№ 14 (March and April 2020)

MINSK BAROMETER

Monitoring of foreign policy and regional security

Dear readers!

We are happy to present the fourteenth issue of Minsk Barometer, which analyzes Belarus's foreign policy and security status in the months of March and April of 2020.

All of the realms of Belarus's foreign policy were affected by the COVID-19 pandemic, one way or another. Traditional diplomatic contacts were minimized. This notwithstanding the processes and projects already in progress were never frozen.

The conflict with **Russia** continued to deepen and aggravate (the index reached a minus 9 mark). The terms of Russian crude oil and natural gas supply remained unsatisfactory to Belarus.

Minsk kept on working with a number of **European Union** member states to diversify its energy imports. Cautious search is underway for a way out of the long-standing political conflict between Belarus and Lithuania.

Belarus's relationship with **China** has been limited to almost exclusively humanitarian cooperation.

The **U.S.** agenda saw some progress in restoring full-fledged diplomatic relations. The two countries continue to explore the terms of supplies of American crude oil to Belarus.

The limitation of contacts exposed the vulnerability of the Belarusian media policy on **Ukraine**. Nevertheless, there have been a number of events paving the way for the implementation of major long-term joint projects.

The regional **security** situation was characterized by the curtailment of military activities and slowdown of militarization. Minsk responded positively to the reduction of the scope of NATO maneuvers and sought to develop relations with its members.

Yours respectfully,

Dzianis Melyantsou,

Editor, Minsk Barometer
Coordinator of Foreign Policy of Belarus program, Minsk Dialogue Council on International Relations

4 Relationship with Russia

8 Relationship with the European Union

11 Relationship with China

13 Relationship with the U.S.

16 Relationship with Ukraine

19 Security Barometer

27 Appendix 1
Catalogue of events underlying the relations development indices

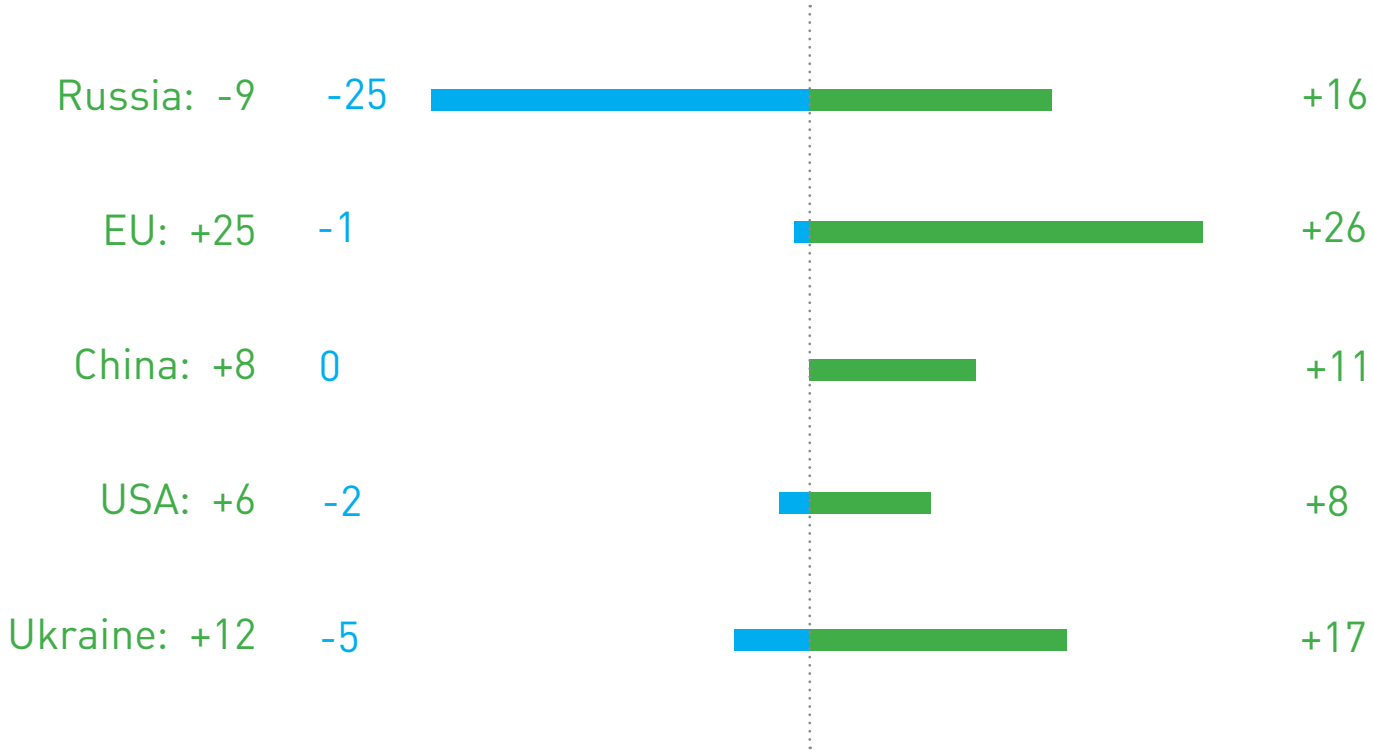
34 Appendix 2
Catalogue of events underlying the security indices

35 Appendix 3
Color scale of regional security tensions

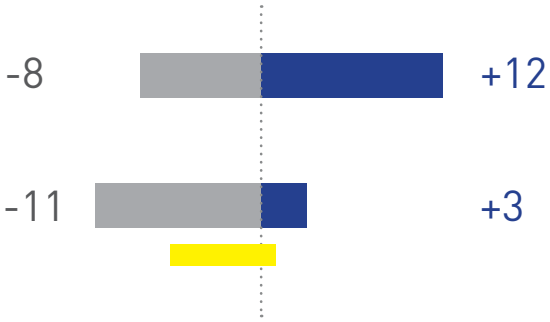
36 Authors

Minsk Dialogue
Council on International Relations

Relations development indices:



Security:

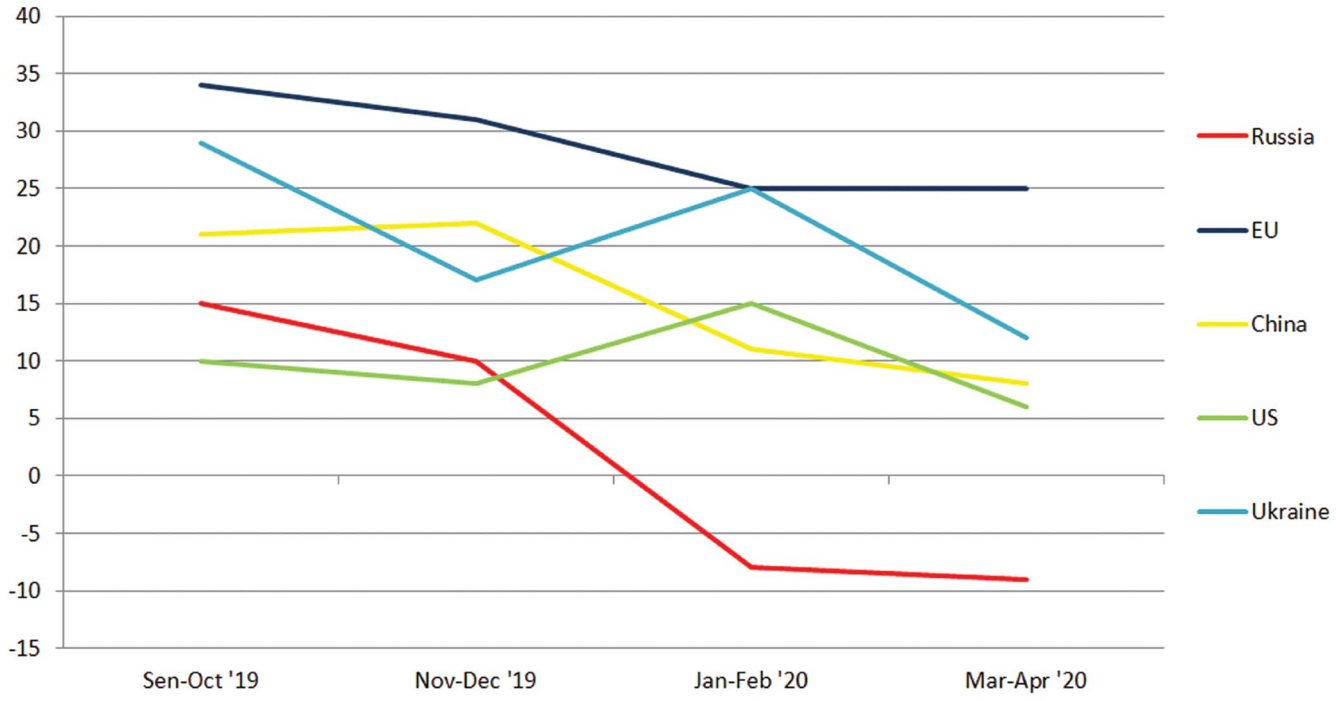


National: +4

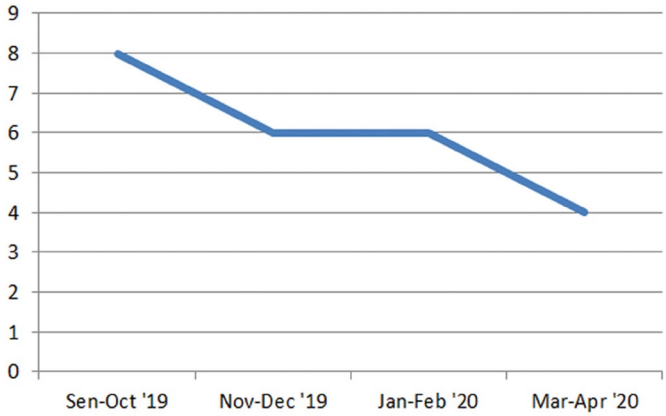
Level of regional tension: -8
(yellow level)

The yellow level indicates that military and other activity is observed that is capable of bringing about escalated tension. The situation calls for close attention.

