into personnel, and garnering external political backing for the regime.

Trends

- Continued erosion of the National Assembly’s political autonomy;
- Steady increase in the number of former security officials within the parliament;
- Expansion of MPs’ ideological role;
- Use of the parliament as an extra instrument to externally legitimize the regime.

What’s new in the parliament?

Following the 2022 “constitutional reform,” the Belarusian parliament — the National Assembly — retained its fundamental powers. Simultaneously, the creation of the All-Belarusian People’s Assembly (ABPA) as the “supreme representative body of popular rule” has somewhat reshaped its role and the distribution of formal authority within the political system. Nevertheless, there

is predictably no visible competition, at least publicly, between the parliament and the ABPA. Throughout 2025, parliamentary representatives repeatedly highlighted the significance of the ABPA as a “unique form of people’s power” and described it as “the most important institution of Belarusian statehood.”

The year 2025 marked the first full year of activity for the new composition of the National Assembly, established following the “elections” — or more accurately, the appointment campaign — held on February 25, 2024. Similar to its predecessor, it is made up entirely of loyalists, despite the formal inclusion of representatives from various structures in the lower chamber — namely, the *four* remaining pro-government parties registered in the country: Belaya Rus, the Communist Party of Belarus, the Liberal Democratic Party of Belarus, and the Republican Party of Labor and Justice — as well as loyal public organizations, government-organized non-governmental organizations (GONGOs), and a significant number of non-party deputies connected to the state apparatus and the budget sector.

A key feature of the 2024 parliament was the rise in representation of former intelligence and security officials, highlighting the broader trend of securitization and militarization of governance in Belarus.¹ There are at least seven such deputies — six in the lower chamber and one in the upper — with most of them serving their first term. Among the most prominent are Igor Sergeyenko, a former first deputy head of the KGB and ex-head of the Presidential Administration; Ruslan Kosygin, a former military intelligence chief; and Alexander Barsukov, a former deputy interior minister.

Significantly, Sergeyenko subsequently assumed the role of speaker of the House of Representatives, while Valery

¹ Chulitskaya, Tatsiana, et al. *Good Governance and Public Administration in Belarus in 2014–2025*. INGAC Working Paper No. 2, Institute of International Relations and Political Science, Vilnius University, 2025, <https://www.tspmi.vu.lt/wp-content/uploads/2025/11/INGAC-Working-Paper-2.pdf>.

Gaidukevich, representing the veteran security elite, maintained his seat in the Council of the Republic. Unlike earlier convocations, where security officials participated intermittently, their presence in the current parliament has become more institutionalized, particularly within the national security committee of the lower chamber.

Another notable characteristic is the greater representation of individuals from the state ideology and propaganda machinery in the 2024 parliament. The new composition of both chambers includes pro-government media personalities, ideologists, and propagandists such as Igor Lutski, Vadim Gigin, Alexander Shpakovsky, and Alexander Lukyanov, most of whom are serving their first term in parliament.

One exception is Igor Marzalyuk, who has served multiple terms in parliament and exemplifies an earlier approach of integrating a dedicated ideological loyalist into the system. The inclusion of propagandists and ideologists in parliament suggests that, after 2020, the realms of state journalism, ideology, and propaganda have developed into more than just instruments of authority — they have also become the parliament's talent pool.

Legislative process: speed and repression

In 2025, Belarus's parliament primarily maintained a procedural role in the legislative process. The executive branch largely determined the agenda and key priorities, with parliament mainly serving to formally review and approve those initiatives. Most laws were proposed by the government, ministries, or the Presidential Administration. A notable aspect of the legislative process was the swift adoption of laws, with many bills passed rapidly, often unchanged and unanimously. Debates over socio-economic policies, including the budget, seldom resulted in

public disagreements, indicating a broader trend of power consolidation within the system.

Meanwhile, the parliament continued to institutionalize repressive policies. The most notable changes were made to the Criminal Code: under the guise of “humanization,” these amendments *de jure* broadened the possibilities for extraterritorial prosecution on “extremist” and political charges, while also establishing new grounds for liability related to criticizing the regime and spreading information about the military sector.²

Special focus was given to strengthening societal control and preserving system secrecy. Legislation was enacted to ban individuals convicted under “extremist” charges from working in the education sector or participating in activities related to children. The 2025 amnesty law did not extend to political prisoners sentenced under “extremist” or “terrorist” accusations.³

Laws were progressively designed to protect the current power hierarchy. MPs adopted measures that provided additional guarantees of inviolability for the former president and his family, while also toughening penalties for actions deemed threats to the state or attempts to discredit the political system. Concurrently, they approved initiatives aimed at increasing state control across multiple sectors:

- Mandatory fingerprinting was introduced for certain categories of citizens, including those with residence permits or dual citizenship;

² «Пересмотр санкций и усиление “гуманистической составляющей”. Депутаты во втором чтении приняли изменения в Уголовный кодекс.» *Зеркало*, 10 Jan. 2025, <https://news.zerkalo.io/economics/88060.html>.

³ «Гарантии для будущего экс-президента и никаких поправок для “экстремист_ок”: обзор борьбы с “экстремизмом” в Беларуси за январь-март 2025.» *Human Constanta*, 12 May 2025, https://humanconstantia.org/garantii-dlya-budushhego-eks-prezidenta-inikakih-poblazhek-dlya-ekstremist_ok-obzor-borby-s-ekstremizmom-v-belarusi-za-yanvar-mart-2025/.

- Amendments to the Law on State Secrets institutionalized the inclusion of ABPA structures in the system of access to classified information;
- Criminal liability was established for breaches of UAV operation regulations;
- Procedures for official business trips were made more stringent as part of efforts to improve internal discipline within the government apparatus.

Furthermore, the parliament engaged in more routine legislative activities, such as drafting new codes on healthcare and environmental protection, revising banking operations, cross-border payment regulations, and tax proposals aimed at strengthening economic stability under sanctions. It also tackled certain socially significant matters, including the regulation of vape sales.

Parliament as a tool for ideological mobilization

Throughout 2025, the parliament continued to serve as a venue for advancing state ideology and encouraging political mobilization. Legislators from both chambers actively participated in “dialogue forums,” gatherings with workplace groups, patriotic seminars, and numerous other events. This pattern was especially prominent surrounding the January 2025 “elections” of the head of state, where MPs repeatedly stressed the legitimacy of the electoral process and underscored the need for national unity in support of the current leadership.

As a result, the parliament gradually took on a greater role in endorsing the regime’s political and ideological agenda. Leaders from both chambers frequently made statements emphasizing the importance of safeguarding historical memory, resisting “foreign interference,” and strengthening patriotism.

Igor Sergeyenko and Natalya Kochanova were especially prominent in promoting similar ideological themes related to external threats, historical awareness, and social cohesion.

Council of the Republic and Natalya Kochanova as a public figure of the Belarusian establishment

The renewal of the House of Representatives and the Council of the Republic involved limited personnel changes while maintaining a core group of loyalists. The new composition featured several symbolically important figures, including former head of the pro-government sports foundation Dmitry Baskov and Irina Abelskaya, whose name is publicly associated with the personal circle of Alexander Lukashenko and his youngest son, Nikolai. Their inclusion is directly connected to their political and personal closeness to the Lukashenko family. Abelskaya's public role goes beyond the medical field, where she heads the elite medical commission of the Presidential Property Management Directorate and wields considerable administrative influence.

Meanwhile, the Council of the Republic maintained a strong level of personnel continuity, with at least 15 senators from the previous term remaining in the new roster. This approach exemplifies the management strategy typical of the post-2020 period: the regime favors limited elite renewal and avoids widespread rotation that might undermine internal stability.

Natalia Kochanova, who once again assumed leadership of the upper house, remains one of the most publicly visible figures within the Belarusian official circles. In 2025, she repeatedly conveyed messages to society about the permissible boundaries of political loyalty, stressing the importance of "order," executive discipline, and patriotic education. Simultaneously, Kochanova actively promoted the agenda of "traditional values," with many of her statements resonating with official Russian rhetoric.

As before, her public speeches highlighted her personal loyalty to Lukashenko.

Throughout her activities, N. Kochanova displayed the typical Belarusian approach of top-down governance. Both state and independent media consistently depicted her as an official directly engaged in resolving social and everyday issues, as well as implementing Lukashenko's orders. When citizens raised concerns, she publicly took questions "under control," called for "order," and reported the results to the president. In this manner, Kochanova acted as a sort of lightning rod for public dissatisfaction, channeling social grievances from the political arena into individual appeals to authorities.

Parliamentary diplomacy amid isolation

Parliamentary diplomacy has long been a key aspect of the National Assembly's activities. In the context of Minsk's continued international isolation by democratic nations, the parliament served as an additional channel for foreign policy engagement. However, this role was not autonomous; as before, MPs mainly reinforced the government's existing foreign policy rather than actively shaped it.

Meanwhile, the resumption of contacts with the U. S. President's Executive Office encouraged Belarusian authorities to pursue a thaw in relations, including with European nations. However, deputies mostly played a symbolic role, engaging primarily in ceremonial events. For example, they took part in the III Minsk International Conference on Eurasian Security, which the government utilized as a platform to demonstrate its commitment to international openness.⁴

⁴ «Лукашенко примет участие в III Минской международной конференции по евразийской безопасности.» БелТА, 28 Oct. 2025, <https://belta.by>.

In 2025, further symbolic “breakthroughs” in the diplomatic blockade occurred, such as a delegation led by Sergeyenko participating in the inauguration of the new Pope. Belarusian parliamentarians also maintained their involvement in a select few international forums, including the OSCE Parliamentary Assembly and the Inter-Parliamentary Union, providing Minsk with opportunities to showcase its ongoing international agency despite ongoing political isolation from Western countries.

Another significant activity for Belarusian MPs centered on advocating for a multipolar world order and enhancing relations with countries in the so-called Far Arc. Their primary emphasis was on collaboration with China, Cuba, and various nations across Asia, Africa, and Latin America. Delegations from the House of Representatives and the Council of the Republic engaged in meetings with representatives of “friendly states,” addressing topics related to trade and economic cooperation, industrial partnership, and support on international platforms like the United Nations.

Nonetheless, the primary focus of MPs’ international efforts remained, as in previous years, cooperation with Russia. They actively engaged in events organized by the Parliamentary Assembly of the Union State, underscoring the strategic significance of their alliance and the need to deepen integration. In 2025, the allied parliamentarians outlined plans for joint efforts in multiple areas and engaged in discussions on security issues and historical remembrance.

Members from both chambers took part in initiatives endorsed by Russia on various international platforms, such as the CIS and CSTO. They contributed to the activities of the expert council under the Inter-Parliamentary Assembly of the CIS and participated in the CSTO Parliamentary Assembly. Additionally, Belarusian parliamentarians maintained ongoing regional

by/president/view/lukashenko-primet-uchastie-v-minskoj-mezhdunar-odnoj-konferentsii-po-evrazijskoj-bezopasnosti-745414-2025/.

contacts with their Russian counterparts, negotiating cooperation and joint projects. However, the National Assembly did not develop a separate international agenda; rather, it served as a tool to support the government's diplomatic initiatives.

Conclusion

The emergence of the ABPA in Belarus's political system has further solidified the parliament's hierarchically subordinate role within the power structure. Overall, in 2025, both chambers continued to operate within a personalist management framework, exerting minimal influence on the political agenda. The National Assembly demonstrated no indications of political autonomy and mainly served to support executive decisions, promote ideological mobilization, and represent Belarus externally.

The inclusion of former security and law enforcement officials in the 2024 parliament highlights wider patterns of militarization and securitization in Belarus's political environment. These ex-security personnel and military members occupy senior positions, actively participate in international contacts, and collaborate with Russia and associated international organizations and initiatives, particularly the CSTO.

The parliament remains a key component of the regime's institutional framework. It offers a façade of formal stability, helps legitimize government decisions, and contributes to administrative and ideological mobilization efforts.

In the foreseeable future, this pattern is expected to persist. The National Assembly will continue to function as a subordinate body, primarily supporting Lukashenko's initiatives and the executive branch, with little real impact on decision-making. It will remain a mechanism for sustaining controlled authoritarian stability and ensuring the regime's legitimacy.

STATE'S SECURITY FRAMEWORK: “HARD” TIMES CALL FOR SIMPLE AND UNAMBIGUOUS SOLUTIONS

Marlev Varashchuk

Summary

In 2025, the Lukashenko regime completed the institutionalization of repression, fully subordinating the judicial system and law enforcement agencies to the mission of persecuting its opponents. A key trend was the increased influence of the State Security Committee (KGB) within the security sector (and in the broader government structure). The KGB not only assumed the role of chief negotiator with Western countries from the Foreign Ministry but also became the main talent pool for senior leadership in the prosecutor's office and investigative bodies.

Criminal legislation regressed to the point of legitimizing widespread repressive practices, including specialized court procedures, prosecution of citizens abroad, and systemic restrictions on the rights of those convicted under “extremist” articles.

The proactive involvement of security forces in the 2025 electoral campaign signified a major change in control tactics: instead of responding reactively to protests, security agencies shifted to preventive measures and exercised extensive oversight of the entire electoral process.

Trends

- A profound transformation of the governance system, in which the security apparatus has evolved from a mere tool to the foundation of statehood;
- The expanding role of the KGB, with the Foreign Ministry receding into the background in negotiations with the U. S.;
- Personnel appointments within the judiciary and security sectors as the concluding step in subordinating them to persecution interests;
- A legal collapse representing a new phase of repression against Belarusians.

KGB and Foreign Ministry: replacing instead of collaborating

For the Belarusian authorities the year 2025 is primarily marked by vigorous negotiations with the U. S., resulting in the release of many political prisoners¹ and partial lifting of the U. S. sanctions across various sectors. That said, Lukashenko repeatedly claimed he was unwilling to let political prisoners go, one reason being he believed there were none in Belarus, and asserted that such “acts of humanity” were part of negotiations with the U. S.

This ambiguous stance likely explains why KGB Head Ivan Tertel was involved in the negotiation process, wielding powers and functions beyond his usual remit. Replacing a civilian ministry with a security agency for diplomatic affairs signals its diminished role within Belarus's government system. Notably, the Foreign Ministry's negotiations with the U. S. are handled by the country's Permanent Representative to the UN Valentin Rybakov, rather than the minister or their deputies.

Human rights groups report that in 2025, 342 political prisoners were pardoned, with 189 forcibly deported from Belarus.² Nonetheless, repression continued, and over the past year, 509 individuals in Belarus were recognized as political prisoners.³ Experts conclude that the instrumentalization of political prisoners has become a routine practice.

The KGB not only compiled lists of individuals to be released for Alexander Lukashenko. Ivan Tertel personally took part in all stages of negotiations, overseeing the entire process — from arranging releases (prisoner transfers to the KGB detention

1 U. S. President Trump spoke about the release of over 500 people between May 2025 and March 2026.

2 «189 принудительно депортированных: ситуация с политзаключёнными в 2025 году в цифрах.» Правозащитный центр “Вясна”, 23 Dec. 2025, <https://spring96.org/ru/news/119347>.

3 Ibid.

center before negotiations) to deporting former political prisoners outside Belarus. These procedures were often overly harsh: prisoners were frequently transported in handcuffs and hoods, and were kept unaware of the purpose of their transfers.

By including the KGB chief in the negotiations, Lukashenko sought to somewhat “calm” the entire security apparatus, which has been engaged in systematic repression and persecution of dissenters against the authoritarian regime both inside and outside Belarus since 2020.

The enhanced role of the KGB as an agency also manifested in its broad involvement in the Lukashenko regime’s staffing decisions — both within the security services and in other state structures.

“Staffing December” and the ABPA

In 2025, the personnel policy in the security sector primarily adhered to a traditional model: regional and national leaders were typically selected from officials who had risen through the ranks within the same agency or ministry, or from related departments externally. Horizontal rotations — transfers to equivalent positions in different regions — were also frequently employed. This approach has been a consistent element of Lukashenko’s leadership in the security apparatus for many years.

For the first time, the All-Belarusian People’s Assembly (ABPA) was involved in staffing decisions, making appointments of the heads of the Constitutional Court⁴ and the Supreme Court⁵. Whereas making someone without judicial experience chair of the Constitutional Court was not unusual in over three

⁴ «Председателем Конституционного суда избран Сергей Сивец», БелТА, 19 Dec. 2025, <https://belta.by/society/view/predsedatelem-konstitutsionnogo-suda-izbran-sergej-sivets-755117-2025/>.

⁵ «Председателем Верховного суда избран Андрей Швед», БелТА, 19 Dec.

decades of Lukashenko's rule, the appointment of Andrei Shved as chair of the Supreme Court (the third one in Belarusian history) marks an uncharacteristic move in the country's personnel policy. For the first time, a person lacking judicial experience was appointed head of the Supreme Court, a role that is not merely administrative or ceremonial but involves the direct administration of justice.

In Belarus, considering the widespread use of fabricated cases, the system of general courts cannot be viewed as an institution of justice; instead, it primarily serves the interests of the security apparatus. Political loyalty to the regime and the lack of any judicial resistance to repressive practices since May 2020 indicate a shift from a "simulation" of justice to the execution of "departmental tasks." Andrei Shved's career path demonstrates that the top leadership trusts him with "difficult" cases — he was responsible for investigating the Minsk metro bombing in April 2011 — and also in "challenging" times. In September 2020, Shved was appointed prosecutor general, with the regime officially adopting the "sometimes law does not matter" pattern.

Other top-level appointments within the security sector follow a certain logic: replacing vacant positions with trusted, loyal personnel affiliated with the KGB. Dmitry Gora was appointed prosecutor general; he had headed the Belarusian Investigative Committee since 2021 and served as deputy prosecutor general since 2019. Gora's career progression began in the KGB, where he served as head of the investigative department for a *decade*.

The new head of the Investigative Committee — Konstantin Bychek — has a similar career trajectory; he previously led the KGB's investigative department for nearly two years and previously worked there as an investigator. A notable aspect

2025, <https://belta.by/society/view/predsedatelem-verhovnogo-suda-iz-bran-andrej-shved-755122-2025/>.

of Bychek's career is his media activity: since mid-2020, he has regularly commented on politically motivated criminal cases (his first prominent appearance was connected to the Viktor Babaryka case in June 2020), participated in government media programs, and appeared in propaganda films. Such behavior is unusual for security officials, especially those from the KGB.

December 2025 introduced a new trend in the appointment of the security sector's top officials: most are proven investigators from the KGB. Furthermore, in 2025, the complete subjugation of the judiciary to the dictator's personal control was achieved: for the first time, the authority of the new constitutional body — the ABPA, of which he is the chairman — was actively exercised.

Era of lawlessness

Back in 2020, lawyer and attorney Maxim Znak spoke of a “legal default” in Belarus, and although the situation may have changed since then, it has only deteriorated. The authoritarian regime has codified the persistent persecution of the politically dissenting population segment, retroactively framing widespread repressive practices as lawful.

In 2025, the primary shift in repression tactics was linked to the amended Criminal Code: for the first time, a new discriminated group — individuals accused of committing “extremist” crimes⁶ — was introduced. Using law as a cover for repression is not a new phenomenon in Belarusian political reality: for more than thirty years, Lukashenko has been battling both his direct opponents and all citizens who disagree with his policies.

⁶ «Закон Республики Беларусь “Об изменении кодексов по вопросам уголовной ответственности” от 17.02.2025 № 61-З.» Национальный правовой Интернет-портал Республики Беларусь, 17 Feb. 2025, <https://pravo.by/document/?guid=12551&p0=H12500061>.

“Political” articles in the Criminal Code, politically motivated criminal cases, and political prisoners existed in Belarus prior to 2020, but the scale and demonstrative brutality of repression had never been as extensive.

In March 2025, amendments to the Criminal Code came into effect, imposing systemic restrictions on the rights of individuals accused of so-called “extremist crimes.” A new term — “crimes of extremist nature” — was coined, a highly vague concept that covers not only “extremism” but potentially any violation. Some provisions that could improve the legal standing of the accused or allow for more lenient sentences for certain crimes could no longer be applied. Additional aggravating circumstances were added, increasing liability for crimes committed during wartime or martial law. New components of crimes were introduced, related to the unauthorized dissemination of information about the deployment and movement of military equipment (Article 375-3 of the Criminal Code), etc.

Furthermore, systemic cross-border persecution of Belarusians abroad continued: the Investigative Committee opened criminal cases against Belarusians participating in protests overseas, conducted searches, and seized property.⁷ Sentencing *in absentia* (via special procedures), involving lengthy prison terms and hefty fines that effectively result in the confiscation of all seized assets, persisted. Repression of relatives of political prisoners also continued.

As a result, by the end of 2025, an unprecedented legal framework had been established, allowing for the persecution of Belarusians both inside and outside the country. This effectively legalized the repressive practices carried out by security agencies.

⁷ «Правозащитники: Обыски проходят у участников мероприятий ко Дню Воли не только в Варшаве и Вильнюсе, но и в других городах.» Зеркало, 06 Aug. 2025, <https://news.zerkalo.io/life/105649.html>.

Special operation
“Election 2025” orchestrated
by security officials

In January 2025, during the Belarusian presidential “election,” the electoral “special operation” conducted by the security apparatus demonstrated a transformation of their core functions. Whereas in the previous 2020 electoral campaign, security forces were involved retroactively to suppress mass protests and retain Lukashenko’s grip on power, in 2025, a different approach was taken: proactively neutralizing all potential risks before and throughout the election process.

Their focus encompassed the following:

1) *Dismantling of potential protest* through preemptive detention of individuals associated with the 2020 protests and subsequent events, summoning of citizens who could potentially incite a recurrence of protests for “conversations”;

2) *Militarization of the electoral process*, transformation of polling stations into special security areas with bans on photography, open voting booths, presence of not only police officers but also mixed armed groups, along with rapid response units across multiple precincts;

3) *Digital blocks and information barriers*: Belarusian security services (primarily the Operations and Analysis Center and the KGB) launched a consistent campaign to limit access to information, including internet throttling, blocking VPN services, and restricting access to certain websites. Together with propaganda pundits, they spread a narrative that foreign intelligence agents were planning terrorist attacks during the election campaign. This message justified the deployment of special equipment and security forces in urban areas.

At this point, the Belarusian regime dreads even the slightest possibility of protests. In 2025, security forces went beyond merely safeguarding the authorities and suppressing

protests – they actively participated in imitating electoral procedures seeking to legitimize the Belarusian regime.

Conclusion

By 2026, the security forces had completely solidified an unprecedented legal framework that formally codified the existing repressive practices of persecution both within the country and abroad. The KGB broadened its scope beyond conventional intelligence and security duties.

The security agencies positioned themselves as key players in external political bargaining over political prisoners and in internal political control by ensuring an uncontested electoral process and asserting dominance in personnel decisions.

Looking ahead, we expect further consolidation of persecution against dissenters, “technologization” of repression – from detention through to release after serving sentences, “normalization” of persecution via legal codification of repressive practices, expansion in cross-border persecutions, and the use of political prisoners in negotiations with the United States.

LOCAL AUTHORITIES: RENEWAL OF THE DEAL WITH LUKASHENKO

Dzmitry Kukhlei

Summary

At the start of 2025, local authorities demonstrated their unwavering loyalty to Alexander Lukashenko, as evidenced by the smooth conduct of the presidential election across all regions. In response, the state leader reaffirmed his agreement with regional elites, empowering basic-level executive committees with additional staffing, financial resources, administrative authority, and oversight capabilities.

For years, discussions have been underway within the ruling establishment regarding the redistribution of power within the governance framework. These efforts to delegate authority have finally begun to take shape, primarily through republican governing bodies rather than at the presidential level.

Following the election campaign, Lukashenko replaced approximately *one-third* of district and city authorities. The significant rise in personnel turnover — 34%, compared to 20–25% in previous years — signals an effort to promote greater initiative among local authorities, who are now endowed with delegated powers to support regional economic development.

Amid ongoing Russian aggression against Ukraine and regional tensions, the ruling circles persist in strengthening the Grodno Region with security officials. Meanwhile, in other regions, civilian officials are regaining influence and positions, indicating a limited return to normalcy after the political crisis of 2020.

Trends

- Limited normalization and the eventual resolution of the political crisis in the regions;

- Demilitarization of regional governance while preserving the influence of security officials in the Grodno Region;
- Pseudo-decentralization: redistributing authority to district and city executive committees while Lukashenko retains control;
- Structural inertia and systemic incapacity to encourage local initiative;
- Ideological infiltration of regions by agents of the “Russian World.”

Personnel rotation in districts: a third of leaders replaced within a year

In 2025, the primary focus of personnel policy was on rotating leadership at the basic level of the vertical hierarchy, where direct administrative management of territories takes shape. Of the 67 regional appointments, 44 were made for chairpersons of local executive committees. Additionally, Lukashenko replaced two regional governors (in Grodno and Minsk), four of his aides-inspectors, and approved 17 senior officials within regional executive committees and city administrations.

The professional backgrounds of appointed officials reveal a noticeable skew, with nearly half (34) originating from the agricultural sector — such as agronomists, zootechnicians, heads of agricultural enterprises, and other former agro-industrial complex employees. Belarusian agriculture remains the most state-dependent sector, fostering a talent pool loyal to Lukashenko.

The next most prominent group comprises personnel from construction, utilities, and infrastructure sectors (11 officials). Representation from economic and industrial backgrounds is less prominent, with only nine officials, underscoring the limited role of economic expertise within the decision-making hierarchy.

In 2025, the pace of personnel rotation among district leaders was on the rise. Specifically, 44 local executive committees

(or 34%)¹ appointed new leaders — 42 districts and two cities. By the crisis year of 2020, Lukashenko had replaced about 20–25 % of district and city heads annually. In Belarusian autocracy, such rotations serve as a substitute for electoral cycles, which are typical of democratic countries. Over a span of four to five years, leadership was changed in nearly all districts, sometimes multiple times.

This acceleration in staff turnover is driven by several factors, including the completion of the electoral cycle and Lukashenko's seamless reappointment as president at the beginning of 2025.

Another contributing factor is the delegation of greater powers from the central authorities to local administrations — districts and cities with region status. The expanded competencies are intended to encourage local executive committees to achieve greater economic efficiency. Power delegation proponents expect increased initiative from local officials in regional development, rather than relying solely on administrative directives coming from the top. Most likely, these new powers, combined with funding under the “One District — One Project” program, will stimulate the growth of private businesses close to local officials.

It is also noteworthy that personnel rotations within regions are coordinated with Alexander Lukashenko himself. However, regional elites often initiate personnel reshuffles within their respective territories independently.

In the context of the ongoing war in Ukraine and worsening relations with Western countries, Lukashenko continues to appoint individuals from the security sector to oversee the Grodno Region. Yuri Karaev, the former interior minister, was appointed head of the regional executive committee. Since 2020, Karaev had served as Lukashenko's aide-inspector for the Grodno

¹ Total of 128 basic-level administrative and territorial units (118 districts and 10 regionally governed cities).

Region. He was succeeded by another former security official, Konstantin Burak.

When appointing Karaev as governor of Grodno Region, Lukashenko openly acknowledged that one of the reasons was the “situation on the western borders” and Karaev’s security background. Traditionally, Lukashenko has been cautious about this northwestern region due to the significant Polish minority, including in leadership roles, and concerns regarding the loyalty of the local population.

In contrast, the newly appointed presidential aides-inspectors in other regions do not possess security backgrounds. Lukashenko’s aides for Brest, Vitebsk, and Gomel Regions — Alexander Lomsky, Vladimir Yurgevich, and Ruslan Parkhamovich, respectively — come from agriculture or construction rather than security services.

Notably, in Brest Region, Valery Vakulchik, a security official who served as KGB chief from 2012 to 2020, was replaced by an agricultural specialist as the presidential aide-inspector. These personnel changes indicate that Lukashenko is gradually “turning the page” on 2020, perceiving the regional political crisis as having been resolved.

The personnel reshuffle in 2025 is distinctly different from the measures implemented during the political crisis triggered by the post-election protests of 2020. For instance, in 2021, Lukashenko sought to tighten control over the regional elite by appointing security personnel to key positions within regional executive committees nationwide.²

Most of the individuals appointed as district executive committee heads have backgrounds in agriculture. However, some come from diverse sectors, including security agencies — though such cases are relatively rare. For example, Nikolai Budnevich,

² Кухлей, Зміцер. “Мясцовыя ўлады: год вертыкальнага яднання”, *Наше мнение* / *Белорусский ежегодник 2022*, <https://nmn.media/year-book/2022/page5.html>.

head of the Shumilino executive committee, graduated from the Belarusian State Agrarian Academy and the Academy of the Ministry of Internal Affairs. His career began in agriculture, followed by work in the department combating economic crimes, and he eventually led the district's criminal investigations department. Out of the 44 heads of local executive committees appointed in 2025, only one has a purely security background – Vladimir Antonenko, head of the Zhitkovichi District, who was transferred from the Narovlya District executive committee, which he had led since 2021.

Additionally, among those approved by Lukashenko as district executive committee heads in 2025, there are no women. The head of state has only authorized the appointment of four women to secondary leadership roles within regional and city administrations. Lukashenko has publicly expressed concerns about appointing women to high-ranking positions.³

In this way, Lukashenko has adapted the late-Soviet-style administrative and personnel system to fit his personal governance model. The main goal of regional staffing policy is to maintain manageability, predictability, and stability of the regime. Despite efforts to promote and stimulate business activity in the regions, this approach has led to economic stagnation.

Lukashenko's alliance with the local elite: consolidating staffing at the expense of Minsk officials

In 2025, there was a noticeable increase in the control exerted by local authorities over all aspects of regional life. Following the presidential campaign, Lukashenko issued Decree No. 74 on February 21, 2025, titled “On Strengthening the Role of

³ «Рассмотрение кадровых вопросов.» *Президент Республики Беларусь*, 27 Mar. 2025 <https://president.gov.by/ru/events/rassmotrenie-kadrovyyh-voprosov-1743066396>.

Chairpersons of Basic-Level Executive Committees in Regional Development.”⁴ The key innovations introduced by this decree include:

- Financial: Chairs of district executive committees are authorized to manage remaining balances from the previous year and make amendments to the budget;
- Administrative: Procurement processes involving state contractors were simplified, and regulations for sand extraction were relaxed;
- Personnel: The appointment and dismissal of organizational leaders – both in the public and private sectors – within subordinate territories now require coordination with the executive committee chairs;
- Control and accountability: Executive committee chairs gained authority to issue directives to address legal violations, with personal liability for their orders, personnel decisions, and directives.

Through his decree, Lukashenko empowered local executive committee chairs with additional personnel authority. This includes the power to approve leaders of organizations of all ownership types, as well as state territorial organizations (excluding the KGB). This represents a significant expansion of the powers granted to local authorities by the Belarusian leader. On the one hand, this increases their influence in dealings with businesses and reduces the role of ministries and agencies in shaping the personnel policies of local enterprises and organizations. On the other hand, these measures heighten officials’ accountability to the central government in managing subordinate territories and strengthen political loyalty, including among local businesses.

⁴ «Указ Президента Республики Беларусь от 21 февраля 2025 года № 74 “Об усилении роли председателей исполнительных комитетов базового уровня в развитии регионов”.» *Эталон Онлайн*, 19 Mar. 2025, https://etalonline.by/document/?regnum=p32500074&q_id=2519915.

Notably, small and medium-sized enterprises were among the primary drivers of the 2020 protests. After suppressing large-scale rallies, the Lukashenko regime introduced a series of restrictive measures targeting this social group. For example, in Minsk, the opportunity to register individual entrepreneurs only resumed on October 1, 2024. Between August 17, 2021, and September 30, 2024, registering this type of activity in the capital was impossible “due to technical reasons,” mainly as a response to the support for the protest movement).⁵

It should be highlighted that Decree No. 74 effectively establishes a mechanism of semi-coerced civic participation and social obligations for businesses in urban beautification. Specifically, cleanliness and order are regarded as Belarus’s defining features – traits that propaganda seeks to promote as a result of Lukashenko’s leadership.

In this manner, the autocrat is refining the existing political structure, where he positions himself as an intermediary between local authorities and national governing bodies – including the government, ministries, agencies, and the All-Belarusian People’s Assembly. Lukashenko himself emphasizes the increased independence of district and city elites: “We’ve learned: no matter who comes from Minsk – they issue directives to district executive committee chairs. But they are not subordinate to them. Therefore, proper order must be maintained.”⁶ These measures relate to Lukashenko’s longstanding commitment to shifting powers between the central government and regional authorities.

⁵ «В г. Минске приостановлена регистрация ИП.» *Бизнес портал Минска*, 20 Mar. 2026, <https://invest.minsk.gov.by/ru/novosti-i-meropriyatiya/498-20210820-v-g-minske-priostanovlena-registratsiya-ip>.

⁶ «Рассмотрение кадровых вопросов.» *Президент Республики Беларусь*, 20 Nov. 2025 <https://president.gov.by/ru/events/rassmotrenie-kadrovyyh-voprosov-1763628884>.

In turn, Lukashenko aims to preserve the long-standing tested governance system in which district and city leaders are controlled by the “trio” of regional overseers: the chair of the regional executive committee (the top official in the region), envoys, and aides-inspectors. All are appointed by and directly report to the head of state.

Lack of initiative within the vertical:
“One District – One Project” program, investments,
and Decree No.74

A new mobilization initiative launched in 2023 had already begun to lose its relevance in the eyes of the Belarusian leadership by 2025. The primary objective of the project, as understood by authorities, was to boost employment in small towns and settlements. However, by 2025, unemployment had reached historically low levels. It was rather the other way round: regional labor shortages were becoming increasingly acute.

At the same time, the administration anticipated grassroots initiatives – active proposals from executive committees. Yet, the government publicly recognized that, when compiling the project list, it received few proposals from many districts and was compelled to impose projects from the top down. This reflects the longstanding cautiousness of the Belarusian elite within Lukashenko’s established power system regarding taking initiative. This tendency was further exacerbated by the prolonged authoritarian crackdown, which involved extensive purges and repression.

Despite these challenges, the government managed to assemble a package of 129 investment projects based on the “One District – One Project” principle, totaling BYN 4.3 billion. In February 2025, the first deputy prime minister announced that

small and medium-sized businesses were responsible for executing more than half of these projects (116 out of 208).⁷

The ruling elite is compelled to support the development of the private sector given the decline and unprofitability of the state sector, despite the head of state's cautious stance on private entrepreneurs. Simultaneously, Lukashenko seeks to reinforce the loyalty of local businesses through additional oversight by local administrations — by empowering them to approve heads of private enterprises and increasing their personal responsibility.

Despite Lukashenko's regular efforts to mobilize local leadership, the current power system constrains initiative within the local vertical. This is evident in the distribution of foreign direct investment (FDI): regions demonstrate minimal interest in attracting FDI. Minsk accounts for nearly half of the total — USD 7.085 billion. This is understandable, given that the capital remains the primary economic hub, hosting banks, IT firms, corporate headquarters, and the main financial flows.

In contrast, regions significantly underperform in FDI attraction. The breakdown of FDI by region in USD million is as follows: Brest — 592.2, Gomel — approximately 768.2, Vitebsk — 818.8, Mogilev — 1,240, Grodno — 1,523, Minsk — 3,807.⁸ The higher investment volume in the Minsk Region is mainly due to its proximity to the capital.

The government intends to encourage local leadership initiatives by decoupling the level of budget subsidies from the amounts of revenues of local budgets in 2026. Consequently, in drafting the republican budget for 2026, the authorities are

⁷ «Встреча с представителями частных предприятий.» *Президент Республики Беларусь*, 17 Feb. 2025, <https://president.gov.by/ru/events/vstreca-s-predstavitelami-castnyh-predpriatij>.

⁸ «Беларусь завалили иностранными инвестициями.» *Белорусы и рынок*, 08 Mar. 2026, <https://belmarket.by/news/ca2f03ab-ec82-427c-a2aa-95ffa924d771>.

expected to allocate regional subsidies at least at the level of 2025.

Furthermore, district and city executive committees (basic level) gained expanded financial powers under Decree No. 74. This includes the ability to allocate accumulated local budget reserves without regional approval under certain conditions.

These measures represent a positive step toward encouraging local executive bodies to find sources and opportunities for increasing local revenues. However, they are unlikely to significantly alter the motivation of the local elite, which, after years of Lukashenko's rule, has become accustomed to strict vertical control. An increase in personnel turnover is unlikely to substantially improve economic efficiency locally.

Cross-border cooperation of regions: Russia's dominance

Prior to 2020–2022, Belarusian regions benefited from significant investments through participation in European cross-border cooperation programs. Beyond financial gains, these initiatives promoted experience exchange and fostered contacts between European and Belarusian officials. The ruling elite, especially in western regions, gradually aligned with European standards of transparency and citizen engagement.

However, following the events of 2020 and especially February 2022, cooperation with Europe minimized. Consequently, EU projects valued at tens of millions of euros in sectors such as utilities, healthcare, and environmental protection were frozen in the regions. The closure of border crossings caused a sharp decline in tourism and contacts with Poland, Lithuania, Latvia, and Ukraine, along with the suspension of cultural and educational exchanges — especially impacting Belarus's border regions.

Belarusian cities lost their ties with European partners primarily after the Kremlin's invasion of Ukraine in February 2022, rather than as a response to internal repression. The same applies to cross-border initiatives and European assistance.

In 2025, local authorities failed to restore cross-border cooperation and contacts with European cities. Moreover, city leadership organized activities in line with the foreign policy priorities of official Minsk, thus showing no noticeable activity in the European track amidst ongoing isolation and sanctions against Lukashenko's regime.

Belarusian cities compensated for losses in the European dimension by strengthening ties with Russian regions. In the context of wartime hysteria, Z-propaganda increasingly penetrated Belarusian provinces through expanded contacts with Russian partners.

Official Minsk emphasizes that regional integration with Russia helped resist the pressure of sanctions and facilitated import substitution. However, Belarus–Russia cooperation created other risks and negative implications for Belarus.

In place of European influence, a network of pro-Russian clubs, organizations, and media has expanded across Belarusian regions. Nearly all regional centers host Russian cultural centers known as “Russian Houses” – Brest, Gomel, Grodno, and Mogilev (where its status remains uncertain) – along with the capital city. These operate under the auspices of Rosotrudnichestvo, the Federal Agency for the Commonwealth of Independent States Affairs, Compatriots Living Abroad, and International Humanitarian Cooperation. Through its regional branches, the agency seeks to shift the loyalty and cultural identity of Belarusians toward Russia.

The cooperation frameworks between Belarusian cities and regions and their Russian partners are expanding, including:

- The XII Belarus–Russia Regional Forum, held in Nizhny Novgorod on June 25–27, 2025;

- Congresses of small towns from Belarusian and Russian regions, designed to reinforce the institutional architecture within the Union State;
- The Kupala Night festival in Alexandria, which has been organized under the Union State's patronage since 2023. In 2025, the event was heavily infused with propaganda narratives emphasizing the cult of the Great Patriotic War, the unity of Belarusian and Russian peoples, and traditional values — interpreted through the lens of “Russian World” ideologists.

The enhanced cooperation between Russian and Belarusian regions, coupled with the spread of Russian propaganda, is yielding tangible results. For instance, the head of the Lida District executive committee openly voiced support for Russian aggression in Ukraine and demonstrated allegiance to Russia.⁹ Similar patterns are emerging in other parts of the country, though unevenly. Through the use of “soft power” and cross-border cooperation, the Kremlin seeks to strengthen the ties of Belarusian regions to Russia.¹⁰

Conclusions

In 2025, personnel and institutional policies reflected an adaptation of the authoritarian regime through the controlled reinforcement of the local administrative hierarchy. Following the resolution of the political crisis, the influence of regional elites has returned to pre-crisis levels. The expansion of authority for

⁹ «Глава Лидского райисполкома заявил, что его сердце “всегда принадлежало” не Беларуси, а другой стране.» *Зеркало*, 13 Aug. 2025 <https://news.zerkalo.io/economics/106170.html>.