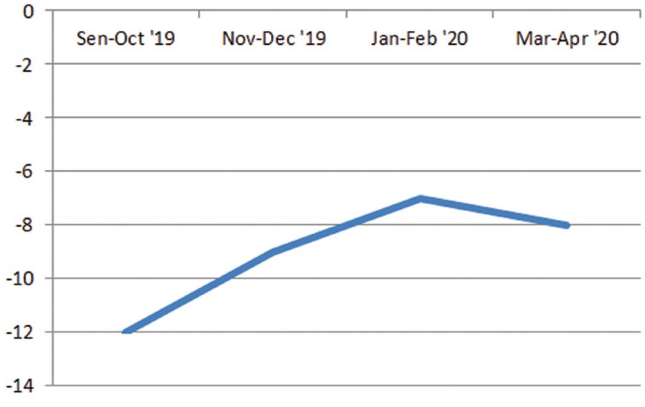
Dynamics of foreign policy indices



National security



Level of regional tension



Relationship with Russia



Aggregate index: -9
Positive points: +16
Negative points: -25

Trends

1. The conflict with Russia is deepening and intensifying.

2. The terms of Russian crude oil and natural gas supplies have remained unsatisfactory to Belarus.

3. The new items on the bilateral agenda – the nuclear power plant loan, the borders with Russia and the falling paying capacity of the Russian market – have expanded the scene of conflict;

4. The different anti-COVID-19 policies and, first and foremost, the media coverage of Belarus's method of fighting the pandemic aggravated the conflict all the way to a dangerous point.

Developments and processes

Political agenda

The political background of the months of March and April in the eastern dimension remained tense. Belarus's relationship with Russia has failed to reach a "new normal", i.e. a point of dynamic equilibrium, and has therefore been deteriorating for six months in a row.

Of the entire range of matters of concern, certain compromise, albeit temporary and unreliable, was worked out only with respect to crude oil supplies in March–April 2020. No progress on the visa issue, road maps or Union State roaming has been made, though. Due to the choice of the quarantine as an important element of its anti-epidemic policy, Russia shut its border with Belarus. Attempts to offer humanitarian aid or cooperation in the fight against the pandemic failed.

The EEU summit was held with no obvious conflicts, but mostly due to the fact that the heads of state made statements and never really engaged in debate.

The tonality of rhetoric against the policy adopted by the ally, found both in the media and in officials' statements, has become increasingly acrid.

COVID-19

The media coverage of the anti-COVID-19 policy pursued by Belarus is based on accusations of stupidity, medical impotence and even malicious intents of all governments that have chosen alternative ways, including Russia. The main arguments cited by the official media in favor of the Belarusian response model would be painful to the Russian leadership even if they were inexplicit. However, both President Lukashenka and representatives of

the Ministry of Health repeatedly address these unequivocal arguments to the Russian leadership.

While European governments do not seem to be particularly susceptible to such accusations, Russia, on the other hand, appears to be quite irritated. First of all, Belarusian messages are all presented in the Russian language, and the media space of Belarus and Russia is to a significant degree shared, i.e. the arguments of the Belarusian leadership reach Russians quickly and are almost always unedited. Secondly, in a crisis situation (Russia is currently faced with three crises at the same time: the general epidemiological crisis, the economic crisis caused by the drop of oil prices and sanctions, and the political crisis due to the suspension of constitutional amendments at the high point of the process) the Russian elites feel especially vulnerable to accusations. Thirdly, this rhetoric appears to coincide with those of some anti-Kremlin forces (Sergei Baburin with the All-People's Union for the Revival of Russia, intra-church opposition to the Patriarchate in the Russian Orthodox Church, and similar movements) in Russia itself and reinforces them.

It turns out that as Minsk seeks to justify its choice in the most emotional way possible, it thereby intervenes in Russia's internal politics on the side of the opposition — as it did back in the late 1990s, while associating itself with the Kremlin's external opponents. The tonality of the Russian media regarding the Belarusian anti-epidemic policy shows that the Belarusian media impact is perceived as a serious threat.

The decision to hold the Victory Parade in Minsk on May 9 against the backdrop of Russia's postponement of celebrations, adds some emotional spice to the conflict between the two countries brought about by their opposing responses to the pandemic.

Crude oil

In March, for the third month in a row, crude oil deliveries via the Druzhba pipeline to Belarus, i.e. the main route, were either not carried out at all, or minimal. Belarus contrived to reach an agreement with a number of new Russian companies in March. These include, in addition to Mikhail Gutseriev's Safmar, which was supplying crude oil throughout January and February, UDS neft, Yangpur (a subsidiary of Belorusneft) and three unnamed companies. As a result, Russian oil supplies amounted to 321,000 tonnes in March. Alternative routes via Ukraine and Lithuania were used.

Combined crude oil imports from Russia in the first quarter fell by 77% year-on-year to 1 million tonnes. According to calculations of the Kosht urada initiative, the Belarusian budget was short of BYN 350 million, GDP contracted by 0.3% from the first quarter of 2019, oil product output dropped by 42% and export of oil products was down by USD 0.7 billion as against the first three months of 2019.

By the end of the first quarter, Belarus and Russia had reached a compromise on crude: supplies via the Druzhba pipeline were resumed in April. The Belarusian authorities had claimed that deliveries would total 2 million tonnes, i.e. the volume originally agreed at the end of 2019, with no compensation for the tax maneuver, but with no premium, either (or with a considerably reduced premium), which, according to the Belarusian side, will be reimbursed to Russian companies by the Russian Finance Ministry. Despite preliminary arrangements between the premiers Rumas and Mishustin, as well as cross-service agreements between companies, as of April 1, there was no clarity on deliveries for the month of April. Belarus continued to enter into supply agreements during the first three weeks of April, and started doing so more actively starting April 20, when prices of short crude oil futures crashed to a minimum.

As a result, deliveries of Russian crude oil via Druzhba amounted to 1.47 million tonnes in April. Contract prices were likely to be quite low, with the export duty standing at USD 52 per tonne in April. Starting May 1, it dropped to USD 6.8 per tonne, and gasoline export duty went down from USD 15.6 per tonne in April to as low as USD 2 per tonne in May.

The developments in the crude oil market observed in April make pointless the very subject of the 18-month dispute with Russia over indemnity for the tax maneuver. Duty rates applied to crude oil and oil products are no longer of a strategic nature. According to spokesman for Belneftekhim Aliaksandr Ciščanka, the tax maneuver for Belarus concluded ahead of schedule.

Therefore, the crude oil agreements reached with Russia make the search for and promotion of alternative supplies a relevant pending issue. On March 2, Belarusian Oil Company (BOC) signed a contract with Ukrtransnafta for crude pumping via the Odessa-Brody pipeline for the period to the end of 2020. In March, tanker crude oil supplies to Belarus amounted to 570,000 tonnes, while in April, they dropped to 170,000 tonnes. On April 29, Aliaksandr Lukashenka ordered that a pipe connecting the two Belarusian refineries, based in Mozyr and Navapolack, should be built within three years. This decision, if it is ultimately implemented, will not only strengthen Belarus's energy security, but also strategically change the situation with energy supplies in the entire region. Belarus may then become part of the route for energy running not only from east to west, but also from north to south, which will seriously enhance the role of Belarus in the regional security framework.

EEU, natural gas and road maps

On April 14, an online meeting of the EEU leaders was held. Belarus suggested establishing a joint fund to combat the coronavirus crisis, hardly assuming it would become its donor, and, backed by Armenia, further suggested Russia should reduce its natural gas rates for its allies. In response, Vladimir Putin spoke about the scope of the problems that Russia had recently encountered.

There was a follow-up on gas prices: against the backdrop of falling spot prices, rates for Belarus turned out to be unnecessarily high. The price for Belarus is determined by a formula based on prices effective in the Yamalo-Nenets District plus delivery across Russia. It is this delivery that accounts for the bulk of the price, with transportation tariffs calculated in U.S. dollars. On April 23, a meeting of the EEU heads of government took place. Price-formation decision-making was postponed until the meeting of the EEU presidents on May 19.

Russia accepted the application of Belarus to restructure the loan for the construction of the nuclear power plant. In its application, Belarus requests a two-year extension of loan use, along with postponement of the due date for the commencement of principal repayment until April 1, 2023 (from April 1, 2021), as well as replacement of the current "mixed" rate to the fixed 3.3% p.a. According to Interfax news service, these parameters are included in the draft protocol to the loan agreement. The total benefit generated by this loan restructuring procedure is estimated at USD 600 million.

On April 29, the Ministry for Emergencies issued permits for the import of nuclear fuel in Belarus. If Russia agrees with the amendments to the lending terms, Belarus will be able to launch the NPP. If Russia's consent is obtained quickly enough, the power plant will become operational before the presidential elections. However, the general background of the Belarus–Russia relationship is not conducive to a quick resolution of the issue.

The road maps for deepening the integration process were not considered during the period under review.

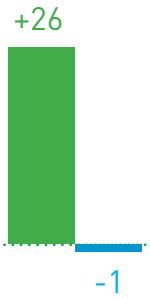
Forecast

Despite the fact that crude oil has lost its key role both in the Belarus–Russia engagement and as the pillar of the Belarusian economy, it is quite likely that both the leadership of the two countries and the media will continue to focus on oil-related issues.

The relationship between Belarus and Russia has been riddled with conflicts, and this situation is expected to last, which suggests further tension, especially amidst preparations for constitutional reforms in both Russia and Belarus.

It is unlikely that natural gas prices and the restructuring of the Belarusian NPP loan will be resolved in the next two months.

Relationship with the European Union



Aggregate index: +25
Positive points: +26
Negative points: -1

Trends

1. The COVID-19 pandemic has minimized Belarus's possibilities for traditional diplomatic contacts with the EU member states and institutions, limiting them to telephone conversations and online conferences. The intensity of contacts dropped significantly at the middle level and slightly less at the high and top levels.

2. At the same time, COVID-19 has dramatically modified the current Belarus–EU agenda, bringing to the fore the short- and medium-term response to the pandemic challenges.

3. Despite the de facto international emergency and the oil agreements reached with Russia, Minsk continued to work with a number of EU member states to diversify its energy supplies.

4. The very cautious search is underway for a way out of the long-standing political controversy between Belarus and Lithuania over the Belarusian NPP that is under construction in Astraviec.

Developments and processes

Most of the period under review was marked by the coronavirus pandemic, which unprecedentedly interrupted all of the traditional forms of interstate engagement. Within the Belarus–EU framework, there was only one high-level visit during the two months in question: Minister of Foreign Affairs of Hungary Péter Szijjártó visited Minsk. He had negotiations with the heads of the Ministry of Foreign Affairs and the Ministry of Agriculture, as well as the speaker of the House of Representatives. A program of cooperation between the Foreign Ministries of the two countries was signed, as well as a contract for the supply of 40 double-deck Stadler trains of Belarusian make to Hungary. Hungarian EXIM Bank opened a EUR 40 million credit line to finance joint projects.

Due to the lockdown and the closure of most European borders, some of the other scheduled high- and top-level visits never took place, with respect to both Belarusian officials and EU officials that had expected to visit Belarus. All diplomatic activities were limited to videoconferencing or telephone conversations, whereas international response to the numerous challenges of the pandemic became the dominating topic, ranging from mutual assistance in returning citizens stuck abroad to financial and humanitarian assistance.

Lukashenka had telephone conversations at the top level with his counterparts from Latvia and Lithuania. The conversation with Egils Levits was held on March 24 and, in addition to the consequences of COVID-19, touched upon economic cooperation and, specifically, energy

transit and cargo transportation. The state leaders agreed to postpone the visit of the head of Belarus to Riga, which had been scheduled for April.

The conversation with Gitanas Nausėda took place on April 23 at the initiative of the Lithuanian president, who held similar conversations with the heads of all of the six Eastern Partnership countries on the eve of the EaP summit originally slated for mid-June. Given the long-standing political conflict between Minsk and Vilnius over the NPP that is under construction in Astraviec, attention was locked on the conversation between Nausėda and Lukashenka. That was the first bilateral top-level contact between the countries in the past decade.

Naturally, the NPP took a special place in the talks between the presidents. According to the press service of the Lithuanian president, Lukashenka agreed to receive a group of international experts to conduct a security inspection of the Belarusian Nuclear Power Plant. Incidentally, on March 9, the State Atomic Supervision Committee of Belarus held a meeting with a delegation of the European Nuclear Safety Regulators Group (ENSREG). The European experts were updated on the underlying principles of the National Action Plan following the NPP stress tests and on the current status of its implementation. Vilnius continues to insist that all negotiations on the Astraviec-based nuclear plant should be held in the EU–Belarus format, rather than on a bilateral or regional basis, and President Nausėda addressed a request to personally monitor the topic to the chairperson of the European Commission, Ursula von der Leyen.

The heads of state also discussed many other issues on the Belarus–Lithuania agenda, specifically the diversification of energy supplies and possible increase in cargo flows using the Klaipeda seaport infrastructure. The presidents also addressed the prospects of the Eastern Partnership, as well as Vilnius's initiative to submit a joint application with Belarus to UNESCO to declare the Year of Francysk Skaryna in 2022. The Lithuanian side offered Minsk humanitarian aid in the form of medical supplies and equipment to counter the spread of the coronavirus infection. According to Nausėda, Lukashenka thanked him for the offer, but never accepted it.

However, Minsk has officially appealed to the EU and affiliated international financial institutions for financial assistance to overcome the pandemic. Specifically, Belarus requested a USD 1 billion loan from the EBRD to support companies in the most affected sectors. The matter was discussed during a conversation between First Deputy Prime Minister Zmicier Kruty and EBRD Vice President Alain Pilloux on April 16. It was also agreed that the bank would not apply any punitive measures due to the quarantine-caused difficulties encountered in the implementation of current projects.

The Belarusian authorities have requested from Brussels funding in addition to what the EU normally provides for the EaP in order to finance urgent purchases for medical institutions and minimize the projected economic impact. On the whole, the appeal received positive feedback from the EU, and High Representative of the EU for Foreign Affairs and Security Policy Josep Borrell specified during his telephone conversation with Uladzimir Makiej that the amount referred to in the request exceeded EUR 60 million. However, at some point Brussels also mentioned a condition: the aid will be provided only if the Belarusian government implemented the WHO social distancing recommendations, although this can hardly be called stringent conditionality with clearly structured criteria. A separate humanitarian aid convoy arrived in Belarus from Poland on April 24.

Joint emergency response to the challenges of the pandemic became the main topic of telephone conversations between the Belarusian Foreign Minister and his counterparts from Lithuania (March 20), Latvia (March 20), Estonia (April 1) and Sweden (April 2), as well as with the Commissioner for Neighbourhood and Enlargement (March 10).

On March 20, Makiej held more intensive negotiations via videoconferencing with his Polish counterpart Jacek Czaputowicz and the Polish government commissioner for strategic energy infrastructure. The composition of the Polish participants implies that an important item on the agenda was the prospects of infrastructure development to commence regular

crude oil supplies to Belarus via Poland. A broad range of issues was also discussed during the April 21 conversation between Makiej and Borrell that was mentioned above. Specifically, the head of European diplomacy expressed his commitment to entering into an agreement on partnership priorities and confirmed his intention to visit Belarus as soon as the epidemiological situation normalized.

Two more "long-playing" agreements on the Belarus–EU agenda — on visa facilitation and on readmission — have come very close to the day they officially come into effect. Since their signing in January, Minsk has completed all of the internal procedures: on April 2, the documents were ratified by both chambers of the Belarusian parliament, while Lukashenka signed them on April 9.

This issue of our monitoring report is the first one that does not account for the quantitative indicators of Belarus's relations with the UK, which withdrew from the EU on January 31, 2020. The relations with London are traditionally important for Minsk economically, and in recent years, they have significantly intensified politically as well. Therefore, this development will inevitably have a noticeable downward impact on the overall index of Belarus's relationships with the EU member states. At the same time, we will still mention the most remarkable developments in Belarus's relations with the UK in the narrative portion of the report. In March–April, special attention was drawn to the two-week joint exercise of the Belarusian and British military at the Losvida range near Viciebsk. The exercise was entitled "Winter Partisan" and became an element of the preparation for peacekeeping activities under the UN auspices.