¹⁰ “Паміж Страсбурам і Масквой: транспамяжнае супрацоўніцтва беларускіх рэгіёнаў.” *IDSMBEE*, 23 Sept. 2025, <https://idsmbec.org/tpost/lmnnylmes1-five-years-of-confrontation-quo-vadis-be>.

district and city executive committees is balanced by heightened control and accountability to central authorities.

The current model of relations between the regions and the central government enables the regime to maintain short-term stability and manageability. However, this approach contributes to socio-economic stagnation in the regions, increased reliance on Russia, and a gradual decline of the state management system. These trends could prompt the Kremlin to intervene effectively in the event of a new political crisis, potentially leading to the disintegration or paralysis of Belarusian governance.

FOREIGN POLICY

BELARUS IN EUROPEAN UNION POLICY: SANCTIONS, SECURITY, AND THE LIMITS OF PRAGMATISM

Alexander Freidman

Summary

The EU's approach to authoritarian regimes is typically guided by two primary considerations: normative principles and pragmatic interests. On one side, Brussels emphasizes its commitment to democracy, human rights, and the rule of law; on the other, it considers geopolitical realities such as energy security, regional stability, and strategic competition with other global centers of power. As a result, the EU's stance can sometimes appear selective.

Accusations of "double standards," including from Minsk, are partly justified: the level of pressure exerted on a regime depends not only on its internal policies but also on how strategically important that country is to Europe and whether the EU is actually capable of impacting its policies. For instance, pragmatism often guides the EU's actions regarding Azerbaijan, while in the case of Belarus, the normative approach continues to dominate, enhanced by Europe's limited ability to influence the country that remains politically and economically dependent on Russia.

Trends

- The EU's sanctions are maintained without any visible prospects for easing;
- The Lukashenko regime is perceived as a political "partner" with limited agency;
- The "normative" approach dominates over the "positive" approach in the EU's policy on Belarus (by analogy with the approach of the Trump administration).

Crime after punishment: an agent with limited agency

The August 2020 presidential election and the subsequent mass protests, which were harshly suppressed by the Belarusian authorities, sparked a deep crisis in Minsk's relations with the European Union and shattered the hopes for rapprochement and cooperation that had emerged in the latter half of the 2010s. Widespread internal repression, the forced landing of a *Ryanair* passenger flight from Athens to Vilnius in Minsk, and later the migration crisis at the EU borders, orchestrated by the Lukashenko regime in late 2021, further severely worsened the situation.

Lukashenko's short-sighted and likely Moscow-coordinated attempt to coerce the EU into engaging in dialogue and lifting sanctions through blackmail and provocation failed: in 2021, the EU's sanctions regime against Belarus was substantially tightened. In 2022, following Russia's full-scale invasion of Ukraine — where official Minsk backed its ally — political and economic pressure from the EU reached an entirely new level. Although Belarus is not directly involved in the Kremlin's "special military operation," it continues to provide Russia with political, economic, and military support, including helping to circumvent Western sanctions and expanding military-technical cooperation.¹

The Zapad joint Russia–Belarus military exercises, invitation extended to Wagner Group PMC fighters following the June 2023 mutiny, deployment of Russian tactical nuclear weapons and 'Oreshnik' intermediate-range ballistic missile in Belarus, incidents at the border with the European Union — including the use of weather balloons for cigarette smuggling — and the

¹ "Belarus in the Shadow of Russia's War in Ukraine." *CSS Analyses in Security Policy*, № 373, Mar. 2026, ethz.ch/content/dam/ethz/special-interest/geiss/cis/center-for-securities-studies/pdfs/CSSAnalyse373-EN.pdf.

aggressive rhetoric of Belarusian leadership have all reinforced the view of Belarus as an instrument of Russian policy against Europe – completely dependent on Moscow or, at best, highly constrained in its autonomy.

Scenarios of potential future Russian aggression against NATO member states prevalent among European experts regularly name Belarus a possible springboard for invasion.² Consequently, the European Union harbors serious doubts about the sovereignty of the Lukashenko regime in making security decisions deemed crucial for the region.

Why can't the Azerbaijani “pattern” be used?

Against the backdrop of the U.S.-Israeli military operation against Iran, on March 11, 2026, European Council President António Costa paid an official visit to Baku. During talks with President Ilham Aliyev, prospects for expanding economic and political cooperation between the European Union and Azerbaijan were explored. Costa described Azerbaijan as a “key partner” of the EU and invited the Azerbaijani leader to visit Brussels.

The heightened focus on Azerbaijan is driven by several factors: its increasing importance as an energy supplier to Europe, complicated relations with Moscow, its strategic position on the Iran border, and close ties with the U. S. and Israel.³ The conspicuously friendly tone of the contacts has elicited mixed

² Vehlewald, Hans-Jörg, “Militärhistoriker Prof. Sönke Neitzel: „Das könnte unser letzter Sommer im Frieden Sein.“ *Bild*, 22 Mar. 2025, <https://www.bild.de/politik/inland/putin-angriff-historiker-warnt-koennte-letzter-friedenssommer-sein-67d84e9a7de6aa748383cded>.

³ “EU-Azerbaijan Relations: From Normative Divergence to Strategic Convergence.” *Redemos*, 18. Sept. 2025, <https://redemos.eu/2025/09/18/eu-azerbaijan-relations-from-normative-divergence-to-strategic-convergence/>.

reactions among Azerbaijani dissidents and European human rights advocates. Human rights concerns and authoritarian tendencies, which had previously been regularly highlighted by Brussels, were not on the table and did not impede the rapprochement between the two sides.⁴

The Azerbaijani example is relevant in the context of Belarus. At first glance, there appears to be no connection, but closer analysis reveals that Minsk is aiming to follow a similar model: normalize its relations with the European Union and leverage economic and political benefits without implementing domestic reforms that could weaken the authoritarian regime. Unlike Ilham Aliyev, his long-standing partner Alexander Lukashenko has been unable to achieve this. The reason lies not only (and perhaps not even primarily) in the repressive nature of the Minsk regime but also in its close ties with Moscow and the consistent perception of Belarus as entirely dependent on the Kremlin across several key dimensions.

This perception, combined with an unfavorable political environment — most notably the war in Ukraine — significantly restricts the prospects for normalizing the relationship between Minsk and Brussels. Although Belarus borders the European Union, it holds a secondary position in Brussels' foreign policy priorities. The fact that the approach of sanctions pressure has not led to substantive changes in Belarusian policies, combined with the noticeable increase in Russia's influence over the country in recent years, has sparked discussions about possible adjustments to the European strategy toward Minsk.⁵

4 "Aliyev meets European Council President Costa in Baku." *OC Media*, 12. Mar. 2026, <https://oc-media.org/aliyev-meets-eu-council-president-costa-in-baku/>.

5 "Transforming Belarus from a Russian Asset to a Buffer State for European Security." *Chatham House*, 14 Jan. 2026, www.chathamhouse.org/2026/01/transforming-belarus-russian-asset-buffer-state-european-security/what-are-main-influences.

Trump's "template" as a new approach

The debate over revising the European strategy was also prompted by a shift in U.S. policy following Donald Trump's return to the White House in January 2025. Viewing Lukashenko as a potentially "useful" factor in resolving the war in Ukraine and aiming to weaken Belarus's ties with China — not Russia — Washington embarked on normalization of its relations with the official Minsk regime. This approach led to the release of over 500 political prisoners, who were subsequently forcibly deported from Belarus.

Democratic circles are divided on the U.S. policy. Former political prisoners Maria Kalesnikava and Viktor Babaryka, released through contacts between Washington and Minsk, recommended that the European Union adopt a similar approach, believing that such steps could improve conditions in Belarus, help reduce Russian influence, and increase the chances of preserving Belarusian sovereignty.⁶ In contrast, Belarusian democratic leader Sviatlana Tsikhanouskaya remains skeptical about engaging with the Lukashenko regime and advocates for maintaining, or even heightening, pressure — viewing sanctions and international isolation as the most effective means of countering the official Minsk regime.⁷

Although the Belarusian authorities will hardly embrace the proposals made by experts, including suggestions from Kalesnikava and Babaryka aimed at softening the repressive policies and partially revising Belarus's foreign policy, as well as the idea for dialogue between democratic forces and regime

⁶ "Europe risks driving Belarus closer to Putin, says freed Opposition Leader." *Financial Times*, 19 Jan. 2026, <https://www.ft.com/content/3a0f83f7-f99c-4ea4-8c12-8af408ecf84a?syn-25a6b1a6=1>.

⁷ «Тихановская обсудила с главой МИД Латвии 'сохранение жёстких санкций' против режима Лукашенко.» *Pozirk*, 13 Mar. 2026, pozirk.online/ru/news/179230/.

representatives, the very fact that a discussion is ongoing about revising the EU's current course offers Minsk a certain (though very limited) optimism about the future.

Point of stalemate:
stubbornness that yields no reward

The Lukashenko regime continues to pursue a contradictory policy toward the European Union. Radical anti-European narratives remain prevalent in state propaganda, alongside sharp, often insulting statements by Lukashenko and some influential officials. However, these statements are frequently paired with calls for an “equitable dialogue,” which the Belarusian authorities claim could help address longstanding issues in bilateral relations.⁸

At the same time, Minsk openly states that its primary diplomatic goal is the lifting or significant easing of sanctions imposed by the EU after 2020. Contacts with the EU are maintained both publicly – such as with Hungary and Slovakia – and less visibly, mainly behind the scenes, including with Poland, Lithuania, and France. Nonetheless, it is premature to speak of any serious breakthroughs or fundamental shifts in the EU's policy. A lack of trust in Alexander Lukashenko, his reluctance to change course, negative experiences of previous normalization efforts, the perception of his regime as a “Russian puppet,” and the ongoing war in Ukraine all severely restrict the space for meaningful dialogue.

In its efforts to improve relations with Europe, the Belarusian authorities rely on the United States and its influence on European partners. While the EU monitors Washington's actions, it

⁸ «Беларусь и ЕС – диалог возможен? Пока на Западе спорят, мы заглянули на 10 лет вперед.» БелТА, 20 Nov. 2025, belta.by/world/view/belarus-i-es-dialog-vozmozhen-poka-na-zapade-sporjat-my-zagljjanuli-na-10-let-vpered-749797-2025/.

avoids making public assessments. For instance, in May and July 2025, members of the German Bundestag Stefan Keuter, Steffen Kotré, and Jan Wenzel Schmidt (all for the Alternative for Germany) submitted so-called “small inquiries” to the federal government, asking about Berlin’s stance on potentially applying the U. S. experience in Belarus. The German federal government reaffirmed that the liberation of all political prisoners in Belarus remains its priority but declined to comment on U.S. actions. Statements by Chancellor Friedrich Merz also suggest that Germany and the EU currently have no plans to follow Washington’s lead.⁹

The different approaches are due not only to Donald Trump’s “specific” political style and the fact that the U.S. has largely ceased promoting democratic values but also geographical and strategic considerations. For the U. S., Belarus is part of the Russian-Chinese “axis of autocracies.” In this context, contacts with Minsk are seen as a way to gather information on Moscow’s positions or as a communication channel with the Kremlin. For the EU, the situation is different: Belarus is a neighbor whose actions directly affect the security of member states, especially Poland and the Baltic countries.

The European Union is interested in maintaining good neighborly relations with Belarus but is uncertain that concessions from Lukashenko will help achieve this. Furthermore, key security issues are effectively beyond the scope of the Belarusian authorities, as final decisions regarding the deployment of Russian nuclear weapons or new missile systems are made in Moscow, not Minsk.

Brussels consistently stresses that sanctions can only be lifted once the fundamental reasons for their implementation are addressed, such as ending repression, stopping the use of

⁹ Фридман, Александр. «Политика Берлина по отношению к Беларуси остаётся инертной. Изменится ли она с приездом в ФРГ Бабарико и Колесниковой?» *Pozirk Online*, 22 Dec. 2025, pozirk.online/ru/longreads/169128/.

migration as a pressure tactic, and halting support for Russia's war against Ukraine. None of these conditions are currently met. This further diminishes the prospects for dialogue with Minsk and allows the EU, unlike in the case of Azerbaijan, to emphasize democratic values.

Conclusion

The constraints on the EU's policy toward Belarus are driven not only by regulatory considerations but primarily by security concerns. Amid the ongoing war in Ukraine and the deepening integration between Moscow and Minsk, Belarus is viewed through the prism of Russian strategic interests. With this situation continuing, prospects for improving relations with the EU remain highly vague. Only drastic changes in the regional security framework — most notably the end of the war — could pave the way for a fundamental reassessment of the EU's approach.

The Azerbaijani model for warming relations remains unrealistic for the Lukashenko regime. The EU adopts a pragmatic stance on Azerbaijan, expanding cooperation despite human rights concerns, while toward Belarus, a hardline approach persists due to its dependence on Russia and its role in the conflict against Ukraine. Minsk seeks to emulate the “Azerbaijani model” of normalization without implementing internal reforms, but this is hindered by sanctions, a crisis of trust, and perception of Belarus as the Kremlin's puppet.

Even amid some easing of tensions between the U.S. and the Belarusian authorities, the EU is not ready to alter its position, tying any potential rapprochement to the end of repression and a change in Belarus's political course. Under these conditions, a meaningful improvement in the relationship between Belarus and the EU remains unlikely.

BELARUS — RUSSIA: FIFTY ASPECTS OF DEPENDENCE

Yury Drakakhrust

Summary

In 2025, Belarus's dependence on Russia continued to intensify, including in the military-strategic sphere, where a prominent symbol of this was the deployment of Russian 'Oreshnik' intermediate-range hypersonic ballistic missiles in Belarus at the end of the year. Another significant development was the ratification of the Agreement on Security Guarantees within the Union State, marking the first time Russia extended its nuclear security commitments to an ally beyond its own territory not only in the event of a nuclear attack against it.

In terms of institutional economic cooperation, notable advances included the creation of a unified electricity market and the establishment of a supranational tax committee.

Sociological surveys recorded a growing prevalence of pro-Russian sentiments among the Belarusian population.

Trends

- Growing integration in the military-strategic sector;
- Russia's increasing engagement in shaping Belarus's regulatory, legal, and administrative frameworks related to tax and customs;
- Belarus's deepening infrastructural, logistics, and trade reliance on Russia;
- The emergence of a partial "reverse" dependence of Russia on Belarus within the oil refining and petroleum products industries;
- An upsurge in pro-Russian sentiment in Belarus, driven by extensive cultural outreach from Russia.

Lukashenko's election

In 2025, Belarus conducted its presidential election. For the first time in bilateral relations, Russia openly and decisively expressed its preferences early in the process. On October 23, 2024, Lukashenko announced his intention to run for re-election. Just two days later, Dmitry Peskov, Russian presidential spokesperson, stated: “I am confident that everyone in Russia will support Alexander Grigoryevich’s candidacy.” Russian President Vladimir Putin was among the first world leaders to extend congratulations to Lukashenko on his electoral victory.

Nuclear “umbrella” and potential military bases

Russia’s previous nuclear doctrine allowed for the use of nuclear weapons in response to a nuclear attack on Russia and its allies, as well as a “conventional” attack that “threatens the very existence of the state.” The revised doctrine, adopted in 2024, expanded these guarantees to include Belarus in case of conventional attacks. This new framework was incorporated into the Treaty on Security Guarantees within the Union State, signed in 2024 and ratified in 2025.¹

Under Article 5 of the treaty, “in the territory of the Republic of Belarus, military and other facilities of the Russian Federation may be established, and Russian military formations may be deployed.” This creates a legal framework for expanding Russia’s military presence in Belarus. Currently, only two Russian

¹ «Договор между Российской Федерацией и Республикой Беларусь о гарантиях безопасности в рамках Союзного государства.» Министерство иностранных дел Российской Федерации, https://www.mid.ru/ru/foreign_policy/international_contracts/international_contracts/2_contract/62699/.

military facilities are operational in Belarus: the Volga Radar Station near Gantsevichi and the 43rd Vileyka Communications Center of the Russian Navy, both active since the 1990s.

As part of the agreement, Russia deployed an ‘Oreshnik’ missile system in Belarus. Official Minsk cited regional security concerns amid rising tensions as the rationale for this move. The missile complex became operational in Belarus in December 2025.² Although the exact locations of the launchers were not disclosed, it was stated that they were situated in positions deemed “most advantageous” from a tactical perspective.

In 2023, Putin announced that Russia would deploy tactical nuclear weapons (TNWs) in Belarus. In 2024, Lukashenko claimed that Russian TNWs were already stationed in the country. However, there has been no independent confirmation or verification from independent researchers, Western governments or intelligence agencies.

Belarus hosts Russian Iskander short-range ballistic missile systems and Sukhoi Su-30 fighter aircraft capable of carrying nuclear weapons. In March 2025, satellite imagery revealed expanded infrastructure at the Osipovichi base, including new fencing, loading platforms, and air defense systems — suggesting preparations for storing and potentially deploying TNWs.³

Overall, Moscow appears to be using the threat of deploying nuclear weapons in Belarus as a form of pressure, while stopping short of actual deployment or maintaining ambiguity. The possibility of establishing military facilities in Belarus is also employed as leverage. This tactic may be motivated by either

2 «Ракетный комплекс “Орешник” заступает на боевое дежурство в Беларуси.» БелТА, 18 Dec. 2025, <https://belta.by/president/view/raketnyj-kompleks-oreschnik-zastupaet-na-boevoe-dezhurstvo-v-belarusi-754924-2025/>.

3 “У Асіповічах разбудоўваюць інфраструктуру для расейскай ядзернай зброі? Спадарожнікавыя здымкі.” *Радыё Свабода*, 24 Mar. 2025, <https://smarturl.click/2qnbD>.

Lukashenko's reluctance or Moscow's belief that the mere threat of placing TNWs is more beneficial than actual deployment.

Zapad 2025 exercise

Belarus hosted the Zapad 2025 Russian–Belarusian joint strategic military exercise between September 12 and 16. The event raised concerns in the NATO countries neighboring Belarus, as well as in Ukraine, amid fears they could escalate into an attack from the territory of Belarus on Ukraine or NATO members, similar to the 2022 Union Resolve Exercise.

In May, *three months* prior to Zapad 2025, the Belarusian authorities announced a revision of the original scenario, indicating that the exercise would now be conducted deeper within Belarus.⁴ They also reported a reduction in the number of troops involved, with approximately 6,000 Belarusian and 1,000 Russian soldiers participating.

On September 10, the day before the exercise began, *nineteen* Russian drones crossed into Polish territory, with some originating from Belarus. In response, Warsaw closed its border with Belarus, including rail links. The border was reopened on September 25, nine days after the conclusion of the drills.

Reports indicated that the exercise involved practicing the deployment of nuclear weapons and the use of 'Oreshnik' intermediate-range hypersonic ballistic missiles. However, contrary to concerns, the maneuvers did not escalate into an invasion of neighboring countries, as had occurred in February 2022. It remains unclear whether Minsk deliberately shifted to a less aggressive scenario in coordination with Moscow or if this decision was made solely by the Russian leadership.

⁴ «Хренин: Мы приняли решение о снижении параметров учения “Запад-2025” и переносе его основных манёвров вглубь страны.» *Зеркало*, 28 May 2025, <https://news.zerkalo.io/economics/100339.html>.

Cooperation in the military-industrial complex

According to the *Prism* UA think tank, 99 Belarusian defense companies supply around 1,900 components to 255 Russian military manufacturers.⁵ *Belpol*, the union of former Belarusian security services personnel, estimates that at least 287 Belarusian companies contribute to Russian military production. In 2025, *Belpol* released a list of 120 Belarusian enterprises engaged in supporting the Russian military-industrial complex.⁶

Oleh Luhovskyi,⁷ the first deputy head of Ukraine's Foreign Intelligence Service, stated that over 80% of Belarusian companies were involved in fulfilling Russia's State Defense Order and the Russian State Armament Program for 2025–2034.⁸

Supranational tax committee: administrative integration

Researcher Rosa Turarbekova reports that “the implementation of the agreement to establish an integrated system for managing indirect taxes is advancing fully. Notably, the Supranational Tax Committee has been created and is operational. Its members were appointed, and its inaugural report was published on

⁵ “Inside Belarus’s Secret Role in Arming Putin’s War Machine.” *United24media*, <https://united24media.com/latest-news/inside-belaruss-secret-role-in-arming-putins-war-machine-14010>.

⁶ «Кто в Беларуси помогает российской агрессии.» *Belpol*, 16 Feb. 2026, <https://belpol.pro/kto-v-belarusi-pomogaet-rossijskoj-agressii/>.

⁷ Major-general Oleh Luhovskyi currently (since February 4, 2026) serves as acting head of Ukraine's Foreign Intelligence Service.

⁸ «Более 80 % предприятий Беларуси привлечены к оборонным заказам РФ – разведка.» *NV Украина*, 24 Jan. 2026, <https://nv.ua/ukraine/events/beloruskiy-vpk-integrirovalsya-v-rossiyskiy-bolee-80-predpriyatiy-vovlecheny-v-oboronnnye-zakazy-rf-50578261.html>.

May 28, 2025. An examination of the report revealed that most exemptions pertain to Lukashenko's decrees concerning specific legal entities that are either exempt from VAT or benefit from reduced tax rates.”⁹

Researcher Hanna Liubakova observes that “the unified tax system encompasses a common policy, a supranational committee, and a digital platform developed by Russia that grants access to centralized taxpayer data. While Lukashenko insists that Belarus retains control over its decisions, Moscow now has unprecedented access to Belarus's economic infrastructure.”¹⁰

According to Liubakova, “the same dynamics is evident in the customs sector. The joint customs group proposed by Lukashenko, which bills itself solely as an advisory body, potentially paves the way to additional dependency — the more Russia shapes Belarus's regulatory, legal, and administrative framework, the less independent Minsk becomes.”

Turarbekova highlights the growing infrastructural reliance of Belarus on Russia: “In 2023, shipments of Belarusian goods to Russian seaports surged by 130 %, and in the first half of 2024, they further increased by 22.5 %. This mainly involves transshipments of petroleum products and potash fertilizers. The figures for petroleum products are as follows: 2023 — 6.3 million tons; 2024 — 4.3 million tons; 2025 — 16 million tons (this covers all commodities, most of which are petroleum products).”

However, experts also highlight Russia's growing dependence on Belarus in certain sectors. Ukraine's successful attacks on

⁹ Турарбекова, Роза. «Союзное государство для Беларуси: проблема целостности суверенитета и роста зависимости от России (2024–2025).» Банк Ідэй, <https://ideasbank.vision/wp-content/uploads/2025/12/sajuznaja-dzjarzhava-dlja-belarusi.pdf>.

¹⁰ Liubakova, Hanna. “Minsk in Moscow's grip: How Russia subjugated Belarus without annexation.” *Atlantic Council*, <https://www.atlanticcouncil.org/content-series/russia-tomorrow/minsk-in-moscows-grip-how-russia-subjugated-belarus-without-annexation/>.

Russian oil refineries disrupted domestic fuel supplies in central Russia and temporarily increased demand for Belarusian petroleum products. This has resulted in a form of “reverse dependency,” where Russia relies on Belarusian refineries — operating at full capacity — to meet its petroleum needs, as Belarusian facilities are unable to fully satisfy Russia’s demand for petroleum products.

Common electricity market

In December 2024, Belarus and Russia signed a treaty to establish a unified electricity market, which became operational in December 2025. Originally, the plan was for a single market to be functional by 2024, encompassing not only electricity but also natural gas, crude oil, and petroleum products.

Belarus was expected to be the primary beneficiary of this integrated market for gas, oil, and petroleum products, aiming for potential price reductions or at least assurances that rates would remain low. However, Russia did not proceed with the development of these integrated markets as initially planned.

Russia’s share in Belarus’s foreign trade turnover expands

Russia’s share in Belarus’s commodity trade continued to grow. In 2021, bilateral trade in goods between Belarus and Russia made up 49 % of Belarus’s total foreign trade turnover; in 2024, the figure rose to 57 %, and in 2025, it further expanded by an additional percentage point.¹¹

¹¹ «Внешняя торговля.» Национальный статистический комитет Республики Беларусь, <https://www.belstat.gov.by/ofitsialnaya-statistika/realny-sector-ekonomiki/vneshnyaya-torgovlya/>.

Preliminary data indicates that two-way trade in volume terms increased to approximately USD 51.9 billion in 2025. Belarus remains heavily reliant on Russia for logistics related to its trade with other countries. Some estimates indicate that, due to transit through Russian ports and railways, Moscow may control over 90 % of Belarus's foreign trade.

Unified mobile communication space

The Union State of Belarus and Russia launched “easy” mobile communication tariffs on March 1, 2025, effectively abolishing roaming charges. Subscribers now enjoy 150 free incoming minutes per month, 150 outgoing minutes within packages, and affordable internet access — up to 5 GB at discounted rates. In 2025, over 13 million citizens of Belarus and Russia were reported to benefit from these reduced tariffs.

Education as a tool for expansion

The process of Russification in Belarus continues amid unprecedented efforts by Russian “soft power” institutions. The Rossotrudnichestvo Federal Agency for the Commonwealth of Independent States Affairs, Compatriots Living Abroad, and International Humanitarian Cooperation established five representative offices in Belarus. Since 2019, the number of scholarships for Belarusians studying at Russian universities has increased 18 times, reaching 1,300 annually. Furthermore, the Alexander Gorchakov Public Diplomacy Fund and the Russkiy Mir Foundation are actively engaged in these initiatives.

Experts estimate that over the past two decades, the percentage of university students studying in Belarusian has decreased from 0.9% to just 0.09%, while the share of secondary

school students has fallen from 23.0% to 10.7%. They argue that the Belarusian-speaking population has become a marginalized minority. Following 2020, the Belarusian authorities also closed all educational institutions serving Polish and Lithuanian minorities, including schools and language courses.

Hanna Liubakova reports that the jointly produced Belarusian-Russian history textbook portrays Belarus as a subordinate branch of Russian civilization.¹² In sync with other experts¹³, she emphasizes that Belarusians are actively encouraged to pursue education at Russian universities, with a record-breaking quota of 30,000 places available through Rossotrudnichestvo. A joint history commission, led by Russian presidential aide Vladimir Medinsky and Belarus's lower house speaker Igor Sergeyenko, oversees these efforts.

Media policy

In 2025, efforts to establish a media holding for the Union State continued. Belarusian Minister of Information Marat Markov stated that the media holding had largely been formed: its articles of association and supervisory board were approved, and Russian journalist Ekaterina Abramova was appointed as its director.

However, by 2026, the media holding had not yet begun operations. In February 2026, Russian presidential spokesperson Peskov announced that the union's media company would start functioning within a few months.¹⁴

¹² Liubakova, Hanna. Ibid.

¹³ Expert discussions organized by the IDSMBEE (Institute for Development and Social Market in Belarus and Eastern Europe).

¹⁴ «Песков: союзная медиакомпания заработает в ближайшие месяцы.» *Спутник Беларусь*, 26 Feb. 2026, <https://sputnik.by/20260226/>

Cultural policy

As noted by experts, specifically Alexander Klaskovsky¹⁵, Russia and Belarus emphasize a shared unique historical path, an intimate development model, and a distinct set of values — often referred to as “spiritual bonds.” These are contrasted with what is characterized as the “decayed” Western democracy and moral decline, with both nations praising the strength of a firm leadership. A recurring theme is the reverence for the Great Patriotic War, with authorities in both countries positioning themselves as “heirs of the Great Victory.” Anti-Western sentiment is a prominent element in both narratives, with Minsk additionally highlighting anti-Polish rhetoric.

In 2025, numerous joint cultural events took place across Belarus and Russia, including commemorations of the 80th anniversary of the victory in World War II. Notably, in April, the Great Heritage — Common Future forum was held in Volgograd, and in December, Moscow hosted the ART-PANORAMA Russia — Belarus International Festival-Competition, supported by the Belarusian parliament, along with the Slavianski Bazaar Festival and the Istoki festival of Russian culture.

Increase in pro-Russian sentiments

A November 2025 survey of the urban population in Belarus, carried out by the Belarus Initiative at Chatham House (UK), recorded a historically high level of support for the union with Russia.¹⁶ Forty-four percent of respondents expressed support for the union — marking the highest level since September

peskov-soyuznaya-mediakompaniya-zarabotaet-v-blizhayshie-mesyatsy-1104691780.html.

¹⁵ Expert discussions organized by the IDSMBEE.

¹⁶ «Результаты двадцать первой волны исследования. Взгляды белорусов

2020, when the Belarus Initiative first began its research in the country.

Additionally, a September 2025 survey conducted by the iSANS international network¹⁷ confirmed an uptick in pro-Russian geopolitical attitudes. Sociologist and professor Andrei Vardomatsky attributes this rise in pro-Russian sentiments to two main factors: the widespread dissemination of Russian propaganda within Belarus, and the impact of sanctions and mobility restrictions imposed on Belarusians by the European Union.¹⁸

Conclusion

When evaluating Belarus's level of alignment with Russia through what did not happen in 2025, it is notable that the Belarusian military was not involved in any conflicts, and Russia did not launch attacks on Ukraine from Belarusian territory. There is no evidence to suggest that Russia had direct control over Belarus's civilian administration or its Armed Forces.

Nevertheless, our analysis indicates that in 2025, Belarus's reliance on Russia intensified across multiple domains — ranging from military and political spheres to education and culture. This increasing dependence was also reflected in shifts within public opinion in Belarus, which showed a growing preference for closer integration with Russia.

на войну, внутреннюю и внешнюю политику.» *Belaruspolls*, 02 Dec. 2025, <https://belaruspolls.org/wave-21>.

¹⁷ Дракахруст, Юры. “Як змяніўся выбар беларусаў паміж Расеяй і Эўропай за 20 гадоў.” *Радыё Свабода*, 11 Dec. 2025, <https://smarturl.click/XDmQW>.

¹⁸ Дракахруст, Юры. “Як мяняліся пражэўрапейскія настроі ў Беларусі і ва Ўкраіне за апошнія дзесяцігодзьдзі. Параўноўваем.” *Радыё Свабода*, 24 Dec. 2025, <https://smarturl.click/QbnnR>.

Simultaneously, several events indicate that the Belarusian authorities at least sought to project an image of some independence from Moscow. These include the shift of the 2025 military exercise to a less threatening scenario for the West, as well as a warning issued to Poland on September 10, 2025, regarding a large-scale deployment of Russian drones directed toward the Polish territory. However, these actions, along with other gestures of supposed autonomy, could have served as a “smoke-screen” deliberately coordinated with or even orchestrated by Russia.

BELARUSIAN-U. S. RELATIONS: PARADIGM SHIFT AND DEAL DIPLOMACY

Anton Penkovsky

Summary

The year 2025 marked a significant transformation in the bilateral relationship between the United States and Belarus, set against the backdrop of Donald Trump's second term and his focus on pragmatic realism and "deal diplomacy." The White House revised traditional U.S. policy tools, cutting international aid and dismantling the infrastructure that supported democratic forces abroad.

The U. S. engaged in dialogue with the Lukashenko regime, exploring the possibility of pragmatic cooperation through mutual concessions. Throughout the year, a series of contacts led to the release of prisoners and steps toward normalizing relations, including discussions about restoring diplomatic presence and easing sanctions. Minsk leveraged this process to showcase a breakthrough in diplomatic isolation and sought to strengthen its relationship with the U. S. without compromising its strategic alliance with Russia. Meanwhile, the Trump administration mainly perceived these interactions with Lukashenko through the perspective of regional security.

Trends

- The U. S. policy has shifted from a values-driven democratization agenda to pragmatic "deal diplomacy" in its relationship with Minsk;
- Contacts between the U. S. and the Lukashenko regime intensified, using prisoner releases as a trust-building tool;
- Signals of limited de-escalation amid mutual concessions include partial sanctions relief and ongoing discussions about re-establishing diplomatic missions;
- Minsk is being viewed as a potential conduit for communication on regional security matters;
- The U. S. has substantially reduced financial backing for Belarusian democratic forces, diminishing their influence in the bilateral relationship.

Strategy shift and practical outcomes of deal diplomacy

The start of 2025 marked a crucial period of electoral cycles in both countries. In the U. S., Donald Trump and the Republican Party won the presidential election (with the latter securing a majority in the U. S. House of Representatives); all was set for the inauguration on January 20. In Belarus, amid repression, the Lukashenko regime was preparing for another presidential election scheduled for January 26.

The inauguration of the 47th U. S. president signaled significant shifts in the U. S. foreign policy, which pivoted toward pragmatic realism and deal diplomacy. This shift also impacted its policies on Belarus.

With his early executive orders, Trump started to dismantle the U. S. international aid system for developing countries, a key instrument of democratization for more than thirty years. This aid had been crucial for Belarusian opposition groups in exile, with U. S. funding covering approximately half of their operational needs. This marked the beginning of very challenging times for Belarusian émigré communities, many of which faced a struggle for survival.

A second, more symbolic, signal was the change in public rhetoric regarding Minsk. After the White House's official website was transferred to the new administration, the pre-approved statement condemning Belarus's undemocratic elections was removed.¹ Although seemingly a minor technical incident, it proved prophetic of the broader policies of the 47th U.S. president's administration toward Belarus.

On February 12, Deputy Assistant Secretary (DAS) for Eastern Europe, Policy and Regional Affairs Christopher W. Smith

¹ «Соединённые Штаты передумали не признавать выборы в Белоруссии...» *Независимая газета*, 26 Jan. 2025, www.ng.ru/week/2025-01-26/8_9178_week3.html.

visited Minsk, meeting with Lukashenko and his officials. That was the first high-level visit to Belarus in five years, indicating a new phase of the U. S. adopting a more proactive stance toward Lukashenko. Following the talks, the Belarusian authorities released three individuals from detention, including U. S. citizen and ‘Radio Liberty’ journalist Andrei Kuznechyk, a move that was positively acknowledged by the U. S.²

Christopher W. Smith suggested that a “big deal” with the Belarusian authorities might be possible, alongside the exchange of political prisoners for the easing of sanctions on state enterprises. The U. S. showed a willingness to pave the way for an agreement through public gestures and other confidence-building measures, while also testing Minsk’s responses to increased engagement. The regime appeared interested in initiating dialogue with the West and gaining leverage to ease pressure, all without jeopardizing its vital support from Russia.

On February 27, Lukashenko gave an interview to U. S. blogger Mario Naufal, who belongs to a network of mid-ranking pro-Trump opinion leaders. In the interview, Lukashenko expressed his overt liking for the new U. S. administration and voiced hope for dialogue, claiming to possess unique expertise in the Eastern European region. His responses stood in stark contrast to his public rhetoric over the past five years and appeared aimed at garnering attention. The interview also conveyed a clear message: that Lukashenko, like Trump, views himself as a victim of unjust persecution by the Democratic Party and the “liberal elites” in the U. S.

On April 30, Belarusian and U. S. citizen Yuri Zenkovich was released from custody. He had been detained in 2021 for an alleged attempt to overthrow the government — an operation the Lukashenko propaganda claimed had been orchestrated by

2 “Belarus releases three prisoners, including US citizen and jailed journalist.” *France 24*, 12 Feb. 2025, www.france24.com/en/live-news/20250212-white-house-says-american-among-three-detainees-freed-by-belarus.

U. S. intelligence agencies. Zenkovich had been the last U. S. citizen imprisoned in Belarus for political reasons.

The practice of behind-the-scenes negotiations with the Belarusian authorities to secure the release of U.S. citizens was also typical of the first Trump administration in 2020. However, in 2025, this approach should be viewed within the broader context of the new U. S. administration's efforts to free its citizens worldwide, including in Russia, the Middle East, and Asia.

On May 5, Representatives Smith, Keating, and Wilson submitted an updated version of the Belarus Democracy, Human Rights, and Sovereignty Act to the U.S. Congress, condemning the rigged 2025 presidential elections and the illegal transfer of Ukrainian children.³ Nevertheless, by the end of the year, that version had not passed a legislative vote and was not enacted into law. Consequently, the 2020 version of the Act remained in force.

On June 21, U. S. Special Envoy for Ukraine Keith Kellogg visited Belarus, meeting with Lukashenko along with accompanying diplomats. While the details of the negotiations were not publicly disclosed, the Lukashenko administration sought to present the visit as a strategic victory and a breakthrough in diplomatic isolation. The following day, Belarus released 14 political prisoners, including Siarhei Tsikhanouski and Nobel Peace Prize winner Ales Bialiatski.

Therefore, it would be fair to assume that in the first half of 2025, the U. S. tested the hypothesis of leveraging Lukashenko to address security issues in Eastern Europe, as well as Minsk's capacity for broad dialogue. As subsequent developments demonstrated, the U. S. was satisfied with the outcomes. Both official and independent American sources interpreted this as the beginning of a public phase of dialogue, during which

3 "H.R.3201 — Belarus Democracy, Human Rights, and Sovereignty Act of 2025." *Congress.Gov*, 05 May 2025, [www.congress.gov/bill/119th-congress/house-bill/1/text](https://www.congress.gov/bills/119th-congress/house-bill/1/text).

U. S. diplomats employ sanctions and releases of individuals as tools of pressure and negotiation simultaneously.

Meanwhile, the Belarusian authorities signaled their readiness to cooperate through symbolic gestures, while maintaining strict control within the country and avoiding the most sensitive sphere — the relationship with Russia. At the same time, Belarusian democratic forces were bolstered by the 2020 opinion leaders who had been released from prisons.

On August 15, en route to his meeting with Putin in Alaska, Donald Trump made a phone call to Lukashenko. This marked the first known direct contact after many years of no communication between the U.S. leadership and the Lukashenko regime. On the *Truth Social*, Trump publicly stated that he expected the release of 1,300 Belarusian prisoners, without clarifying the conditions for reaching such an agreement.

In an interview with *TIME* magazine, Lukashenko described himself as a possible mediator in international negotiations and expressed his willingness to utilize the new U.S. policy to break free from international isolation.

Diminishing support for democratic forces

While relations between the Trump administration and the Lukashenko regime showed some signs of development, when it comes to democratic forces, the policies of the 47th U. S. president dealt a severe blow to sources of support that had seemed inviolable for decades. Following the announcement of an embargo on international assistance in the first half of the year and the closure of the U. S. Agency for International Development (USAID) and other organizations supporting pro-democratic movements outside the U. S., Belarusian exile groups were even left without the support previously approved by the prior administration.

According to official sources in the U. S. government, in 2025, financing of the Belarusian segment decreased by more than 30 times from the previous year and barely reached USD 1 million.⁴ Even this amount was largely allocated before Trump's inauguration or spent on administrative expenses of the agency, which was soon disbanded.

The efforts of Belarusian democratic forces to engage with the U. S. centered on keeping the Belarusian issue prominent in U. S. foreign policy and maintaining their role as Washington's primary partner on Belarus. They adjusted their demands in response to shifts in U. S. policy, even considering the possibility of negotiations with Lukashenko through a roundtable format facilitated by the U. S. government.⁵ However, some exile representatives expressed concerns about the new U. S. approach toward Belarus, clearly recognizing that the previous consensus of applying pressure and isolating the Lukashenko regime was no longer practically applicable.

Beginning of détente and mutual concessions

September saw a turning point, featuring several key events: the release of dozens of political prisoners, easing of sanctions, statements about restoring diplomatic missions, and military-diplomatic contacts.

On September 11, a U. S. delegation, this time led by Kellogg's deputy, John Cole, visited Minsk again for talks with Lukashenko. The discussions covered prospects for normalizing relations,

⁴ "U. S. Foreign Assistance by Country." FA.Gov, foreignassistance.gov/cd/belarus/2025/obligations/0.