According to the National Statistics Committee, two-way trade between Belarus and the European Union amounted to USD 2,672.7 million in January-March 2020 (down by 14.1% year-on-year). Belarusian exports reached USD 1,120.7 million, a drop by 29.7% from the first quarter of 2019. Imports from the EU countries amounted to USD 1,552 million, an increase by 2.2% from the same period in 2019. Two-way trade therefore came to a deficit of USD 431.3 million for Belarus.

Forecast

The pandemic factor will continue to have a determining influence on the current agenda in the relations between Belarus and the EU. However, as quarantine measures in the EU are gradually mitigated, and as Europe adapts to the new operating environment, the relationship can be expected to intensify.

The future of the Eastern Partnership, within which Minsk has traditionally been very active, will become one of the focuses in the near future. The European Commission has already prepared its long-term proposals for the promotion of the initiative after 2020, which will be first considered by the Council of the EU and then submitted for discussion at the EaP summit scheduled for this summer. The EU will likely have completed all of its internal procedures to ratify the agreements with Belarus on visa facilitation and readmission before the summit starts.

Finally, the upcoming presidential campaign in Belarus will become another background factor to reckon with — most of the campaign will be held during the summer months. The campaign will most likely be a nerve-wracking one due to numerous internal and external difficulties faced by the Belarusian authorities. In such circumstances, the probability of the negative impact of the campaign on the relationship between Belarus and the EU increases.

Relationship with China



Aggregate index: +8
Positive points: +8
Negative points: 0

Trends

Amid the COVID-19 pandemic and lockdown measures imposed across the globe throughout March and April, the density of contacts between China and Belarus has sharply decreased. In fact, humanitarian cooperation became the only type of engagement that remained.

Developments and processes

The months of March and April became even less eventful for Belarus–China cooperation compared with the previous period under review, with the Chinese side being responsible for most of the activities, unlike in previous months. There are two main reasons for that:

- the worldwide spread of COVID-19 and mobility limitations imposed globally, as well as the unfavorable development of the epidemiological situation in Belarus;
- the delay in the actual accession to the office of Mikalaj Snapkoŭ, Belarus's new Ambassador to China, due to the COVID-19 situation.

During the period under review, only humanitarian cooperation was developing. In the months of March and April, three flights arrived in Belarus from China with humanitarian cargoes from Chinese agencies, provinces and companies, as well as from Belarusian companies operating in the Chinese market (Wargaming, Servolux, Energo-Oil). The arrivals of humanitarian cargos were invariably widely covered in the Belarusian state media.

At the end of March, when the epidemiological situation in Belarus began to deteriorate and China announced the end of the epidemic, President of Belarus Aliaksandr Lukashenka held a meeting with Ambassador of China to Belarus Cui Qiming focusing on humanitarian cooperation and praised China's success in combating COVID-19. During the meeting, as well as in some of his speeches, Lukashenka once again praised constant advisory support by Chinese specialists. Lukashenka urged the parties to "not only restore, resume" cooperation with China, but also "enhance" it in 2020. In the public part of the meeting, the Belarusian side referred to the projects to build a swimming pool and a stadium, which will be financed from Chinese technical and economic assistance as an opportunity for China to showcase its achievements to Western Europe, among other states.

In the context of the spread of COVID-19, it is notable that there were no instances of anti-Chinese discrimination in Belarus, unlike in some Western countries and in neighboring Russia. This is partly due to the fact that among the first COVID-19 cases brought to Belarus there were no Chinese citizens, which is why in the state media, the positive image of China strengthened, supported by media efforts of the Chinese Embassy in Belarus and the arrival of humanitarian aid from China.

The official annual data of the National Statistics Committee for the year 2019 evidence the increase in all of the two-way trade indicators: exports increased by 40% year-on-year (against the export efficiency target of +10%), imports went up by 20%, and trade turnover soared by 23%. The trade deficit expanded by 17%. According to the Ministry of Agriculture and Food of Belarus, in January and February 2020, amid the overall decline in bilateral trade (by 4.4%) and the significant drop in export supplies in volume terms (by 59.4% from January-February 2019), produce exports to China almost doubled from the same period in 2019 (to USD 18 million with growth reported for most exports).

Great Stone

During the period under review, Sinomach's Torch project, an area of scientific and technological cooperation and development, was registered as a resident of the China–Belarus Industrial Park. The Chinese side reports that it is planned to use this area to attract Chinese and European technologies, for them to be introduced and exported to Europe and China.

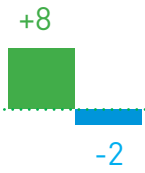
The spread of COVID-19, first in China, and then in Belarus, has significantly affected operations in the Park. It became formally difficult for Chinese contractors to bring workers to Belarus due to restrictions imposed on everyone leaving China, internal mobility limitations and partial lockdown inside provinces, as well as the availability of the single AirChina Beijing–Minsk flight and frequent reluctance of Chinese workers to leave China in the current epidemiological situation.

Nevertheless, in his interview to the Belarus 1 TV channel Head of the CBIP Administration Aliaksandr Jarašenka shared his optimism that the next 10 resident companies would start their business operations in 2020, i.e. there would have been a total of 30 operating companies in the Park by the end of 2020.

Forecast

Possible restoration of the previous level of bilateral activities will depend on further development of the epidemiological situation both in China and Belarus, as well as in neighboring countries (primarily in Russia). The normalization of work on joint investment projects, as well as China's top-level visit to Belarus previously scheduled for May 2020 all depend on lockdown measures in place and their mitigation.

Relationship with the U.S.



Aggregate index: +6
Positive points: +8
Negative points: -2

Trends

1. The COVID-19 pandemic has brought about a reduction in bilateral contacts.

2. There has been some progress in restoring full-scale diplomatic relations — Trump nominated a career diplomat of quite a high level for the position of Ambassador to Belarus.

3. Belarus and the U.S. continue exploring the terms of American crude oil supplies to Belarus.

Developments and processes

Just as in other foreign policy areas, the COVID-19 pandemic caused a marked reduction in the number of contacts between the U.S. and Belarus at various levels in March and April. At the same time, official Minsk's general approach seeking to ensure the normalization of bilateral relations remained unchanged.

On March 5, the House of Representatives of the National Assembly held the workshop "Priorities of International Parliamentary Cooperation in Conditions of Building a Multipolar World for the Development of the Republic of Belarus", where Deputy Foreign Minister Alieh Kraučanka provided clarifications on the development of the Belarus–U.S. relationship. Specifically, he said that the current stage of the bilateral relations *"is not anything extraordinary and does not go beyond the restoration of the relations that have been in an extremely bad condition for too long,"* what is taking place now *"is only a return to the normal state of things,"* while so far *"Belarus–U.S. relations have not got back to the state observed before the diplomatic conflict between Minsk and Washington in 2007-2008."* Therefore, against the backdrop of *"former difficulties, the current relations may indeed be perceived as developing almost boisterously."*

Kraučanka emphasized that he *"categorically turns down the opposition of normalized relations with the U.S. to the strategic allied relations between Belarus and Russia [...] There is nothing anti-Russian about them and nothing can be. Firstly, because we do not have such plans, and secondly, because the Americans not only make no demands that we turn our backs to Russia, but also make no such suggestions."*

These accents, previously reiterated by Belarusian diplomacy, became an answer to numerous reports spreading in a number of primarily Russian media and Telegram channels about Belarus's forced reorientation to the West amid the crisis in the Belarus–Russia domain.

Aliaksandr Lukashenka also mentioned the U.S., albeit in a slightly different way — the Belarusian president emphasized the impact of anti-COVID-19 measures taken across the globe on the economy. He cited U.S. President Donald Trump's statement that the consequences for the economy and people's wellbeing can be worse than the virus itself.

"... I liked his latest statements very much [...] Trump, as a man who used to do business, quickly understood what he's dealing with... He said: if we do not immediately get back to companies and start working, many more Americans will die from unemployment than from the coronavirus."

On March 13, U.S. Secretary of State Michael Pompeo had a telephone conversation with Foreign Minister Uladzimir Makiej. According to the press service of the Department of State, Pompeo thanked Makiej for his successful February 1 visit to Minsk and reiterated U.S. support for Belarusian sovereignty. The Secretary of State affirmed the willingness of U.S. companies to begin immediately selling oil to Belarus at competitive market prices. The Secretary and the Foreign Minister also discussed the potential to increase bilateral business ties, including plans for an independently organized senior U.S. trade delegation to travel to Minsk later this year. The Belarusian Foreign Ministry notably preferred not to go into detail and reported only the discussion of bilateral cooperation issues, "including energy security."

In late March, the U.S. Department of State reported that USD 1.3 million worth of aid would be provided to Belarus to combat the spread of COVID-19. It is noted that the allocated funds would help to prepare laboratory systems, intensify case search and surveillance, support technical experts in response and preparedness, improve risk communication and much more.

On April 20, the White House issued a report announcing the nomination of Deputy Assistant Secretary for Western Europe and the European Union in the State Department's Bureau of European and Eurasian Affairs Julie D. Fisher by Donald Trump as a candidate for the post of Ambassador Extraordinary and Plenipotentiary of the United States of America to the Republic of Belarus. Fisher previously served as Chargé d'Affaires a.i. of the U.S. Embassy in Russia, Deputy Chief of Mission of the U.S. Mission to NATO, Deputy Director of the Private Office of the Secretary General of NATO, Counselor for Political and Economic Affairs at the U.S. Embassy in Tbilisi, Georgia. Julie D. Fisher is a high-level official and will suit official Minsk perfectly well, as she is a career diplomat with mainly administrative experience, not a political appointee. In order to be appointed to the post Fisher must be approved by the U.S. Senate.

In April, the Supervisory Board of Belarus Hi-Tech Park (HTP) decided to register 82 more companies as HTP residents, including companies from the U.S. These include Zenia AI LLC, which develops mobile applications for home fitness and yoga using a motion detection technology. LLC Saber BGS plans to create gaming mobile applications for its parent company SaberInteractive (U.S.). Scheduler LLC (U.S.) intends to develop and promote a multifunctional system for automating customer engagement.

During the period under review, some negative developments in bilateral relations were recorded as well.

In March the U.S. Department of State published a report on the status of human rights in the world in 2019, in which Belarus was named an authoritarian state where numerous human rights violations were committed. According to the report, "Since his election as president in 1994, Alyaksandr Lukashenka has consolidated his rule over all institutions and undermined the rule of law through authoritarian means, including manipulated elections and arbitrary decrees. All subsequent presidential elections fell well short of international standards. The November parliamentary elections failed to meet international standards."

The report listed significant human rights issues: arbitrary arrest and detention; life-threatening prison conditions; arbitrary or unlawful interference with privacy; significant problems with the independence of the judiciary; undue restrictions on free expression, the press, and the internet, including censorship, site blocking, and the existence of laws regarding criminal libel and defamation of government officials; detention of journalists.

On March 17, the U.S. Embassy in Belarus suspended the issuance of nonimmigrant visas for Belarusians as part of the combat against the spread of COVID-19.

Forecast

Bilateral visits and contacts with the U.S. will remain few in the coming months due to the coronavirus pandemic. We should still expect that options for trial supplies of U.S. oil to Belarus will be explored, and — on a broader scale — ways to expand economic engagement. The process for the ambassadors to return to the two countries will continue.

The approaching presidential elections in Belarus will kindle interest in the country's developments, which may strengthen negative rhetoric. However, this will not lead to any deterioration of the bilateral relations.

Relationship with Ukraine



Aggregate index: +12
Positive points: +17
Negative points: -5

Trends

1. The COVID-19 pandemic produced an impact on the implementation of joint political and economic cooperation projects pursued by the two countries. Personal meetings between politicians and businessmen became unfeasible.

2. The need to work exclusively with information (with personal contacts minimized) demonstrated the vulnerability of Belarusian media policy on Ukraine.

3. Nevertheless, in March–April 2020, extremely important developments were observed, paving the way for further implementation of major long-term joint projects at the junction of politics and economics.

Developments and processes

Politics

The COVID-19 pandemic brought about adjustments to the development of the bilateral framework at the political level. On the one hand, preventing the spread of the virus has become a dominant item on national and global agendas alike. Governments have shifted the focus to their home affairs, and most contacts with foreign partners have addressed COVID-19 one way or another.

The relationship between Belarus and Ukraine was not an exception. The beginning of March was productive, despite the first indications of policy shift. For example, Palina Halavina, Secretary General of the NOC of Belarus, visited Kyiv on March 3-4 at the invitation of the NOC of Ukraine. The meetings and negotiations focused on cooperation between sports associations in 2020–2021. On March 12–13, a delegation of Belarus's Brest Region held talks with the leadership of the Lviv Regional State Administration and the City Hall. The meeting explored the development of trade and cultural cooperation between the regions, as well as preparations for the Forum of the Regions of Belarus and Ukraine.

A forum of bitumen producers had been scheduled for March 16, where representatives of Belarusian Oil Company, Mozyr Refinery and Oil Bitumen Plant had expected to address a number of problems that prevent Belarusian oil companies from operating more actively in the Ukrainian market. However, the lockdown in Ukraine caused the event to be postponed to a later date.

Starting that day onwards, political contacts either took the online form or were postponed until the end of the quarantine in Ukraine. The dominating coverage opportunities included

combat against the epidemic and imposition of a strict lockdown. Given that Belarus and Ukraine had chosen different algorithms to respond to the challenges, the Ukrainian media offered various assessments of the Belarusian policy, ranging from "madness" to complete approval. The balance of opinions is in the neutral area, but still with a bias towards negativity. To a great extent, that was due to the poor media efforts of the Belarusian side: the deficit of objective information about the Belarusian response model and the logic of behavior of official Minsk was obvious.

Media work was also missing positive practical achievements of Belarus to ensure the transit and return of Ukrainians coming from third countries to their homeland, despite the fact that in his interview with Belarusian media outlets Ambassador of Ukraine to Belarus Igor Kizim expressed his appreciation to the Belarusian authorities for their assistance in the evacuation of Ukrainians. He also noted the active cooperation of healthcare organizations, research and industrial groups in matters related to the fight against the epidemic.

On March 31, 2020, Ukraine joined the EU sanctions against Belarus. Given that the remaining package of sanctions has a limited impact (it is primarily about an arms embargo), such a step can be regarded as a political demonstration. Formally, representatives of the Ukrainian Foreign Ministry attribute the decision to their country's policy of approximation with the European Union. In reality, this could be a response to Belarus's votes in the UN on the Ukraine issues.

Such a decision could have been a high-profile one, at least from the media point of view. However, the COVID-19 pandemic was the number 1 topic both in the Belarusian and Ukrainian media — the sanctions report went almost unnoticed. By the end of April, progress had been made towards discussions of practical steps to further cooperation.

On April 21, a telephone conversation between the ministers of foreign affairs of Belarus and Ukraine took place. The officials confirmed that the third Forum of the Regions of Belarus and Ukraine would be held in Hrodna in August 2020. Three days after the conversation between the ministers, Ambassador of Belarus to Ukraine Ihar Sokal met with Minister for Communities and Territories Development of Ukraine Oleksii Chernyshov. They addressed practical steps to organize the forum, which can be implemented today in conditions of the pandemic. The Belarusian side also suggested adding to the list of discussions cooperation in the prevention of emergencies (primarily forest fires) in border areas.

The latter was not accidental, because in mid-April Ukraine suffered from large-scale forest fires in its northern regions. Some Ukrainian politicians used the opportunity to accuse "subversive groups that have infiltrated from the territory of Belarus." The Ukrainian Interior Ministry even issued a statement that it was "searching for saboteurs" in forest areas. The search was futile, but advisers to the minister of the interior said that it made sense to study and partially adopt the experience of Belarus in forest fires prevention.

Important political events also included the commencement of the operation of the southern route for crude oil deliveries to the Belarusian refineries. On March 10, the first tanker from Azerbaijan was accepted for unloading, and as early as on March 17, oil pumping via the Odessa-Brody oil pipeline started. The approval in principle by the Verkhovna Rada of the bill "On Inland Water Transport" in the version that benefits Belarus — with allowed navigation for ships flying flags of third countries — became another significant development. This will unblock further implementation of the E-40 waterway project.

Economy

As we had predicted in the previous issue of the Barometer, the spring of 2020 became a period when some Ukrainian companies sought to create artificial obstacles to the export of commodities and services from Belarus. On March 11, reports were made that a group of road companies challenged the terms of new tenders organized by Ukravtodor. The Ukrainian concern put forward requirements that could not be met by the market leaders, but which automatically suited a number of smaller companies.

In April, the National Energy and Utilities Regulatory Commission (NEURC) issued an order banning electricity imports from Belarus until the end of the lockdown. On the one hand, the decision was due to the fall in demand for electricity. However, given that the matter has turned into a political issue since the start of supplies, there is definitely some lobbyism in it, especially considering the following decisions by NEURC to restrict the purchase of cheap electricity from state-owned nuclear power plants while maintaining the volume of purchases from private suppliers at the green tariff.