⁵ «Переломный момент для Европы». Офис Тихановской предложил США провести круглый стол с Лукашенко.» *Zerkalo.io*, 30 July 2025, news.zerkalo.io/economics/105156.html.

Russia's war in Ukraine, economic cooperation, and the issue of political prisoners. Lukashenko expressed gratitude to Trump for his efforts to resolve international conflicts and indicated openness to discussing prisoner releases as part of a potential "big deal."

In turn, Cole delivered a letter and a souvenir from Trump to Lukashenko, announced that the U. S. had decided to suspend sanctions against the national airline 'Belavia', allowing authorized maintenance, repair, and procurement of spare parts for its fleet, and called this a first step toward normalizing relations. Cole also briefly mentioned, without providing details, plans to reopen the U. S. embassy in Minsk.

The visit concluded with the release of political prisoners. The group of 52 included media figures, key opposition members, and 14 foreign nationals. Following their release, both the detainees and diplomats left the country for Lithuania, where since 2021, the U. S. State Department's Belarus Affairs Unit has been operational at the U. S. Embassy in Vilnius.

On September 15, a report was published regarding the participation of a U. S. military attaché as an observer in the 'Zapad 2025' military exercise held in Belarus. Previously, inviting U. S. military personnel to take part in such events seemed impossible, as the Belarusian regime portrayed the U. S. as an unfriendly country that directly threatened national security. In fact, the regime had previously cited threats by the U. S. when trying to account for some of its arrangements to tighten internal controls. However, by mid-2025, the Lukashenko regime had become so emboldened in its desire to improve relations with the U. S. that it was willing to demonstrate transparency even in such sensitive issues as military cooperation with Russia and the training of its own armed forces.

At the end of September, Sviatlana Tsikhanouskaya paid her last year's only visit to the U. S. to participate in the UN General Assembly, where she met with U. S. politicians and diplomats.

On September 30, during his speech at the Warsaw Security Forum, Kellogg stated that Washington's discussions with Lukashenko mainly centered on regional security concerns and on establishing a communication channel with the Russian leadership to seek resolutions to end the war with Ukraine. He also mentioned that the release of political prisoners was a secondary outcome of this process. Kellogg further implied that the Trump administration was aware of the potential for new arrests but regarded even isolated releases as a significant accomplishment.

On October 14, Lukashenko told a meeting with representatives of the state apparatus that he was ready to strike a "big deal" with the U. S. as long as Belarus's interests were taken into account.⁶ He clarified that the U. S. had not yet completed the process of easing sanctions against Belavia, emphasized the need for the full removal of sanctions on the airline, and noted the sluggishness of the U. S. in meeting the agreed conditions.

Soon after, on November 4, the U. S. Department of the Treasury indeed issued the relevant license⁷, allowing the airline to conduct transactions and purchases, including for Lukashenko's private aircraft. On November 9, Trump announced on *Truth Social* the appointment of Cole as his special envoy to Belarus, a position that had been vacant since mid-2022.

On November 22, the Belarusian authorities released 31 Ukrainian citizens and handed them over to Kyiv. According to Lukashenko's press service, this step was made in pursuance

⁶ «Лукашенко: мы готовы заключить большую сделку с США, если будут учтены интересы Беларуси.» БелТА, 17 Oct. 2025, belta.by/president/view/lukashenko-my-gotovy-zakljuchit-bolshuju-sdelku-s-ssha-esli-budut-uchteny-interesy-belarusi-742860-2025/.

⁷ "Cyber-Related Designations; North Korea Designations and Designation Update; Belarus Designations Removals; Issuance of Belarus General License." *Office of Foreign Assets Control / U. S. Department of the Treasury*, 04 Nov. 2025, ofac.treasury.gov/recent-actions/20251104.

of the agreements between Minsk and Washington. At the end of November, reports⁸ began to circulate that Washington was negotiating with Lukashenko a new release of a large number of prisoners.

On December 13, another U. S. delegation visited Minsk, after which the Lukashenko regime released 123 prisoners and transferred them to Ukraine. The U. S. announced its decision to suspend sanctions against Belarusian Potash Company.⁹ The exchange of concessions was unprecedented, as key figures of Belarusian civil society, such as Viktor Babaryka, Maria Kalesnikava, and Pavel Seviarynets, were released, while the regime benefited from a relaxation of the U. S. sanctions targeting one of the country's key export sectors.

Trade relations

In 2025, the trade turnover between the two countries remained very low. According to U. S. Census Bureau, two-way commodity trade came to USD 39 million.¹⁰ Compared to 2024, the overall trade turnover expanded (by approximately 20%) due to an increase in deliveries from the U. S., while Belarusian supplies declined.

The trade structure was dominated by niche and small-volume categories of commodities. Belarus exported certain food

⁸ "Exclusive: Trump administration seeks major Belarus prisoner release, sources say." *Reuters*, 26 Nov. 2025, www.reuters.com/world/europe/trump-administration-seeks-major-belarus-prisoner-release-sources-say-2025-11-26/.

⁹ "Issuance of Belarus General License." *Office of Foreign Assets Control /U.S. Department of the Treasury*, 15 Dec. 2025, ofac.treasury.gov/recent-actions/20251215.

¹⁰ "International Trade." *United States Census Bureau*, 15 Apr. 2019, www.census.gov/foreign-trade/balance/c4622.html.

products, linen items, textiles, and small industrial products. Imports from the U. S. included pharmaceuticals, medical and laboratory equipment, and chemical products. Strategic Belarusian exports, such as potash fertilizers or petrochemical products, were virtually absent due to sanctions restrictions.

As a result, the U. S. accounted for a small share of Belarus's foreign trade, and economic ties between the two countries were minimal. These figures reflect only trade in goods and do not include services, which are recorded separately and are not detailed in current U. S. sources.

Official Belarusian statistics on non-CIS countries for 2025 show an increase in total imports, but no specific data on the U. S. are presented in open publications.

Conclusion

Throughout 2025, a framework of limited de-escalation was developing, centered on exchanges of political and economic concessions. At the same time, Belarusian democratic forces were considerably weakened due to decreased U. S. financial support and gradually lost their previous role as the primary partner in U. S. – Belarus relations.

In 2026, the most likely scenario is the continuation of cautious dialogue and non-recurring deals between Washington and Minsk, including further exchanges of political prisoners for limited economic concessions in conditions of Belarus's persistent strategic dependence on Russia and absence of deep institutional changes in bilateral relations.

FORMER SOVIET UNION COUNTRIES AND THE “FAR ARC”: A GEOPOLITICAL AND ECONOMIC COUNTERBALANCE TO WESTERN ISOLATION

Katsiaryna Lozka

Summary

Amid the pressures of isolation and Western sanctions, Belarus persistently sought to diversify its partnerships primarily through economic engagement with countries in Central Asia, the South Caucasus, Latin America, Africa, and the Middle East. These efforts aim to secure political support and explore new markets for potash fertilizers, machinery, and agricultural products, offsetting the loss of access to the European market.

Nonetheless, relations with these partners are still largely influenced by their internal political contexts, which often result in inconsistent cooperation. Moreover, the overall scope of interaction remains limited due to considerable geographical distances and high logistics costs.

Despite strong diplomatic rhetoric, the political and geographical realities of 2025 continue to restrict intercontinental connectivity.

Trends

- Belarus primarily approaches cooperation with countries on other continents as an economic strategy to compensate for the loss of European markets;
- Despite vigorous diplomatic efforts, growth in alternative markets has yielded limited results and has not significantly diminished Belarus's economic dependence on Russia;
- Strategic alliances with Central Asia, Africa, the Middle East, and other regions remain heavily affected by the internal political situations within partner countries, making long-term collaboration vulnerable to leadership changes and internal instability.

Belarus within the regional framework of relations

In 2025, relations with Former Soviet Union (FSU) countries remained a central element of Belarus's foreign policy. This focus was regarded as a strategic approach to securing economic and geopolitical benefits. Nevertheless, relations with individual countries continued to be heavily influenced by the broader geopolitical environment and the internal political stability of those nations.

In Belarus's trade, the FSU countries (excluding Russia) rank *second* among macro-regions, competing with China in trade volume (bilateral trade with China reached approximately USD 8.8 billion in 2025). Kazakhstan emerged as the top partner within the region, with bilateral trade totaling USD 1.2 billion in 2025, reflecting a 29.6% increase compared to the previous year (see Table 1).¹

Table 1. Belarus's major trade partners within the FSU (excluding Russia)

Country	Mutual trade (approx.), USD bln	Change and status
Kazakhstan	1.2 (2025)	Up by 29.6 % year-on-year; largest EAEU partner after Russia
Uzbekistan	0.6–1.0	Potential estimated at USD 2 bln; mutual trade up by 130 % over past five years
Azerbaijan	0.4–0.5	One of major trade partners; rapid increase in industrial cooperation
Kyrgyzstan	0.15–0.2	Growth fueled by supplies of foods and machinery

¹ «Внешняя торговля товарами / Годовые данные.» Национальный статистический комитет Республики Беларусь, <https://www.belstat.gov.by/ofitsialnaya-statistika/realny-sector-ekonomiki/vneshnyaya-torgovlya/vneshnyaya-torgovlya-tovarami/godovye-dannye/>.

*Belarus and the South Caucasus:
priorities and key areas of cooperation*

The relationship between Armenia and Belarus was at a low point, evident in overt tensions between Prime Minister Nikol Pashinyan and Alexander Lukashenko. Although both nations remained formal members of the Eurasian Economic Union (EAEU) and the Collective Security Treaty Organization (CSTO), their ties were affected by Armenia's pivot towards Western integration and provocative statements made by Lukashenko. In response to Belarus's remarks, Pashinyan stated that he would limit his participation in the EAEU summit in Minsk to online presence.

Additionally, Armenia chose not to participate in the 'Zapad 2025' joint military exercises conducted by Russia and Belarus. Nevertheless, the deterioration of official relations with Minsk prompted increased engagement between Armenia and the Belarusian democratic opposition, including high-level meetings between Pashinyan and Sviatlana Tsikhanouskaya.²

Belarus, for its part, maintained amicable relations with Azerbaijan, underpinned by longstanding personal connections between Ilham Aliyev and Lukashenko. This bond facilitates ongoing political dialogue, characterized by frequent high-level visits and mutual support on the international stage. In October 2025, a Belarusian delegation led by a deputy prime minister visited Baku, resulting in the signing of a protocol aimed at expanding economic cooperation, particularly in the sectors of agriculture and specialized machinery.

Furthermore, Belarus and Azerbaijan exhibit mutual political support, with both countries expressing their readiness

² "Sviatlana Tsikhanouskaya met with Armenian Prime Minister Nikol Pashinyan in Paris.", *Sviatlana Tsikhanouskaya*, 30 Oct. 2025, <https://tsikhanouskaya.org/en/news/sviatlana-tsikhanouskaya-met-with-armenian-prime-minister-nikol-pashinyan-in-paris.html>.

to host peace negotiations between Ukraine and Russia. Their cooperation also encompasses the Nagorno-Karabakh region, where Minsk is actively involved in reconstruction efforts in territories captured by Azerbaijan during its war with Armenia – a conflict in which, according to reports,³ Belarus supplied arms to Azerbaijan.

Relations between Belarus and Georgia can be described as pragmatic engagement, prompted by the Georgian Dream party's shift away from the West, which resulted in the development of a shared anti-Western rhetoric and mutual support for “sovereignty” in the face of external pressures. Georgia declined to participate in the main sanctions against Minsk, maintained active aviation operations, and remained one of the top tourist destinations for Belarusians. Belarus, in turn, continued to follow its policy of non-recognition of Abkhazia and South Ossetia, despite Lukashenko's visit to Abkhazia in 2022.

Central Asian focus

Central Asia was viewed as a strategically vital market for diversifying political and economic relations, with the goal of breaking the isolation imposed by the Western sanctions. Leveraging its role as the chair of the EAEU in 2025, Minsk sought to position itself as a key partner in regional stability, as well as in economic and logistics cooperation.

The primary areas of collaboration included exporting agricultural products, developing joint logistics initiatives, and active engagement with the Shanghai Cooperation Organization (SCO) and the Eurasian Economic Commission. For instance, in 2025, Belarus's leading logistics company, Beltamozhservice, announced the launch of an express container rail service

³ “The secret arms deal that cost Putin an ally.” *Politico*, 13 June 2025, <https://www.politico.eu/article/leaked-documents-reveal-belarus-armed-azerbaijan-against-ally-armenia/>.

dedicated to cargo shipments to Iran.⁴ This new route, passing through Russia, Kazakhstan, and Turkmenistan, was designed to provide a high-speed alternative to traditional sea freight.

Interactions with individual nations and regional strategic goals varied. Trade between Belarus and Uzbekistan increased by 34%, mainly driven by exports of industrial and agricultural goods. Meanwhile, Belarus's collaboration with Kazakhstan concentrated on industrial cooperation, including joint projects in machinery manufacturing, agriculture, logistics, and industrial engineering.

Turkmenistan and Tajikistan were instrumental in expanding transit and technical infrastructure, with Turkmenistan joining the railway connection for the new freight route to Iran. At the same time, Kyrgyzstan remained highly engaged in regional integration efforts, participating in economic alliances and joint CSTO military exercises to bolster security coordination.

Overall, although these strengthened ties with Central Asia created a certain economic buffer, they did not enable the regime to achieve a decisive strategic breakthrough.

Belarus's relations with Africa, the Middle East, and Latin America

In response to Western isolation, Minsk persisted in its Far Arc diplomacy, emphasizing trade and industrial collaboration with countries in Africa, the Middle East, and Latin America (see Table 2).

⁴ «Беларусь запускает ускоренный железнодорожный маршрут в Иран через Россию и Центральную Азию.» *New Central Asia*, 12 Dec. 2025, <https://www.newscentralasia.net/2025/12/17/belarus-zapuskaet-uskorenniy-zheleznodorozhnyj-marshrut-v-iran-cherez-rossiyu-i-centralnuyu-aziyu/>.

Table 2. Key partners of the Far Arc in 2024–2025

Country/ Region	Mutual trade (approx.), USD bln	Main goods and status
China	8.5–9.0	Imports: machines, electronics, components Exports: potash fertilizers, foods, timber
India	1.0–1.2	Exports: potash fertilizers, nitrogen compounds Imports: medications, tea, textiles
Brazil	0.8–1.1	Traditional major purchaser of potash fertilizers. Imports: Embraer aircraft, coffee
UAE	0.6–0.8	Hub for re-exports of Belarusian machines and IT services; Rise in investment cooperation
Vietnam	0.2–0.3	Exports: MAZ trucks (assembly), fertilizers, dairy products
Pakistan	0.06–0.1	Exports: MTZ tractors, engineering products, chemicals

A key motivation was to circumvent Western sanctions and lessen their impact, while also seeking new market opportunities. This approach yielded mixed outcomes: although it resulted in some local successes and growth in certain sectors, it was unable to fully compensate for the loss of Western markets, nor did it reduce Belarus's severe economic reliance on Russia.

Diversification efforts with African countries

Belarus persisted in its strategy to engage with African nations, aiming to establish political alliances and access new markets for sanctioned goods. The core focus of Belarus's Africa policy

was on securing a lasting economic presence on the continent and expanding into new African markets. By offering agricultural machinery and defense equipment without the typical political conditions demanded by Western donors, the regime actively positioned itself as a pragmatic alternative in infrastructure development and food security initiatives.

In 2025, several high-level visits by African leaders to Minsk took place, including by Zimbabwean President Emmerson Mnangagwa (May 2025), Egyptian President Abdel Fattah El-Sisi (July 2025), Tanzanian President Samia Suluhu Hassan (September 2025), and Angolan President João Lourenço (October 2025).

Belarus's total trade with African partners in 2025 was approximately USD 500 million. This includes agricultural and industrial equipment, as well as transportation. As for security and arms trade, Belarus sought to position itself as a supplier for military modernization and internal security needs. As part of these efforts, Minsk promoted the Sapsan mobile, multifunctional counter-unmanned aerial vehicle (C-UAV) system, designed to safeguard critical infrastructure from smaller drones. This system integrates detection, electronic warfare, and kinetic engagement capabilities into a single mobile platform and was reportedly offered to two African countries.⁵

At the national level, Zimbabwe remained one of Belarus's key partners. On December 15, 2025, during Belarusian Defense Minister Viktor Khrenin's visit to Harare, the two defense ministries signed a military cooperation agreement.⁶ This cooperation encompasses military education and healthcare, opera-

⁵ Malyasov, Dylan. "Belarus offers new counter-drone system to African markets." *Defense Blog*, 22 Apr. 2025, <https://defence-blog.com/belarus-offers-new-counter-drone-system-to-african-markets/>.

⁶ "Alignment and shared perspectives. Key takeaways from Belarusian defense minister's visit to Zimbabwe." *BelTA*, 17 Dec. 2025, <https://eng.belta.by/society/view/alignment-and-shared-perspectives-key-takeaways-from-belarusian-defense-ministers-visit-to-zimbabwe-174849-2025/>.

tional and combat training for personnel, military R&D, as well as electronic warfare systems, information systems, and equipment for military communications.

Equatorial Guinea became a focal point for health initiatives and construction projects. Ethiopia was used as a testing ground for Belarusian unmanned aerial systems and military radio-electronic equipment.

India

In 2025, relations between India and Belarus significantly intensified, marked by deeper strategic coordination and enhanced military cooperation. India actively supported Belarus's integration into the BRICS framework, where Belarus has held the status of an official partner since 2025. This partnership also extended to security cooperation: India deployed a military contingent for participation in the 'Zapad 2025' Russian-Belarusian exercises.

Additionally, India remains a key market for Belarusian potash fertilizers. The strength of these bilateral ties was underscored by high-level diplomatic contacts between Lukashenko and Indian Ambassador Ashok Kumar.

Relations with Middle Eastern countries

In its efforts to diversify international partnerships, Belarus sought to bolster political and economic ties with Middle Eastern nations. A notable milestone in 2025 was the strategic engagement with the United Arab Emirates, exemplified by the visit of the Abu Dhabi Crown Prince to Minsk in June 2025. This visit led to over USD 4 billion in investment agreements, focusing on digital innovation, smart city initiatives, and logistics hubs.

Furthermore, a substantial USD 1.4 billion contract was signed with Oman for the development of a forestry and paper manufacturing complex. As part of its broader effort to diversify

exports, representatives of Lukashenko's regime also visited Oman and Algeria in December 2025.

Relations with Latin American countries

Belarus's pursuit of new markets to compensate for the decline in Western trade influenced its relations with Latin America. A key development in 2025 was the abolition of the visa regime with Colombia, aimed at facilitating business trips and expanding access to the Pacific regional market. Simultaneously, Minsk upheld its longstanding political stance by continuing to support the Maduro regime in Venezuela, focusing on revitalizing abandoned joint industrial projects and assembly plants. In November 2025, Nicaragua officially expressed interest in knowledge exchange and expanding cooperation with the China – Belarus Industrial Park.

However, despite these efforts, interactions remain limited due to geographical distance and high logistics costs, which continue to impede deeper economic collaboration.

Conclusion

In 2025, Belarus sought to forge partnerships with countries in Central Asia, the South Caucasus, Latin America, Africa, and the Middle East, viewing this strategy as a geopolitical and economic response to its isolation from the West. While Belarus's main interest remains economic – focused on accessing new markets for exports – these relations often involve mutual political support in the face of Western pressures. Nevertheless, these partnerships lack the potential to replace the nearby Western market.

Looking ahead to 2026, Belarus is anticipated to continue its efforts to establish connections with other continents. Despite

the U. S. policy shift in 2025, the European Union remains firm in opposing the Lukashenko regime and maintaining strict sanctions, prompting Minsk to seek alternative avenues both economically and politically.

BELARUS — CHINA RELATIONS: AMBITIOUS GOALS, DOUBT ACHIEVEMENTS, UNCERTAIN OUTLOOK

Arseny Sivitsky

Summary

The Belarus — China relationship has been marked by intense diplomatic engagement, yet with limited economic gains. In 2025, Alexander Lukashenko visited China twice, the sixth meeting of the intergovernmental committee took place, several documents were signed, and both nations proclaimed an “all-weather strategic partnership.”

China is Belarus’s second-largest trading partner after Russia, surpassing the European Union, and continues to be a vital supplier of technological goods amid Western sanctions-driven isolation. At the same time, Belarus accounts for only a negligible fraction of China’s trade volume.

Although robust institutional connections and aligned political interests indicate considerable potential for expanding bilateral cooperation, Chinese assessments indicate that prospects are constrained by sanctions risks, heavy reliance on Russia, insufficient market reforms, and a tense, unstable internal political environment — challenges that demand immediate attention.

Trends:

- Intense diplomatic engagement with limited translation into economic outcomes;
- Growing trade volume accompanied by a chronically increasing trade deficit;
- Development of unrealistic plans after the failure to meet previously set cooperation targets;
- Sustained and escalating investment risks that undermine interests and run counter to China’s expectations.

Boisterous contacts and limited results

A defining feature of 2025 was the vigorous personal diplomacy with Chinese President Xi Jinping, with Lukashenko making two visits to China, thus bringing the total number of his visits to sixteen.¹

On May 21, Minsk hosted Liu Guozhong, Vice Premier of the State Council, for the sixth session of the Belarusian–Chinese Intergovernmental Cooperation Committee. The visit was part of the preparations for the upcoming June summit between the two leaders. During the meeting, a memorandum on the digital economy and a protocol on flagship scientific and technological projects for 2025–2026 were signed, and both sides agreed to establish a new industrial cooperation commission within the intergovernmental committee, which Belarus considers a priority. However, all of the signed documents are primarily declarative and do not impose specific obligations on Beijing.

The June 3–5 visit was informal. The meeting between Lukashenko and Xi Jinping took place at the Zhongnanhai private residence in a one-on-one setting. No concrete economic agreements were announced afterward — the results were decided to be “kept under wraps.”

The August 31–September 3 visit coincided with Belarus’s participation in the SCO summit in Tianjin — the first such event for Belarus as a full member. Lukashenko held bilateral and expanded talks with Xi Jinping. In Beijing, a series of closed-door meetings were also held with leaders of Chinese companies in sectors including industry, automotive and engine manufacturing, greenhouse farming, and floriculture.²

1 «О политических отношениях Беларуси и Китая.» Министерство иностранных дел Республики Беларусь, <https://china.mfa.gov.by/ru/bilateral/>.

2 «Подробности переговоров и закрытых встреч Лукашенко с бизнес-кругами Китая.» БелТА, 02 Sep. 2025, <https://belta.by/president/view/>

The September 22 meeting with Li Xi, a member of the Standing Committee of the Political Bureau and Secretary of the Central Commission for Discipline Inspection, did not clarify the prospects for implementing the agreements reached in Beijing.³ The context of the visit is notable: shortly before it, Poland suspended railway links with Belarus due to the joint Russia – Belarus strategic exercise ‘Zapad 2025’, a move that blocked the transit of Chinese goods along the China – Europe – China route. Official Minsk claimed that Poland’s action harmed China’s geo-economic interests in Eastern Europe, hoping to use Beijing to put Warsaw under pressure. However, its strategy failed: the outcome of the talks between Polish Foreign Minister Radosław Sikorski and Chinese Foreign Minister Wang Yi was China’s readiness to facilitate dialogue between Belarus and Poland, essentially pushing Minsk toward concessions.⁴

Additionally, Li Xi’s visit to Minsk formed part of a broader European tour that started in Greece – a crucial hub of the 21st Century Maritime Silk Road, where a smuggling operation involving Chinese containers had been uncovered. Polish customs officials had previously detected illegal Belarusian cigarettes in container trains moving from China to Europe. Evidently, this matter was likely included in the negotiations agenda.

Circumventing technical regulations also contributed to increased tensions, as Chinese customs discovered that Minsk was re-exporting Turkish and Ukrainian poultry to China disguised

podrobnosti-peregovorov-i-zakrytyh-vstrech-lukashenko-s-biznes-krugami-kitaja-735048-2025/.

3 “Senior CPC official pays official goodwill visit to Belarus.” *Xinhua*, 23 Sep. 2025, <https://english.news.cn/20250923/c99a6edf09ee44b2931bbcb6204ba098/c.html>.

4 Pawlicki, Jacek. “Wiemy, co szef MSZ Chin obiecał Radosławowi Sikorskiemu. Chodzi o Białoruś, ale nie tylko.” *Newsweek*, 17 Sep. 2025, <https://www.newsweek.pl/swiat/chiny-zmusza-lukaszenko-do-ustepstw-wobec-polski-wiemy-co-obiecano-sikorskiemu/bs77dx2>.

as Belarusian products. Between 2023 and 2024, China repeatedly revoked licenses from Belarusian suppliers; by 2025, 11 of the 13 certified poultry farms had been barred from the Chinese market, resulting in estimated annual losses of at least USD 140 million.

In the public segment of the meeting, Li Xi limited his remarks to rhetoric about the “all-weather strategic partnership” and opposition to unilateral sanctions. However, his emphasis on strengthening cooperation within the Belt and Road Initiative and advancing the China – Belarus ‘Great Stone’ Industrial Park appeared to serve as an implicit critique, since the joint project had not met expectations as an industrial and logistics hub with access to the European market.

Record trade turnover with widening structural deficit

In 2025, bilateral commodity trade between Belarus and China exceeded USD 8.85 billion for the first time (an increase of 5.5 % year-on-year), and overall trade, including services, reached USD 12 billion. Over the past decade, China’s share of Belarus’s external trade *doubled*, reaching 11 %. China imports 30 % of Belarus’s potash exports, 45 % of rapeseed oil, 50 % of linen fibers, 33 % of timber, and 37 % of milk whey.⁵ Consequently, China is Belarus’s second-largest trading partner after Russia, surpassing the total trade with the European Union by roughly USD 1 billion. In December 2025, monthly trade turnover between the two countries exceeded USD 1 billion for the first time.

⁵ «Снопков: Беларусь за 10 лет увеличила втрое товарооборот с Китаем и вдвое экспорт.» БелТА, 27 Jan. 2026, <https://belta.by/economics/view/snopkov-belarus-za-10-let-uvelichila-vtroie-tovarooborot-s-kitaem-i-ivdvoe-eksport-761180-2026/>.

However, these record figures conceal a significant structural imbalance. Chinese exports to Belarus amounted to USD 7.19 billion (up by 9.3 %), while Belarusian exports to China were only USD 1.66 billion (down by 8.4 %). Belarus's trade deficit with China thereby reached USD 5.53 billion, expending by 15.9 % over the year and more than *fivefold* from 2019 (when it was below USD 1 billion). In 2025, all growth in two-way trade was driven solely by Chinese exports, while Belarusian shipments to China declined for most of the year.

Import structure vividly illustrates Belarus's reliance on the Chinese market. Three main product groups constitute roughly 70 % of imports: vehicles and components (30 %), industrial and agricultural equipment (25 %), and electrical and electronic goods (15 %). The swift increase in Chinese supplies in these categories aligns chronologically with a decline in European imports due to sanctions, clearly highlighting China's role as a substitute for essential technological products under Western sanctions pressure.

Belarusian exports to China mainly consist of raw materials: fertilizers (45 %, with exports decreasing from USD 844 million to USD 747 million), fats and oils (17 %), timber (14 %), and meat and by-products (7 %, sharply dropping from USD 272 million to 108 million following the withdrawal of export certificates for Belarusian poultry). The decline in major exports coupled with increasing imports is more structural than caused by the temporary market situation, reflecting that the Belarusian economy does not produce enough goods that are in demand in the Chinese market.

This deficit has been recorded monthly throughout 2023–2025 without exception. For China, the Belarusian market accounted for a negligible share of 0.191 % of the country's total exports and 0.064 % of imports in 2025. Economically, relations with Beijing are critically important for Minsk, whereas for China, Belarus is a barely noticeable entry in trade statistics.

The ratification of the Agreement on Service Trade and Investment between Belarus and China in February 2025 represents a major milestone.⁶ This arrangement creates a supportive framework aimed at attracting Chinese investors to Belarus and provides Belarus with access to the Chinese market under conditions comparable to those granted by China to its key Southeast Asian partners. Belarusian officials expect that this will help reverse the ongoing trade deficit in commodities.

However, experts from relevant agencies note that, despite the progressive provisions of the agreement, its practical implementation faces considerable challenges. China benefits from broader access to the Belarusian market, while Belarusian suppliers continue to face barriers, particularly when operating through commercial presence (Mode 3). Additionally, many of Belarus's commitments are marked as *unbound*, which diminishes transparency and the actual prospects for market access. Restrictions on the physical presence of specialists — such as limits on duration, citizenship requirements, and labor tests — remain strict. Additionally, the agreement falls short in covering key areas such as public procurement, e-commerce, and investment protection. It also lacks dispute resolution mechanisms grounded in the Most Favored Nation (MFN) principle, mutual recognition of electronic signatures, and China's commitments to establish branches, thereby placing Belarus at a relative disadvantage.

In this context, the official forecasts of a 12–15% growth in service exports and a 30% increase in investments appear overstated: experts from relevant agencies project only an 8–8.5% annual growth in service exports under current conditions.

⁶ «Беларусь и Китай: предсказуемость и прозрачность торговли услугами и осуществления инвестиций.» Министерство экономики Республики Беларусь, 13 Feb. 2025, <https://economy.gov.by/ru/news-ru/view/belarus-i-kitaj-predskazuemost-i-prozrachnost-torgovli-uslugami-i-osuschestvlenija-investitsij-50069-2025/>.

More ambitious targets (14–14.5%) could be achieved only through liberalization and further legal adjustments in Belarus and China. Without substantial expansion of commitments and removal of regulatory barriers, the actual impact of the agreement will remain limited. Only by adding a free trade zone for goods — making it a “deep” agreement — can Belarus realistically expect a 3.45 % increase in gross exports and 0.45 % GDP growth.⁷

A similar outlook applies to investment cooperation. Notably, in 2025, for the first time in bilateral relations, China ranked *second* among the largest investors in Belarusian economy (up from *fifth* place in 2015).⁸ As of the nine months of 2025, Chinese investments totaled USD 443 million — an increase of 160 % compared to the same period in 2024.

Over the past decade, total Chinese investments in Belarus have exceeded USD 2 billion. The number of enterprises with Chinese capital grew 240 % — from 67 in 2015 to 230 in 2025. However, within the EAEU framework, Belarus's share remains modest: according to EDB estimates, direct Chinese investments in Belarus over ten years amounted to USD 550 million, compared to USD 17.45 billion in Russia and USD 11.41 billion in Kazakhstan.⁹

⁷ Мазулина, А. Батый, Е. «Соглашение Беларуси и Китая о торговле услугами и осуществлении инвестиций: сравнительный анализ положений и обязательств (часть 2).» *Экономический бюллетень НИЭИ Министерства экономики Республики Беларусь*, № 4, 2025, С. 31–47.

⁸ «Взаимная торговля, инвестиции, кредиты. Снопков назвал топ-3 результатов в сотрудничестве с Китаем за 10 лет.» *БелТА*, 27 Jan. 2026, <https://belta.by/economics/view/vzaimnaja-torgovlja-investitsii-kredity-snopkov-nazval-top-3-rezultatov-v-sotrudnichestve-s-kitaem-za-761193-2026/>.

⁹ «Китайские миллиарды в ЕАЭС: что получает Беларусь.» *Экономическая газета*, 13 Jan. 2026, <https://neg.by/novosti/otkrytj/kitayskie-milliardy-v-eaes-chto-poluchaet-belarus/>.

Structural constraints and unfulfilled potential

The overall situation forced Lukashenko to acknowledge the failure of Directive No. 9 dated December 3, 2021, “On the Development of Bilateral Relations between the Republic of Belarus and the People’s Republic of China” through 2025.¹⁰ Despite the proclaimed special status of Belarus — China relations, economic cooperation remains modest. In 2025, Belarus’s exports to China surpassed its deliveries to the European Union, but represented only 4 % of Belarus’s total foreign supplies.

The failure is also evident in the attraction of Chinese investments: in the first nine months of 2025, they expanded 150 % to USD 443 million, but this is still well below the targets set in the directive (at least USD 500 million annually and a minimum of USD 150 million in direct investments in each region).

The extent of the shortfall becomes even clearer when examining the indicators of the *three*-year regional cooperation program with Chinese provinces for 2023–2025: by early 2025, 17 of the 35 planned activities had been removed from oversight and canceled, including key projects for Belarus such as the potassium fertilizer terminal in Tianjin, a pharmaceutical cluster, and joint fertilizer production, indicating a failure to achieve key objectives.

The Chinese authorities have consistently demonstrated limited interest in Belarusian initiatives, declining to engage in the development of a pharmaceutical cluster, industrial sub-parks, assembly of HONGQI vehicles, or the launch of the Chongqing — Minsk air route due to concerns over sanctions risks. The Great Stone Industrial Park, often touted as a flagship project of Chinese–Belarusian economic collaboration, has produced minimal tangible outcomes, mainly consisting of negotiations and

¹⁰ «Совещание по вопросам развития сотрудничества с КНР.» БелТА, 27 Jan. 2026, <https://president.gov.by/ru/events/sovesanie-po-voprosam-razvitiia-sotrudnicstva-s-kr>.

memoranda, with only a few successful operations, such as the assembly of Midea refrigerators.

A survey of 164 leading Belarusian industrial enterprises indicates that, despite claims of a strategic partnership, Belarus — China economic cooperation remains asymmetric and predominantly import-oriented.¹¹ More than half of Belarusian industrial firms collaborate with China, which is limited to the procurement of Chinese components and equipment, while reciprocal investments and technological exchanges are minimal. Joint investment initiatives are virtually absent, with only 2.2 % of enterprises involved in projects with Chinese capital, and Chinese loans accounting for no more than 1.3 % of the total investments attracted by Belarusian industrial companies.

For Belarusian organizations, setting up assembly production of Belarusian goods in China is considered unappealing. Just 0.8 % of respondents report benefiting from this, as China boasts a well-developed machinery industry and does not need Belarusian components for domestic assembly of finished products.

“Connected” lending channels funds exclusively towards the purchase of Chinese goods, equipment, and labor, sidestepping the Belarusian labor market and reducing the local multiplier effect. The mismatch of standards, settlement restrictions due to sanctions, and the absence of institutional frameworks for financing joint projects further reinforce an imbalanced, one-sided cooperation model.

According to industry experts, under an active diversification strategy, Belarusian exports to China could grow from USD 1.84 billion in 2024 to USD 3.1 billion by 2030. However, unlocking this potential depends on aligning products with

¹¹ Павловская, Ю. «Развитие производственной кооперации предприятий Беларуси с китайскими партнёрами (социологический опрос).» *Экономический бюллетень НИЭИ Министерства экономики Республики Беларусь*, № 3, 2025. С. 46–57.

Chinese technical standards and deploying targeted marketing strategies.

Belarus lags considerably behind China in the development of infrastructure and institutions for the digital economy. Collaboration with Chinese technological ecosystems is confined to isolated agreements and lacks comprehensive institutional backing.

Belarus-specific risks: China's perspective

As early as 2015, while recognizing positive aspects of Belarus's business environment, Chinese experts also pointed out potential political and economic risks: dominance of a planned economy, lack of structural reforms, unstable economic policies, worsening economic crisis, and heavy reliance on Russia; threats of unpredictable leadership changes and power transitions; the potential for a "color revolution"; and negative repercussions from the Ukraine crisis.¹² Since 2020, and especially after 2022, these risks have materialized.

In the 2025 Belarusian investment climate report, China's Ministry of Commerce highlighted *five* main risk categories for Chinese investors: secondary sanctions imposed by the U. S. and EU; payment channel disruptions caused by financial sanctions and increased caution among Chinese banks; shortages of qualified workers and technical experts; elevated logistics costs and unpredictable timelines due to reliance on land transportation, complicating cost control and project implementation; and a deteriorating reputation of certain Belarusian companies,

¹² «Исследование политических рисков инвестиций: Беларусь, 2015.», http://www.china.com.cn/opinion/think/2015-05/11/content_35536829.htm.

as evidenced by cases of prepayments received without subsequent delivery.¹³

A survey of twenty companies with Chinese capital in Belarus identified several deterrents: limited capacity of regional markets; inadequate skill levels of the local workforce; the significant impact of sanctions, including challenges in international payments and logistics; restricted access to Western European markets; and the dominance of the state sector in the Belarusian economy.¹⁴

Despite the country's unique advantages — such as its geographical location, industrial and scientific infrastructure, human resource potential, and internal political stability — Xinhua Silk Road, the Belt and Road (BRI) portal, assesses the overall investment risk within the BRI as high.¹⁵

In the political arena, the concentration of power in Lukashenko's hands ensures apparent stability but also introduces systemic risks: corruption, public discontent (notably during protests and strikes in 2020), and uncertainty regarding leadership succession. The system is highly personalized, with weakened independence of parliament and government, suppressed opposition, and economic decisions enacted through presidential decrees that bypass legislative procedures. Institutional development remains insufficient.

The administrative model, centered around the dominance of state-owned enterprises, ensures continuity and strict enforcement of operational discipline; however, the private sector

¹³ *Руководство по странам (регионам) внешних инвестиций и сотрудничества (выпуск 2025): Беларусь.* Министерство коммерции КНР, Mar 2026, С. 76.

¹⁴ «Взгляд китайского бизнеса на работу в Беларуси.» *Экономическая газета*, 15 Jan. 2025, <https://neg.by/novosti/otkrytj/vzglyad-kitayskogo-biznesa-na-rabotu-v-belarusi/>.

¹⁵ *Анализ инвестиционных рисков Беларуси 2025.* Экономическая информационная служба Синьхуа (Xinhua Silk Road), Mar. 2026, С. 1-17.

is limited, barriers to foreign capital are high, and labor and tax laws lack transparency.

Investment projects require political endorsement and approval from the Presidential Administration, the KGB, and specialized ministries. Land use, profit repatriation, mergers and acquisitions, foreign investment approval, and government procurement are high-risk areas prone to corruption due to the absence of transparent regulations, excessive centralization of authority, weak oversight mechanisms, and controlled media.

In the geopolitical arena, there remains a potential for Belarus to be passively drawn into the Russia – Ukraine conflict. The presence of Russian troops, deployment of tactical nuclear weapons, and transit of munitions position the country – despite its non-participation – as a rear base for Russia's aggression against Ukraine and as a staging ground for confrontation with NATO. Ukraine has not ruled out launching strikes against Russian military targets on Belarusian territory. NATO is expanding its presence in Poland and Lithuania, increasing the risk of miscalculations and regional escalation.

Support for Russia's aggression against Ukraine, the “weaponization” of refugees, information warfare, and geopolitical pressure have strained relations with neighboring countries. Belarus faces strict sanctions from European nations and the U. S., with prospects of further tightening, raising doubts about the China – Europe container train route passing through Belarus as a logistics hub. The economy, financial sector, foreign policy, and military sphere are deeply integrated with Russia, with dependence on Moscow steadily increasing.

Since the 2020 protests, Belarus has carried out a comprehensive purge of the opposition, and public space is tightly controlled. The risk of violent protests and terrorist attacks is low; however, quasi-military opposition groups might serve as a “provocative trigger.” At the same time, latent instability and

“silent radicalization” are building among the large émigré youth population.

Economically, the private sector remains suppressed, the investment climate is unfavorable, and Lukashenko shows little interest in implementing economic reforms. Despite modest and declining growth rates — from 2.1–2.4 % down to an expected 0.8 % by 2029 — structural economic risks are increasing due to the high dependence on the Russian market, with over 50 % of combined trade turnover, reliance on supplies of raw materials and energy, prolonged effects of international sanctions, limited external financing options, and a restricted space for monetary, credit, and fiscal policy. Sanctions hamper the development of high-tech industries; the economy lacks long-term internal growth drivers. Budget deficits and high social spending aimed at maintaining political stability further constrain investments in development, infrastructure, and modernization.

Belarus’s deep involvement in the Russia — Ukraine conflict increases the likelihood of geopolitical tensions impacting its economy. Western sanctions, including disconnection from SWIFT, stringent currency controls, and chronic devaluation of the Belarusian ruble lead to currency losses when subsidiaries repatriate profits to parent companies. Consumer inflation remains elevated, foreign reserves are limited, and external debt is substantial at 42.9 % of GDP, further worsened by “junk” credit ratings.

In the legal domain, Belarus’s investment climate is hindered by opaque enforcement practices, significant administrative interference amid a weak rule of law, and insufficient guarantees for the enforcement of contractual obligations. Corporate legislation, presidential decrees, and government resolutions impose substantial restrictions on foreign investors. Environmental regulations are strict: violations can result in project suspensions, as seen with a Chinese battery plant in Brest that sparked mass protests in 2018–2019.

Operationally, Belarus's infrastructure is relatively developed; however, its modernization has decelerated in recent years. Railway and road logistics, warehouse facilities, and parts of the energy network face risks of physical deterioration and obsolescence. In the context of geopolitical conflict, railway and road logistics chains are vulnerable to disruption, which increases production and transportation costs.

The country is experiencing rapid population aging, a critical shortage of skilled labor, and significant outflows of technical workers and highly qualified specialists due to mass emigration to Poland, Lithuania, and Russia. Labor costs are rising. The process of recruiting foreign workers is complex and requires approval from the Interior Ministry, complicating cross-border management and staffing for Chinese enterprises.

Overall, Chinese assessments indicate that the investment climate is worsened by Belarus's involvement in the Russia – Ukraine war, Western sanctions-related isolation, complete dependence on the Russian economy, low political predictability, lack of reforms, and shrinking government financial resources.

Instead of a conclusion: deadlock or gateway of the Silk Road?

Since 2013, when Belarus and China declared a comprehensive strategic partnership, it has taken a *decade* to achieve one of the highest levels of cooperation with Beijing – the “all-weather” comprehensive strategic partnership in 2022. Robust institutional collaboration and shared political interests underscore the significant promise for deepening bilateral ties. Nevertheless, as the last ten years have shown, potential by itself does not ensure automatic progress or substantial economic benefits.

The primary reason for this is Belarus's deviation from the agreements made with Beijing during Chinese President Xi

Jinping's visit to Belarus in May 2015. At that time, the plan was for Belarus to serve as a substitute for Ukraine — destabilized by Russia through the annexation of Crimea and the invasion of Donbas in 2014 — within China's Belt and Road Initiative in Eastern Europe. According to these plans, Belarus was supposed to become an industrial and logistics hub for high-tech industries utilizing Chinese technologies and investments, with access to European markets.¹⁶ The political crisis of 2020 and Belarus's involvement in Russia's conflict against Ukraine effectively wiped out these prospects.

Consequently, Belarus's vision and outcomes within China's Belt and Road Initiative, as well as the broader outlook for China — Belarus cooperation, will largely hinge on Minsk's ability to align with Beijing's expectations regarding risk mitigation — both internally and externally.¹⁷ Ultimately, this entails distancing from Russia's war against Ukraine, reducing critical reliance on Russia, stabilizing the domestic political landscape, pursuing reforms and policies of openness, as well as restoring relations with Western countries, and gaining access to their markets.

¹⁶ Сивицкий, А., Царик, Ю., Савков, Н. Беларусь — Китай: достижения, проблемы и перспективы стратегического партнёрства. ЦСВИ, Фонд Фрудриха Эберта, Sep. 2020, <https://forstrategy.org/ru/posts/20201215>; <https://collections.fes.de/publikationen/download/pdf/452716>.

¹⁷ Sivitsky, Arseny. "Belarus' full membership strengthens SCO cooperation." *China Daily*, 08 Sep. 2025, <https://www.chinadaily.com.cn/a/202509/08/WS68be17fca3108622abc9f4f1.html>.

SOCIETY

REGIME AND SOCIETY: TRANSITION TO TOTALITARIANISM AND QUIET DISCONTENT

Genadz Korshunau

Summary

In 2025, there were no significant shifts in the development of society, the regime, or their interactions. Even the presidential election in January 2025 had little to no impact on the country's overall situation. The trends observed throughout the year merely represented the continuation of existing processes that had been developing earlier.

Currently, Belarusian society can be characterized by a deep sense of emotional alienation from the state. The government's repressive measures persist, albeit in a somewhat altered form. Key aspects include the systemic militarization of the education system, ongoing military integration with Russia, involvement in Western nuclear blackmail, and continued hybrid aggression along the borders with EU countries.

The regime began to conceal repression, and through a deal with Washington, released some of the political prisoners. The apparent ease of repression in certain sectors is a result of completed purges, while in other areas — particularly in the personal persecution of citizens — the scale of terror remains unchanged.

Trends

- The Belarusian regime persists in its gradual movement toward establishing a totalitarian state;
- The state's repressive grip on society remains, albeit in a different format;
- The influence of the Russia-Ukraine war on public opinion is beginning to wane;
- Discontent with the actions of state institutions and emotional estrangement from the state are becoming increasingly evident;
- The image of authority is evolving from a “protector” to an “aggressor.”

Militarization as a foundation for Belarusian totalitarianism

Over the past few years, the Belarusian political regime has been steadily transforming into a “classical” form of totalitarianism. The unique aspect of this process is the conspicuous deficit of profound ideological underpinnings, which are mainly reduced to a cult of personality around Alexander Lukashenko. This ideological void is offset by widespread and enforced militarization of society. The process affects all aspects of social life, from education to foreign policy.

One of the signs of the regime’s growing harshness is the unprecedented intensification of military cooperation with the Russian Federation. Belarus is no longer merely an economic “rear” for the Russian military machine — it has become an immediate arena for nuclear escalation. The most notable development was the deployment of Russia’s tactical nuclear weapons and its state-of-the-art Oreshnik missile system on Belarusian territory. This effectively renders Belarusian military facilities, and more broadly the country itself, legitimate targets for a powerful retaliatory strike in the event of a conflict.

The most concerning aspect is the total infiltration of military propaganda into the education system. Indoctrination starts as early as in kindergartens, where security forces (notably OMON) conduct master classes on assembling weapons for six-year-old children. Essentially, schools have transformed into factories for raising amenable followers, where military discipline and unquestioning obedience to orders have displaced critical thinking and personal responsibility.¹

In addition to its internal military buildup, the regime has been utilizing migration flows as a form of hybrid warfare against its Western neighbors. The long-standing border crisis,

¹ «Дети без будущего. Доклад BELPOL и НАУ.» Belpol, 23 Oct. 2025, <https://belpol.pro/deti-bez-budushhego-doklad-belpol-i-nau/>.

which had been ongoing for years, reached a historical peak in 2025, with no signs of abating. Statistics revealed that the number of attempted crossings of the border illegally surpassed 43,000 (up from around 36,000 in 2024 and approximately 42,000 in 2023).

The migration pressure was further augmented by new forms of provocation — large numbers of weather balloons carrying contraband cigarettes were launched from the territory of Belarus. In 2025, this practice became so routine that it began to pose a significant threat to air traffic, causing a temporary closure of Vilnius International Airport. This led to a strict response: Lithuania temporarily closed the border, prompting Belarus to detain hundreds of Lithuanian trucks, which remained in its territory as hostages in the ongoing economic and political conflict.

In this manner, the Belarusian regime opted for a path of militarization, turning the country into a closed military enclave where ideological indoctrination of children is paired with the deployment of Russian nuclear weapons. This approach, along with hybrid attacks on neighboring countries, destabilizes regional security and threatens national sovereignty, turning Belarus into a hostage of external military gambling.

Continued repression — a shift in format

The events of 2025 in Belarus indicate a transformation in the state's repressive machinery. While the post-2020 protest period (2020–2023) was marked by overt acts of repression — such as mass arrests documented on camera, the release of “confession videos,” and high-profile court cases — the current phase can be characterized as a strategy of “covert repression.” This shift does not suggest that the regime has become more lenient; rather, it reflects the government's adaptation to evolving

international conditions and its efforts to suppress civil society more discreetly.

The primary tool for masking the scale of persecution is the isolation of the judicial system from society. On March 5, 2025, the authorities stopped publishing court schedules, which had previously been a key resource for monitoring. Alongside the restricted access to registers of court rulings and the silence of official representatives, this brought about a data void. An external observer might have an illusion of a “thaw,” since human rights defenders find it increasingly difficult to document every arrest. However, this statistical “silence” is a direct consequence of government policies aimed at hiding repression, and coincides with a period of intensified unofficial contacts between official Minsk and the U. S. administration.

Phenomenon of release and violent expatriation

A notable event in 2025 was the release of 342 individuals from detention through the support of the United States. While the release of prisoners is always welcome, this year, the move was accompanied by the forced deportation of a substantial portion of the freed political prisoners: after the 2025 pardoning, 189 political prisoners were forcibly deported from Belarus — many without passports. The authorities therefore use releases as a means of physically driving opponents out of the country, effectively transforming pardons into a form of expulsion.

Sector-wise “(over)supply” of repression

Statistics across different sectors reveal a varied dynamic that should be interpreted as “oversupply of the repression market.”

1. Civil society (NGOs): the number of dissolved organizations decreased from 385 in 2024 to 107 in 2025. This is not a sign of liberalization, but a result of the regime's effort to crack down on nearly all dissenting groups. The civic sphere has become depleted, and consequently, the number of new closures has naturally fallen.

2. Media and “extremism”: the number of extremist materials and formations increased slower than previously. Courts find it more and more difficult to identify new organized entities: the share of personal social media pages among those recognized as extremist increased to 44%. In 2025, educational platforms, think tanks, and even small substructures of earlier banned organizations were labeled as extremist, rather than major media outlets or political parties. This indicates that the repressive machine has started “devouring” small segments due to the absence of larger targets.

3. Personalized terror: unlike organizations, individuals represent an inexhaustible source for repression. This is where growth is observed both in the “extremist” and “terrorist” dimensions. In the first case, after years of decline, a 16 % increase was recorded in 2025 (1,335 people); in the second case, there was a 40 % growth over the year (219 people). This is an all-time high for the entire monitored period. Labeling someone as a “terrorist” has become a convenient tool for depriving citizens of their rights and increasing isolation.

Statistical trap of “political prisoners”

In 2025, the count of “officially recognized” political prisoners fell to 448 from 593 in 2024. However, experts caution that this number no longer reliably reflects the level of repression. *First*, relatives of detainees, intimidated by law enforcers, are increasingly hesitant to turn to human rights advocates. *Second*,

the verification process itself is severely delayed due to the information blackout surrounding courts. Consequently, the true number of individuals imprisoned for political reasons may be substantially higher than the figures reported by human rights groups.

Repressive policies have entered a phase of systemic consolidation. The regime effectively combines tactical concessions to the West — such as releasing some detainees — with their simultaneous expulsion. Consequently, reduced numbers in certain sectors are merely the result of their complete cleansing, while in other areas — especially in the personal persecution of citizens — the scale of terror continues to grow. Repression remains an integral part of state governance, changing only in visibility but not in their fundamental nature.

Regime's image is changing

Russia's full-scale invasion of Ukraine became the key game changer in the relationship between Belarusian society and Lukashenko's regime. It was precisely this event, or rather the anticipation of military and economic apocalypse, that shaped societal consciousness for several years.

However, a few years after the war's onset, concerns about security began to decline. Surveys suggest that in 2025, only 28 % of people voiced their worry about Belarus's involvement in the conflict (compared to 57 % in April 2022). The demand for security as the primary service provided by the state also started to diminish.²

² Korshunau, Genadz. "Perceptions of the Belarusian regime: aggressor or protector?" *The Center for New Ideas*, 22 Dec. 2025, <https://newbelarus.vision/publications/perceptions-of-the-belarusian-regime-aggressor-or-protector/>.

Devaluation of the “protector” role

The regime’s perceived role as a protector, guarantor of security and stability — which gained prominence in 2020 — has been gradually eroding. Empirical evidence shows that society no longer knows what the authorities do or in whose interests they act. Half of those surveyed believe that the state primarily defends the interests of the ruling elite; 23 % are completely unaware of whose interests are served.

The image of the regime is becoming more dynamic and contradictory. On the one hand, citizens continue to regard security as a valuable asset, especially women and young people. On the other, awareness is growing that the regime itself increasingly acts as a threat to security: in 2024, nearly half of Belarusians stated that regular citizens were unprotected from the arbitrariness of those in power. In 2025, 42 % identified the primary task of the state as “ensuring citizens’ rights and freedoms” — a position that for the first time topped the priority rankings, particularly among men, those with higher education, and individuals aged 45 and older.³

Economic autonomy and social contract

Tensions are also intensifying in the economic dimension. Although the regime continues to portray itself as a guarantor of stability, the reality is quite different. Over time, an increasing number of people believe that their well-being depends on themselves rather than the state; the standard of living in Belarus is perceived as lower than in most other countries. Furthermore, economic factors now occupy the top positions in the list of main issues (see Table 1).

3 Only 9 % of respondents believe the authorities fully perform their duties, and 26 % believe they “rather” perform their duties.

Table 1. Top 10 responses to the question “Which of the following do you consider to be the most important problems facing contemporary Belarus?”⁴

	%
Low wages/salaries	49.4
Consumer inflation and price rises	48.6
Low pensions	33.4
Threat of involvement in wars and international conflicts	27.9
EU's and U. S.' sanctions	26.2
Quality of medical services	25.6
Inability to secure a good job	22.3
High utility bills	20.7
High level of emigration	20.7
Low economic development rates	18.9

These processes translate into a clear demand for political change: competitive elections, liberalization, and a reduction of state control. Opposing these reforms are only 10–14% of respondents.

Despite this, Belarusians do not exhibit hope that their expectations will be fulfilled. Importantly, the call to diminish the state's role in society is not a random reaction to recent events but a consequence of the gradual evolution of social independence over the past decades.

And still, a segment of society clings to the “remnants of the social state.” The logic of “*he may be an aggressor, but he pays pensions*” allows the regime to maintain the loyalty of part

⁴ Korshunau, Genadz. “Perceptions of the Belarusian regime: aggressor or protector?” *The Center for New Ideas*, 22 Dec. 2025, <https://newbelarus.vision/publications/perceptions-of-the-belarusian-regime-aggressor-or-protector/>.

of the population. Meanwhile, expectations have significantly declined: people are satisfied with the mere existence of free healthcare and education, even though they acknowledge their poor quality.

“Pact of silence” as a coping strategy

In the public perception, the Belarusian regime continues to be seen largely as a protector, but increasingly, it is also viewed as a threat to the safety of ordinary citizens — essentially as an aggressor. This environment fosters a strong desire among many in society to detach themselves from the traumatic situation, to distance themselves in order to survive, avoid further harm, and restore stability to their lives. This response can be understood through the framework of emotionally driven coping strategies, which at the community level manifest as a “pact of silence” approach.

This tactic appears as a quiet refusal to discuss personal experiences or form opinions about issues beyond daily life. Consequently, Belarusians generally steer clear of politics, and a large portion of the population either remains silent or chooses not to openly support any specific economic strategy. Two-thirds of Belarusians are unable to respond to questions regarding the country’s achievements or shortcomings.

Notably, this tendency to silence traumatic experiences of the past five years is supported and even encouraged by the regime itself (specifically through the use of “anti-extremist” legislation). Contrary to this recent traumatic experience, the regime continues to systemically implant its version of the chosen trauma — the so-called genocide of the Belarusian people during the Great Patriotic War.

The current status of Belarusian society can be characterized as a deep emotional alienation from the state. The image

of authority shifts from a “protector” to an “aggressor,” making social stability in the country fragile despite outward silence.

Conclusion

In the near future, unless a new significant “game changer” emerges, the Lukashenko regime is likely to continue advancing toward establishing a totalitarian state. It will also likely rely on hybrid aggression — ranging from border crises to nuclear blackmail — as a tool of foreign policy, which will further restrict Belarusian sovereignty.

Economic challenges such as low wages and inflation will remain the primary sources of potential social discontent. The authorities will try to address these by promoting the “trauma of the past” and sustaining repressive control over society, although in certain areas, their capacity for repression is already nearing its limit.

In 2026, emotional alienation between society and the government is expected to deepen. The regime will be increasingly perceived as an aggressor, and society’s primary survival tactic will continue to be the “pact of silence.” This will create an illusion of stability despite mounting internal tensions.

DIVIDED YET UNBROKEN: BELARUSIAN CIVIL SOCIETY ORGANIZATIONS

Natallia Rabava

Summary

In 2025, Belarusian civil society persisted amid a deepening divide: some organizations operated in exile — primarily in Lithuania and Poland — while others remained within Belarus under tight government control. A number of organizations maintain staff on both sides of the border.

Within Belarus, the government employs a dual strategy: a repressive approach — shutting down organizations, targeting activists, and extending extremist lists; and a co-optation approach — integrating loyal civil society organizations (CSOs) into the state machine.

Exiled organizations faced a severe financial crisis following the withdrawal of USAID support and banking restrictions imposed by sanctions. The gap between domestic and exile CSOs continues to grow. Overall, the environment for Belarusian CSOs is deteriorating.

Trends

- Increasingly restrictive legislation targeting CSOs and ongoing repression;
- Sector-wide financial difficulties following the withdrawal of USAID support;
- Government strategies of co-optation and superficial imitation of civil society groups;
- Growing disparity between domestic and exile CSOs.

External environment changes impacting CSO within Belarus

According to the *Eastern Partnership Index* 2025, Belarus continues to be one of the poorest performers in the region in terms of civil rights.¹ As of 2023, it ranked lowest among Eastern Partnership countries when it comes to freedom of opinion, expression, assembly, and association; in 2025, the situation has worsened even further.

The *CSO Meter Index* 2024,² published in 2025, provides the following assessment for Belarus: Freedom of Association – 2.3 out of 7.0, Access to Funding – 2.2, Freedom of Peaceful Assembly – 1.5, and Freedom of Expression – 1.8. These scores are on a scale from 1 to 7, where 1 represents an extremely unfavorable environment for civil society and 7 indicates an extremely favorable one. In all these areas, law enforcement considerably lags behind legal standards, indicating that actual practices concerning CSOs fall short of existing legal norms.

Another metric, the *CSO Sustainability Index* 2024,³ indicates a slight deterioration in Belarus's overall score, which moved from 6.0 in 2023 to 6.1 in 2024 (with 7.0 representing the worst possible situation). The *Legal Environment* indicator reached its lowest point of 7.0 as early as 2021 and, in theory, cannot decline further. Two other indicators – Financial Stability and Advocacy – are also above 6.0. However, following a sharp decline in 2020–2021, the index scores have stabilized at a relatively steady level, suggesting a tentative new equilibrium.

¹ *Eastern Partnership Index* 2025, <https://eap-csf.eu/content/uploads/2025/10/EaP-Index-Layout-Final-version.pdf>.

² *CSO Meter. Belarus 2024 Country report*, https://csometer.info/sites/default/files/2025-05/2024%20CSO%20Meter%20Belarus%20Country%20Report_0.pdf.

³ “Індэкс устойлівасці АГЧ Беларусі.” *CSO Fusion*, <https://csofusion.org/index/>.

The external environment for CSOs in Belarus is influenced by government policies that, according to the CSO Meter classification, operate along two parallel tracks: repression and co-optation.

Repressive track

Under this repressive approach, the Belarusian authorities employ a wide range of measures, including legislative amendments to restrict the scope of and possibilities for CSO activities, the liquidation and inspection of organizations, persecution of individual activists, information and smear campaigns, as well as informal pressures such as targeting activists' families.

The campaign to cleanse civil society, initiated in 2021, continues unabated. According to *Lawtrend*, by February 28, 2026, at least 2,012 non-profit organizations had been either liquidated or compelled to close voluntarily. While the rate of closures slowed somewhat in winter 2025, it intensified from summer onward.⁴ There have also been instances of forced re-registration of public organizations as agencies (non-membership organizations), likely aimed at tightening control.

In June 2025, the government issued Resolution No. 319,⁵ which expanded the list of crimes classified as extremist activities. Under this resolution, criminal convictions for violations related to receipt of foreign aid now serve as grounds for placing individuals on the extremist list. This has resulted in substantial

⁴ «Мониторинг ситуации со свободой ассоциаций и положением организаций гражданского общества в Республике Беларусь. Сентябрь 2025.» *Lawtrend*, 02 Sep. 2025, https://www.lawtrend.org/freedom-of-association/monitoring-situatsii-so-svobodoj-assotsiatsij-i-polozeni-em-organizatsij-grazhdanskogo-obshhestva-v-respublike-belarus-sentyabr-2025#_ftn1.

⁵ «Постановление Совета министров Республики Беларусь от 10 июня 2025 г. № 319.» *Pravo.by*, 10 June 2025, <https://pravo.by/document/?guid=12551&p0=C22500319>.

restrictions on civic participation, which continue even after the sentence has been served. Additionally, the Interior Ministry's authority was extended to enhance oversight of foreign aid.

In June, the bill “On State Registration and Liquidation of Entities” passed its first reading. Experts contend that the document not only fails to enhance the current framework but, in some areas, actually worsens the operational environment for CSOs.⁶ Notably, it introduces a requirement to scrutinize founders for “threats to national security,” aiming to “eliminate risks associated with destructive activities financed from abroad.”

A system comprising *eight* different extremist and terrorist lists is actively used against CSOs and activists. These lists are continuously updated and serve as tools for repression. Some are directly employed to target CSOs, activists, their informational materials, and products. These include:

1) The Republican List of Extremist Materials (maintained by the Ministry of Information)⁷, which contains over 9,000 entries.⁸ This is one of the most comprehensive lists, encompassing various materials recognized as extremist through closed court proceedings. It covers websites, books, videos, audio recordings, scientific works, publications, social media pages, and even individual photographs. This process targets both historical and cultural assets as well as contemporary publications and social media pages, many of which belong to different CSOs;

⁶ «Какие новации предусмотрены в законопроекте о госрегистрации и ликвидации субъектов хозяйствования.» *Pravo.by*, 02 Oct. 2025, <https://pravo.by/novosti/obshchestvenno-politicheskie-i-v-oblasti-prava/2025/july/89414/>.

⁷ «Республиканский список экстремистских материалов.» Министерство информации Республики Беларусь, <http://mininform.gov.by/documents/respublikanskiy-spisok-ekstremistskikh-materialov/>.

⁸ Number of items on each list is provided as of March 18, 2026.

2) The list of citizens involved in extremist activities (maintained by the Interior Ministry)⁹, which includes 6,402 individuals, predominantly Belarusian citizens. This list is regularly updated to incorporate those convicted under the so-called “extremist” articles of the Criminal Code;

3) The list of organizations and individuals involved in terrorist activities (maintained by the KGB)¹⁰, comprising 1,424 persons, of whom around 700 are Belarusians;

4) The list of extremist formations (compiled jointly by the Interior Ministry and KGB)¹¹, which includes 340 organizations; most of these are Belarusian CSOs, including local communities and media outlets.

Engagement with individuals, organizations, and materials on these lists can result in various penalties, including long-term imprisonment. The authorities explicitly warn citizens against participating in operations of foreign and international organizations and networks — for example, advising not to accept travel funding from the European Bridge initiative.

Unwanted online content is blocked to restrict access from Belarus. The list of such materials is compiled and regularly updated by BelGIE, the state inspectorate responsible for overseeing telecommunications.¹² In the summer of 2025, the minister of information estimated that approximately 18,000 resources had been blocked, including sites involved in fraud (such as drug

⁹ «Перечень граждан, причастных к экстремистской деятельности.» Министерство внутренних дел Республики Беларусь, <https://mvd.gov.by/ru/news/8642>.

¹⁰ Website of the KGB, <http://kgb.by/ru/perechen-inf-ru/>.

¹¹ Website of the Interior Ministry, <http://mvd.gov.by/uploads/news/8642/f9ec26b67e0509bae39efc399cdc3f5fa900aee1.docx>.

¹² «Список ограниченного доступа.» Сайт БелГИЭ, https://sod.belgie.by/ru/lists_access.

sales, gambling, and phishing) as well as those belonging to independent CSOs and media outlets.¹³

As of March 18, 2026, out of 1,136 political prisoners, at least 100 are CSO leaders and activists.¹⁴ Several individuals have been released during waves of amnesty for political prisoners mediated by the U. S.

Co-optation Track

The co-optation track aims for maximum control over registered CSOs and, ideally, their integration into the government apparatus — similar to Soviet-era organizations like Komsomol communist youth league. Some developments within this approach can be viewed as positive for CSOs operating in Belarus, though subject to certain limitations.

Opportunities for state social orders have been modestly expanded, and the requirement for mandatory co-financing has been removed. There are documented instances of participatory budgeting: Article 36-1, titled “Civil Initiatives,” in the Law “On Local Governance and Self-Governance in the Republic of Belarus” (introduced in 2023) allows for the implementation of community improvement projects.¹⁵ In 2025, Minsk selected 14 such projects through a competitive process, mainly related to installing playgrounds and sports facilities.

According to officials, around 90 civil initiatives aimed at community improvement are ongoing across Belarus.¹⁶ However,

¹³ «Ограничена деятельность 18 тыс. информационных ресурсов. Мининформ о продолжении гибридной войны.» БелТА, 06 June 2025, <https://belta.by/society/view/ogranichena-deyatelnost-18-tys-informatsionnyh-resursov-mininform-o-prodolzhenii-gibridnoj-vojny-719455-2025/>.

¹⁴ “Спіс палітычных вязней.” Вясна, <https://prisoners.spring96.org/be#list>.

¹⁵ «Закон “О местном управлении и самоуправлении в Республике Беларусь»» Pravo.by, <https://pravo.by/document/?guid=3871&p0=h11000108>.

¹⁶ «Минприроды: в Беларуси реализуют 90 гражданских инициатив

human rights advocates and experts argue that the selection process lacks transparency, citizen participation is limited, and the mechanism, judging by the nature of the winning projects, appears to be merely a façade of genuine civic engagement.

Changes in the external environment for CSOs in exile

Belarusian CSOs in exile operate within the legal and political frameworks of their host countries. In EU member states, legislation generally remains favorable toward non-profit organizations; however, in practice, sanctions-driven restrictions are often imposed. In 2025, banks' excessive caution (*overcompliance*) regarding sanctions and anti-money laundering laws caused issues for Belarusian-registered organizations, including audits, account freezes, and closures.

The most significant shock of the year was the withdrawal of USAID and its affiliated implementers. Experts estimate that civil society lost up to 50% of its funding, a blow particularly severe for media outlets and organizations working within Belarus. While European donors helped partially bridge this funding gap, their resources proved largely insufficient.

Competition for funding within the sector has become significantly more intense. Many organizations have been compelled to shut down projects, lay off staff, and give up physical spaces — such as the *Creative Culture Hub*, the *Free Belarus Centre* coworking space, and Tbilisi's *Kropka*, which ceased operations at the end of 2024.

Systemic problems in the external environment for CSOs in exile include:

по благоустройству.» БелТА, 12 Sep. 2025, <https://belta.by/society/view/minprirody-v-belarusi-realizujut-90-grazhdanskikh-initsiativ-po-blagoustrojstvu-737019-2025/>.

- Cross-border repressions, including trials in absentia¹⁷ against politically active Belarusians and CSO staff, as well as the use of anti-extremism and anti-terrorism legislation for these purposes;
- Administrative obstacles faced by Belarusians abroad, such as challenges with identity verification and complications arising from Belarus's status as a co-aggressor in the ongoing war;
- Limited access to target audiences inside Belarus, along with barriers faced by invited Belarusian citizens attending international events;
- Difficulties in obtaining visas for Belarusians outside the European Union;
- Challenges in balancing *visibility* with security considerations;
- Burnout and the loss of staff and expertise.

Status of civil society inside Belarus

According to *Lawtrend*, as of March 2026, Belarus had 1,924 registered CSOs: 1,347 NGOs (membership organizations), 464 agencies (non-membership organizations), and 113 foundations. Associations are not included in this analysis. Of these, 257 CSOs were registered after 2021, with agencies being the most numerous among recent registrants (136), followed by NGOs (108), and foundations (13). In 2025, 38 new CSOs were registered. However, registration does not necessarily equate to active operations.

The most common thematic categories among registered CSOs are sports and dance, charity and social services,

¹⁷ «Преступления нет, а приговор есть: Специальное производство как инструмент репрессий в Беларуси.» *Правовая инициатива*, 08 Sep. 2025, https://legin.info/documents/specprod_2025.

professional and service organizations, education, animal protection, and culture. At the bottom of the list are human rights groups, with only three registered organizations. The distribution of new registrations (after 2021) mirrors this pattern, as organizations tend to emerge mainly in sectors that the government deems safe.

Information about the actual activities of organizations operating within the country is almost entirely unavailable. CSOs are constantly faced with a dilemma: publicity is crucial for their work, but it also exposes their participants, staff, and members to risks. This forces most CSOs to operate in “invisible mode.” Nonetheless, some announcements and invitations suggest that strictly non-political events are still held – especially under the auspices of government agencies or “authorized” international organizations, such as UN agencies. However, even non-political initiatives can be labeled as extremist by the authorities, as was the case with the Borisov-based ‘Sklad Butelek’ art space in December 2025.

Civil society in exile: status and developments

The precise number of organizations established by Belarusians abroad remains unknown, with estimates being challenging for several reasons. Experts suggest there are between 400 and 600 CSOs, primarily registered in Poland and Lithuania, as well as in Germany, Sweden, the UK, Estonia, Ukraine, Georgia, the U. S., and other countries. However, a significant portion of these entities operate as unregistered initiatives, leveraging partner organizations for funding or are registered as sole proprietorships, despite engaging in public activities. Some organizations are registered in multiple countries simultaneously.

In 2025, CSOs published several studies on civil society, including *CSO Sustainability Index*, *Lawtrend* monitoring reports

and reviews, a study¹⁸ by ‘The Others BY’ organization, and a youth-focused study in Belarus titled “Ha-ha, we’re still here.”¹⁹

Among the achievements of CSOs in exile are advocacy campaigns (notably, the Association of Belarusian Parents in Lithuania), participation in international platforms (such as the Council of Europe Contact Group on Belarus), and the preparation of alternative reports within mechanisms where Belarus is officially represented. For instance, in 2025, Belarusian CSOs presented an alternative review of the implementation of the Sustainable Development Goals,²⁰ highlighting a systemic crisis of rights and freedoms, questioning the credibility of official reports, and describing the data collection system as closed and manipulative.

Human rights organizations conducted expert monitoring of the January 2025 presidential “election,” despite the inability to observe them within the country.

The connection between CSOs in exile and people inside Belarus remains structurally weak. It is not uncommon for relocated CSOs to covertly retain staff or volunteers within Belarus. However, more often, Belarusians inside the country remain beneficiaries — consuming content or services — rather than active participants or partners. This is primarily due to security concerns, though the question of the agency and role of those who stay is still unresolved.

The activities of organizations in exile are diverse: some focus solely on the Belarusian agenda, others target the diaspora

18 «Как медиа и НГО (не) сотрудничают: результаты исследования и советы друг другу.» *Иныя*, 30 Oct. 2025, <https://theothersby.org/ru/yak-ne-supratsounichayuts-medyya-i-nda-dasledavanne/>.

19 “«Ха-ха, мы яшчэ тут». Вынікі даследавання становішча беларускай моладзі.” *Рада*, 2025, <https://rada.fm/2026/01/27/ha-ha-my-yashchetut-2025/>.

20 “Belarusian Civil Society Report on Sustainable Development Goals Implementation.” *Belarusgreen*, 2025, <https://belarusgreen.vision/wp-content/uploads/2025/07/belarusian-cso-report-on-sdgs-implementation.pdf>.

or the local population in the host country, and some pursue a combination of both. Overall, the gap between CSOs inside the country and those in exile — in terms of legal status, focus, and operational methods — continues to grow wider.

Conclusion

Over the coming year, both repressive and co-optation strategies by the Belarusian authorities are expected to continue. If efforts are made to normalize relations with the West, the authorities may supplement the co-optation approach with a “simulacrum” of active presence and operations of civil society organizations within Belarus, as well as incorporation of their opinions.

Domestic CSOs will likely continue operating discreetly, focusing on sectors considered safe by the state. Exiled organizations will need to function amid financial instability and fierce competition for resources. Structural issues — including personnel loss, burnout, declining expertise, and the broadening gap with their audiences inside Belarus — are unlikely to be resolved in the short term.

DEMOCRATIC FORCES: SVIATLANA TSIKHANOUSKAYA MAINTAINS LEADERSHIP, IDEA OF NATIONAL DIALOGUE HANGS IN THE AIR

Aliaksandr Klaskouski

Summary

In 2025, Sviatlana Tsikhanouskaya's team maintained its leading role within the Belarusian democratic landscape. However, the five-year anniversary of the 2020 mass protests marked a psychological milestone, fueling heightened criticism of the democratic leader, her allies, and their strategy. The release of Viktor Babaryka and Maria Kalesnikava from prison at the end of the year laid the groundwork for a stronger faction favoring a more flexible approach toward Alexander Lukashenko's regime.

Trends

- Mainstream democratic forces, while still advocating for pressure on the regime, must now take into account the new U. S. policy toward Belarus, which proposes lifting some sanctions in exchange for the release of political prisoners;
- Sviatlana Tsikhanouskaya's Office (STO) and the United Transitional Cabinet (UTC) took on board and sought to promote the idea of a national dialogue;
- Throughout the year, voices of conditional “doves” gained prominence, prioritizing the need to free political prisoners and suggesting that Europe adopt a stance similar to that of the Trump administration regarding Belarus;
- Relations between the STO and the Lithuanian authorities deteriorated, forcing some members of Tsikhanouskaya's team to relocate to Warsaw.

“No-Choice” Elections 2025: a campaign without the opposition

On January 26, 2025, Belarus conducted presidential elections that the opposition labeled as “no-choice” elections. The campaign took place after the liquidation of all opposition parties and amidst intense repression, with no participation by regime opponents (except for pseudo-opposition figure Hanna Kanapatskaya, who was registered as a candidate by the Central Election Commission (CEC) and thrown a bone of a negligible share of votes). There were also no opportunities for independent monitoring.

Due to the regime’s harsh suppression of any political alternatives, democratic forces were fighting a losing battle, unable to formulate a robust strategy for this election cycle. Opponents of the regime who still decided (or were compelled) to visit the polling stations were encouraged to “express their protest by voting against all candidates, who were stealing our right to vote.”¹ Unsurprisingly, this had no effect on the official results announced by the CEC. Belarusian political émigré groups lacked the means to accurately gauge how many individuals genuinely expressed their dissent through such acts.

The primary focus was on delegitimizing the official results of the “no-choice” elections both domestically, in the eyes of Belarusians, and internationally. To this end, a broad campaign of protests and initiatives was launched outside the country. Notably, on January 26, as a symbolic alternative to the electoral farce, a forum and march titled “Belarusians Deserve Better” took place in Warsaw. The opposition emphasized that the European Union, dozens of countries, and several

¹ “Агульная заява дэмакратычных сілаў Беларусі да ‘выбараў’ 2025.” Святлана Ціханоўская, 23 Oct. 2024, <https://tsikhanouskaya.org/be/news/agulnaya-zayava-demokratychnyx-silau-belarusi-da-vybarau-2025.html>.

international organizations declined to recognize the outcomes of the 2025 elections.

Meanwhile, the narrative of this pseudo-electoral campaign highlighted the diminished influence of foreign opposition centers over internal Belarusian affairs. Pro-democracy citizens and remnants of the defeated political structures within the country also failed to make a significant impact within this campaign.

Keeping Belarus within international agenda

Given these circumstances, the efforts of the STO, UTC, Coordination Council, and several other organizations united around Tsikhanouskaya were primarily centered on maintaining Belarus's presence on the international stage. Their goals included increasing sanctions pressure on the regime, advocating for the release of political prisoners, and protecting the interests of Belarusians abroad — such as legalizing their status internationally and preserving and expanding mobility for those inside the country. Proposals for Western governments and international organizations to impose sanctions on Minsk and hold Lukashenko criminally accountable — particularly for the illegal deportation of Ukrainian children from occupied territories — were the main focus of the National Anti-Crisis Management, led by Pavel Latushka.

In August, at the “New Belarus — 2025” conference held in Warsaw, a resolution titled “European Choice of Belarus and Preparation of a Roadmap for EU Integration”² was adopted, reaffirming the democratic forces' pledge for the country to eventually join the European Union. However, given the current

² “Еўрапейскі выбар Беларусі і падрыхтоўка дарожнай карты інтэграцыі ў Еўрасаюз.” Святлана Ціханоўская, 09–10 Aug. 2025, https://tsikhanouskaya.org/Jeurapiejski_vybar_Bielarusi_i_padrychtouka_daroznaj_karty.pdf.

circumstances, this commitment appears largely declarative. The regime's opponents have only a limited range of tools to counter Belarus's increasing reliance on Moscow and the growing pro-Russian sentiment among the population.

Although Sviatlana Tsikhanouskaya and her allies urge the West not to conflate the Lukashenko regime with the Belarusian people, and despite the EU's verbal backing of Belarusians' European ambition, in practice, amid the Russia — Ukraine war — where the Belarusian regime acts as a co-aggressor — European political elites tend to prioritize securitization and favor isolating Belarus behind an iron curtain.

Several politicians and analysts argue that the mainstream democratic forces' approach of advocating for continuous pressure on the regime may inadvertently increase society's isolation from the democratic community and could even threaten Belarus's sovereignty. This perspective is notably endorsed³ by veteran opposition leader Zianon Pazniak, head of the "Free Belarus" movement.

Embedding Belarus track into Trump's game

Initially, the STO and UTC expected that with Trump assuming office, the United States would "maintain its policy of non-recognition toward Alexander Lukashenko," as Tsikhanouskaya's Deputy in the UTC, Latushka, noted in January 2025. However, contrary to these assumptions, the White House started engaging in dialogue with the regime. Trump even called Lukashenko "a deeply respected president," gifted him cufflinks, and consistently demonstrated other gestures of respect.

3 Пазыняк, Зянон. "Аб антыдзяржаўнай рыторыцы праціўнікаў дыктатуры." *Беларускі нацыянальны сакратарыят "Вольная Беларусь"*, 23 Jan. 2025, <https://www.bns-volnayabelarus.org/post/rytoryka-praciunikau-dyktatury>.

A gradual process of releasing political prisoners in exchange for the partial lifting of U. S. sanctions was set in motion. Nonetheless, repression in the country persisted, and Lukashenko effectively deported those who had been pardoned. In other words, there were no indications that Washington was pressing Minsk for systemic reforms on the road to a so-called “big deal.”

Nevertheless, Tsikhanouskaya and her allies opted not to openly criticize Washington’s new Belarus policy, instead choosing to align themselves with its trajectory. Democratic representatives emphasized their close contact with Trump’s team, which was engaged in negotiations with Minsk. A considerable effort was undertaken to facilitate the reception of former political prisoners who had been taken abroad with the assistance of U. S. diplomats. Tsikhanouskaya explained in September that the primary aim of the democratic forces was to “provide those released with legal, psychological, and medical support; address issues related to their legalization and documents.”

Simultaneously, Tsikhanouskaya and her allies continued to press the U.S. authorities to demand that Lukashenko halt repression and the practice of forcibly deporting pardoned prisoners abroad. Some criticism of the U.S. leadership was also voiced. In an interview⁴ with *Politico*, Tsikhanouskaya urged Trump: “We must not normalize the trafficking of political prisoners, when people are released for some concessions from your side, softening of sanctions or publicity ... Lukashenko has to be punished, not rewarded.”