On the other hand, the months of March and April became quite eventful in terms of cooperation expansion. Specifically, the following needs to be mentioned in the context of the promotion of Belarusian products:

- Delivery to Kryvyi Rih and Dnipro of Dnipro trolleybuses, which are assembled from Belarusian kits by the Dnipro-based Yuzhmash. The Dnipro trademark, which appeared four years ago, is now among the top-3 trolleybus brands sold in the Ukrainian market;
- Agreement between Bobruiskagromash and Nezhinselmash on the assembly of tractor trailers in Ukraine from Belarusian components;
- Confirmation by JSC Road Construction Trust 4 of Brest of the execution of contracts for repair and modernization of roads in four regions of Ukraine;
- Opening of specialized shops for the sale of Belarusian confectionery products in Kyiv;
- Decision of the Kyiv City Council to purchase 200 MAZ buses for the needs of municipal carriers in Kyiv;
- Renewal of Belarusian fuel purchases by the National Police of Ukraine.

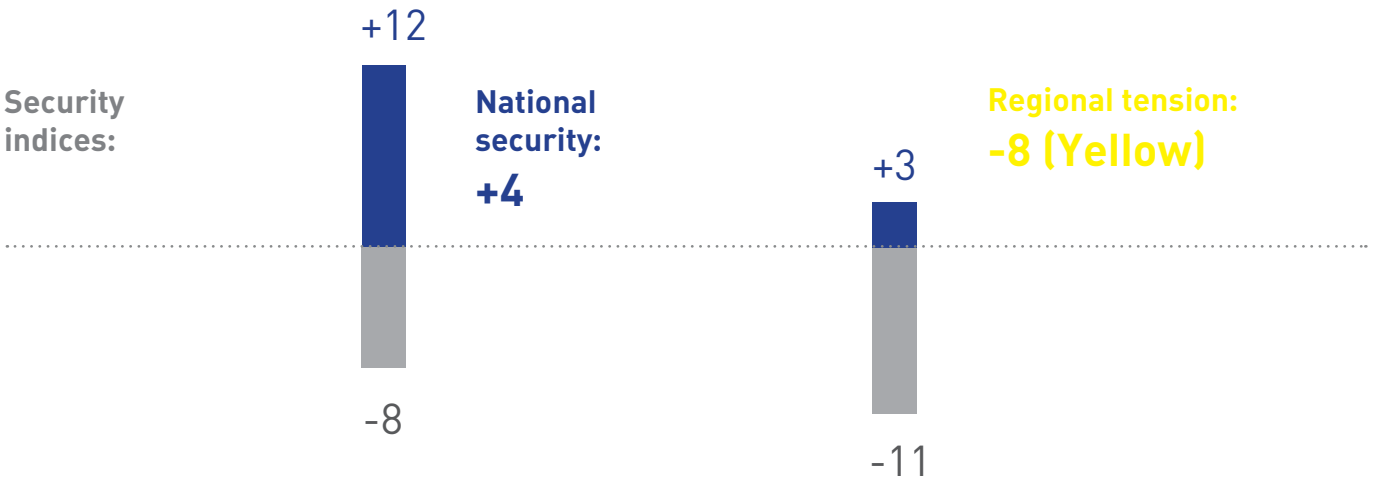
It is also notable that in the first quarter of 2020 Belarus became the main supplier of potatoes to the Ukrainian market. In 2019, Belarus was one of the top-7 suppliers of agricultural machinery to the Ukrainian market.

Forecast

The quarantine hit the already quite feeble Ukrainian economy quite hard. Normal operation will resume when the first wave of the global economic crisis starts. Therefore, in the coming months, both Ukrainian and Belarusian companies will be very cautious about launching new major projects. Both countries will focus on the implementation of earlier agreements.

At the level of the governments, key decisions will be prepared for signing at the Forum of the Regions of Belarus and Ukraine. As part of preparations for that event we should expect a revival of political contacts. However, these will mostly take the form of consultations and working meetings, which do not involve the signing of final documents.

Security Barometer: status of national and regional security



Trends

1. The COVID-19 pandemic markedly affected military activity in the region. Some countries had to reduce defense procurement and the scope of exercises, or even cancel them. It also led to the cessation of confidence-building measures.

2. The regional stability and security landscape was characterized by a decrease in military activity and slowed down militarization. The conflict in the east of Ukraine was the major source of tension — yet another attempts by Russia and Ukraine to resolve their conflict failed, and both conducted large-scale exercises to showcase their combat capabilities to each other.

3. Minsk welcomed the reduction in the scope of NATO's maneuvers and sought to improve relations with its members, while disagreements with Russia in the defense sector persisted.

4. Belarus held an exercise that was formally designed as a response to NATO maneuvers while making a point of having no Russian troops involved in order to underscore its independence in defense matters. Important components of the new national security architecture, particularly the key units of the army and territorial defense, were tested. Since only small-scale defensive or counter-sabotage actions were practiced, they cannot be considered preparation for a war with NATO or for engagement in major operations together with Russia.

1. National security

Overall status of national security

At a meeting with Interior Minister Jury Karajeŭ on March 13, President Lukashenka said that the main threats to national security were lurking inside the country. *"Those who want to undermine us from the inside are not getting fewer. Most of those who cherish this idea are so-called 'our citizens.' Therefore, I pin much hope on the police in ensuring stability in our society."*

The Belarusian leadership welcomed the fact that NATO scaled down its Defender Europe 2020 exercise, while pointing to the fact that it was not canceled completely. Speaking about an inspection of the army in connection with the NATO maneuvers, Minister of Defense Viktar Chrienin emphasized that all activities related to the NATO actions at the Belarusian border are carried out "independently, without any help", in other words, regardless of Russia's position. Also, as Chrienin said, the army worked on "border reinforcement" jointly with border guards.

Speaking about measures to respond to the NATO exercises, Lukashenka said, *"I would not want this to be taken as our warlike gesture. Today, we do not interpret NATO exercises in the immediate vicinity of our borders as such, among other things, because they have significantly departed from their original plans. There should be no excessiveness. This should be somehow weaved into the army's regular action plan."* It is noteworthy that he mentioned the good practice of the joint exercise of Belarus and the UK's peacemakers.

Equipment and training of the national army

An unannounced combat readiness check of the army was the biggest event in the period under review. It was not that sudden, though. The second phase of the comprehensive inspection began on March 9. It was combined with first seasonal field training of key combat units of the Belarusian army. Defense Minister Chrienin said it took place against the backdrop of militarization of the region and the continent, and increased intensity of exercises in the cross-border regions, pointing at the NATO exercises in particular.

As part of the comprehensive inspection, over a thousand reservists were called up, some units were put on red alert, and their ability to perform tasks day and night was checked, together with the preparedness of arms and materiel, including conserved hardware. In total, almost 6,000 personnel and over 200 hardware pieces were subject to the inspection, which ended with a tactical exercise that began on March 23.

Several large events of March should also be viewed as part of the inspection. A command and staff exercise with the air force and air defense was held on March 2–6. It involved aviation and air defense task forces.

On March 3–6, the North-Western Operational Command held a joint staff training session on the application of Belarusian troops in defensive operations under the leadership of NWOC Commander Andrej Žuk. Attending the session were officials engaged in the management of the NWOC and its subordinate units.

A tactical live firing exercise with anti-aircraft missile and artillery battalions of the 19th and 120th infantry brigades took place in mid-March. The military used the Strela-10 anti-aircraft missile systems, Igla portable air defense systems, and Tunguska anti-aircraft missile cannons.

Two tactical exercises with the 339th infantry battalion and the 355th tank battalion of the 120th infantry brigade were held at the end of March. The infantry battalion practiced encounter battle, and the tank battalion was engaged in ambush operations, extended position defense at night and counteroffensive with live firing, using standard ammunition.

A tactical exercise with an infantry battalion of the 11th infantry brigade was held in early April. It involved more than 300 personnel, tracked vehicles and reinforcing means.

A tactical exercise with tank and infantry units of the 19th infantry brigade took place in early April. The military worked on the organization of multi-layered and mobile defense in several lines, and ambush operations and retreat with live firing.

A battalion tactical counter-sabotage training session with around 200 personnel and 50 pieces of materiel of the 38th air assault brigade was organized in early April. The program included search operations, protection of critical facilities, such as a gas distribution station, and live firing.

A tactical battalion exercise with live firing held on April 7–9 involved a tank battalion of the 6th infantry brigade of the Western Operational Command. Artillery and signal crews, military engineers, air defense units and combat aviation practiced counterattacks. The application of antitank missiles at night was a new element.

A tactical exercise with live firing was held in mid-April. A battalion of the 11th infantry brigade supported by aviation practiced withdrawal from action and defense in a populated locality. The battalion was reinforced by a tank company, a howitzer battery, an engineer platoon and air defense means.

Joint exercises. A joint exercise with 28 British marines was held on March 1–14 near Viciebsk as part of the training of the peacemaking company of the 103rd airborne brigade for participation in UN operations. Such events with the British military have been held regularly since 2018 in both countries.

A joint flight data exchange exercise of the Belarusian and Polish air force and air defense took place on March 25 as part of the preparation for securing the airspace during the 2021 World Ice Hockey Championship and the 2023 European Games.

Territorial defense. The territorial defense system was inspected in the second half of March simultaneously with the combat readiness check of the army. A headquarters and a territorial defense battalion were formed in Kleck. The unit was trained in the application of weapons, tactics, engineering and combat coordination, protection of critical facilities, service at checkpoints, counteraction to illegal armed groups and actions in the martial law regime, etc. in collaboration with the police. Nearly 180 persons liable for military service were called up in the Kleck District.

Territorial defense of the Astraviec District was checked for mobilization and logistics preparedness, preparation for the acceptance of reserve personnel and operational coordination, alerting, and acceptance of reserve officers with operational coordination of the organizational core from March 31 to April 3. The inspection was limited in scale, being a follow-up of the inspection of the Kleck District.

Equipment of the army. It was announced on April 15 that the armed forces would be provided with an entire range of state-of-the-art satellite communications stations designed by AGAT–Control Systems–Managing Company of Geoinformation Control Systems Holding.

International security contacts

At the meeting with CSTO Secretary General Zas held on March 5, Lukashenka said, "We stand committed to integration, including in the defense segment, thus being by all means guided by our national interests. No need to specify the one making the republics around that 'integrator' stick to this super-pragmatic position." The president also asked about the prospects of Belarus's CSTO promotion proposals, in particular, on the legal status of a partner and observer at the CSTO.

On March 12, First Deputy Chief of General Staff of Belarus Ihar Karol met with Commander of the Western Military District of the Russian Federation Alexander Zhuravlev in St. Petersburg to address defense cooperation and operational and combat training of the armed forces. Belarusian media did not cover that meeting.

2. Regional Security

Overall situation in the region

Militarization and reduced transparency. According to the April report by the Stockholm International Peace Research Institute, global military spending in 2019 probably reached the all-time high, having increased by 7.2% from 2010 to over USD 1.9 trillion. Russia was ranked 4th in this respect with USD 65.1 billion. Poland was 20th with USD 11.9 billion, and Ukraine was 35th with USD 5.2 billion.

It was reported in early April that the Donald Trump Administration was going to pull out from the Treaty on Open Skies, which enabled its signatories to conduct observation flights over the member states' territories. The official withdrawal notice is expected to be published by the end of the fiscal year in September. The United States' closest allies in Europe, including Poland and the United Kingdom, want the Treaty preserved, although they accuse Russia of violating it.

The war in the east of Ukraine. There were no significant developments in the conflict in the east of Ukraine. The foreign ministers of Ukraine, Germany, Russia and France stated during the online conference on April 30 that the conflict resolution process came to a standstill, and only one out of the nine agreements reached at the December summit had been executed. Therefore, a new Normandy Four meeting will not be convened.

Exercises and confidence building measures in the region

On March 16, the United States European Command reported a reduction in the number of military personnel involved in the Defender Europe exercise due to the pandemic. Redeployment of troops and hardware was suspended. Germany, Italy and the Netherlands suspended their participation in the exercise in mid-March, and the UK reduced its involvement. Several related exercises in the Baltic States were canceled. For example, Estonia reduced the scope of the Spring Storm 2020 exercise in April. The planned number of personnel — 7,000 Estonian troops and 3,000 delegated by 15 participating countries — was at least halved. Estonia will not involve its reservists, who were supposed to form the bulk of its contingent, and only volunteers stay.

Kyiv does basically the same. On April 9, the Ukrainian leadership decided to postpone multinational exercises in its territory.

Dynamics. Alongside Defender Europe, fifteen relatively large exercises conducted in the region by Russia and five by other countries combined were identified (see Table 1). This information is incomplete, especially with regard to Poland.

Table 1. Exercises in the region

Date	Place	Name and subject	Scale	Note
Early March	Voronezh Region, Russia	Bomber aviation exercise	3 squadrons of Su-34, S-300, Su-30SM and MiG-31BM, 600 personnel	Concrete-piercing bombs
Early March	Moscow Region, Russia	Air-defense brigade exercise		S-300V air defense systems
Early March	Moscow Region, Russia	Bilateral tactical exercise with tank and motorized rifle units of the Kantemirovskaya division of the Russian Western Military District	1,000 personnel, 200 pieces of hardware	One week

Date	Place	Name and subject	Scale	Note
Early March	Voronezh Region, Russia	Tactical exercise with an infantry regiment of the Western Military District (battalion tactical training with live firing)	800 personnel, 250 pieces of hardware	Repelling an attack
Mid-March	Voronezh Region, Russia	Exercise with an infantry regiment of the Western Military District (battalion tactical training with live firing)	700 personnel, 80 pieces of hardware	Defensive combat
Mid-March	Leningrad Region, Russia	Bilateral tactical battalion exercise with Krasnoselsk infantry brigade of the Western Military District	1,000 personnel, 120 pieces of hardware	Mobile defense
Around 20-23 March	Dnipropetrovsk Region, Ukraine	Two-phase command and staff exercise with a tank brigade of territorial defense and air force	No data	Offensive, overcoming defense and surrounding the enemy
Around 22-28 March	Kaliningrad Region, Russia	Exercise with an infantry unit of the Baltic Fleet army corps (battalion tactical exercise)	1,000 personnel, 70 pieces of hardware	Live firing with BMP-2 armored infantry carriers, T-72 tanks, Akatsya and Gvozdika self-propelled artillery vehicles, Tunguska air defense systems, Grad multiple rocket launchers; supervised by Baltic Fleet Deputy Commander S. Yeliseyev
23-26 March	Kaliningrad Region, Russia	Exercise with a detached marine engineering regiment	Around 1,000 military personnel, 250 pieces of equipment	Mortars, howitzers, multiple rocket launchers, and helicopters
Of the Baltic Fleet	800 personnel, 60 pieces of hardware	Demining, engineer obstacle arrangement, position development, assault landing, etc.		Practiced fire support for mobile defense from howitzers and multiple rocket launchers
24 March	Kaliningrad Region, Russia	Redeployment and naval landing exercise with live firing	No data	Korolyov large landing ship, Evgeny Kocheshkov small landing ship, 3 landing boats, 15 pieces of hardware and approx. 100 marines of the Baltic Fleet of Russia
Around 25-27 March	Ryazan, Nizhny Novgorod, Moscow, Smolensk, Voronezh, Kursk and Belgorod Regions, Russia	Exercise with Signal Corps units of the Western Military District	1,500 personnel	Laying of >10,000 km communications lines

Date	Place	Name and subject	Scale	Note
Around 26-27 March	Voronezh Region, Russia	Exercise with tank units of the Western Military District (battalion exercise)	1,000 personnel, 120 pieces of hardware	Repelling of armored offensive; T-72BA tanks, Msta-B, BMP-2 armored infantry carriers
Late March	Chernihiv Region, Ukraine	Exercise with infantry units of the 169th Training Center	No data	Offensive operation
Late March	Voronezh Region, Russia	Exercise with operational tactical aviation of the Western Military District	25 crews, 30 aircraft	Su-35 and Su-30SM fighters; Su-34 and Su-24M bombers; Il-78 tankers
Late March	5 western regions of Russia	Command and staff training of the tank army of the Western Military District	1,000 personnel, 300 pieces of hardware	Maneuvers, redeployment and pinpoint attacks
Around 4-8 April	Ukraine	Two-phase command and staff exercise with a detached marine brigade	No data	Tactical landing; first one by NATO guidelines
Around 4-8 April	Baltic Sea	Tactical exercise of the Baltic Fleet of Russia	20 ships and support vessels	
Mid-April	Western Ukraine	Tactical exercise with land and air assault troops and the air force of Ukraine	Scale unknown	In the presence of Air Assault Troops Commander Moysyuk; live firing
20 April	Kaliningrad Region, Russia	Landing exercise on unequipped coast	10 ships and vessels, naval aviation of the Baltic Fleet, 20 BTR-82A armored personnel vehicles, Baltic Fleet marines	Together with tactical marines landing
21 April -22 May	Estonia	Spring Storm exercise	5,000 Estonian and foreign personnel	Downscaled

The pandemic significantly reduced the number of identified confidence-building measures (see Table 2). Observation flights under the Open Skies Treaty were suspended until April 26.

Table 2. Confidence-building measures under bilateral agreements on the confidence- and security-building measures in supplement to the Vienna Document 2011, the Treaty on Conventional Armed Forces in Europe and the Treaty on Open Skies

Date	Composition of the delegation	State subject to inspection	Note
2-5 March	U.S., Poland	Belarus	Inspection of 6th infantry brigade of Belarus under the CFE Treaty
3-4 March	No data	No data	Belarusian officers at the annual meeting on the execution of the 2011 Vienna Document in Vienna
8-18 March	No data	No data	Belarusian officers observe NATO Cold Response 2020 exercise in Norway. The exercise was suspended due to the pandemic.