Ultimately, Tsikhanouskaya’s team devised a compromise approach: U. S. sanctions in exchange for the release of people, and European sanctions for the liberation of the country — meaning systemic reforms in Belarus. There was a consistent

⁴ Svirnovskiy, Gregory. “Belarusian opposition leader calls for Trump to ‘punish’ dictator Lukashenko.” *Politico*, 07 Jul. 2025, <https://www.politico.eu/article/belarus-opposition-leader-sviatlana-tsikhanouskaya-donald-trump-punish-alexander-lukashenko/>.

plea for European leaders not to replicate the U. S. approach, but rather to maintain the strategy of pressure on the regime.

Siarhei Tsikhanouski's release from prison in June 2025 marked a significant milestone for democratic forces. After five years of imprisonment, mostly incommunicado, his political perspective appeared to remain rooted in the realities of 2020. As a result, his declared plan to "deal a decisive blow to Lukashism" within three weeks seemed naive. Tsikhanouski struggled to secure the necessary funds, eventually lost a large portion of his hastily assembled team, and ultimately moved to the U.S. to connect with local politicians and improve his English. His suggestion of "Finlandization" for Belarus faced strong criticism from various opposition figures.

Tsikhanouski therefore failed to step into the same river twice — to regain his popularity as a leading figure or rally like-minded supporters. It ultimately boiled down to an informal alliance with former restaurateur Vadim Prokopyev, one of Sviatlana Tsikhanouskaya's critics.

This narrative once again underscores how dramatically the prospects for the struggle for change in Belarus have evolved since 2020, also reflecting the shifting sentiments among supporters of change.

Roundtable with the authorities: a utopian idea or a viable future step?

In mid-year, the STO and UTC began to actively advocate for a national dialogue, with a key stage being a roundtable discussion with the authorities. On July 15, at the 107th Rose-Roth seminar in Brussels, Sviatlana Tsikhanouskaya declared: "Many individuals within Lukashenko's system, his officials, support our course and do not want Belarus to become Russia. We offer them a roundtable, similar to the one held in Poland in 1989."

However, some analysts challenged this analogy, pointing out that the current situation in Belarus is fundamentally different from Poland's at that time. Despite this, the concept has remained a recurring motif in Tsikhanouskaya and her allies' rhetoric. On August 9, the UTC officially announced its initiative to hold a national dialogue, seeking a peaceful resolution to Belarus's deep political and social crisis.

Why has this proposal gained increased promotion? First, it is likely a result of efforts to develop a constructive concept that complements the call to escalate pressure on the regime. Second, there appears to be hope that the U.S. may play a role in advancing this idea.

Valery Kavaleuski, head of the Euro-Atlantic Affairs Agency, strongly criticized attempts to incorporate this concept into negotiations between Washington and Minsk. He stated that "there are currently no objective reasons for Lukashenko to initiate dialogue with Sviatlana Tsikhanouskaya." Additionally, Kavaleuski warned that such efforts might even obstruct the further release of political prisoners. Meanwhile, Radio Liberty political analyst Valer Karbalevich commented, "For now, the idea of a roundtable remains a beautiful dream."

In any case, by the end of the year, there were no indications that Washington was lobbying for the roundtable proposal in negotiations with Lukashenko. This topic had noticeably receded in the rhetoric of democrats. Nevertheless, political scientist Piotr Rutkowski praised the concept, remarking: "The well-known Russian saying, 'Prepare the sled in summer and the cart in winter,' encapsulates the essence of strategic planning. The idea of a roundtable represents one of the possible avenues for change — one of the 'cart wheels' to be prepared during the political winter."⁵

⁵ Рудковский, Пётр. «Готовь телегу зимой. Почему идея круглого стола для Беларуси не наивность, а стратегия.» *Позірк*, 28 Jul. 2025, <https://pozirk.online/ru/longreads/148414/>.

Conditional “doves” vs. conditional “hawks”

During 2025, a debate unfolded within democratic forces regarding strategies toward the Belarusian regime, contrasting supporters of a conditionally hard approach with those favoring a conditionally flexible stance. The hardline approach envisioning continued pressure until the authorities commit to systemic reforms was championed by Tsikhanouskaya’s team, with Latushka emerging as its most ardent proponent.

The flexible approach, which involves making certain concessions to the regime — primarily to secure the release of political prisoners — was supported by Kavaleuski and his allies from the Coalition for the Release of Political Prisoners in Belarus (former UTC social policy representative Volha Harbunova, activist Anastasia Kostyugova, and Tatsiana Khomich, co-founder of the Association of Relatives and Former Political Prisoners and Maria Kolesnikova’s sister) and members of Viktor Babaryka’s team (Coordination Council executive secretary Ivan Kravtsov and others). Notably, Kavaleuski and Harbunova had previously left Tsikhanouskaya’s team, likely due to disagreements over these issues.

In March, during a meeting with Volkert Turk, the UN High Commissioner for Human Rights, Kavaleuski remarked that securing the release of Belarusian political prisoners “requires shifting away from unrealistic, maximalist demands and ultimatums.”

Meanwhile, Latushka emphasized that no agreements with Lukashenko could be reached until “he puts in place genuine political reforms that serve the interests of Belarusian society.” In August, during the “New Belarus — 2025” conference, Latushka responded to critics who considered the goals of democratic forces overly ambitious, stating: “Those who lose their battles, abandon their goals, or lower their standards — they exit

the race. The marathon isn't for everyone; you're free to step aside, but do not try to slow down or halt others."

Meanwhile, supporters of a more flexible, compromise-oriented approach capitalized on the momentum and arguments sparked by Washington's unexpected stance toward Belarus. They contended that the maximalist tactic of maximum pressure to the victorious end, pursued over the past five years, had not succeeded in securing the release of a single political prisoners. However, when Trump's administration started combining sticks with carrots, the process gained traction.

The December release of Viktor Babaryka and Maria Kalesnikava, two central figures of the 2020 protests, paved the way for the strengthening of the "dove" faction. In early 2026, Kalesnikava urged Europe to engage in dialogue with the Belarusian authorities in an interview with the *Financial Times*⁶, stating: "As someone with a European mentality, I don't understand why Europe didn't start talking to Lukashenko sooner than the U. S." Babaryka's first political statement on Facebook also reflected a tendency toward relatively more moderate rhetoric and a general reluctance to directly address the issue of sanctions.

Several analysts predicted that, with Babaryka and Kalesnikava having relocated to Berlin, a new hub for democratic forces could emerge, potentially heightening competition within the democratic movement. As of this writing, no official statement has been issued about the establishment of such an organization. However, Babaryka has indicated his intention to give an impetus to his party initiative, 'Razam'.

Tsikhaneuskaya's team took several strategic steps to foster understanding with Babaryka's supporters and prevent potential conflicts. The democratic leader and her associates held meetings with Babaryka and Kalesnikava, where they "discussed

⁶ Stognei, Anastasia. "Europe risks driving Belarus closer to Putin, says freed opposition leader." *Financial Times*, 19 Jan. 2026, <https://www.ft.com/content/3a0f83f7-f99c-4ea4-8c12-8af408ecf84a>.

strategic priorities, efforts to strengthen democratic forces, enhance unity, and improve coordination on the international stage.” According to insider sources, Tsikhanouskaya’s team is considering a reorganization of the democratic movement, with the goal of integrating Babaryka into their ranks in a position that reflects his political capital.

Conclusions

In 2025, Sviatlana Tsikhanouskaya solidified her position as the uncontested leader of the democratic forces, despite efforts by several opponents to challenge her legitimacy in light of the five-year anniversary of the 2020 elections. Tsikhanouskaya and her team successfully maintained robust contacts with Western political stakeholders.

The mainstream democratic movement, unified behind her leadership, persisted in its strategy of applying increasing pressure on the regime in hopes of securing systemic concessions. However, critics of this uncompromising approach gained ground and voiced stronger opposition.

One of the most pressing issues for democratic forces remained the challenge of influencing Belarusians within the country, particularly amid ongoing repression and societal depoliticization.

Forecast

It is highly probable that, as a result of U. S. diplomatic efforts, additional political prisoners will be released. Democratic forces will emphasize their involvement in this process, concentrate on supporting those released abroad, and offer assistance to them.

Given Kyiv's new policy toward Belarus, it is anticipated that relations between democratic forces and the Ukrainian authorities will evolve actively.

Belarusians' participation in the upcoming Coordination Council elections in May 2026 is unlikely to be widespread, as the organization continues to face a prolonged crisis. It has yet to build a compelling and appealing reputation among a broad coalition of change advocates.

If Russia and Ukraine reach a peace or ceasefire agreement, the conditional “doves” faction of democratic forces may have additional arguments to press the EU for a more flexible approach to Minsk and negotiations with Belarusian authorities.

Sviatlana Tsikhanouskaya's team will seek to incorporate Viktor Babaryka into their ranks to prevent the emergence of a competing political exile hub.

The likelihood of a *roundtable* with the authorities materializing before a significant crisis within the regime is low. Such a crisis might be sparked, for instance, by Lukashenko's physical withdrawal from power. However, in that situation, the risk of Moscow taking drastic measures — such as installing a puppet leader in Belarus or fully annexing the country — would rise considerably.

MEDIA: INTEGRATION INTO THE RUSSIAN PROPAGANDA ECOSYSTEM, SEMANTIC CAPTURE, FRAGMENTATION OF THE INDEPENDENT SEGMENT

Mikhail Doroshevich

Summary

In 2025, Belarus's media landscape was shaped by *three* interconnected processes: accelerated integration of state media into the Russian propaganda ecosystem, ongoing fragmentation of the independent segment driven by emigration and repression, and the rise of short-form video content as a new arena for media influence. Drawing on a database of over one million documents from both government and independent sources, this analysis examines: the degree of synchronization between Belarusian state media and the Russian agenda, the lexical war surrounding Ukraine, the portrayal of the EU in the state media, and the advent of TikTok as a platform for political influence.

Trends

- Total — over 90 % — synchronization of the Belarusian and Russian state media agendas;
- Controlled narrative toolkit: strategic overhaul of the propaganda register; configuration of the repertoire to respond to geopolitical stimuli common to both Belarus and Russia;
- Lexical warfare as a methodological challenge: a sharp rise in the use of the term “special military operation” in independent media as forced citation;
- Escalation: TikTok as a new front in media influence.

Media landscape: structural divide

Throughout 2025, the Belarusian media landscape remained fundamentally split – a trend that had originated after 2020. The state-controlled segment, including BelTA, STV, ONT, Belarus 1, Belarus Today, and hundreds of regional media outlets with their Telegram channels, YouTube, and TikTok, operates as a unified media system with centralized narrative coordination.

The independent segment, comprising *Zerkalo*, *Nasha Niva*, *Reform*, *Euroradio*, and others, primarily operates from Lithuania, Poland, Germany, and Ukraine, with limited access to the domestic audience.

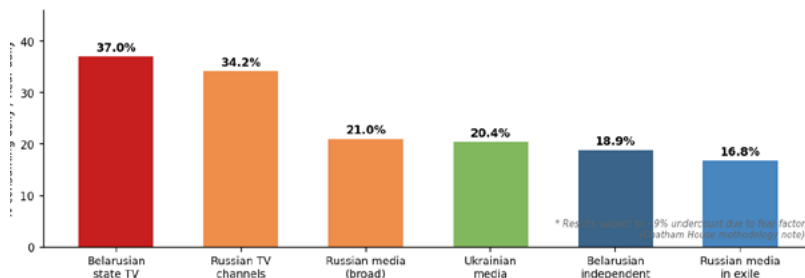
YouTube remains the main video channel for state media, whereas for independent content its significance as a platform has markedly declined. Continuous YouTube traffic monitoring (23,500 data points over 2,011 days between 2020 and 2025)¹ identified the emergence of a “new normal” beginning in 2023: a stabilization of the average daily index at 22–25, down from the historical level of over 35. The peak was recorded on January 4, 2023, at 10:00 PM (83.22), while the all-time low coincided with the mass internet shutdown following the August 2020 elections (0.048). Three waves of outbound migration (2021 – content creators, 2022 – IT specialists, 2023 and beyond – ongoing) have structurally weakened the independent YouTube segment.

According to a *Chatham House* survey, 37.0 % of respondents watch Belarusian state TV channels daily or almost daily, 34.2 % watch Russian TV channels, 18.9 % follow Belarusian independent media, and 16.8 % consume Russian media in exile (see Figure 1). The authors argue that fear factor may result in up to 9 % undercount of critical responses.²

¹ Дорошевич, Михаил. «Анализ YouTube-трафика белорусских медиа: 2020–2025.» *FactCheck.lt*, 08 July 2025, <https://factcheck.lt>.

² «Медиапотребление белоруской интернет-аудитории в начале

Figure 1. Media consumption of Belarusian



Source: Chatham House / belaruspolls.org, wave 20; cluster analysis: infopolicy.net, Feb. 2025.

Independent media organizations faced a sharp financial crisis: on January 20, 2025, the Donald Trump administration froze foreign aid projects. According to Reporters Without Borders (RSF), six of the thirty largest Belarusian media outlets in exile lost all their funding; the frozen U.S. assistance accounted for over half of the total Western funding for the sector – around USD 30 million.³ The European Federation of Journalists (EFJ) called on European donors to compensate for the lost funds.

This financial crisis was further exacerbated by repressive measures. A report by the Belarusian Association of Journalists (BAJ) and *Justice for Journalists* recorded 478 cases of assaults and threats against media workers in 2025; as of February 2026, 28 journalists remained behind bars.⁴ The practice of remote criminal prosecution of journalists in exile – about 100 cases

2025 года.» *Information Policy*, 12 Feb. 2025, <https://infopolicy.net/mediapotrebienie-belaruskoj-internet-auditorii-v-nachale-2025-goda/>.

³ “RSF condemns USAID freeze as catastrophe for post-Soviet independent media.” RSF, Feb. 2025, <https://rsf.org>.

⁴ “Attacks on Media Workers in Belarus in 2025.” *Justice for Journalists Foundation*, 09 Mar. 2026, <https://jfj.fund/attacks-on-media-workers-in-belarus-in-2025/>.

known by 2025 — has effectively turned emigration into a constant state of legal vulnerability.

Russian influence: five dimensions of integration

The concept of “Russian influence” is measured through five parameters: (1) citation of Russian experts, (2) citation of officials, (3) references to Russian media, (4) thematization of Russian television, (5) mention of Union State narratives. Methodological note: comprehensive monitoring of sb.by was initiated in 2025, ensuring comparability of the text corpus for that year, but limiting accurate comparisons with 2024.

Union State narratives

In 2025, the text corpus recorded 38,937 publications featuring Union State narratives, of which 93.7% (36,497 items) came from state sources. The presence of independent media remains consistently low — 100 to 200 publications monthly — indicating that the category’s behavior is entirely driven by the editorial policies of state media, not an organic agenda. The peak month was August 2025, with 6,412 publications from state sources — directly linked to the deployment of Russian troops to Belarusian training grounds in preparation for the Zapad-2025 exercises (September 12–16). This was followed by September (4,763) and April 2025 (4,268 publications).

Citation of Russian experts and references to Russian media

In 2025, a total of 24,444 publications quoted Russian experts (89.9% from government sources), while independent media persist in keeping their distance, accounting for 2,480 publications. The category “references to Russian media” with

24,849 publications, of them 95.2% in the state segment, reflects direct content borrowing, including word-for-word reprints from TASS, RIA Novosti, and *Russia Today*.

Table 1. Synchronization of Belarusian state media with Russian sources, 2025

Synchronization indicator	Publications
Simultaneous topics with Russian media (same day)	115
Direct reprints of Russian sources	426
Publications on joint military exercises	18,734
Narratives about integration (civil)	4,350

Source: FORESIGHT/FactCheck. LT monitoring tool, Digitalhub VSI.

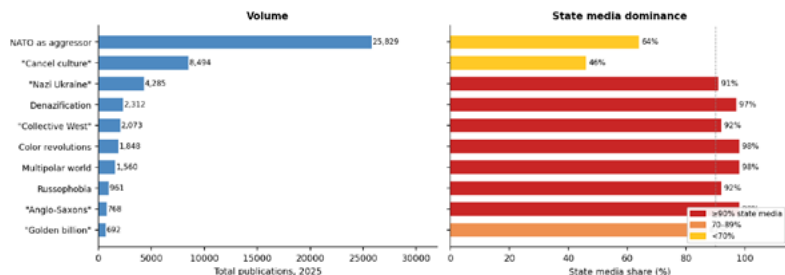
Data on synchronization confirm the institutional nature of integration: 115 instances of simultaneous same-day publication on the same topic with Russian state media, 426 instances of direct reprints, 18,734 publications about joint military exercises, and 4,350 narratives related to integration in the civic sector (see Table 1).

Russian narrative points

The most prominent narrative is “NATO as an aggressor” with 25,829 publications, of them 64% in the state segment — the only category where the proportion of state media is notably below the average, indicating widespread dissemination of this idea across the media landscape.

In 2025, the “denazification” narrative (2,312 publications, 97% from the state segment) was actively employed in the context of negotiations: state media used it seeking to legitimize Russian terms (see Figure 2).

Figure 2. Russian narrative markers in Belarusian media, 2025 (left: total publications; right: state media share)



Source: FORESIGHT monitoring system / FactCheck.LT, Digitalhub VSI.

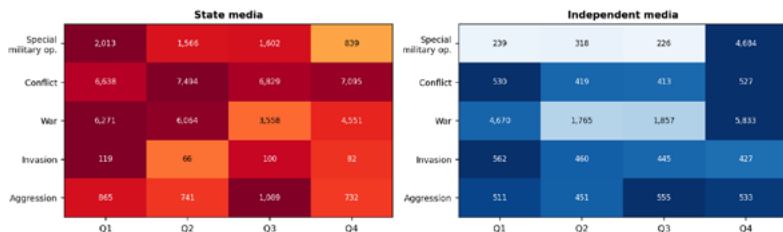
The “cancel culture” narrative (8,494 publications) is the only category where independent sources constitute a significant share (54 %). While state media used it to accuse the West, independent outlets employed it as a subject of critical analysis (see Figure 2).

Ukraine: four mirrors of a single war

An analysis of 488,635 publications on the Ukraine war, from both government sources (BelTA, Belarus Today) and independent media (*Zerkalo*, *Nasha Niva*, *Reform*, *Euroradio*), over four years, suggests the concept of “four mirrors”: each type of source reflects the war through its own set of filters.

Mirror One (government media): The war is depicted as a “conflict” instigated by Western aggression (see Figure 3). Key markers include: “special military operation” (2,013 mentions in the first quarter, state segment), “conflict” as a neutral substitute (6,638–7,494 mentions per quarter), and a notable absence of the word “invasion” (66–119 mentions versus 427–562 in independent media).

Figure 3. War terminology in Belarusian media by quarter, 2025 (row-normalized intensity)



Source: FORESIGHT / FactCheck.LT; corpus: 488,635 publications.

Mirror Two (independent media): Consistent use of language aligned with human rights standards: “war” (4,670 mentions in the first quarter, 5,833 in the fourth quarter), “invasion” (427–562), and “aggression” (451–555). In the fourth quarter, there was a sharp increase in the use of the term “special military operation” within independent media, rising from 226–318 mentions per quarter to 4,684. However, this does not indicate a change in their stance; rather, it reflects the forced quoting of the 2025 negotiation discourse, which reproduced the Russian narrative language for critical analysis.

Mirror Three (“the silence map”): State media consistently concealed information about civilian casualties, infrastructure destruction, and the use of the Belarusian territory for Russian military operations. The 2025 negotiation process was portrayed as “Belarus’s historical justice,” whereas independent media critically examined the conditions for a potential deal.

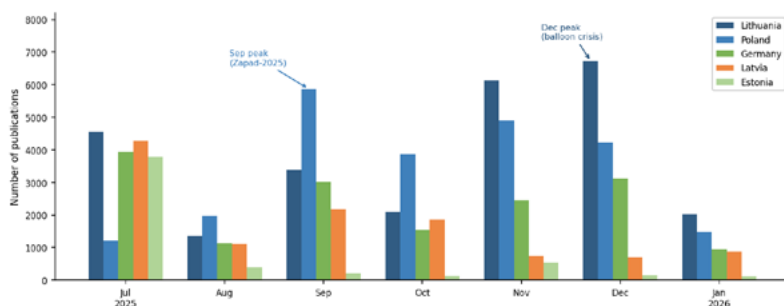
Mirror Four (“Belarus as a transit area”): State media consistently depicted Belarus as an “uninvolved party,” while independent sources documented its military role through satellite images and open-source data.

Portrayal of neighbors: EU countries in Belarusian state media

An analysis of the coverage of EU countries in the period between July 2025 and January 2026 shows a steady hierarchy in the level of attention they received: Lithuania – 26,271 mentions; Poland – 23,547; Germany – 16,177; Latvia – 11,726; Estonia – 5,338 (see Figure 4).

The peak of mentions of Lithuania occurred in December 2025 (6,723), coinciding with the escalation of the weather balloon crisis: throughout the year, approximately 500 launches from the territory of Belarus were recorded. For example, on December 6, Vilnius International Airport was shut down, and the Lithuanian Interior Ministry proposed declaring a state of emergency.⁵ Belarusian state media interpreted the crisis as a Western provocation. The narrative scope included themes such as support for the opposition as interference in internal affairs, economic “failures,” and militarization as a “threat to peace.”

Figure 4. EU neighbor coverage in Belarusian state media, Jul 2025 – Jan 2026 (publications/month).



Source: FORESIGHT monitoring system / FactCheck.LT, Digitalhub VSI.

⁵ “Belarus Review, December 8, 2025.” iSANS, 8 Dec. 2025, <https://isans.org/analysis/belarus-review/belarus-review-by-isans-december-8-2025.html>.

The peak in mentions of Poland in September (5,871) was linked to the Belarus – Russia West 2025 exercises: on September 9, 2025, Polish Prime Minister Donald Tusk announced the closure of the state border between Poland and Belarus starting September 11. Belarusian state media portray Poland not merely as a hostile neighbor but as a “historical claimant” to Belarusian territory and NATO military outpost. This narrative essentially reproduces the Russian image of Poland.

Germany, with its highest number of mentions in July (3,936 publications), is depicted through internal contradictions, such as the surge of ultranationalism and economic challenges. Latvia and Estonia are mainly referenced within narratives associated with “Russophobia.” The significant drop in publications about Estonia by January 2026 (112 compared to 3,781 in July) highlights the event-driven nature of the coverage: most of the July articles were related to the joint military exercises of Belarus and Russia (see Figure 4).

TikTok: a new battleground for information influence

By 2025, TikTok had fully established itself as a platform for political influence. Systematic monitoring shows consistent growth: in May, there were 245 active channels out of more than 300 monitored, with 10,946 videos and 417 million views; in July, 240 active channels out of over 400 (11,288 videos, 528 million views); in October, 249 active channels out of more than 500 (11,109 videos, with reach surpassing 600 million).⁶ These figures are comparable to the audiences of the country’s largest television channels.

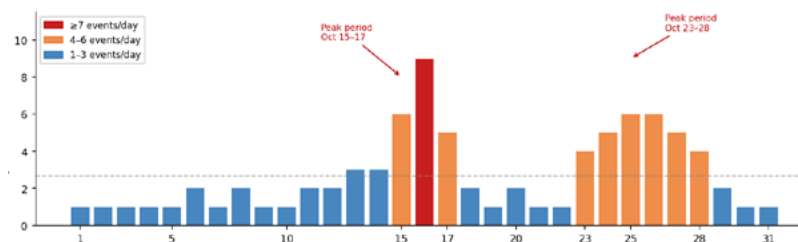
The Belarusian TikTok landscape is structurally quite different from platforms like YouTube or Telegram: it lacks direct

⁶ See TikTok-мониторинг: ежемесячные отчёты май, июль, октябрь 2025. Information Policy, <https://infopolicy.net/en/category/belarus/>.

administrative control by the government. Instead, it is characterized by a complex network of channels that are officially independent but exhibit strong signs of coordination.

An analysis of 21 thematically related channels revealed a coordination index of 91.7 out of 100 ($p < 10^{-80}$), providing statistical evidence that the synchronization observed could not have occurred by chance.⁷ Among 83 instances of posts made within a one-minute window, 13 shared an interval of less than 10 seconds, ruling out manual coordination and indicating the use of automated systems (see Figure 5).

Figure 5. Distribution of 83 synchronization events (posts within 1-minute windows) across 21 Belarusian TikTok channels, Oct 2025

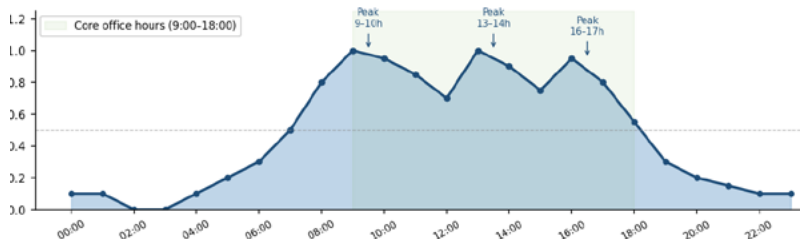


Source: FactCheck.LT, Nov. 2025, https://factcheck.lt/news/tiktok_coordination/.

Activity patterns throughout the day show distinct peaks at 9:00–11:00, 13:00–14:00, and 16:00–17:00, with a sharp decline after 19:00. This suggests the involvement of a professional team working on a typical office schedule (see Figure 6). Notably, there is a clear “working hours” pattern, with activity nearly nonexistent after 20:00.

⁷ Дорошевич, Михаил. «Как белорусский TikTok превращается в фабрику дискредитации.» *FactCheck.LT*, 17 Nov. 2025, https://factcheck.lt/news/tiktok_coordination/.

Figure 6. Hourly distribution of synchronized publications, 21 Belarusian TikTok channels, Oct 2025. Note the clear “office hours” pattern and near-zero activity after 20:00



Source: FactCheck.LT, Nov. 2025, https://factcheck.lt/news/tiktok_coordination/.

A key tactic in discrediting the opposition involved the hashtag #война (war) targeting opposition leaders: four main strategies were used — ridicule, contextual discrediting, narrative substitution, and comparative delegitimization. The hashtag #тихановский (Tsikhanouski) appeared in 87 posts, with 82.8% concentrated within pro-government channels of the coordination core. The hashtag #оппозиция (opposition) was used in 10 posts, all within the same channels. This distribution is statistically inconsistent with organic use.

The most thoroughly documented case is the presidential elections in Poland (May-June 2025). The analysis of Belarusian state YouTube channels from April 21 to 27, 2025 revealed five coordinated narratives: absence of genuine choice, external control over the candidates, criminalization, potential election fraud, and widespread voter disillusionment.⁸ All materials appeared within a single week, with some featuring the same “experts” who cited each other — classic markers of influence operations.

⁸ Дорошевич, Михаил. «Беларуская пропаганда и польские выборы.» *FactCheck.LT*, 29 Apr. 2025, https://factcheck.lt/news/by_propaganda_pl_elections/.

Subordination or “spontaneous” harmony?

The combination of these processes raises a methodological question for the researcher: are we witnessing a coordinated or “spontaneous” harmony between Belarusian and Russian narratives? The 2025 data are compatible with both interpretations; however, several observations point in favor of the latter. The managed narrowing of the narrative repertoire (notably, the almost complete withdrawal of the “Anglo-Saxons” narrative, which nevertheless maintains its dominance in the state segment at around 98%) suggests more an internal editorial logic reacting to the same geopolitical stimuli as the Russian side, rather than an external command.

The “NATO as aggressor” narrative, with only 64% share of the state segment, is the only one in this regard reflecting its organic presence across the entire media landscape, which is characteristic of congruence (“accidental” synchronization) rather than mere targeted transmission. Furthermore, the involvement of independent media in the lexical trap of the “special military operation” in the *fourth* quarter occurs autonomously, through the negotiation context, without any dependence on the state segment.

Therefore, it is more accurate to speak not of the retransmission of Russian media operations, but of profound ideological congruence: Belarusian state media independently produce narratives that are compatible with those Russian content-wise, building on a shared institutional matrix of Soviet and post-Soviet origins. Regardless of which mechanism more precisely explains the reality, the observed outcome for the Belarusian media environment remains the same: the state media space operates as a domain where Russian and Belarusian propaganda agendas are virtually indistinguishable.

The independent sector faces simultaneous pressures on multiple fronts. Technologically: resource asymmetries on

TikTok are structurally disadvantageous for content focused on deep engagement rather than broad reach. Audience-wise: access to the internal audience remains restricted. Financially: the crisis in donor funding, triggered by the freezing of American assistance in January 2025, remains unresolved. Legally: in 2025, there were 478 documented cases of pressure on media workers, 28 journalists remained imprisoned, and approximately 100 cases of extrajudicial persecution against émigré editorial offices were ongoing.

Collectively, these factors pose a systemic challenge not only to the Belarusian media environment but also to the stability of democratic discourse in the region as a whole.

Conclusion

In the near term, the degree of narrative congruence between Belarusian state media and the Russian agenda will be shaped by the course of negotiations over Ukraine: a sustainable ceasefire could enable partial editorial independence, while persisting conflict will reinforce the current model.

TikTok will become the primary battleground for influencing the internal, especially young, audience, and the asymmetry between coordinated pro-government networks and dispersed independent content is likely to intensify. Financial threats to independent media will remain as long as there is no structural response from European donors.

EDUCATION: PATRIOTISM AND LOYALTY ABOVE ALL

Pavel Tereshkovich

Summary

In 2025, the escalation of totalitarian practices was clearly manifested through the instrumentalization of education to ensure consolidation of the ruling regime. Key government initiatives in this area included political indoctrination emphasizing the personality cult of Lukashenko, militarization, and the ongoing political repression. These processes were accompanied by Russification campaigns, carried out both by the Lukashenko administration and Russian “soft power” agencies. The deterioration of the education system has become increasingly apparent, notably reflected in the declining standings of Belarusian universities in international rankings.

Trends

- Political indoctrination and militarization remain central components of the education policy;
- The age for indoctrination and militarization is decreasing, reaching down to preschool children;
- The Russification of education persists, with vigorous efforts by Russian “soft power” initiatives;
- Repressive measures continue, including cross-border actions targeting educators, students, and teaching communities;
- The education system as a whole is experiencing ongoing decline and deterioration.

Political indoctrination

In 2025, political indoctrination remained a central element of the official educational framework. A notable example was the

release of a new textbook on recent Belarusian history, which exemplified ideological influence on educational material.¹ The textbook relied on Soviet historiographical paradigms, emphasizing the glorification of Lukashenko's regime, and was fully aligned with narratives justifying Russia's aggression in Ukraine.

Even the music curriculum was politicized, featuring a list of works "aimed at fostering civic identity and patriotism." A prominent trend over the past year was the increased emphasis on Soviet legacy, including celebrations of Vladimir Lenin's birthday and the October Revolution Day.

In 2025, the cultivation of the Lukashenko personality cult was significantly intensified, especially against the backdrop of the formal presidential election process. Beyond the traditional coercion of students to vote early and participate in campaign activities, widespread practices included group video greetings celebrating victory, public displays of loyalty ("You are the People's President," or performances of the song "Our Batka is Cool"), and participation in pickets along Lukashenko's convoy route during the inauguration.

Great emphasis was placed on promoting the book "Our President."² For instance, Belarusian State University Rector Korol delivered a special heuristic lecture titled "Time Chose Us."³ A prominent display of propaganda was the public Santa wish-granting event, where a schoolchild was presented with "Our President" as a desired New Year's gift. In recent years,

1 *История Беларуси в контексте всемирной истории. 11 класс. Часть 2.* Мн.: Издательский центр Белорусского государственного университета, 2025.

2 *Наш президент.* Мн.: Беларусь РУП Изд-во, 2025.

3 «Эвристические занятия выступают современным путеводителем к воспитанию лидеров и настоящих патриотов страны.» *Белорусский государственный университет*, 21 Feb. 2025, bsu.by/news/evristicheskie-zanyatiya-vystupayut-sovremennym-putevoditelem-k-vospitaniiyu-liderov-i-nastoyashchikh-d/.

a notable trend has been the lowering of the age for indoctrination, with the Lukashenko personality cult being promoted even among preschool children.

Militarization

Militaristic themes and rhetoric remained a key element of ideological indoctrination. A distinguished trait of the analyzed period was the active utilization of the network of military-patriotic clubs, cadet schools, and military personnel in organizing events with schoolchildren and students. These gatherings increasingly included demonstrations of weapons and the conduct of militarized games and competitions. Such events are particularly concerning when held in kindergartens, as the young participants are especially vulnerable to this type of rhetoric.

In 2025, plans were announced to extend the duration of war games for schoolchildren from five to ten days. These exercises are conducted within the framework of the Initial Military Training course introduced in 2023, which covers weapons handling, basic shooting skills, and the use of hand grenades. Last year, university rectors were also involved in training sessions, practicing scenarios such as “conducting combat operations in populated areas.”⁴

Last year, a distinct focus emerged on establishing a comprehensive system for training specialists aligned with the needs of the military-industrial complex. This included the development of a network of engineering classes, the National Children’s Technopark, and specialized higher education institutions. Notably, the National Children’s Technopark launched a dedicated

⁴ «Ректоры вузов на военных сборах отработают ведение боёв в населённых пунктах.» Pozirk, 04 June 2025, <https://pozirk.online/ru/news/141316/>.

program⁵ for training UAV operators. Seventeen universities planned to open specialized classes to support these initiatives. Throughout the year, discussions also centered on creating “Belarusian Harvard” — an elite school of natural sciences and technology aimed at training top-tier engineers, primarily in fields relevant to military applications.⁶

Political repression

In 2025, educators and students continued to be targets of repression, facing imprisonment, politically motivated dismissals, restrictions on certain professions, and intimidation tactics. While some political prisoners were released, the number of teachers convicted on political charges continued to grow.

Most cases of dismissals due to political reasons and bans on professional activities remain unreported, often due to coercion to resign voluntarily or non-renewal of contracts. The true scope of repression can only be estimated indirectly. For example, the Education Development Program for 2026–2030, published at the end of 2025, revealed an unprecedentedly low percentage of university faculty with academic degrees — only 40 %.⁷ Compared to the 2019/2020 academic year, this marks a decline of 7.3 %, or approximately 2,700 individuals, representing 28.5 %

⁵ «Новая учебная программа для учащихся образовательного направления “Авиакосмические технологии”». *Национальный детский техно-парк*, 17 Feb. 2025, ndtp.by/2025/02/17/17730/.

⁶ «Министр образования Иванец сказал, кто и как поступит в белорусский Гарвард.» *Комсомольская правда*, 18 Aug. 2025, <https://www.belarus.kp.ru/online/news/6525247/>.

⁷ «Постановление Совета министров Республики Беларусь от 30.12.2025 г. № 796 “О Государственной программе ‘Беларусь интеллектуальная’ на 2026–2030 годы”» *Pravo.By*, 30 Dec. 2025, <https://pravo.by/document/?guid=12551&p0=C22500796>.

of all degree-holding faculty.⁸ Additionally, in 2025, a new version of legislation concerning children's rights was enacted, legalizing the exclusion of individuals who committed "extremist" crimes from working with children.⁹

A prominent feature of 2025 was the widespread use of public show trials to intimidate students and schoolchildren, often conducted in front of their peers. Previously, such trials were primarily aimed at preventing drug abuse, but last year, they were carried out under typical "political" charges.

As in previous years, repression continued to target professional communities of teachers and educators: the *Vasminoh* educational platform, the *Uchitelskaya* and *Nastaunik.info* Telegram channels were designated as extremist entities. Furthermore, repression extended beyond the national borders. For example, the European Humanities University and the Belarusian Academy online platform (affiliated with a Polish university), both holding official status as foreign institutions, were also targeted.

Russification and Russian "soft power" initiatives

Throughout Lukashenko's rule, the Belarusian education system has undergone persistent Russification. Between 2005 and 2024, the percentage of secondary school students studying in Belarusian decreased from 23.0 % to 8.2 %, with the figures in Vitebsk and Mogilev Regions dropping to 4.6 % and 6.6 %, respectively.¹⁰

⁸ «Образование в Республике Беларусь (2019/2020 учебный год).» *Белстат*, 31 Dec. 2019, https://www.belstat.gov.by/ofitsialnaya-statistika/socialnaya-sfera/obrazovanie/publikatsii_8/index_16031/.

⁹ «Закон Республики Беларусь от 12.07.2025 г. № 86-З "Об изменении законов по вопросам обеспечения прав детей."» *Pravo.By*, 12 July, pravo.by/document/?guid=12551&p0=H12500086.

¹⁰ «Численность учащихся в дневных учреждениях общего среднего

This Russification has been accompanied by unprecedented efforts by Russian “soft power” institutions, namely, the five branches of Rossotrudnichestvo Federal Agency for the Commonwealth of Independent States Affairs, Compatriots Living Abroad, and International Humanitarian Cooperation (usually their number does not exceed two). Their primary focus is on offering scholarships at Russian universities, which have increased 18-fold since 2019, reaching 1,300 scholarships annually.¹¹ Beyond this, the activities of Russian Houses are purely ideological, including propaganda supporting the war in Ukraine, promoting Putin’s personality cult, organizing trips for Belarusian youth to “patriotic forums” in Russia, and similar initiatives.

International contacts

Belarus’s international cooperation in education has been driven solely by ideological motives. China has evolved as the country’s top partner. For instance, a delegation from Beijing University visited Belarus, and Belarusian State University established the Belarus–China Center for Fundamental Scientific Research in mathematics, physics, chemistry, and biology. Officials report that China accounts for up to 20 % of all international agreements of Belarusian State University.¹² Notable developments last year also included establishing educational relations with

образования по языку обучения.» *Белстат*, dataportal.belstat.gov.by/oids/indicator-info/10103000022.

¹¹ «Россия выделила 1300 квот на бесплатное образование для белорусских абитуриентов.» *МИР 24*, 07 Feb. 2023, by.mir24.tv/news/16540998/rossiya-vydelila-1300-kvot-na-besplatnoe-obrazovanie-dlya-belorusskikh-abiturientov.

¹² «В БГУ открыли Белорусско-Китайский центр фундаментальных научных исследований.» *Белорусский государственный университет*, 15 July 2025, bsu.by/news/v-bgu-otkryli-belorussko-kitayskiy-tsentr-fundamentalnykh-nauchnykh-issledovaniy-d/.

North Korea, the Taliban regime in Afghanistan, and the military junta in Myanmar.

Degradation of the education system

Widespread repression has led to a significant shortage of qualified teachers across all levels and a general decline in the education system. This is most clearly seen in higher education. Belarusian universities are virtually absent from the Shanghai Academic Ranking of World Universities and *Times Higher Education* World University Rankings, while in the QS World University Rankings, the country's leading Belarusian State University fell by 60 positions over the past year.¹³ The latest effort by the Ministry of Education — the *Webometrics* Ranking of World Universities — fell short of expectations, with only eight Belarusian universities ranking within the top 5,000 worldwide.¹⁴

Conclusion

By 2025, the transformation of the education system into a tool for total control over students and teachers continued unabated. The educational agenda focused heavily on activities aimed at ideological indoctrination and militarization. Notably, the propaganda age threshold was lowered to include even kindergarten children.

A clear push to establish a personality cult around Lukashenko became apparent. Efforts to militarize the system, including

¹³ “Belarusian State University.” *Top Universities*, www.topuniversities.com/universities/belarusian-state-university.

¹⁴ “Belarus Ranking January 2026 — Webometrics Global Position.” *WEBOMETRICS Global Web Rankings for Universities*, www.webometrics.org/belarus.

training specialists for the military-industrial complex starting from the school level, increased significantly.

Political repression persisted, involving politically motivated dismissals, intimidation of students, and the designation of educational communities and institutions — including foreign ones — as extremist.

International engagement has been solely driven by ideological motives, involving interactions with some of the most notorious contemporary totalitarian regimes.

The mass repression of the recent years and the prioritization of ideological objectives over educational goals have led to a general deterioration of the education system. As a result, Belarusian universities are increasingly falling behind in international rankings.

It is highly probable that the system will continue to experience broader and deeper ideological indoctrination, militarization, and international isolation, ultimately contributing to its ongoing decline.

SCIENCE AND INNOVATION: AN “OPTIMISTIC TRAGEDY”

Andrei Laurukhin

Summary

In 2025, the most recent State Program for Innovative Development was concluded. It was accompanied by triumphant official reports amid a significant decline in citations in international databases and a drop in the Global Innovation Index ranking. Over the past five years, Belarus's innovation system has failed to escape the trap of low innovation activity. Belarusian scientists and innovators have shifted their focus toward international cooperation with the Russian Federation, China, and the “far arc” countries.

Belarus's financial, infrastructural, cognitive, and informational dependence on Russia has substantially increased. With ongoing repression and (self)isolation from developed democracies, sanctions pressure, and role in facilitating Russia's military acts against Ukraine, Belarus has set new priorities in science and innovation: import substitution, strengthening of the military-technical sector, and robotics.

Trends

- Decline in the citation index of Belarusian scientists in high-ranking international databases, such as *Scopus* or *Web of Science*;
- Deterioration of the human resource capacity of Belarusian science;
- Greater dependence on the Russian Federation and the People's Republic of China for innovation;
- Growth in the share of R&D and innovation for the defense industry.

Trap of low innovation activity

The State Program for Innovative Development for 2020–2025 concluded in 2025, and official statistics along with public reports from officials sound optimistic. In 2025, the five-year growth in R&D/GDP intensity continued: in 2021, it was 0.46 %; in 2022, 0.47 %; in 2023, 0.57 %; and in 2024, 0.59 % of GDP.

Compared to several post-Soviet countries (Kazakhstan with 0.14 % of GDP, Azerbaijan with 0.18 %, Armenia with 0.18 %, and Moldova with 0.22 %), Belarus looks quite strong.¹ However, this growth remains significantly below the internationally recognized threshold of 1.0 % and falls short of the figures seen in neighboring Former Soviet Union (FSU) countries that are members of the European Union. For instance, in 2025, Lithuania's R&D/GDP intensity showed steady growth, settling between 1.5 % and 2.0 %.

Another equally important indicator of scientific potential – the number of researchers per 10,000 population – increased by more than 10 % compared to 2021: in 2021, it was 17.5; in 2022, 17.8; in 2023, 18.7; and in 2024, 9.4 researchers.² This figure is higher than in the above FSU countries, but remains significantly lower than in developed countries worldwide. Over the past decade, countries like Poland, Cyprus, Greece, Hungary, Portugal, Sweden, and Belgium have seen researcher numbers grow by over 60 %. On average, the EU has about 100–150 researchers per 10,000 population. Leaders such as Germany and

¹ «Директор Института экономики НАН Беларуси: За пятилетку наукоёмкость ВВП выросла более чем на четверть.» *Беларусь сегодня*, 16 Jan. 2026, <https://www.sb.by/articles/direktor-instituta-ekonomiki-nan-belarusi-za-pyatiletku-naukoemkost-vvp-vyroslo-bole-chem-na-chetve.html>.

² Республика Беларусь. *Статистический ежегодник*. Минск: Белстат, 2025. С. 297.

Scandinavian countries significantly surpass this level, while Eastern European countries are somewhat below the average.

Overall, the main indicators of innovative development have traditionally increased within a range below the critical thresholds recognized in developed countries. In this perspective, Belarus appears relatively decent only when compared to countries with even less advanced innovation systems. However, when measured against more developed nations, it lags considerably behind. The growth of innovation metrics, which stays below the necessary threshold – insufficient to achieve a breakthrough or move to a higher category – is described by international experts as *low innovation activity* or *insufficient innovation output*. This leads to a more realistic conclusion: Belarus remains stuck in a trap of low innovation activity.

This is the reason why Belarus ranks very low in the 2025 Global Innovation Index (85th out of 139 countries), and the five-year trend (spanning 2020 through 2025) is largely negative, with a decline of *eleven* positions in the global ranking.³ A more detailed analysis shows uneven changes in indicators in the short term and a prevailing negative trend over the longer term.

If we take “science and innovation investment,” the situation with scientific publications improved in the short term (+51% between 2023 and 2024), but worsened over the past decade (minus 0.7 %). R&D investments expanded by 26.6 % in 2022–2023, but decreased by 0.9 % compared to 2013. The number of venture capital deals dropped by 66.7 % in 2022–2023. International patent filings shrank by 18.8 % between 2023 and 2024, but remained unchanged in the period between 2014 and 2023.

³ Global Innovation Index 2025. © WIPO, 2025. P. 19.

Patent activity is notably a key comprehensive indicator — both quantitative and qualitative — of the effectiveness of R&D and the innovation activity of organizations, regions, and countries. It reflects the capacity to generate new scientific and technical solutions, demand for them, and their commercial viability. For Belarus, this indicator speaks for itself: since 2015, the number of patent filings has decreased by more than 55 %, with applications from foreign applicants falling by over 65%; the number of granted patents has dropped by almost 70 %, and patents granted to domestic applicants, by more than 70 %; the total number of active patents has halved.⁴

When it comes to “technology adoption,” the situation with safe sanitation was at “zero” between 2023 and 2024, and minus 0.2 % in the previous period beginning in 2014. Connectivity improved both in the short (+2.4 % in 2022–2023) and in the long term (+1.4 % since 2013). However, there are no data on the deployment of 5G in Belarus, as it is just beginning to be rolled out now. The development of robots declined in the short term (minus 17.5 % in 2022–2023), but showed a slight improvement of 3.3 % since 2013.

In terms of “socioeconomic impact,” labor productivity increased both in the short term (+4.4 % for 2023–2024) and over the long period (+1.2 % since 2014). Life expectancy grew by 0.1 % in 2022–2023 and by 0.2 % since 2013.

Overall, Belarus is among the countries with the highest levels of human capital development and research (rank 39), performs fairly well in knowledge and technology outputs (49), but ranks below average in infrastructure (85). The country ranks lowest in institutions (137), market sophistication (102), and creative outputs (94).⁵

⁴ Республика Беларусь. Статистический ежегодник. Минск: Белстат, 2025. С. 294.

⁵ *Global Innovation Index 2025*. © WIPO, 2025. P. 108.

In the annual *Human Development Index 2025*, compiled by UN experts based on three primary and three additional indicators,⁶ Belarus was ranked 65th out of 193 countries.⁷

Decline in international citation index of Belarusian scientists despite RSCI leadership

The number of citations of Belarusian scientists in the Russian Science Citation Index (RSCI) surged significantly after 2022, and by 2025, it had become the primary and almost sole measure used. For example, the country's leading Belarusian State University (BSU), in its official report on scientific, technical, and innovative achievements, primarily highlights its leadership in the volume of publications cited in the RSCI. It then modestly and somewhat evasively mentions the “position of BSU journals in the *SCImago Journal & Country Rank*, based on *Scopus* data”.⁸

Meanwhile, in the *SCImago Institutions Rankings*, which measures productivity of academic and research institutions based on research, innovation, and societal impact (measured

⁶ The primary indicators are: (1) life expectancy at birth; (2) the literacy level of the population (measured by the mean years of schooling and expected years of schooling); and (3) the standard of living, evaluated through gross national income per capita adjusted for purchasing power parity in U.S. dollars. The three supplementary indicators are: (1) the Inequality-adjusted Human Development Index; (2) the Gender Inequality Index; and (3) the Multidimensional Poverty Index.

⁷ “Human Development Report 2025. A matter of choice: People and possibilities in the age of AI.” UNDP (*United Nations Development Programme*), 6 May 2025, <https://hdr.undp.org/content/human-development-report-2025>.

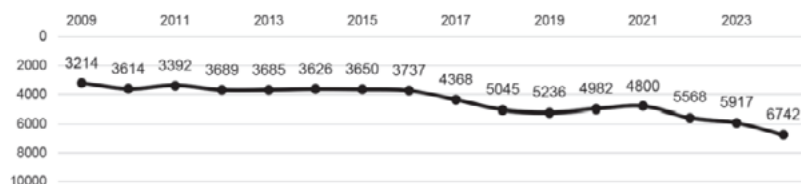
⁸ «Итоги научной, научно-технической и инновационной деятельности комплекса за 2025 год и задачи на текущий год рассмотрели в БГУ.» *Белгосуниверситет*, 24 Feb. 2026, <https://bsu.by/news/itogi-nauchnoy-nauchno-tekhnicheskoy-i-innovatsionnoy-deyatelnosti-kompleksa-za-2025-god-i-zadachi-n-d/>.

by its visibility on the web), Belarus is represented by *nine* institutions with ranks ranging between 5,003 and 8,678. The highest-ranked is Belarusian State University with a worldwide rank of 5003.

The National Academy of Sciences (NAS) has a lower rank of 6,742, placing it well below the global median.⁹ Of the 27 NAS organizations, only *two* are ranked: the Scientific and Practical Center for Materials Science and the B.I. Stepanov Institute of Physics. This is because only these institutions meet *two* essential criteria: (1) publication of at least 100 Scopus-indexed works annually, and (2) ensuring that at least 75% of publications meet citation criteria. Additionally, the number of Scopus-indexed NAS journals is obviously insufficient.

The NAS has declined in rankings for ten years (since 2016), but the trend has markedly accelerated since 2021: in under four years, it dropped more than 1,700 positions (see Figure 1).

Figure 1. Overall ranking of the NAS of Belarus in SCImago Institutions Rankings, 2009–2024



Belarusian scientists are increasingly restricted in their access to reference databases such as Scopus and Web of Science due to sanctions. Experts from the Institute of Economics note that “as a result, many journals have stopped accepting articles from Belarusian authors. Cooperation with countries of the

⁹ SCImago Institutions Rankings, <https://www.scimagoir.com/rankings.php?country=Eastern+Europe&ranking=>.

European Union, Canada, and the U. S. has stagnated, as these nations have adopted policies that deny our scientists involvement in current R&D and access to state-of-the-art technology. The number of Belarusian journals included in *Scopus* and *Web of Science* remains low.”¹⁰

Science and innovation within the research-oriented education sector: decline in human resources

The human resource capacity of research-oriented education has significantly deteriorated, based on official statistics. For instance, between the academic years 2020/2021 and 2024/2025, the number of permanent (full-time) academic staff decreased by 2,523 specialists. This included researchers with a candidate of sciences degree (minus 1,204), associate professors (minus 938), as well as doctors of sciences (minus 186) and professors (minus 144).

The key indicators of the Belarusian postgraduate school also show a negative trend over the same period: the number of educational institutions and organizations providing postgraduate programs (including postgraduate military courses) went down by 4; student enrollment fell by 703; admissions to postgraduate programs decreased by 44; and graduates from these programs dropped by 91 (including by 17 with defended theses). The reduction in the number of postgraduate students was relatively uniform across most scientific fields, except for six disciplines where an increase was reported: agriculture (+1),

¹⁰ «Белорусская наука не ценится в мире: почему Академия наук падает в международных рейтингах?» *Thinktanks*, 22 Jan. 2025, <https://thinktanks.pro/publication/2025/01/22/belorususkaya-nauka-netsenitsya-v-mire-pochemu-akademiya-nauk-padaet-v-mezhdunarodnyh-reytingah.html>.

philosophy (+11), teaching (+40), arts (+58), sociology (+6), and political science (+40).

A similar pattern is observed in doctoral studies: despite a slight rise in the number of institutions and organizations offering doctoral programs (+2) and a more noticeable increase in doctoral graduates (+64, including 3 with defended theses), the number of enrolled students shrank by 111, and admissions to doctoral studies decreased by 64.¹¹

New geography of international cooperation: unquestioned dominance of Russia and China

The sanctions and (self)isolation of Belarus from developed European nations have substantially reshaped the policies and geographic reach of the country's international collaboration in science, technology, and innovation. To make up for the loss of Western European partnerships, the authorities are focusing on strengthening ties within the Union State, EAEU, CIS, and with countries of the "far arc" — including India, Pakistan, Turkey, Venezuela, Vietnam, Mongolia, Algeria, and others — with China playing a particularly prominent role.

Official figures show that in 2025, the leading foreign investors in the Belarusian economy were Russia (with approximately 30.0 % of the total), Cyprus (16.0 %), the UAE (11.8 %), China (10.1 %), and Qatar (4.1 %). In this context, Western European countries' share appears modest: Germany with 2.6 %, the Netherlands and the UK with 2.1 % each, and the U. S. with 1.6 %.¹² Notably, Russia and China account for most of the investments in Belarus's innovation sector.

¹¹ *Статистический ежегодник*. Минск: Белстат, 2025. С. 86–91.

¹² «Беларусь завалили иностранными инвестициями.» *Беларусы и рынок*, 08 Mar. 2026, https://belmarket.by/news/ca2f03ab-ec82-427c-a2aa-95ffa924d771#google_vignette.

Cooperation with Russia in science and innovation remains dominant and virtually the only feasible option in terms of scale and investment. In 2025, thirty-two concepts were being drafted for new programs, including research in microelectronics, artificial intelligence, and new materials. Priority was given to innovations in the defense sector: in March 2025, the Parliamentary Assembly of the Union State of Belarus and Russia highlighted the need to accelerate the adoption of innovations to bolster defense capabilities and economic security.

Within this framework, particular attention is drawn to the joint development of a Russian-Belarusian ultra-high-resolution (UHR) Earth remote sensing vehicle (0.35 meters). Belarusian company 'Peleng' is responsible for designing and manufacturing the imaging equipment (telescope), while its Russian partners handle platform development and orbital deployment. The satellite project involves the National Academy of Sciences of Belarus, 'Roscosmos', JSC 'Peleng', and VNIIEM Corporation. The satellite has a dual purpose — civilian applications such as cartography, disaster monitoring, agriculture, environment, and urban planning; as well as military uses, including target recognition, monitoring of military bases, real-time reconnaissance, and precision weapon guidance. The satellite is projected to be launched in 2028.

Simultaneously, collaborative work continues in the fields of robotics, unmanned aerial vehicles (UAVs), and precision agriculture. At the beginning of 2025, joint engineering initiatives were launched to train skilled personnel for these sectors and other innovative dual-use industries. In August, a cooperation agreement was signed to address intellectual property matters, regulating the utilization of IT solutions and artificial intelligence.

Belarus — China collaboration ranks as the second most significant in terms of importance, scale, and investment. In September 2025, at the 18th Pujiang Innovation Forum, the results

of the previously announced two-year (2024–2025) partnership in science, technology, and innovation were summarized. Almost 90 events took place, resulting in the establishment of 34 high-level joint platforms for scientific and technological collaboration, engaging 140 organizations from both nations. The main focus areas of this cooperation include artificial intelligence, space exploration, biotechnology, and healthcare.

The Chinese ambassador to Belarus stated that over a two-year period, the two countries conducted more than 60 scientific, technical, and academic exchanges, involving over 2,000 experts in areas such as artificial intelligence, information technology, biopharmaceuticals, laser technology, new materials, and agriculture. The Xi'an branch of the National Academy of Sciences of Belarus was inaugurated in China. Furthermore, the Guangdong Academy of Sciences and the National Academy of Sciences of Belarus established a joint industrial technology innovation center, which led to the development of a Belarusian atomic force microscope now available on the Chinese market.

The two parties collaboratively executed 47 scientific and technical projects, with a combined funding of CNY 80 million.¹³ According to First Deputy Prime Minister of Belarus Nikolai Snopkov, in 2025, over 60 investment projects involving Chinese capital and technology were implemented in Belarus, with declared investments amounting to approximately USD 1.6 billion. Most of these — 52 investment projects — were located in the Great Stone China — Belarus Industrial Park.¹⁴

¹³ «Китай и Беларусь ускоряют совместное внедрение результатов научно-технического прогресса – посол КНР в Беларуси.» СИНЬХУА Новостям, 30 Jan. 2026, <https://russian.news.cn/20260130/902911c6ac214f7eab3bb7ace96fbabe/c.html>.

¹⁴ «Взаимная торговля, инвестиции, кредиты. Снопков назвал топ-3 результатов в сотрудничестве с Китаем за 10 лет.» БелТА, 27 Jan. 2026, <https://belta.by/economics/view/vzaimnaja-torgovlja-investitsii-kredity-snopkov-nazval-top-3-rezultatov-v-sotrudnichestve-s-kitaem-za-761193-2026/>.

New old leaders in science and innovation

In 2025, the country's key science and innovation institutions had new leaders appointed: on May 22, Alexander Lukashenko appointed Vladimir Karanik as Chair of the Presidium of the National Academy of Sciences, and on November 20, Denis Korzhitsky was appointed Chair of the State Committee for Science and Technology. Both are purely administrative figures, with no scientific authority, professional reputation, notable achievements, or trust from the scientific community. They also have limited experience in managing scientific and innovative projects. These appointments symbolically emphasize the status of science and innovation institutions in contemporary Belarus as routine bureaucratic structures that can be managed by any official, regardless of their professional expertise.

Instead of a conclusion: directive innovations

On December 21, 2025, a new State Program for Innovation Development for 2026–2030 (SPID 2026–2030) was approved. It is planned to allocate around BYN 7 billion for the implementation of innovative projects and the promotion of innovation infrastructure under this program. Furthermore, there is an intention to “gradually reshape government support for innovative projects by shifting to a repayable preferential financing system” — meaning funds would be reimbursed over seven years (with an optional two-year extension) at an interest rate of 0.5%. Such conditions might discourage high-risk innovative projects rather than encourage them — particularly among SMEs.

At the same time, the emphasis in SPID 2026–2030 recognizes that innovative projects often stem from private “bottom-up”

initiatives. Consequently, there are plans to broaden participation in the innovation process by introducing a new category of local projects, “representing innovations by small organizations and medium-sized businesses.” However, government oversight of this initiative is also being reinforced through new financial and administrative mechanisms. For instance, only organizations with more than 50 % state ownership will qualify to act as beneficiaries of government-supported innovative projects.

At the same time, the innovation system will become even more bureaucratic and harder to manage, as two levels of decision-making are introduced: the Council of Ministers for national and comprehensive projects, and the State Committee for Science and Technology for local projects. The “simplification” of decision-making procedures proclaimed in SPID 2026–2030 effectively entails a tightening of government regulation and oversight — through the selection process of innovative projects deemed “of priority importance for Belarus’s development,” compilation of their lists and classifications, introduction of new regulatory legal acts, and other measures.

The program aims to achieve ambitious targets: by 2030, the share of innovation-active organizations in the manufacturing sector should reach 45 %, while the proportion of science-intensive and high-tech products in Belarusian exports should grow to 39 %.

The share of innovative products (works, services) new to the domestic or global markets shipped by manufacturing organizations is expected to reach 57.2 %, and the percentage of residents of technoparks investing in innovation should increase to 83.0 %.

It remains to be seen how feasible this is amid sanctions, Belarus’s self-isolation, and increasing dependence on Russia and China. A far more critical question concerns the quality, impact, and scale of innovations. Under the current status quo, it is unlikely that innovations will become a genuine driver of economic

growth, social development, or improved living standards in Belarus over the coming years. Instead, innovations are more likely to retain a limited technical and technological character – focusing on dual-use technologies – and be used to reinforce primitive and archaic social structures, with the goal of establishing a more sophisticated yet rigid model of political control, governance, and citizen mobilization.

RELIGIOUS SPHERE: “SUBTLE” PRESSURE AND “DIRECTED RESILIENCE”

Natallia Vasilevich

Summary

In 2025, repressive policies toward religious communities persisted, including the persecution of clergy and believers, although its presence in the public sphere became less visible. A key development and new context was the finalization of the re-registration process for religious organizations, which imposed additional pressure through opaque procedures of state oversight. This increased dependence on the authorities, heightened anxiety, and encouraged internal self-censorship. Religious organizations increasingly operated in survival mode, lowering their political profile in order to maintain at least some limited space for activity, steering clear of anything that could trigger response from controlling agencies, and accepting necessary compromises.

Trends

- Administrative dependence as the new normal: re-registration has entrenched the asymmetry between the state and communities;
- Repressions are “easing,” but expanding: persecution continues, often operating behind the scenes and affecting a broader group;
- Self-censorship and depoliticization as survival strategies: communities uphold their core principles while minimizing public gestures and statements;
- Reduced visibility of the religious sphere: shrinking sources and increased risks for informants.

Re-registration: not across-the-board “cleansing,”
but blow to the vulnerable

In 2025, a significant administrative milestone was reached with the completion of the re-registration of religious organizations under the revised Law “On Freedom of Conscience and Religious Organizations,” which was adopted on December 30, 2023. The deadline for submitting re-registration applications was July 5, 2025. However, after the process concluded, the government did not ensure full transparency regarding the outcomes: the Office of the Plenipotentiary for Religions and Nationalities under the Belarusian Council of Ministers has yet to release detailed, updated statistics on the religious landscape following re-registration.

The only official data on the number of religious organizations is contained in the report by the plenipotentiary for the current cycle of the Universal Periodic Review (UPR) submitted to the UN Human Rights Committee (paragraph 208).¹ According to preliminary figures in the report, the number of religious communities has decreased to 3,257, reflecting a 4 % decline.

The lack of comprehensive official statistics inherently became a factor of uncertainty. In the absence of clear and transparent data, greater dependence is placed on informal cues: “what can be perceived as indications of disloyalty?” In this context, re-registration appeared not merely as a legal requirement but also as a means of exerting control over the religious community. Consequently, religious organizations experiencing difficulties with re-registration due to political motives as a rule avoided publicly addressing these issues.

For instance, the Belarusian Greek Catholic Church, the most affected by repression during the political crisis, refrained from publicly voicing concerns about re-registration issues or targeted

¹ «Национальный доклад в Совет по правам человека по универсальному периодическому обзору.» *United Nations*, 11 Aug. 2025, docs.un.org/ru/A/HRC/WG.6/50/BLR/1.

persecutions of priests and active believers, seemingly motivated by a desire to avoid exposing itself to even greater vulnerability.

Although the central authorities remain silent, some regional executive committees began updating regional registers. This sheds light on which denominations have declined and in which regions, and suggests that, in several areas, certain confessional groups effectively ceased their activities.

An overview of available data was prepared by Christian Vision.² In the Grodno Region, out of 520 religious organizations across 16 confessions, 483 organizations representing 14 confessions remained after re-registration. In the Vitebsk Region, 492 religious communities from 17 confessions remained active out of 525 communities representing 18 confessions. In the Gomel Region, out of 422 religious organizations belonging to 16 confessions, 380 communities from 15 confessions were active following re-registration. In the Mogilev Region, out of 298 communities across 20 confessions, only 237 communities from 17 confessions remained.

“Natural” factors stood behind certain closures: some Roman Catholic parishes in the Mogilev Region existed only “on paper: and did not function due to a lack of active believers; in certain communities, the number of parishioners decreased because of deaths and migration; occasionally, communities had been registered with the minimum required number of believers in hopes of growth, which never materialized. And still, re-registration most severely affected small, local, and less organized communities, for which the formal requirements and specific focus of the administration posed a much greater burden.

In contrast to the situation with political parties, NGOs, and other forms of civic organization, the religious sphere did not

2 «Несколько конфессий прекратили деятельность в регионах Беларуси после перерегистрации.» Царква і палітычны крызіс у Беларусі, 05 Feb. 2026, <https://belarus2020.churchby.info/neskolko-konfessij-prekratili-deyatelnost-v-regionah-belarusi-posle-pereregistraczi/>.

experience one-time comprehensive liquidations. This suggests that religious communities remain among the most resilient and structurally advanced segments of civil society in Belarus. However, this resilience comes at a cost, manifesting as increased dependence, anxiety, and self-regulation.

Repression remains systemic but less visible

Since the onset of the political crisis in 2020, repression in Belarus has become systemic, and 2025 became no exception. A notable development in recent years has been the gradual loss of the religious sphere's former partial "immunity": whereas earlier, repressive actions mainly targeted Protestant denominations, post-2020 persecution expanded to affect Orthodox and Catholic clergy, including prominent and high-ranking figures. By 2025, this trend continued, evolving with some distinctive characteristics.

First, repression manifests a cumulative effect: those who have previously been targeted remain under heightened surveillance, and over time, the reach of repression broadens — from the most active and publicly prominent individuals to those who are less visible and relatively de-politicized. Often, these measures unfold in a cascading sequence: the detention of one person leads to the identification of their contacts, with repression subsequently extending to include the entire network. The "cascading effect" of the extremist legislation should be highlighted: designating materials on one platform as extremist frequently results in the listing of related channels and profiles. Moreover, criminal charges against a single individual can lead to the entire group being classified as an "extremist formation," thus amplifying risks for others involved.

Second, a considerable share of public pro-democratic, anti-war clergy and religious activists had already left the country or

been detained. Consequently, repression was more frequently carried out through “subtle” pressures that were more difficult to identify and publicly record than high-profile cases.

Third, those who remained in Belarus following public activism were subjected to heightened surveillance and control, often being coerced into “cooperating” with security agencies as an alternative to criminal or administrative charges. Increasingly, forced recruitment emerged as a tactic to pressure clergy and religious activists, eroding trust within their communities.

Fourth, many of those who did not take part in mass protests publicly retreated even further into obscurity.

Fifth, tracking cases of persecution became increasingly challenging, as reports like “confession videos,” court schedules, and judicial decisions largely vanished or were significantly diminished. The prosecution and emigration of human rights defenders and lawyers further hampered efforts to monitor such cases. Additionally, designating human rights initiatives as “extremist formations” elevated the risks associated with sharing information with these organizations. As a result, many individuals, even when facing persecution, opt to remain non-public in order to safeguard themselves and their communities from heightened danger.

Based on the Christian Vision monitoring, in 2025, the primary grounds for the persecution of members of religious communities included their involvement in the 2020 protests, possession of materials labeled as “extremist” on their mobile phones (including those discovered during border checks), providing support for political prisoners, and sharing information with independent monitoring organizations. Persecutions in absentia were most frequently linked to interviews with independent media, participation in activities of organizations designated as “extremist formations,” and public statements.³

³ «Религия в Беларуси в 2025 году: давление и репрессии в контексте перерегистрации.» Царква і палітычны крызіс у Беларусі, 11 Jan. 2026,

As a result, repressions did not “vanish” altogether; rather, they became less visible — partly because publicity is increasingly seen as a factor that heightens risk.

Potential of religious organizations and their survival strategies

Despite the challenging environment, religious organizations and communities continue to carve out spaces for independent life by carrying out missionary, social, educational, and cultural initiatives. Faced with administrative pressure and persistent repression, these groups and individuals are compelled to reduce risks and avoid triggers for the state control agencies. Therefore, they often operate without media coverage, sometimes clandestinely, prioritizing safety.

Moreover, all religious communities maintain a protest core, alongside mutual support networks, kept as covert as possible. In the meantime, efforts to advance agendas on sensitive or potentially dangerous issues are carried out in a depoliticized and neutral manner. Ironically, this approach has the opposite effect: even neutral and depoliticized events are perceived by the authorities as potentially threatening, rendering depoliticization an insufficient marker of loyalty.

Organization of events and implementation of projects remain “unnoticed” by the independent media to safeguard participants and organizers against potential risks. Consequently, this fosters the illusion that nothing meaningful or noteworthy is happening within Belarus’s religious landscape. At the same time, events showcasing loyalty or support for the regime enjoy official coverage, resulting in a distorted portrayal of different facets of the religious community’s life. This often leads to an

<https://belarus2020.churchby.info/religion-in-belarus-in-2025-pressure-and-repression-in-the-context-of-re-registration/>.

underestimation of their true potential and an overemphasis on their loyalty.

The authorities are instrumentalizing religious communities and compelling them to provide the state with their “voluntary” support. Clergy at various levels participate in ideological events, with pro-government priests being invited to appear in propaganda media outlets.

Participation in these events can be seen as a “moment of triumph” for especially controversial religious figures, who leverage their loyalty to gain social capital. Conversely, others may participate against their personal beliefs as a pragmatic survival strategy to safeguard their ability to operate and coexist in relative peace. This “pragmatism of participation” as a means of risk mitigation for the community became particularly pronounced during the re-registration period.

Belarusian Orthodox Church: closer to Lukashenko than to Moscow

In 2025, support for the Russian aggression within the Belarusian Orthodox community was predominantly driven by the same actors who, in 2020, positioned themselves as centers offering support for the Belarusian regime. Those primarily involved were two women’s monasteries: the Saint Elisabeth Convent in Minsk, led spiritually by Protopresbyter Andrey Lemeshonok, and the Nativity of the Virgin Monastery in Grodno, headed by Mother Superior Gavriila (Glukhova). Both were awarded the Pushkin Medal at a November 4, 2025 ceremony in Moscow by Russian President Vladimir Putin.

The Saint Elisabeth Convent stands out as one of the most prominent institutional centers backing the war effort, primarily through fundraising and “humanitarian” initiatives that effectively serve the needs of the Russian military and occupation

infrastructure.⁴ As for Gavriila Glukhova, she was the sole representative of religious organizations to take part in the All-Belarusian People's Assembly.

Within this framework, it is crucial to understand that pro-war loyalty goes beyond isolated “activist centers.” Concurrently, Belarus is increasingly militarizing its children and youth on a broader scale, with state authorities, security services, and, in some cases, church representatives — often through collaboration between the Belarusian Orthodox Church and schools, youth clubs, and educational initiatives — playing active roles in fostering “patriotic education.”

In 2025, the Belarusian Orthodox Church did not exhibit the forms of ideological hysteria and militaristic radicalization that emerged as prominent features in certain segments of the Russian Orthodox Church. Metropolitan Veniamin remains loyal to Moscow's ecclesiastical leadership and publicly avoids endorsing Ukraine; however, Belarusian parishes did not recite the “Prayer for Holy Rus,” introduced by the Russian Orthodox Church, which sparked controversy and carried the threat of church sanctions in Russia for those refusing to incorporate it.

This cautious approach sparked irritation among certain radicalized Russian church activists. In response to the refusal to recite the prayer, they filed complaints with Patriarch Kirill, calling for “disciplinary action” and accusing the Belarusian church of harboring “hidden pacifism.” Nonetheless, the conflict remained contained and did not escalate into an open confrontation between the Belarusian Orthodox Church and the Russian Orthodox Church.

One of the few points of contention between the Russian Orthodox Church and the Belarusian Orthodox Church was the latter's self-identification. Since the early 1990s, the name “Belarusian Orthodox Church” had been used publicly and officially

⁴ See: Стопсем, <https://stopsem.churchby.info/>

as a symbol of local identity within the broader church hierarchy. In July 2025, the Synod of the Moscow Patriarchate exerted significant pressure on Minsk, insisting on the exclusive use of the designation “Belarusian Exarchate of the Russian Orthodox Church” and public emphasis of the church’s affiliation with the Moscow Patriarchate. This prompted a wave of renaming and adjustments to official titles and signatures; for a certain period, even the Church’s official website reflected ongoing discussions about possible compromises. Ultimately, a consensus was reached: the traditional name “Belarusian Orthodox Church” was retained, supplemented with the clarifying note “(Exarchate of the Moscow Patriarchate)” in parentheses.

Catholic Church and the growing influence of the Holy See

The year 2025 marked a significant turning point in Vatican–Belarus relations: Pope Francis passed away on April 21, and on May 8, the conclave elected his successor — Leo XIV. Remarkably, the Holy See invited not only officials from the Belarusian regime to the funeral Mass but also Belarusian democratic leader Sviatlana Tsikhanouskaya.

In this context, official contacts between Minsk and the Holy See took on a more distinct diplomatic tone and were increasingly exploited by the regime as a channel for international maneuvering. A significant milestone in this evolution was the formalization of diplomatic ties: as early as December 2024, a decision was made to open Belarus’s embassy to the Holy See, and on March 27, 2025, Yury Ambrasevich was appointed as Belarus’s inaugural ambassador.

In 2025, Belarus welcomed a new apostolic nuncio — Archbishop Ignazio Ceffalia — whose appointment was marked by his first official meeting with Belarusian Catholic bishops in

Minsk on June 26. His background is particularly noteworthy given his experience in Venezuela, a major authoritarian crisis area where the Holy See has long maintained a delicate political dialogue and emphasized a humanitarian agenda. This included addressing the plight of political prisoners and advocating for their potential release as “gestures of trust.” His appointment therefore holds importance not only from a church perspective but also in diplomatic and humanitarian contexts: a nuncio with such experience enhances the Holy See’s capacity to engage in cautious yet impactful dialogue, particularly in a setting where internal church affairs are intertwined with wider issues of security, repression, and international negotiations.

Nevertheless, former political prisoner Andrey Krylov, who had contact with incarcerated priest Henrykh Akalatovich, revealed that the latter was offered “freedom” in return for participating in a provocation designed to undermine the apostolic nuncio in Belarus — specifically, to plant a flash drive with damaging information. This indicates that the Lukashenko regime still relies on coercion in its diplomatic interactions with the Holy See.

The prospect of a papal visit was employed as a prominent public signal of “normalization”: in October 2025, Archbishop Jozef Staniewski presented Pope Leo XIV with an official invitation to visit Belarus “on behalf of the episcopate, clergy, and all believers in Belarus” during an audience at the Vatican. Alexander Lukashenko also officially extended an invitation to the Pope. However, a procedural requirement — obtaining approval for the visit from Patriarch of Moscow Kirill — was never met, meaning that, at this stage, such a visit remains more hypothetical than realistic.⁵

⁵ «Ключи от дверей в Беларусь для папы римского — в руках московского патриарха.» RFI, 25 Nov. 2025, <https://www.rfi.fr/ru/европа/20251125-ключи-от-дверей-в-беларусь-для-папы-римского-в-руках-московского-патриарха>.

The most tangible outcome of this diplomacy manifested in the humanitarian sphere: on November 20, 2025, political prisoners and Catholic priests Henrykh Akalatovich and Andrzej Yukhnevich were released — a move linked to the Vatican's ongoing contacts and in the wake of the October visit of a papal envoy. The Pope's special envoy, who visited Belarus between October 24 and 27, was Cardinal Claudio Gugerotti. During the visit, Gugerotti met with Lukashenko, and to date, the cardinal — who served as nuncio in Belarus during the 2010 political crisis — remains the most effective religious representative in negotiations with the regime.⁶

Conclusion

Based on current trends, it is likely that in 2026, Belarus's religious environment will still function within a “managed stability” framework — maintaining institutional activities amid a landscape characterized by rigid asymmetry and ongoing self-regulation.

First, the administrative dependence, reinforced through re-registration, will continue manifesting through inspections, approvals, and informal loyalty demands. Even now that the legal registration process is finalized, there will be a lingering perception of vulnerability, with activities outside official registration still viewed as criminal. Repression is expected to remain a systemic feature, but take “subtle” forms. This will further deepen the discrepancy between the actual scope of persecution and what is known to the public.

⁶ «Хороший полицейский для Лукашенко: по следам визита спецпосланника Папы Римского в Беларусь.» Царква і палітычны крызіс у Беларусі, 14 Nov. 2025, <https://belarus2020.churchby.info/horoshij-policzejskij-dlya-lukashenko-po-sledam-vizita-speczposlannika-papy-rimskogo-kardinala-klaudio-gudzherotti-v-belarus-v-oktyabre-2025-g/>

Second, the survival strategy will become more pronounced: diminished public visibility, heightened self-censorship, and greater caution in interactions and cross-border communication. Inside communities, a moral dilemma will endure between the obligation to speak out and the responsibility to safeguard individuals and institutions.

Third, the religious sphere will largely be influenced by external factors — most notably the ongoing war in Ukraine and the broader international context. “Windows of opportunity” for change are unlikely to stem from internal liberalization, but rather from external diplomatic considerations and shifts in the risk balance.

BELCULT: EXPERIMENTS IN THE (IM)POSSIBLE

Maxim Zhbakov

Summary

The 2025 version of Belarusian culture (Belcult) marked a new phase in post-revolutionary transformation — shifting from a traumatic, depressive stage of emergency flight and migrant nostalgia toward a “new normal” of conventionally stable existence in a foreign land. Expat creativity fully abandoned illusions of a swift return to the country of origin and focused on adapting to a new cultural landscape. This inevitably leads to the emergence of unique hybrid projects — collaborations with actors of the host country, games with local cultural codes, and multi-cultural experiments.

In a context marked by a clear absence of state social and financial support from Belarus, compounded by political uncertainty and inconsistent donor assistance, Belcult is focused on survival strategies. It adopts a core matrix grounded in multilingualism, formal open-mindedness, mental candor, and a fundamentally nonlinear view of creative development. Through this process, it is experimentally embracing new cultural experiences along with the understanding of Belarusian identity in new dimensions.

Trends

- Belcult in exile is shedding its ethnocentric self-sufficiency, evolving into an open-ended project of creative integration;
- Embracing European standards of cultural practice goes hand-in-hand with a renewed interest in traditions of nonconformism and aesthetic radicalism.

Restart and replay: a hundred Shades of the nation

The year 2025 did not see a breakthrough for divided and fragmented Belarusian culture. The absolute majority of notable cultural products revealed their fundamental secondariness, inertia of content, and a clear reliance on ethnocentric interpretations of national identity, along with a time-proved, cautious stylistic convention. The prevailing trend is the comfortable repetition of recognizable models: patriotic choral exercises (spanning from Volny Khor to Siarzhuk Douhushau's new Kasary male singing project), familiar club ethnic electronica by *Shuma*, protest-oriented victim theater, mocking chanson by RSP and Sergey Pukst, dark-pop post-punk by *Molchat Doma* and *Nurnberg*, trauma-focused egocentric poetry, depressive-repressive prose, and prison chronicles.

The primary strategies in individual artistic practice were three divergent approaches: pragmatic Euro-conformity (contextual adaptation), niche startups, and sole proprietorships (small-scale businesses operating independently), and radical grassroots creativity (niche autonomy).

In the *first* scenario, the emphasis is on aligning expat Belarusian creativity as closely as possible with the standards and norms of the European culture market. One example of problem integration into local themes was the Free Theatre's Warsaw performance *Urząd Przyjemności* — a street theater-style migrant legalize drama. Olga Mzhelskaya, through her online project, adapts the expatriate audience to current trends in Polish art.

In the *second* case, targeted commercial activities are directed at a narrow migrant audience. This is how independent Belarusian publishers, cafés, brewpubs, reenactment clubs, and bohemian circles operate.

The *third* scenario includes practices of aesthetic underground and cultural resistance — reproduced both within

Belarus and abroad — where the tradition of Western nonconformism resonates with an unfinished project of Belarusian (auto)identity. Underground activists from the *Nadja* initiative published a collection of works by André Breton, René Char, and Paul Éluard titled *Slow under Construction*. Prague-based Max Shchur, in his two-volume memoir *An Attempt at Experimental Self-Construction*, explores the emergence of a European intellectual within a Belarusian outsider.

The future of Belcult raises questions about the compatibility of various versions of our authenticity with the space for creative work that has drastically changed recently.

Survival stories, again:
chronicles of the “displaced”

Last year can also be interpreted as the time of a definitive farewell to illusions of rapid victory. Replacing the protest émigré mainstream were experiments in integration and adaptation — acts of Europeanization of creative efforts. Three fundamental ideas: (a) we are outside Belarus seriously and for the long haul, (b) Belcult can only survive by accepting and internalizing the cultural norms of the host country, (c) ethnocentric Belarusian identity is becoming a speculative construct — with an inevitable shift toward a softer mode of cultural minorities and diaspora activism in the foreseeable future.

The prospects for cultivating a new, distinct national culture today appear particularly challenging. The previous tension between the quasi-Soviet imperial industry of illusions, the commercial national pop culture, and the underground scene since 2020 has been intensified by the story of radical resource transfer — mass emergency migration gradually developing into long-term cultural expansion into neighboring countries. Meanwhile, the mission of constructing a free Belarus has transformed into

tactics of patchwork professional survival for expatriates. This signifies a final step out of the comfort zone of the late 2010s guerilla culture into the reality of “displaced persons” – activism adapted to foreign rules and accompanied by an inevitable loss of status.

Essentially, this is about expanding practices of adaptations and remixes aimed at transforming them into the “new normal” of Belcult – a convention of residence registration, fluidity of concepts, and mental traffic crossing borders and traditions.

Statehood is temporarily put aside. There is neither space nor partners for cultural policy. The inertia of alternative collides with the inertia of order. In terms of idea monotony, superficial journalism, banal visuals, exaggerated acting, and promotions through state resources, pictures like Belarusfilm’s *Klassnaya* (by Kirill Khaltetsky, one of the season’s few premieres) and the Polish *Pod szarym niebem* by Mara Tamkovich appear equally dull – and equally insignificant.

The process goes on, but this signifies little. Resonance is driven by scandals rather than by breakthroughs. Genuine attempts by the Polish side to figure out¹ the fuss around Max Korzh’s Warsaw stadium concert were overshadowed by a wave of anxious posts following the expulsion of the most disorderly fans.² The popular Berlin-based blogger Kolya Sulima triggered a wave of emotional reactions with his fleeting remarks about a brief visit to Minsk, rather than his debut collection of essays.³

1 Siegień, Paulina. “Agresja czy pacański wajb ze Wschodu? Maks Korż – Białorusin, który zebrał 70 tys. fanów na Narodowym.” *Krytyka Polityczna*, 11 Oct. 2025, <https://krytykapolityczna.pl/kraj/maks-korz-warszawa-koncert-fenomen-kontrowersje/>.

2 Сулима, Роман. «На концерте Макса Коржа в Варшаве задержаны 109 человек.» *Deutsche Welle*, 11 Aug. 2025, www.dw.com/ru/na-koncerte-maksa-korza-v-varsave-zaderzany-bolee-100-celovek/a-73605049.

3 «“Тут по-прежнему опасно ходить”. Минчанин 4 года жил за границей, приехал в Минск на две недели – и после написал этот текст. Почитай-

Noise and distractions: the new No Style

The notion of No Style that we coined as a hallmark of the 2000s, has unexpectedly regained relevance. The horizon of senses is shattered; the vector of direction is lost. Integral style is replaced with memes and superficial pop attractions. Online wrangles generate information noise that regulates collective mood and effectively displaces critical thinking.

Belcult — in all its manifestations — continues to engage in visionary exercises. Regardless of specific location, party affiliation, or ideological orientation, it eagerly produces formal structures, culture bureaucrats, patchwork activism, fragmented expertise, pseudo-leaders, semantic inertia, and internal conflicts.

Devoid of internal development resources foreign-based Belcult projects operate as low-budget startups and short-lived subsidized events. The absence of “long money” (sustainable, long-term funding) in the migrant cultural landscape renders its existence perpetually unstable, its influence and social weight highly conditional, and its growth prospects extremely challenging.

The very fact of functioning in a poorly predictable “guest” mode transforms Belarusian cultural activism into a dubious endeavor of uncertain purpose — a hybrid of small business, political service, and retreat for refugees. In this setup, there’s no room for a powerful subject, and consequently, no powerful texts are generated.

Need a term for this? Let’s call it *new stagnation* — a voicing of space without meaningful shifts.

те, вам точно (не) понравится.» CityDog.io, 29 Oct. 2025, <https://citydog.io/post/kola-sulima-text/>.

The factor of pause: new newsworthiness

The year 2025 was marked by *four* prominent signals: Donald Trump's sharp overhaul of the U.S. support programs (including the one focusing on culture); the minimalist Berlinale breakthrough of Yuri Semashko's *The Swan Song of Fedor Ozerov*; the makeshift lyricism of "incredible" Nastya Rahatko's *Carry It With You*; and the wide release of Mara Tamkovich's heroic melodrama *Pod szarym niebem* (2024). A *four-bar* play: fail, frenzy, pop, and smug. As a result, essential levels of relevant cultural flows within (post)Belcult became apparent: administrative pragmatism, melancholic grassroots "otherness," light auto-design, and clumsy agitprop. These are already markers of the times — new broadcast jingles for a new era.

Belcult-2025 is actively inventing its past, present, and future. It's a school of nomads — marching fugitives, partisans, dandies, and freelancers. For this school, there is no single cultural canon, no unified cultural policy, and no obvious formulas for success.

The traffic of Belarusian identity, fragmented across locations, countries, low-cost airlines, currency areas, and time zones, is culturally conditioned, stylistically chaotic, and persistently unstable. Nevertheless, within the field of post-revolutionary cultural activism, two primary vectors can be identified — *outside* and *inside* — that can functionally be divided into *four* main tracks.

Outside (Belcult operating abroad), the core role belongs to the conversion of the trauma caused by incomplete transition. This involves two tracks of cultural work: status adaptation to European standards (churning out Euro-Belarusians) and nostalgic national design (an emotional refuge for lost souls). In the first, talents are trained for local creative resources; in the second, another diaspora is formed with sentimental ties to the lost homeland. In other words, a daily Tutaka fest.

Inside (within Belarus), civic activism is almost entirely eliminated; informal public activity is punishable, and cultural policy is invariably replaced by police operations. For example, in June 2025, Aleh Khamenka, leader of the ‘Palats’ band, was detained and later sentenced to three years under a criminal article. Materials posted by the social media groups *Dzieciuki* and *Brutto* were labeled as extremist.

Shadow creativity and identity transformations remain the dominant vectors. Consequently, there are two primary tracks of internal cultural work: the preservation and reproduction of “another culture,” and the naive creativity of the “post-barricade generation” – fresh twenty-year-olds who are building their cultural patterns from scratch on their homeland scarred by protests and repression. For them, post-election terror is a distant memory; relatives who left are just a face on a tablet; censored memories are nothing extraordinary; and the skill of being invisible is a chance to survive and make a difference.

This new generation missed the “golden age” of national romanticism and was late to witness the revolution of advertisers. They generally do not share a collective trauma but follow an individual choreography. They gauge their culture by their ability to be non-publicly public while staying meaningful. They arrive quietly, perform briefly, and leave without repercussions.

To complete the picture, add situational alliances of diverse culture groups, noise broadcasting by subsidized culture industry (grouped around Belarusian state elites), and creative consumerist practices of grassroots profane culture, which operate through spontaneous *bricolage* of meaningful fragments borrowed from the surrounding environment.

The conformable are getting loud. The freak-pop band *Casiopeia* returned with the album *Bipolar Star* – a collection of punchy versatile tracks. Russia’s heavy artillery band ‘Ruki Vverh!’ sold out Minsk Arena stadium three times in a row.

What's the takeaway? At least four different versions of cultural residence and creative setting. Four distinct worlds in the desert of native thistle.

Protocols and responses

However, this approach only captures already established and relatively finished forms. The true dynamics of culture remain beyond the scope of analysis — practices of transformation, processes rather than final outcomes.

For fugitives and outsiders, the reference point here is Yuri Semashko's debut feature *The Swan Song of Fedor Ozerov*, produced by the BFN micro-budget film incubator. A curious mixture of early Jarmusch, Soviet alternative cinema, emigrant spleen, and ancient mythology, Semashko's film quite convincingly functions as a program manifesto for new Belcult. It showcases an effective model of screenwriting with a punk slogan: "Less is more."

Once again, Free Theatre engaged with a topical agenda, delivering a conversational, basketball, political, and lesbian-themed show *KS6: Small Forward*, featuring a solo appearance by Belarusian sports megastar Katsiaryna Snytsina. The tightly woven spectacle tosses the audience like a ball into the basket. The question remains: what is art here, and what is manipulative programming?

The lineup of notable hybrid projects included the Polish-Belarusian-Ukrainian performance *Where are you going, Wolf?* by the InexKult Multilingualism on Stage creative laboratory (directed by Monika Dobrowlańska) and the *Yiddish Verses* musical project: seven contemporary Belarusian artists sing poems written in Yiddish in the first half of the 20th century. In August, Warsaw played host to the *Nyamaya Lihamanka* festival, featuring four silent films (including the Belarusian *Prostitute*) with live accompaniment by Belarusian and Polish chamber musicians.

The band *Syndrom Samazvanca*'s new album, *Mahajba*, sounds like an old-school psychedelic band from the 1960s — but infused with Belarusian authenticity, Polish club culture, and Okrestina detention center experiences. The frontwoman of the emerging avant-pop scene, Nasta Rydlevskaya, provocatively merged pagan eroticism with decadent baroque exuberance in her music video for *Isolde*, directed by Madsangria.

Word after words: the advent of post-fiction

Sasha Filipenko's new novel, *Elephant*, resembles a simultaneous exhibition, aiming to win on all boards at once. Its central metaphor references absurdist classics — Eugène Ionesco's *Rhinoceros*. The suffocating atmosphere of a banal nightmare is almost Nabokovian. Flat style, careless writing, and sluggish intonation are typical of the normal Belcult of the 2000s — a regular Victor Martinovich. Carefully crafted creepiness is a tribute to the Russian accent, reminiscent of Vladimir Sorokin. All together (in two language versions) it represents a Belarusian build, transit version.

Among numerous publishing initiatives abroad, *Miane Nema* stands out — a cross-cultural migrant project with a distinctive designer flair and a wide reach of notable authors — from Sergey Kravchenko and Tatsiana Zamirovskaya to Dmitry Strotsev and Marc Chagall.⁴

Amid half-decay of Belarusian cultural space, visionaries and storytellers take on special significance — people with a unique repertoire. Debuts and comebacks are particularly important — often embodied within the same person.

⁴ Жбанков, Максим. «После литературы. Беларусский автофикшн 2020-х как факт, фантом и травма.» *Reform.news*, 08 Feb. 2026, <https://reform.news/posle-literatury-belaruskij-avtofikhshn-2020-h-kak-fakt-fantom-i-travma>.

Melancholic downshifter Andrus Horvat has surpassed his own clichés in his new book *Home*, an existential reconstruction of a past that appears in dreams. Rock and roll veteran Lesley Knife published another prose collection, *Bilingva*. Glamorous TV host Denis Dudinsky made his debut with the novel *Patibulum* — as if *The Dragon* by Evgeny Schwartz were retold by Jorge Luis Borges. Artyom Shukanov took on domestic cyberpunk — and, judging by the initial reviews, succeeded with his invention.

There was logically room for those to make sense of all this. In 2025, *bellit.info* launched Sergey Dubavets's podcast *Literary Notes*.⁵ *Reform.news* featured a series of analyses titled *Gluconate of the Nation*⁶ by Maxim Zhbakov. In October, the same *Reform.news* embarked on *Cultural Re:vision*.⁷ However, high-quality regular cultural critique remains exceedingly scarce.

Bottom line: formulas for growth

The characteristic shifts in post-catastrophic Belcult are quite telling. The first is the de-centering of Belarusian identity — a variable consciousness. The second is the remix of resources — cultural mutations as a habitat of private whims and personal choices. The third is the lack of mechanics to propel all this forward. The typical status of the partisan nation is separateness and dissociation. Belcult is a puzzle that cannot be assembled into a pattern. Each fragment fails to see the others and it self cannot become visible.

⁵ Дубавец, Сяргей. “Літаратурныя зацемкі.” *Белліт*, <https://bellit.info/tag/litaraturnyja-zacjemki>.

⁶ Жбанков, Максим. «Глюконат нации. Введение в новую культурную ситуацию.» *Reform.news*, 30 May 2025, <https://reform.news/category/gluconate>.

⁷ «Культурная Re:Визия.» *Reform.news*, <https://reform.news/category/revision>.

We lack a country with functioning institutions, predictable rules of the game, and the capacity for a peaceful transfer of power. How can we build culture then? And what to choose — military drills or cultural freestyle? The blend of systemic slow-down and improv creativity prompts us *two* possible scenarios for development and the roles of the key actors within them.

The administrative resource of the “new Belarus” culture (as one of the segments of symbolic “management in exile”) can only exist in conjunction with émigré quasi-political structures — and only to the extent that they continue to operate, maintain their status as junior partners within European institutions, and serve as conditional patrons of the “other culture.” The matter of its survival (and emergence) will be determined solely by political circumstances and call for no additional effort or quality shifts in the work of (pseudo)cultural institutions. In other words, for this administrative resource to sustain itself, it is enough simply to remain an administrative resource.

The creative sector is deprived of such insurance and exists in a state of perpetual stress. Risks are higher there. There is no need for state support because it has no state of its own. However, there is demand for clever inputs by the diaspora — adaptable, flexible, and nonlinear, with versatile value, capable of working beyond the confines of cultural bureaucracy.

In this context, the focus shifts from defending the administrative hierarchy to orchestrating events. New formulas for Belarusian identity.

There is an urgent need for a design of post-classical consciousness. Without it, Belarusian politics will successfully do away with Belarusian culture.

ECONOMY

MACROECONOMIC SITUATION: FROM SWIFT GROWTH TO STAGNATION

Dmitry Kruk

Summary

The year 2025 saw the Belarusian economy lose its rapid growth drivers. Amid declining external demand and dip in exports, the economy swiftly exited the accelerated growth phase of 2023–2024 and reverted to sluggish expansion, with a growth rate of just 1.3 % in 2025.

Internal demand benefitted from momentum sustained by rising wages and administrative incentives encouraging investment, and partly cushioned the external shock. However, this was accompanied by mounting macroeconomic imbalances — deterioration of the external balance, growing inflationary pressures, and further worsening of corporate financial health. Institutional policy remained inertial, focused on a dirigiste model and deepening reliance on Russia, with no effort toward structural reform.

The year's outcomes were significantly worse than original expectations, heightening the risk that the economy would be entrenched in stagnation, with increased sensitivity and vulnerability to shocks.

Trends

- Return of stagnation: a considerable deceleration in growth and decay of the positive temporary effects observed over the past two years;
- Drifting with the tide and inertia in domestic institutional policy: consolidation of a dirigiste model, heightened reliance on Russia, and efforts to alleviate sanctions;
- Decline in external demand and reduction in exports;
- Continued rapid wage growth and consumer confidence amid labor shortages and emerging signs of slowdown;
- Reduced macroeconomic ambitions of the economic authorities.

Ambitious plans of the authorities vs. accumulated risks

The Belarusian economy appeared to be in a quite favorable shape at the start of 2025. Throughout 2023–2024, GDP grew by 8.7 % (4.1 % in 2023 and 4.3 % in 2024).¹ By early 2024, this rapid growth had already offset the output losses of 2022, caused by the war and sanctions. Increased demand for exports from Russia and the gradual recovery of two key export commodities — petroleum products and potash fertilizers — had a direct positive effect on output and broadened opportunities to stimulate domestic demand.

Taking advantage of the favorable external trade environment, the economic authorities actively put in place monetary and fiscal incentives, thereby boosting internal demand. Additionally, domestic demand (notably household consumption) enjoyed a strong impetus as wages were growing faster than output amid labor shortages. By early 2025, real wages were 27.3 % higher, and GDP was 4.9 % above the level recorded at the end of 2021 (before the war and sanctions tightening).

The economic authorities were in a state close to euphoria, optimistic about continued rapid growth. According to the official forecast — which in Belarus often looks more like a directive target — GDP was projected to increase by 4.1 % in 2025, with planned investments in fixed capital rising by 7.8 %.

Overall, the government's plan was based on the following assumptions: (a) external conditions would still favor increased demand from Russia and growth in exports of strategic commodities; (b) labor shortages would continue to drive rapid growth in wages and consumption; (c) targeted investment

¹ Henceforth: «Статистические сборники.» Национальный статистический комитет Республики Беларусь, https://www.belstat.gov.by/ofitsialnaya-statistika/publications/izdania/public_compilation/.

stimulation would further bolster GDP growth while keeping it better balanced.

However, even on the eve of 2025, alarming signals began to appear, challenging the optimistic logic of the authorities.

First, in the second half of 2024, exports in volume terms significantly declined, contributing to the widening foreign trade deficit.

Second, the financial health of the real sector, despite improvements in the macroeconomic environment, remained rather fragile. This constrained its ability to increase investments and made it vulnerable to shifts in external demand.

Third, inflationary pressures grew more pronounced, even despite ongoing directive price controls. Elevated wages and overheated domestic demand exerted upward pressure on prices, prompting the authorities to at least partially loosen price regulations. By early 2025, consumer inflation stayed close to 5% in annualized terms due to directive measures, albeit showing clear signs of and potential for acceleration.

Institutional environment: drifting with the tide and efforts to bring down sanctions barriers

In 2025, Belarus's institutional environment remained largely stagnant, developing along the trajectory set between 2021 and 2024. The core principles that had effectively taken shape during that period were further reinforced.

First, the institutional shift associated with deepening integration with Russia within the framework of the “Union State” continued to influence a significant portion of economic policy: many decisions and tools were driven by commitments and coordination with Russia.

Second, dirigisme intensified: the state persistently increased its interventions in private sector activities, combining

regulatory pressure with direct involvement through investment management, directive crediting, and debt redistribution. The consolidation of this model was formalized *de jure* in the programs adopted in 2025 – specifically, the socio-economic development program for 2026–2030 and the government activity plan for 2025–2029. While these programs appeared to focus on the future, they essentially institutionalized the existing model. Compared to earlier programs (2021–2025), the new documents show a marked reduction in emphasis on structural reforms, liberalization, and expanding the private sector; instead, they underline the rhetoric of stability, controllability, and state coordination.

The year 2025 saw no significant institutional transformation: the authorities continued to actively deploy fiscal interventions, including regular redistribution of expenditures and funding for specific projects and initiatives. In parallel, the practice of alleviating enterprise debt burdens through asset and liability redistribution managed by the JSC Asset Management Agency persisted.

These mechanisms were most notably applied in the cement industry and agriculture, where systemic debt issues prevail. The government utilized the Development Bank and related instruments to fund projects, frequently revised the state investment program, and increased bond issuance and guarantee provisions. Although these measures helped support the economy, they also heightened dependence on centralized resource redistribution.

In other areas of economic policy, the logic of adaptation without reform dominated as well. Price regulation continued (with some fluctuations: minor relaxations were often followed by new tightening measures) as a tool to curb inflation, and currency regulation was based on special regimes of currency transactions and restrictions. Together, these measures reinforced the existing model of a managed and highly dirigiste economy.

Among the few institutional innovations, the adoption of medium-term government programs for 2026–2030 in demographic policy, energy, and the labor market stands out. These documents enshrine the priority of an active role for the state in overseeing demographic processes, developing energy infrastructure, and balancing the labor market, including measures for workforce redistribution and employment stimulation in priority sectors. Furthermore, the concept of “mobilization” has gained prominence both in the rhetoric of government agencies and at the regulatory level. For example, the Ministry of Economy was formally tasked with functions related to the economy’s mobilization preparedness.

The institutional environment was largely shaped by the concept of “deepened integration,” pursued since 2021, and particularly by a package of measures for 2024–2026. Central to this was industrial and science and technology cooperation. In 2025, tangible progress was made in this area, rather than mere declarations. The most significant developments occurred within production chains and R&D: interactions increasingly took the form of joint production of components and technologies, as well as integration into import substitution chains.

At the same time, certain selectivity remained: deepening integration focused on priority sectors (industry, technology, logistics), but did not extend to sensitive areas such as energy or a fully unified common market. For instance, the creation of a common market for oil and petroleum products (initially scheduled for 2025) was postponed again, now to 2027. A similar situation *de facto* persisted in the natural gas market: parties relied on bilateral agreements, contrary to the goal — repeatedly proclaimed since 2021 — to establish a unified market.

Within the integration framework, the security component intensified significantly, often overshadowing economic considerations. For example, the security guarantees treaty ratified in 2025, while mainly addressing military issues, also partially

covered economic aspects such as sanctions adaptation and infrastructure placement. Overall, military-strategic priorities increasingly began to shape and subordinate economic decisions.

In 2025, the sanctions environment regarding Belarus exhibited mixed trends. The European Union continued a course of gradual tightening; however, this primarily involved fine-tuning the existing regime rather than significantly expanding the sanctions perimeter. The EU's decisions focused on strengthening enforcement mechanisms, countering circumvention, and broadening criteria for listing entities (notably through links to the military-industrial complex and hybrid activities). Furthermore, the logic of aligning Belarusian sanctions with the Russian track, which had gained momentum since 2024, further constrained the autonomy of decision-making on Belarus.

In contrast, the U. S.' policy showed an opposite trend: following limited negotiations with the Trump administration, the U.S. sanctions strategy shifted from unconditional pressure to a transactional approach, based on targeted concessions in exchange for political steps — primarily the release of political prisoners. This change was reflected in a series of licenses and de facto relaxations concerning certain Belarusian state companies, including the key case of Belaruskali and associated export entities.

The alleviation of the U. S.' policy is likely to produce some positive impact on the affected companies and the sector overall — such as increased bargaining flexibility for Belarusian potash exporters and reduced transaction costs. However, the systemic macroeconomic effect is unlikely to be significant, as the main pressure on Belarus remains driven by the more stringent and comprehensive sanctions regime of the European Union.

Export collapse and altering economic conditions

In 2025, Belarus's economic landscape started to change significantly. The main catalyst for this shift was the decline in external demand, which impacted export performance. During 2023–2024, exports underpinned rapid growth, driving direct demand for production and serving as a buffer for the external balance. However, in 2025, this foundation was lost. By the end of the year, exports had fallen by around 4.7 % in real terms, accompanied by considerable volatility in volumes. After hitting a record high in mid-2024, physical export volumes declined by roughly 15 % by year's end. A brief recovery occurred in early 2025, but from spring onwards, exports resumed their decline.

Notably, the decrease was geographically widespread, encompassing Russia and other destinations alike. This suggests that the previous cyclical growth drivers, particularly the favorable conditions in the Russian market in 2023–2024, had been exhausted, bringing structural limitations – especially low productivity – back to the forefront.

Major fluctuations and divergent trends are characteristic of two key strategic commodities – oil products and potash fertilizers. Throughout the year, exports of oil products declined (by approximately 10–15 % according to estimates) and experienced significant volatility. Logistical challenges and opaque supply arrangements caused sharp swings in volumes during certain periods. For instance, in the fourth quarter of 2025, the situation with oil refining temporarily improved: Ukraine's strikes against Russian oil infrastructure led to increased demand for Belarusian oil products within Russia. However, much of these supplies were routed through tolling schemes, which limited their influence on overall export figures and the external balance.

Meanwhile, exports of potash fertilizers grew, partially offsetting the negative trends seen in other sectors.

In contrast to contracting exports, imports adapted much slower. By the year's end, imports had edged down by only 0.1 % in real terms, buoyed by persistent strong domestic demand fueled by rising incomes and wages. Consequently, the contribution of net exports to GDP growth was sharply negative.

In nominal (U. S. dollar) terms, the external trade deficit also widened, but not dramatically, as favorable behavior of export and import prices partly offset the decline in physical export volumes. In relative terms (% of GDP), the foreign trade deficit and overall current account balance actually shrank a bit, driven by GDP growth in dollar terms. Nonetheless, the economy remained firmly in a deficit zone for external trade and current account.

The slowdown in export activity deepened existing domestic imbalances. The reduction in foreign currency earnings worsened the already weak financial position of companies, putting additional pressure on liquidity and limiting their capacity to maintain wage and investment growth rates. Simultaneously, the increase in the external deficit amid limited access to external financing compelled policymakers to gradually adjust their strategies and reduce the stimulus to domestic demand.

The government's response was phased. In the first half of the year, the authorities pursued a relatively ambitious strategy, seeking to offset weak external demand through active investment promotion. Following personnel changes in spring 2025, directive tools were used more actively to reallocate financial resources towards the corporate sector. This led to a robust 10 % increase in investments, making their contribution to GDP comparable to that of household consumption.

Amid a sharp deceleration in growth — from 2.1 % year-on-year in January–June to around 0.5 % in July–December — the economic authorities de facto embraced the subdued economic pace. This was evident in the moderate tightening of monetary policy and reduced intensity of directive stimuli. Consequently,

investment in fixed assets had also slowed by the end of the year.

Wages and consumer confidence:
high due to momentum,
albeit with signals of decline

In 2025, wage growth and consumer optimism remained key macroeconomic drivers, although indications of their weakening became visible as external conditions deteriorated. Due to a structural labor shortage, nominal wages continued to increase at a fast pace in the first half of the year (about 18 % year-on-year), with real wages rising approximately 9–11 % year-on-year. This significantly boosted household disposable incomes and sustained consumption as a main engine of domestic demand.

During the first half of the year, consumer demand remained overheated: household expenditures grew by around 8 % year-on-year, ensuring the largest contribution to GDP expansion. The high income growth was coupled with limited savings and investment options amid sanctions and administrative restrictions, which further fueled consumption. Despite these factors, strong consumer optimism persisted, rooted in the rapid income growth achieved in 2023–2024.

Nonetheless, during 2025, early signs of instability in this trend became evident. Wage growth greatly outpaced productivity gains, resulting in higher unit labor costs and added strain on corporate financial health. As export conditions deteriorated and revenues declined, companies faced growing limitations in sustaining previous wage increase rates. In the second half of the year, this led to a gradual moderation of wage push (growth slowed to around 14% year-on-year in nominal terms and approximately 6.5% in real terms) and a deceleration in consumer

activity. Consumer confidence also waned as households encountered sluggish income growth and escalating economic uncertainty.

Macroeconomic outcomes of the year: contradictions and rising risks

By the end of 2025, Belarus's economic growth had markedly decelerated — to 1.3 %, compared to 4.3 % in 2024 — with the slowdown intensifying in the second half. On the demand side, domestic demand remained the main driver, as household consumption expanded by about 6.0 % year-on-year, while investment went up by 10 % year-on-year, contributing 3.5 and 2.3 percentage points respectively to GDP growth. The net export contribution was negative (minus 3.3 percentage points), due to declining exports and relatively stable imports.

On the supply side, the growth structure underwent a fundamental change compared to the previous two years. Manufacturing and trade, previously the main engines of growth, contracted by 2.3 % and 0.7 %, respectively. The largest contributions to GDP growth came from the construction sector (which expanded by 8.0 %), ICT sector (3.5 %), transportation (2.9 %), and agriculture (0.8 %).

Simultaneously, a trade and current account deficit (1.9 % of GDP) re-emerged and established a stable pattern, reflecting the disconnect between domestic demand and the economy's external capacity. Consumer inflation remained high at around 6–7 % annually, even amid strict price controls, indicating ongoing inflationary pressures and macroeconomic imbalances.

Another, increasingly pressing, issue is caused by the weak financial health of real sector companies. Since 2022, non-financial firms have been forced to absorb sanctions-induced losses, followed by the financial strain of excess growth in labor costs

(which surpassed productivity gains). Meanwhile, their revenues from the domestic market were artificially restrained by price regulation. Consequently, in recent years, their profitability has declined from the typical range for the economy (7–8 % profit margin and 9–10 % sales margin) to lower figures (6–7 % and 7–8 %, respectively). Throughout 2025, the situation further deteriorated due to declining export revenues and the widening gap between wage increases and labor productivity.

A further sign of emerging issues was the steady growth of finished goods inventories, which by the end of 2025 had reached all-time highs. This indicates increasing pressure on liquidity and limitations on sustaining previous levels of production and investment.

Conclusion

By late 2025, it became evident that the growth model of 2023–2024 — driven by heightened external demand from Russia, rapid wage and consumption growth amid labor shortages — had nearly reached its limit. Widening disproportions, such as a weakened external position, diminished financial health of firms, and inflationary pressures, curtailed the ability to encourage domestic demand and revealed risks of macroeconomic turbulence. Absent these temporary drivers, the economy reverted to growth potential at a rate of 1–2 % annually. From a medium-term perspective, this essentially represents a return to stagnation, marked by high vulnerability to recessions, inflation surges, and financial instability episodes.

FINANCIAL SECTOR: NOMINAL STABILITY AND REAL RISKS

Anastasiya Luzgina

Summary

In 2025, Belarus's financial sector persisted amidst ongoing geopolitical uncertainty and sanctions. The Belarusian ruble's exchange rate remained closely linked to developments in the Russian currency market. Simultaneously, the National Bank of Belarus put in place measures to boost economic growth by encouraging banks to expand investment lending. Analysis suggests that, despite nominal stability in the financial sector over the past year, there remain ongoing risks of potential deterioration in the future.

Trends

- International reserve assets hit a record high, primarily driven by situational factors;
- The financial regulator encouraged investment activity;
- The EU escalated its sanctions pressure on the banking sector;
- The Belarusian ruble remained stable throughout the year, with the foreign exchange market situation still dependent on fluctuations in the Russian ruble's exchange rate.

Brief overview of banking sector performance and external debt

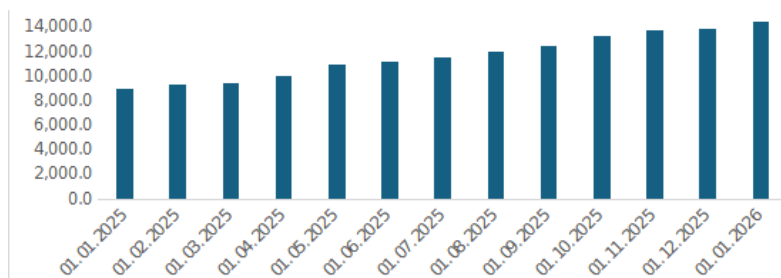
The National Bank reported that throughout 2025, the banking sector demonstrated consistent reliability and stability. Key indicators suggest an almost perfect financial health: the capital adequacy ratio reached 19.2 %, well above the regulatory minimum of 10 %. The total liquidity coverage ratio stood at 158.6 %, comfortably exceeding the minimum requirement of 100 %.

Additionally, the proportion of non-performing assets within banks' credit portfolios was only 2.2 %, significantly below the maximum permissible limit of 10 %.¹

The National Bank's policy of reducing dependence on foreign currencies (de-dollarization) contributed to a decline in retail deposits denominated in foreign currencies, while deposits in Belarusian rubles experienced robust growth. Over the past year, fixed-term ruble deposits increased by over 39.5 %, marking the highest growth rate in the last five years. Consequently, compared to early 2021, fixed-term retail deposits denominated in Belarusian rubles nearly tripled, reaching an equivalent of USD 15.2 billion.

In addition to deposit growth, there was a remarkable expansion in gold and foreign exchange reserves. As of January 1, 2026, these reserves totaled USD 14.4 billion, representing a 61.6% increase over the year (see Figure 1).²

Figure 1. International reserve assets of the Republic of Belarus in 2025, USD million



Source: National Bank of the Republic of Belarus

¹ Official Telegram channel of the National Bank of the Republic of Belarus, 29 Jan. 2026, @pressnbrb.

² «Международные резервные активы Республики Беларусь.» Национальный банк Республики Беларусь, <https://www.nbrb.by/statistics/reserveassets/assets>.

Based on the latest data for the *third* quarter of 2025, Belarus's gross external debt amounted to USD 37.15 billion, representing 42.9% of GDP.³ As of the end of the *third* quarter of 2025, the external debt of the public sector decreased by USD 105.6 million, totaling USD 17 billion.⁴ These indicators suggest a relatively low external debt burden for the country.

Financial sector risks

A more detailed analysis indicates that the situation in the financial sector was partially shaped by short-term factors.

In 2025, the National Bank actively encouraged investment lending,⁵ with ceiling interest rates for investment loans remaining lower than those for other types of loans.

According to the National Bank's data, investment loans grew by 50% in 2025. On the one hand, the significant increase was expected to bolster GDP growth. On the other hand, more favorable financial conditions for enterprises to implement investment projects could carry significant risks. Given Belarus's practice of mandating the fulfillment of government plans, there is a possibility that, over time, some of these investment projects may prove to be unprofitable. This could, in turn, lead to a rise in the proportion of non-performing loans.

³ «Платёжный баланс, международная инвестиционная позиция и валовой внешний долг Республики Беларусь за январь-сентябрь 2025.» Национальный банк Республики Беларусь, https://www.nbrb.by/publications/balpay/balpay2025_3.pdf.

⁴ «Валовой внешний долг Республики Беларусь.» Национальный банк Республики Беларусь, <https://www.nbrb.by/statistics/externaldebt/quarterlydynamics>.

⁵ «С 1 ноября изменяется перечень финансовых инструментов, по которым устанавливаются значения расчётных величин стандартного риска.» Национальный банк Республики Беларусь, 29 Oct. 2025, <https://www.nbrb.by/press/21597>.

The second notable aspect of the credit and deposit market in 2025 was linked to the substantial increase in fixed-term ruble deposits held by households, fueled by the active growth in personal incomes throughout 2024–2025. Amid labor shortages, enterprises and companies were compelled to increase wages despite a decline in operational efficiency. Notably, in 2025, the growth in real wages surpassed productivity growth by 8 percentage points. When adjusted for inflation, real wage growth reached 9%,⁶ although this was lower than the double-digit increases seen in 2024.

Looking ahead to 2026, a 40 % increase in irrevocable fixed-term retail bank deposits denominated in Belarusian rubles is anticipated. However, achieving this target will be challenging given the slowdown in wage growth.

With robust income growth, Belarusians had increased opportunities to save and invest. Given the limited development of the country's stock market, bank deposits continued to be the primary method for building savings. However, foreign currency savings became less appealing due to the depreciation of the U.S. dollar against the Belarusian ruble throughout the year and the low yields on foreign currency deposits.

Meanwhile, households were withdrawing their fixed-term foreign currency deposits. As a result, in recent years, Belarusians have predominantly been net sellers of foreign currency. Non-resident companies also sold more foreign exchange than they purchased. In 2025, non-residents and the local population collectively sold USD 3.5 billion on a net basis. This not only satisfied the USD 2.3 billion⁷ demand from importers but also

⁶ «Социально-экономическое развитие Республики Беларусь.» Национальный статистический комитет Республики Беларусь, 25 Feb. 2026, https://www.belstat.gov.by/ofitsialnaya-statistika/publications/izdania/public_bulletin/index_162378/.

⁷ «Статистический бюллетень Национального банка РБ № 12(318), 2025.»

allowed the National Bank to buy foreign currency, contributing to the growth of foreign exchange reserves.

The main factor driving the growth of Belarus's international reserves, however, was the rising price of gold. Over the course of the year, gold's value increased by approximately 40 %, or more than USD 1,000 per troy ounce. Since foreign exchange reserves are traditionally valued in U. S. dollars, this increase largely reflects the appreciation of gold in U. S. dollar terms.

Furthermore, it is important to acknowledge that Belarus has not consistently managed its external debt properly. The country continues to default on its obligations to foreign Eurobond holders. For example, on December 29, 2025, the Ministry of Finance replaced the Eurobonds maturing on December 29, 2027 with domestic government bonds, marking a significant deviation from the original contractual commitments.⁸

On December 29, the Ministry of Finance officially executed an interest payment on its Eurobonds, totaling the equivalent of USD 12.2 million.⁹ Instead of settling the interest in the currency specified in the contract, though, the ministry transferred an equivalent amount in Belarusian rubles to a dedicated account at Belarusbank. This transaction enabled it to formally fulfill its current obligations to creditors, while international reserves remained intact.

Furthermore, in 2025, Belarus once again had its debt to Russia refinanced. Payments on the principal of state loans,

Национальный банк Республики Беларусь, https://www.nbrb.by/publications/bulletin/stat_bulletin_2025_12.pdf.

⁸ «О предстоящей замене еврооблигаций Беларусь-2027.» Министерство финансов Республики Беларусь, https://www.minfin.gov.by/ru/public_debt/pressreleases/a8628845a5564eb9.html.

⁹ «Об исполнении обязательств по еврооблигациям Республики Беларусь Belarus-2027.» Министерство финансов Республики Беларусь, https://www.minfin.gov.by/ru/public_debt/pressreleases/archive/2025/0aced2f6d2374782.html.

originally scheduled to be paid in the second half of the year and amounting to approximately USD 250 million, were deferred to the period between 2027 and 2032.¹⁰ Similar refinancing arrangements had been utilized in previous years.

Outlook for gold and foreign exchange reserves: trends and stability

Although gold and foreign exchange reserves experienced significant growth over the past year, their medium-term outlook suggests potential decline due to several factors. First, the recent increase in reserves is mainly driven by rising prices of gold. Should the gold market reverse course and decline, Belarus's international reserves could quickly diminish.

Second, considering the persistent trade deficit, which reached USD 1.8 billion in 2025 for commodities and services, there is a risk of increased demand for foreign currency as its supply tightens. In 2025, as in 2024, the population largely offset foreign currency demand from businesses. However, this balance may change over time. The population's foreign currency deposits are finite. While at the beginning of 2020, Belarusian fixed-term foreign currency deposits stood at USD 6.2 billion, by the start of 2026, this figure had shrunk to USD 2.5 billion.

Foreign currency inflows continued through personal remittances from Belarusian citizens working abroad. In the first three quarters of 2025, these amounted to USD 880 million.¹¹ However, the volume of such currency inflows may fluctuate over time, especially due to sanctions restrictions.

¹⁰ «Россия предоставит Беларуси отсрочку по долгам.» *ibMedia*, 28 Jan. 2026, <https://ibmedia.by/news/rossiya-predostavit-belarusi-otsrochku-po-dolgam/>.

¹¹ «Личные переводы.» Национальный банк Республики Беларусь, <https://www.nbrb.by/statistics/remittances>.

There was a slight decline in the supply of foreign currency on the domestic market amid a weakening U.S. dollar. In 2024, the population sold a net USD 1.69 billion, whereas in 2025, net sales edged down to USD 1.63 billion. If the U. S. dollar strengthens, the population is likely to sell less foreign currency. This could, in turn, increase pressure on the ruble's exchange rate and compel the National Bank to begin selling foreign exchange reserves to curb the ruble's depreciation and prevent panic.

Third, Belarus remains relatively unattractive to foreign investors due to ongoing sanctions and a negative international reputation, which poses risks to the future stability of its gold and foreign exchange reserves.

Foreign exchange market: dependence on the Russian ruble

The impact of domestic economic factors on the Belarusian ruble's exchange rate movement can be regarded as neutral. Despite a nearly USD 7 billion trade deficit in commodities, the ruble appreciated against a basket of currencies over the past year.

This improvement was supported by growth in net exports of services — in 2025, services trade surplus totaled USD 4.2 billion.¹² The situation also stabilized because the population and non-residents acted as net sellers of foreign currency. Consequently, between December 31, 2024 and December 31, 2025, the ruble strengthened against the basket of currencies by 0.91 %.

However, within the basket, mixed trends were observed. Over the year, the Belarusian ruble depreciated against the Russian

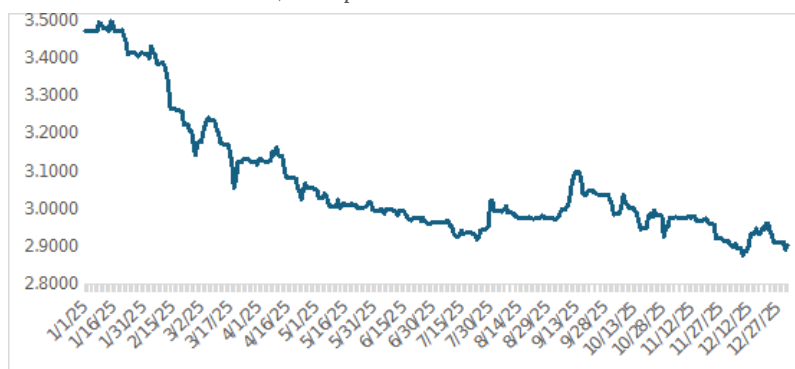
¹² «Социально-экономическое развитие Республики Беларусь.» Национальный статистический комитет Республики Беларусь, Jan. 2026, <https://www.belstat.gov.by/upload/iblock/bc0/tkmzhrealceuto6yw4haw4egzw19euho.pdf>.

ruble by 10.66 %. At the same time, it appreciated against the U. S. dollar by 16.43 % and against the Chinese yuan by 14.61 %.¹³

The decline in the U. S. dollar's exchange rate against the Belarusian ruble was due to the weakening of the U. S. currency globally. For instance, the U. S. dollar weakened against the euro by approximately 15 %.¹⁴ Additionally, movements in the USD/BYN exchange rate were influenced by developments in the Russian currency market.

Over the past five years, Russia has evolved as Belarus's primary trading partner and creditor. Furthermore, over 90 % of bilateral trade is conducted in their national currencies, predominantly in Russian rubles. As a result, the Belarusian ruble followed the trajectory of the Russian ruble's exchange rate against the U.S. dollar, if not fully replicated it (see Figures 2 and 3).

Figure 2. Exchange rate movement of the U. S. dollar against the Belarusian ruble in 2025, BYN per USD 1

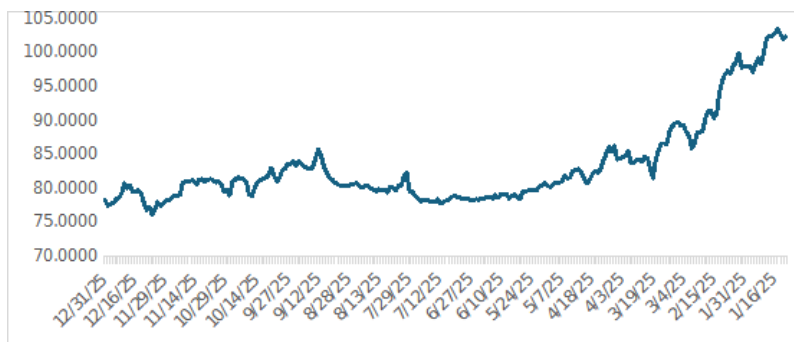


Source: National Bank of the Republic of Belarus

¹³ «Официальные курсы белорусского рубля по отношению к иностранным валютам и стоимость корзины иностранных валют.» Национальный банк Республики Беларусь, 09 Mar. 2026, <https://www.nbrb.by/statistics/rates/currencybasket>.

¹⁴ Rai, Vikram. "The U.S. Dollar in 2025: Down, but not out." *Economics.td.com*, 21 Jan. 2026, <https://economics.td.com/us-the-united-states-dollar-in-2025>.

Figure 3. Exchange rate movement of the U. S. dollar against the Russian ruble in 2025, RUB per USD 1



Source: Central Bank of the Russian Federation

The dependence of the Belarusian ruble's exchange rate movement on the Russian ruble could negatively affect the country's exports if the national currency appreciates for reasons unrelated to domestic factors. Furthermore, this situation may lead to volatility in the currency market in case of sharp fluctuations in the exchange rates of the Russian and, consequently, Belarusian rubles. These risks are further amplified by the ongoing war in Ukraine and the continued enforcement of stringent sanctions on the Russian economy.

Escalation of sanctions against banks

Alongside Russia, Belarus as a co-aggressor is also subject to substantial sanctions. In 2025, sanctions on the banking sector were significantly expanded. For instance, the EU's 16th sanctions package adopted at the end of February 2025, imposed restrictions on BelVEB Bank, BelGazPromBank, and VTB Bank's subsidiary in Shanghai. Later, as part of the 19th sanctions package (October 23), banks such as Alfa Bank, Sberbank, and VTB Bank were also added to the list (see Table 1).

Table 1. List of banks subjected to EU sanctions in 2025

Bank	Sanctions package, date
BelVEB Bank	16 th , February 25
BelGazPromBank	16 th , February 25
VTB Bank Shanghai	16 th , February 25
Bank Dabrabyt	18 th , July 18
BellInvestBank	18 th , July 18
Development Bank	18 th , July 18
BelAgroPromBank	18 th , July 18
Alfa Bank (Belarus)	19 th , October 23
Sber Bank (Belarus)	19 th , October 23
VTB Bank (Belarus)	19 th , October 23

Source: EUR-Lex¹⁵

All dealings with the listed financial institutions are strictly prohibited. This includes not only the inability to perform international transfers or payments and the ban on establishing correspondent banking relationships, but also the blocking of any transactions made with payment cards issued by these sanctioned banks.

Similar restrictions, under the EU's 18th sanctions package, were applied to *four* Belarusian banks previously disconnected from SWIFT. These are Bank Dabrabyt, BellInvestBank, Development Bank, and BelAgroPromBank (see Table 1).

¹⁵ "Council Regulation (EU) 2025/2041 of 23 October 2025 amending Regulation (EC) № 765/2006 concerning restrictive measures in view of the situation in Belarus and the involvement of Belarus in the Russian aggression against Ukraine." EUR-Lex, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L_202502041.

The sanctions significantly restrict the operations of these banks.¹⁶ Essentially, clients of these sanctioned banks cannot perform transactions with counterparties in the European Union or process transactions through European banks. Notably, seven of these banks are classified as systemically significant.

The restrictions introduced by the 16th and 19th sanctions packages target Belarusian banks that engage with Russian payment services. In practice, however, most of these banks are integrated with Russia's Faster Payments System (FPS) and the Financial Messaging System of the Bank of Russia (SPFS). Several Belarusian banks issue co-branded payment cards with the Russian MIR system and the Belarusian BELKART system. Consequently, there is a potential risk of these banks being included in the EU sanctions list in the future.

Furthermore, a ban has been imposed on all operations involving crypto-assets and electronic money for individuals and legal entities registered in Belarus. These measures aim to prevent sanctions evasion through digital payment channels.

The Belarusian authorities are actively exploring digital payment systems as a way to facilitate international transactions and bypass sanctions. Throughout 2025, the National Bank has repeatedly discussed developing a digital version of the Belarusian ruble, with plans for its launch in 2026.

The central banks of China and Russia are actively advancing the adoption of digital currencies. Moreover, in January 2026, Belarus signed a decree authorizing the operation of crypto-banks that will serve as hybrid institutions, combining the roles of traditional banks and cryptocurrency exchanges. One of the intended functions of these crypto-banks is to enable

¹⁶ «Что изменят новые санкции Евросоюза против белорусских банков.» DW, 22 July 2025, <https://www.dw.com/ru/zapret-na-kartockii-perevody-cto-izmenat-novye-sankcii-es-protiv-belorusskih-bankov/a-73367697>.

international settlements in cryptocurrencies, which could potentially make sanctions circumvention easier. In response, the European Union's new restrictions on crypto-assets are designed to thwart such efforts.

Conclusion

In 2025, Belarus's financial sector remained formally stable, mainly due to short-term factors and government intervention. The National Bank redoubled its efforts to stimulate economic growth through the banking sector. As a result, investment loans soared in 2025.

The increase in gold and foreign exchange reserves was driven by rising international gold prices and the population's sale of foreign currency, motivated by unprofitable U.S. dollar savings. The exchange rate of the Belarusian ruble remained heavily influenced by developments in the Russian currency market.

Throughout the year, sanctions against banks were intensified. To mitigate the immediate and future adverse effects of these sanctions on the banking sector, the Belarusian authorities actively began developing the country's cryptocurrency market.

In 2026, the National Bank will continue to support economic growth by shaping the financial sector. This will involve ongoing efforts to promote investment lending and extending programs for consumer loans to encourage the purchase of domestically produced goods. However, achieving a 40% increase in fixed-term irrevocable retail deposits denominated in Belarusian rubles may be challenging due to the slowdown in household income growth.

The Belarusian ruble's exchange rate is expected to continue relying heavily on the Russian ruble. It is also likely that the U.S. dollar will strengthen against the Belarusian ruble, driven

by similar trends in the Russian financial market and escalating tensions in the Middle East.

The level of gold and foreign exchange reserves will vary in line with gold prices, assuming there remains a sufficient supply of foreign currency on the domestic market. Current external debt payments are unlikely to significantly affect reserves, as some payments to the main creditor — Russia — may be deferred, and contractual payments on Eurobonds have been suspended by the Belarusian authorities.

The pressure of sanctions on Belarus's banking sector will hinge on the prospects for ending the war in Ukraine. If the situation does not improve, the list of banks restricted from transacting with counterparts in the European Union could be expanded.

ENERGY SECTOR: NUCLEAR AMBITION FUELED BY RUSSIAN CREDIT

Polina Alekseeva

Summary

In 2026, nuclear power generation failed to substantially cut Belarus's reliance on Russian natural gas imports. Electricity consumption kept growing, and despite previous government assurances, tariffs also increased.

The international sanctions and loss of lucrative export markets in Europe and Ukraine turned the Belarusian oil refineries — once seen as a “golden goose” — into distressed assets. Neither the compensation granted to Belarus for the Russian tax maneuver in the oil sector nor logistics benefits for exporting oil products to “friendly countries” succeeded in maintaining the refineries' former market positions.

The low price of imported Russian natural gas no longer provided Belarusian exporters with a competitive edge. Consequently, throughout 2025, the authorities continued negotiating a closer convergence of natural gas rates with those in Russia.

Trends

- A downturn in the profitability of the oil and gas industry;
- The Belarusian government's emphasis on developing nuclear energy, which could help align natural gas prices with Russian domestic rates and support the transit of electricity through Russia to the East;
- Minsk's continuous efforts to turn political allegiance to the Kremlin into economic advantages, in an attempt to save Belarusian refineries from an undeclared bankruptcy.

Electricity: third power unit at the BelNPP and luring cryptocurrency mining

In 2025, a major development in Belarus's energy sector was the November decision to add a third unit to the Belarusian Nuclear Power Plant (BelNPP). The plant currently operates two VVER-1200 reactors, with a total capacity of up to 2,400 MWe. The first reactor was put into operation in June 2021, followed by the second one in November 2023.

The plan is to bring the third reactor online between 2035 and 2038, funded by the savings from the previously allocated USD 10 billion Russian loan for the BelNPP's construction. The overall cost of the two operational units, including infrastructure, came to about USD 7 billion, with approximately USD 5.36 billion financed through the Russian loan, according to Rosatom State Atomic Energy Corporation.

In reality, the anticipated advantages of building the BelNPP proved less substantial than initially claimed. According to the Ministry of Energy, over the past five years, Belarus's reliance on natural gas for power generation dropped from 95 % to 65 %, yet natural gas still remains the dominant energy source in the country's energy mix.¹ During the same period, the energy intensity of GDP decreased by 4 %, but it remains 130 % higher than in Germany and 30 % higher than in Finland, the U. S., and global averages.

It had been projected that the BelNPP would produce approximately 18.5 billion kWh annually (with the 2024 output reaching 15.693 billion kWh), enough to cover 40 % of domestic electricity demand and replace about 4.5 to 5.0 billion cubic meters of natural gas each year. However, evidence suggests that nuclear generation has not led to a significant decrease in natural gas imports. The Ministry of Energy's statistics indicate

¹ Here and elsewhere: «Белоруссия сделала выбор в пользу атомной генерации.» *Независимая газета*, 12 Feb. 2025.

that in 2025, Belarus continued to import roughly the same volume of Russian natural gas as throughout 2023–2024: around 17 billion cubic meters — compared to the 18–19 billion cubic meters bought from Russia annually before the nuclear plant was launched.

Officials had maintained that, following the commissioning of the BelNPP, the currency burden on the budget due to natural gas substitution would decrease by over USD 500 million per year. However, they did not mention any payments related to the nuclear loan. Russia repeatedly postponed Belarus's loan repayment deadlines and revised its terms. In July 2020, the start of principal repayment was pushed back to April 1, 2023, and in March 2023, it was further put off until April 2024. The loan will now be repaid in Russian rubles rather than U. S. dollars. Moreover, the interest rate became fixed and reduced to 3.3 %. The loan is scheduled to be repaid over a period of 15 years.

Officially, it was anticipated that after the BelNPP became operational, electricity tariffs for end users would decline by 20–30 %. However, the opposite trend took place: on January 1, 2025, tariffs for some organizations increased by 11.9 %, and for households by 12.0 %. In 2026, tariffs rose an additional 7 %.²

In 2024, Belarus's electricity consumption grew by 5 % compared to 2023, reaching 43.2 billion kWh. The Ministry of Energy had estimated that consumption would be approximately 44 billion kWh in 2025. However, according to GPO 'Belenergo', which oversees the country's power sector, Belarus's electricity generation in 2025 decreased by 0.31 % year-on-year to 43.07 billion kWh.³ The Ministry of Energy attributed the growth in electricity usage during 2023–2024 to the completion of large

² «Новые тарифы на газ, тепло и электричество утвердили в Беларуси.» MyFin, 25 Feb. 2026, <https://myfin.by/article/money/novye-tarify-na-gaz-teplo-i-elektricesvo-utverdili-v-belarusi-43940>.

³ «Белэнерго: итоги и задачи.» Белэнерго, 18 Feb. 2026, https://www.energo.by/content/infocenter/news/belenergo-itogi-i-zadachi__13418/.

industrial projects, rising household demand, development of electric transportation, and cryptocurrency mining.

Between 2021 and 2025, over 2 million square meters of electric-powered homes — residences where electricity is the sole energy source for heating, hot water supply, and cooking — were constructed in Belarus. Private homeowners were also increasingly adopting electric heating; in the past five years, 171,000 applications were received to switch to electric heating, with a satisfaction rate of 91.4 %. The upward trend is largely fueled by reduced electricity tariffs for this group of consumers.

Electric mobility is rapidly expanding in Belarus, driven by favorable energy pricing. In 2025, the number of electric vehicles doubled compared to 2024, reaching a total of 49,557 units. According to GPO 'Belenergo', electric vehicle charging stations use between 60 million and 80 million kWh of electricity annually, whereas the Ministry of Energy estimates the total consumption at around 200 million kWh per year. This higher figure accounts for the fact that many electric vehicles are charged at home rather than through public charging stations.

Regarding cryptocurrency mining, Minsk, motivated by ambitions tied to its new nuclear power plant, was among the first countries in Eastern Europe to legalize cryptocurrencies and mining activities. In December 2017, Alexander Lukashenko signed the Decree on the Development of the Digital Economy, which legalized cryptocurrency transactions and offered benefits to miners — including income tax and VAT exemptions until 2023 with the possibility of extensions, as well as permitted the free circulation of digital assets. Belarus is the *third* most affordable country in Europe for electricity. The commissioning of the BelNPP introduced additional power generation capacity, attracting several foreign companies.

These included Chinese manufacturers of cryptocurrency mining equipment, led by the industry giant *Bitmain*, along with Russian operators, one of them being *Mining Express*, which

built a 20 MWe mining farm. Major players deployed their equipment in the High Technologies Park (HTP), where they benefited from tax incentives and received legal support. It is also known that *Whitebird*, a Belarusian Minsk-based crypto platform and HTP resident, plans to launch the country's first crypto bank.

According to preliminary estimates, in 2025, electricity used for mining in Belarus reached around 1.3 billion kWh, which is twice the amount recorded in 2023.⁴

Apparently, with Europe's demand for Russian natural gas declining, Moscow is unlikely to be pleased with Minsk's plans to expand nuclear power, especially since Belarus remains one of the largest importers of Russian natural gas. Nevertheless, Lukashenko tried to assure Putin that the launch of the Bel-NPP wouldn't impact the volume of gas imports. He argued that several Belarusian thermal power plants, which used to run on natural gas, were now in cold reserve and used for mining.

Oil: refineries as a distressed asset

In 2025, Belarusian refineries faced nine months of financial losses, driven by sanctions, the loss of the Ukrainian market, and challenging global oil market dynamics. 'Naftan' and 'Mozyr NPZ' mainly concentrated on supplying the domestic market. Exporting fuel to Russia proved unprofitable because of the contrasting operational conditions with Russian refineries.

According to state-owned 'Belorusneft' oil company, petroleum product consumption in the country amounted to 4.225 million tons in 2025, an increase from 4.055 million tons in 2024, 3.865 million tons in 2023, 3.895 million tons in 2022, and 4.089

⁴ «Лукашенко назвал криптовалюту способом ухода от долларовой зависимости.» РБК, 14 Nov. 2025, <https://www.rbc.ru/crypto/news/69170c579a794754506b8370>.

million tons in 2021.⁵ ‘Belorusneft’ projects that the market capacity for petroleum products will reach 4.288 million tons in 2026.

On January 1, 2024, Russia concluded its tax maneuver, leading both Russian and Belarusian refineries to start purchasing crude oil at international market prices. The 2022 agreement with Russia on general taxation principles helped Belarus address the longstanding challenge of compensating for losses resulting from the Russian tax maneuver. However, to maximize the amount of compensation payable from the Russian budget, Belarusian refineries need to process at least 18 million tons of crude annually – equivalent to 9 million tons per refinery. Attaining these processing levels depends on access to profitable export markets, which Belarus currently lacks.

It was announced that Moscow would support the Belarusian refineries in making up for the loss of the European and Ukrainian markets: its compensation for the tax maneuver was supposed to allow Belarus to sell 1.8 million tons of motor fuel to Russia annually. However, in practice, supplies remained at a minimal level.

Since May 2021, official export figures for Belarusian petroleum products have been unavailable after Belstat National Statistical Committee ceased publishing this data. In autumn 2023, the Russian government *halved* payments under the so-called fuel damper mechanism – a state system designed to stabilize domestic gasoline and diesel prices – due to prevailing oil price conditions. The decision also impacted Belarus. In September 2023, the Belarusian refineries halted their supply of automotive

⁵ «Гендиректор “Белоруснефти”: ежегодный рост потребления нефтепродуктов в стране говорит об оживлении экономики.» *Беларусь Сегодня*, 25 Feb. 2026, <https://www.sb.by/articles/gendirektor-belorusnefti-ezhegodnyy-rost-potrebleniya-nefteproduktov-v-strane-govorit-ob-ozhivlenii-.html>.

fuel to Russia as a result of reduced budget allocations under the fuel damper mechanism.

Over the following two years, the situation remained largely unchanged. Market conditions did not create sufficient incentives for Belarus to supply its petroleum products to Russia. Throughout most of 2025, *Brent* crude oil blend – to which the cost of Russia's flagship *Urals* crude is informally linked – traded within a USD 60–70 per barrel range. During 2024 and 2025, the spread between *Brent* and *Urals* averaged about USD 12–13, rising to USD 27 per barrel in mid-February.

In spring 2025, Lukashenko acknowledged that Belarusian refineries remained unprofitable due to expenses related to modernization, sanctions, high export logistics costs, and rising oil prices. This was despite the 2025 budget law projecting receipts of BYN 4.373 billion (USD 1.49 billion) from the Russian budget as compensation for the tax maneuver.

On March 14, 2025, in his address to the Federation Council, Lukashenko assured Russian officials that the Belarusian refineries were capable of processing several tens of millions of tons of crude oil. However, he indicated that this was unfeasible due to unequal conditions compared to Russia. He urged for measures to secure at least a 7–8 % profitability rate for the refineries. In October 2025, Belarusian Prime Minister Alexander Turchin discussed the same concern.

Following this, Russia passed legislation permitting companies that process Russian oil under tolling arrangements to receive a reverse excise duty, similar to the scheme applied to refineries within Russia. Consequently, in October 2025, Belarus's gasoline exports to Russia surged 32-fold compared to 2024, reaching 24,700 tons.⁶ Beginning in the *fourth* quarter of 2025, Belarusian refineries started processing Russian crude oil under

⁶ «В октябре поставки белорусского бензина в Россию увеличились в 31 раз.» MyFin, 22 Oct. 2025, <https://myfin.by/article/rynki/v-oktabre-postavki-belorusskogo-benzina-v-rossiu-uvelicilis-v-31-raz-41224>.

tolling terms, which, according to the Belarusian government, could guarantee a profitability of 7–8 % and support sustainable, profitable operations.

In November 2025, gasoline shipments to the Russian Federation nearly doubled compared to October, reaching 96,000 tons. However, also in November, amid falling domestic demand in Russia, diesel fuel exports declined by one-third from October, amounting to 21,200 tons. Notably, Belarus exported petroleum products to Russian companies that provided crude oil for processing at the Belarusian refineries.

Regarding the export of Belarusian petroleum products to third countries, the outcomes fell short of high expectations. In 2025, these exports were mainly directed to Central Asia and Afghanistan, rather than Russia. The shipments to this region increased 4.9 times compared to 2024, reaching 946,600 tons.⁷ Meanwhile, transit shipments of gasoline from the Belarusian refineries passing through Russian seaports during the first 11 months of 2025 decreased by 29 % compared to the same period in 2024, totaling 1.36 million tons.⁸

It is worth highlighting that Belarus and Russia originally planned to establish a unified oil market by 2025, but the deadline was subsequently pushed back to January 1, 2027. Despite this, many officials remain doubtful about the effectiveness of this initiative as a viable solution for Belarusian refineries.

The country's oil concern Belneftekhim acknowledged that Belarus's oil refining sector can no longer rely solely on crude oil processing for growth. Consequently, a strategic shift was

⁷ «Россия и Беларусь поставили в страны Центральной Азии 8.4 млн тонн топлива в 2025 году.» *Нефть/Капитал*, 06 Feb. 2026, <https://oilcapital.ru/news/2026-02-06/moskva-i-minsk-narastili-eksport-topлива-v-tsentralnuyu-aziyu-na-29-za-2025-god-5546945>.

⁸ «Удалось ли Беларуси заработать на переработке российской нефти.» *ibMedia*, 05 Dec. 2025, <https://ibmedia.by/news/kak-belorusskuyu-neftyanuku-vyvodyat-na-pribylnuyu-rabotu/>.

announced to transition away from the traditional refinery model focused mainly on motor fuel production toward petrochemical industries. Plans at 'Naftan' include establishing facilities for polycarbonate and ABS plastic production, while Mozyr Oil Refinery aims to advance polypropylene manufacturing. Moreover, by 2030, Belneftekhim intends to move beyond mere modernization and achieve technological leadership across several segments, with a target of launching forty new products.

It is evident that, with a profitability of 7–8%, the Belarusian refineries will find it difficult to fund these expensive projects without government support. In 2026, the Belarusian budget plans to receive BYN 6.672 billion (approximately USD 2.27 billion) from Russia as compensation for the tax maneuver. These funds are expected to be directed to the refineries, assuming no disruptions occur in tolling crude oil processing.

Oil transit: only Kazakhstan remains

Prior to the sanctions, Belarus was the primary transit route for Russian crude oil to Europe, with approximately 50 million tons of Russian oil passing through the 'Druzhba' pipeline annually. Starting January 1, 2023, Germany ceased importing crude from Russia. Subsequently, the European Union imposed an embargo on Russian oil deliveries via the northern branch of the 'Druzhba' pipeline (through Belarus). Meanwhile, oil supplied via the southern branch through Ukraine was purchased by Hungary and Slovakia.

At present, Belarus solely ensures the transit of Kazakhstani oil. In 2024, oil shipments from Kazakhstan to Germany amounted to 1.5 million tons, rising to 2.1 million tons in 2025. Projections indicate an expected increase to 2.5 million tons in 2026. Notably, in January 2026, Kazakhstan boosted its oil exports to Germany via the 'Druzhba' pipeline through Belarus by 144 % compared to January 2025.

Natural gas: stable prices and limited transit

In 2025, the natural gas price was fixed at USD 128.52 per 1,000 cubic meters for Belarus, payable in Russian rubles. This rate has remained unchanged since 2022 and is anticipated to stay the same in 2026. In the neighboring Smolensk Region of Russia, natural gas tariffs are USD 30–40 lower per 1,000 cubic meters. For comparison, the average natural gas price in Europe increased by 9.2 % in 2025 compared to 2024, reaching USD 422 per 1,000 cubic meters.⁹

The Belarusian authorities aim to expedite the creation of a unified natural gas market with Russia. They believe that, within a shared energy framework and as natural gas prices align with Russia's domestic levels, electricity generation costs in Belarus will be significantly lower than in Russia due to the country's more efficient power sector. This would position Belarus to export electricity to Russia and extend its reach further eastward.

It was originally planned to establish a unified gas market on January 1, 2022, but by 2026, this had yet to be realized. In December 2025, Dmitry Krutoi, head of Lukashenko's administration, stated on Belarusian Television that this “key” issue would typically be resolved through discussions between the presidents of Belarus and Russia.

Belarus is unlikely to attain gas prices equal to those within Russia without substantial reforms to its fuel industry. Currently, Russia's ‘Gazprom’ sells natural gas to the Belarusian intermediary GPO ‘Belteplotgaz’, which then sells it to end consumers at a markup. However, ‘Gazprom’ would prefer to earn profits directly from sales within Belarus, a goal that would require the country to open its market to Russian gas suppliers. Most likely, the Belarusian authorities will avoid taking such a step, fearing it could compromise their control over domestic retail prices.

⁹ «В Европе цена газа в 2025 году выросла на 9 %.» ТАСС, 01 Jan. 2026, <https://tass.ru/ekonomika/26067323>.

Gas transit: only to the Kaliningrad Region

The Belarusian segment of the Yamal – Europe gas pipeline, which has been owned by Gazprom since late 2011, has a planned capacity of 32.9 billion cubic meters of natural gas per year. Historically, this pipeline supplied gas to Lithuania, Ukraine, Poland, Germany, and the Kaliningrad Region. Russia annually paid approximately USD 250 million for the transit of its natural gas through Belarus.

In April 2022, Lithuania completely stopped importing Russian gas, allowing only transit to the Kaliningrad Region. According to *Bruegel*, pipeline exports, which totaled around 31 billion cubic meters in 2021, were halted in 2022. In May 2022, Russia imposed sanctions on over 30 foreign companies, including EuRoPol GAZ, the company that owns the Polish section of the Yamal – Europe pipeline. Since then, Gazprom has been prohibited from exporting gas through Poland.

Natural gas transit from Russia to the Kaliningrad Region via Belarus and Lithuania continues through the Minsk – Vilnius – Kaunas – Kaliningrad spur. In 2025, the volume of gas transit increased by 9 % compared to 2024, reaching 2.5 billion cubic meters. Under the new agreement signed on December 30, 2025 with Lithuania's gas transmission operator Amber Grid, Gazprom is committed to delivering 10.5 million cubic meters of natural gas daily through Belarus to the Kaliningrad Region until 2030.

Conclusion

Following the signing of an agreement with Rosatom to build the third unit of the BelNPP, scheduled for finalization in 2026, Belarus is anticipated to become even more reliant on Russia for raw materials and financial support. This agreement is also

expected to result in further delays for Belarus in meeting its repayment obligations on the Russian loan associated with the BelNPP project.

Despite Minsk's longstanding aspirations, it remains unlikely that Belarus and Russia will establish a unified natural gas market in 2026. Nevertheless, Minsk continues to push for the early alignment of gas prices. Developing a common gas market is viewed as a vital step toward integrating the two countries' electricity grids, potentially enabling Belarus to export electricity to Russia. Although Russia currently has an energy surplus, with an estimated excess capacity of approximately 20 GWe, some regions within Russia experienced energy shortages at the end of 2025 and the beginning of 2026.

In 2026, Belarus is expected to remain a supplier of petroleum products to Central Asian markets, as Russian Railways extended tariff discounts for the transit of Belarusian petroleum via the Caspian Sea port facilities. However, these prospects will largely depend on developments in Russia's petroleum market, which experienced volatility in 2025 due to record-high stock prices and repairs necessitated by Ukrainian drone attacks. Consequently, Russia had imposed export restrictions on petroleum products, which had been lifted by 2026.

In January 2026, exports of Russian petroleum products to Central Asia and Afghanistan rose by 44 % compared to December 2025. The Belarusian refineries will need to factor in this trend when supplying petroleum products to the region.

Regarding the transit of Russian crude oil and natural gas through Belarus to Europe, it is unlikely to resume in the near future, even if Russia ends its war in Ukraine.

REAL SECTOR: SLOWDOWN ON THE BRINK OF A CRISIS

Vadim Sekhovich

Summary

In 2025, the rapid slowdown of the Russian economy directly affected Belarus. The country's GDP growth was more than three times below projections, pushing Belarus's economy closer to stagnation.

Industrial output declined. In foreign trade, Belarus recorded its worst deficit of the 2020s.

In the public sector, the loss of market positions in Russia and domestically is becoming increasingly apparent. Russian companies capitalize on price liberalization. In 2025, they offset declining demand at home by expanding into foreign markets. Their primary target for expansion was Belarus, given its geographical proximity and vulnerability in terms of customs regulations.

The private sector remains capable of competing against Russian companies in the domestic market and is sufficiently competitive in Russia and third-country markets. However, cuts in government support and the increased resource extraction undertaken by Belarusian authorities during crises are diminishing its resilience to external challenges.

Trends

- A slowdown in growth driven by declining demand in Russia and the absence of alternative export markets for industry;
- Worsening financial stability of both state and private enterprises, accompanied by a lack of returns on significant investment projects;
- Tightening of the international sanctions regime due to the active enforcement of “secondary sanctions”;
- Growing expansion of Russian businesses into the Belarusian domestic market, particularly in the consumer sector;
- Decline in private sector business activity amid increasing tax burdens and reduced financial support from the government.

Industrial decline

In 2025, Russia experienced a sharp slowdown in economic growth due to a decline in consumer activity. The dependency on the Russian market, which had become critical, immediately impacted Belarus's economic situation. The country's GDP growth also decelerated, bringing the Belarusian economy close to stagnation.

The vital contributor to Belarusian GDP — industry — reported not just stagnation, but a decline, as in 2022. The manufacturing industry, almost entirely reliant on the Russian market, was hit especially hard by falling demand.

The tightening of existing international sanctions also had a substantial effect. The modest GDP growth observed in 2025 was primarily maintained by relatively robust performance in construction, IT and communication, transportation, and overall proactive monetary and credit measures undertaken by the authorities to boost domestic consumer demand.

In 2025, Belarus's GDP expanded by 1.3 % in comparable prices, reaching BYN 286.7 billion. However, this growth was more than three times lower than the initial forecast by the Belarusian government. The key socio-economic development forecast for Belarus in 2025 initially projected a growth rate of 4.1 %.

The slowdown in Belarusian economic growth was primarily driven by issues within the domestic industry. After two years of growth — 7.7 % in 2023 and 5.4 % in 2024 — the volume of industrial production, a key component of Belarusian GDP, reached only 98.2 % (BYN 208.0 billion) of the 2024 level.¹

¹ «Объём и индексы промышленного производства Республики Беларусь.» Национальный статистический комитет Республики Беларусь, https://www.belstat.gov.by/upload-belstat/upload-belstat-pdf/official_statistika/2025/infografics_industry-2512.pdf.

The industrial production index (IPI) declined in *four* of Belarus's seven regions, including the main industrial hub — Minsk (–4.0 %). Growth was recorded only in the Grodno (+1.1 %), Brest (+0.9 %), and Minsk (+0.4 %) Regions.

Manufacturing, which makes up approximately 90 % of the country's IPI, produced goods worth BYN 184.9549 billion, experiencing a 2.5 % decline compared to 2024. Within this sector, there are exceptions demonstrating solid growth. Increased domestic demand paved the way to growth in pharmaceuticals, the food industry, and woodworking, while electronics benefited from supplies to the Russian military-industrial complex. However, the majority of the core industries — such as mechanical engineering, chemistry, metallurgy, and others — have been affected by the shrinking main markets in Russia since the second half of 2025.

Ultimately, enterprises subordinate to the Ministry of Industry alone missed out on an equivalent of USD 1 billion in revenue in the Russian market. A substantial part of the products manufactured and accounted for in GDP was stockpiled in warehouses. As of early 2026, the Ministry of Industry's inventory — comprising products made by the most Russia-dependent enterprises — was worth USD 3.2 billion. In January 2026, inventories grew by an additional USD 800 million.² Overall, in 2025, the industrial sector's inventories ended up equivalent to 80.3 % of the average monthly production volume, up from 63.5 % in 2024.

As sales declined and inventories grew, the financial stability of many industry leaders worsened. The situation was compounded by decreasing exports to the limited markets outside Russia and the CIS, a shortage of Russian port capacities, and stricter sanctions. For example, *ten* companies involved in

² «Отчёт правительства президенту Республики Беларусь за 2025 год». Президент Республики Беларусь, 17 Feb. 2026, <https://president.gov.by/ru/events/otcet-pravitel-stva-za-2025-god>.

exporting Belarusian fertilizers, metal and wood products, and cement to Europe were added to Poland's national sanctions list. Throughout the year, the number of new companies included on this list surpassed all previous Belarusian companies listed since mid-2022.³

Minor increases in other sectors – mining (+2.7 % year-on-year, reaching BYN 2.8233 billion) and power engineering (+1.7 %, BYN 16.4022 billion) – were insufficient to make up for the overall negative performance of the Belarusian industrial sector. The water supply, sewage, waste collection, treatment, and disposal sector performed roughly as effectively as in 2024 (BYN 3.8665 billion).

The agricultural sector expanded, but not as much as the government's expectations – by only 0.2 %. To compare: in 2024, growth was reported at 3.4 %. For most types of agricultural activities, the apparent gross gains mask insoluble efficiency issues. In 2025, state support for agriculture to cover losses (excluding preferential loans and credits) amounted to BYN 2.1 billion.

In 2025, Belarus's GDP sustained positive momentum largely due to services and commerce. Leading sectors in terms of contribution and growth rates in gross added value included construction (up by 8.0 %), information and communication (3.5 %), and transportation (2.9 %). However, growth in these sectors also slowed. Increase in commissioning of new residential buildings slowed from 4.7 % in 2024 to 4.2 % in 2025, impacting secondary housing prices.

Retail turnover expanded by 6.6 % in 2025, compared to 12.2 % in the previous year, while wholesale trade contracted by 4.9 % from 2024 (when a 3.1 % year-on-year increase was reported).

3 “Lista osób i podmiotów objętych sankcjami. Decyzje ministra SWiA w sprawie wpisu na listę sankcyjną.” Ministerstwo Spraw Wewnętrznych i Administracji, <https://www.gov.pl/web/mswia/lista-osob-i-podmiotow-objetych-sankcjami>.

Foreign trade gap

In 2025, the country's foreign trade turnover of commodities and services reached USD 105.23 billion, marking a 4.5 % increase from the previous year. Losses in exports of goods to Russia and the faster growth of imports widened the overall deficit of trade in commodities and services by 18.3 % to USD 1.812 billion.⁴

In terms of goods, the deficit approached the 2010 level (USD 9.6 billion), which was associated with one of the most severe financial crises in contemporary Belarusian history. In 2025, the deficit expanded by 26.6 %, reaching USD 5.96 billion. Exports of commodities, which received some support from petroleum product supplies to Russia and growing potash fertilizer exports, went up by 1.2 % (to nearly USD 40.0 billion). Meanwhile, imports grew significantly more — by 3.9 % — reaching USD 45.95 billion.

Commodity imports grew partly as a consequence of the government's policies aimed at stimulating GDP growth by encouraging companies and citizens to spend more domestically. Some of these resources ultimately went to Russian producers, who continue their expansion into the union consumer market. Currently, Belarus accounts for 45 % of Russia's total agricultural exports to the EAEU. Last year, these exports were estimated at around USD 3 billion. As a result, Belarus's import substitution policy is failing. Over the past five years, the share of domestically produced goods in the local market has shrunk from 60 % to 54 %.

The commodity trade deficit was partly offset by services. Exports of services increased by 16.0 % to USD 11.71 billion, markedly faster than imports, which grew by only 9.3 % to USD 7.56

⁴ «Информация о внешней торговле товарами и услугами Республики Беларусь за 2025 год.» Национальный банк Республики Беларусь, <https://www.nbrb.by/statistics/foreigntrade/current>.

billion. Therefore, trade in services came to a surplus of USD 4.15 billion, representing a 30.6 % increase from 2024.

In the previous two years, the state sector mainly benefited from the exit of Western competitors and an increase in military orders from Russia. However, last year, it experienced the largest losses due to problems in the Russian economy. Years of efforts by the government to find alternatives to the Russian market and replace Western buyers have largely remained unsuccessful. Furthermore, exports to Asia, Africa, and South America declined even more sharply than those to Russia and the rest of the CIS.

New structure of private business

A significant achievement in 2025 was the near completion of a new framework for Belarusian private enterprises. Most of these entrepreneurs are individuals who, despite the events of 2020 and the ongoing conflict in Ukraine – where Belarus aligns with Russia – have maintained their personal involvement and continue to develop their businesses.

The smaller segment comprises those for whom the said triggers prompted relocation, a process mostly completed by 2025. For instance, in Poland – now the primary destination for Belarusian businesses (accounting for up to 75 % of all relocations) – the number of registered companies owned by Belarusians did not increase for the first time in a decade, but declined. In Lithuania, the Czech Republic, Germany, Latvia, and other countries, this decline occurred earlier. Estimates indicate that the combined revenue of Belarusian private businesses based in Western countries is around USD 10 billion, representing roughly one-tenth of the country's GDP.

Two groups of Belarusian private enterprises face both local and shared challenges. The local issues for the first group

include the collapse of the Russian market, fiercer competition there and within the domestic market from Russian suppliers, as well as the traditional austerity measures during crises and the government's efforts to shift some problems from the public sector onto private businesses.

Additional local challenges involve tightening of sanctions, rapid expansion of security agencies into the economy and business, aggravating staff shortages, and increasing technological gap. The Belarus Hi-Tech Park — once a major driver of Belarus's economy that was supposed to contribute 15 % to GDP — is transforming into a source of inexpensive labor and innovative ideas for Russian corporations.

Belarusian companies operating internationally encounter numerous local challenges as well. These include a challenging adaptation process, increased barriers to entering competitive markets, and complex interactions with regulators. Moreover, sanctions have been strengthened, as many relocated businesses depended on models that assumed ongoing operations within Belarus and Russia.

Shared challenges for both groups include the ongoing global technological transformation, particularly the integration of AI and other cutting-edge innovations into the economy. Naturally, the persistent turbulence in the world economy has remained for years, which, amid the new conflict in the Persian Gulf, could develop into the most severe economic crisis of the 21st century.

Conclusion

Since the war in the Persian Gulf began, external challenges, whose number increased last year, have gained real potential to cause a global economic crisis and, more dangerously, serve as a precursor to the Third World War. Against this backdrop, the

Belarusian authorities' forecast of a 2.8 % GDP growth in 2026 seems overly optimistic, if not utopian.

The supposed link between this growth and anticipated improvement in the economic situation in the key market of Russia has no basis in reality. The Russian authorities will be unwilling to share the short-term dividends gained at the start of 2026 from the easing of energy sanctions, especially amid shrinking budget revenues. Meanwhile, Belarus's economy has neither had nor currently has an alternative to the Russian market. The involvement of the Persian Gulf countries in the conflict deprives Belarus of one of its most promising alternative markets and a vital source of investment.

The slowdown in construction volumes and retail turnover last year showed that the capacity for expanding domestic demand is diminishing, and attempts to boost it through stimulation carry the risks of triggering inflation spikes.

Initiatives to attract pensioners and young people have been insufficient to tackle the issue of diminishing available labor resources. The authorities failed to attract migrants, either. Likely global and regional crises could, on the contrary, accelerate the outflow of talent from the national economy. This may also trigger a new wave of Belarusian business emigration – not only from Belarus but also from Russia. This process is already underway, now with a different direction – toward “friendly” countries in Central Asia, the Caucasus, and Turkey.

The repudiation of the social contract between the state and private enterprise in the 2020s has made businesses more susceptible to exogenous interference by officials, primarily from the security sector. Such interference hampers the development of existing businesses and the emergence of new ones focused on long-term investments in the economy.

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