Regional forces buildup

NATO. In early April, Estonia received the first two out of 18 ordered South Korean 155-mm K9 self-propelled howitzers. The rest are expected in 2023. The United States announced in early April the transfer of 128 Javelin anti-tank missiles to the Estonian army as part of a larger contract, and it became known on April 21 that Poland purchased from the United States 180 missiles and 60 FGM-148 Javelin anti-aircraft missile launchers worth USD 100 million. Earlier, such launchers were supplied to Ukraine and the Baltic States.

In April, the Swedish parliament began considering the sale of two almost thirty-year-old Södermanland submarines to Poland. Poland continues to modernize its Navy by purchasing used hardware, although the previously purchased half-century-old Norwegian Kobben submarines and several newer American frigates caused certain problems.

It was reported on April 14 that Lithuania entered into a contract with Norwegian Kongsberg Group on the supply of an unspecified number of Protector Common Remote Weapon Stations (CROWS) combat modules to equip Lithuania's American-made 4x4 Joint Light Tactical Vehicles (JLTV).

Ukraine. The Ukrainian army has used the recently purchased Bayraktar TB2 strike UAVs of Turkish manufacture since mid-March. Minister of Defense of Ukraine Andriy Zahorodniuk said that Ukraine planned to purchase a "large number" of various UAVs this year, and was exploring the possibility of joint production of strike UAVs with Turkey in Ukraine.

After the successful tests of rockets for the Ukrainian Vilkha M multiple rocket launchers (120 km in engagement range) on March 30–31, the Ministry of Defense of Ukraine reported the "consistent implementation" of the national rocket program.[1] The Ukrainian army was supplied with 28 Vilkha rockets of the previous generation ahead of schedule.

Deployment of forces. On March 3, the Chief of Polish General Staff Rajmund Andrzejczak spoke about the plan to considerably scale up the call of reservists to 50,000 this year against 39,000 in 2019. They will be called up for training not for just one day, but for 5 to 12 days. The Ministry of Defense wants them to arrive at the garrisons within four hours now. Most likely, a further increase in the number of draftees will follow. Media reported that the Defense Ministry was going to call up 80,000 personnel this year.

Ukraine follows suit. Newly appointed Minister of Defense of Ukraine Andriy Taran said on March 11 that the country needed an extensive territorial defense system.

From March 30 to April 14, the Latvian army and militia reinforced the national border guards, officially, to safeguard the border during the pandemic. Unofficially, this was used as an occasion to consider possible changes in border protection practices. Last year, the Latvian authorities discussed the possible involvement of the army in the protection of the eastern border shared with Belarus and Russia.

On April 2, NATO Secretary General Jens Stoltenberg said after an online conference of the foreign ministers of the organization's member states that NATO was going to step up cooperation with Ukraine and Georgia through exercises in the Black Sea region and exchange of radar data to monitor the airspace.

Russia. Russia reported at the end of March that the Baltic Fleet's army corps artillery stationed in the Kaliningrad Region was supplied with the Smerch multiple rocket launchers, which are already being replaced with the Tornado launchers. Therefore, this will not strongly affect the strategic balance. The start of deliveries of the T-90M tanks and Terminator tank support vehicles to the tank army of the Western Military District was announced in early April. Their number was not disclosed. The Western Military District troops began the massive re-equipment with the AK-12 assault rifles in March–April.

[1] Ukraine successfully tests 120-km Vilkha M multiple rocket launchers, April 1, 2020 (В Україні успішно проведено випробування ракети «Вільха-М» з дальністю ураження 120 км, 1 квітня 2020), http://www.mil.gov.ua/news/2020/04/01/v-ukraini-uspishno-provedeno-viprobuvannya-raketi-vilha-m-z-dalnistyu-urazhennya-120-km/

Forecast

Regional military activities will become less transparent as a result of both collapse of the system of international treaties, and respective policies of some states, such as Lithuania and Russia.

The pandemic contributes not only to increasing secrecy, but also the militarization of new areas, where the states of the region operate. These are not harmless trends in terms of regional stability. For instance, the Lithuanian State Security Department intends to engage in medical intelligence, and amid that country's accusations of Belarus's negligent COVID-19 policy, it is quite possible that Belarus will be treated as a threat to Lithuania's public health, *inter alia.*

The situation in the east of Ukraine is fraught with aggravation against the backdrop of the active buildup and movement of troops by Russia and Ukraine. Belarus is distancing itself from the crisis, waiting for favorable developments. Minsk is likely to reorient its peacemaking aspirations towards participating in UN operations, giving up hopes for contributing to the resolution of the conflict in the east of Ukraine for now.

Minsk will continue developing a new architecture of national security that its modest budget would be able to afford (in particular, by establishing bodies and national security means capable of preventing destabilization), thus running counter to all countries in the region that seek to de facto entrust their security to powerful allies and blocs. Therefore, active buildup of mobile, compact and more closely integrated defense and security agencies and territorial defense is highly likely.

Appendix 1

Catalogue of events underlying the relations development indices

Relationship with Russia

Date	Event	Point
1 March	Lack of oil supply arrangements	-1
2 March	Natural gas protocol signed (Siamaška-Novak)	+1
5-6 March	Matviyenko visits Minsk	+1
6 March	Rumas's telephone conversation with Mishustin	+1
9 March	Agreements with five new oil suppliers	+1
11 March	Rumas and Mishustin meet in Moscow	+2
11 March	Rumas–Mishustin meeting is fruitless	-2
15 March	Rumas, Mishustin have a telephone conversation	+1
16 March	Russia shuts its border with Belarus	-3
19 March	Conversation between Makiej and Lavrov	+1
21 March	Conversation between Rumas and Mishustin	+1
28 March	Russia tightens its border control	-1
31 March	Only 1 mln tonnes' worth of bids for oil supplies to Belarus	-1
3 April	Russian companies agree to supply about 2 mln tonnes	+1
4 April	Conflict over Russian tests	-2
10 April	Establishment of Belarusian sanitary quarantine stations at the border	+1
14 April	EEU Summit	+2
14 April	Disputes over gas resume	-1
10 April	Oil prices collapse	-1
22 April	Conflict over buckwheat	-1
29 April	Oil supply plans for May approved at 1.13 mln tonnes	+1
29 April	Lukashenka's instruction to connect the two Belarusian refineries with a pipeline	-1
March	Restrictions on oil supply remain in place	-2
March-April	Road maps are frozen	-1
March-April	Negative GDP due to low use of capacity of the two refineries and decline in export	-1

Date	Event	Point
March-April	No visa agreement yet	-1
March-April	Cooperation between border agencies and the Foreign Ministry in travel	+2
March-April	Preservation and buildup of alternative oil supplies	-1
March-April	Disagreements on gas prices	-1
March-April	Accusations hurled at Russia of poor health care work, including at the highest level	-2
March-April	Allegations against the Kremlin of damage to the welfare of the Russians	-2
Total		**-9**

Relationship with the EU

Date	Event	Point
3 March	Jeŭdačenka meets with German Ambassador Manfred Huterer	+1
3 March	Minister of Foreign Affairs of Hungary Péter Szijjártó visits Minsk, meets with Makiej, Minister of Agriculture Chacko, Chairman of the House of Representatives Andrejčanka; signing of the Cooperation Program between the Foreign Ministries of the two countries	+2
4 March	Šestakoŭ meets with Italian Ambassador Mario Baldi	+1
4 March	Minister of Transport and Communications Avramienka meets with Deputy State Secretary of the Ministry of Communications of Latvia Uldis Reimanis and Ambassador of Latvia Einars Semanis	+1
9 March	State Atomic Supervision Authority meets with a delegation of the European Commission and the European Nuclear Safety Regulators Group (ENSREG)	+1
10 March	Dapkiunas meets with Chargé d'affaires a.i. of the Netherlands Henricus Johannes van Oosterhout	+1
10 March	Kraučanka, deputy ministers of energy and emergency situations meet with a delegation of the European Commission led by Acting Deputy Director-General for Energy Massimo Garribba	+1
10 March	Makiej's telephone conversation with Commissioner for Neighbourhood and Enlargement Olivér Várhelyi	+1
20 March	Makiej's telephone conversation with Minister of Foreign Affairs of Lithuania Linas Linkevičius	+1
20 March	Makiej's telephone conversation with Latvian Foreign Minister Edgars Rinkēvičs	+1
20 March	Makiej has a video conference call with Polish Foreign Minister Jacek Czaputowicz and Polish government commissioner for strategic energy infrastructure	+2
24 March	Lukashenka has a telephone conversation with President of Latvia Egils Levits	+2
1 April	Makiej has a telephone conversation with Estonian Foreign Minister Urmas Reinsalu	+1
2 April	Makiej has a telephone conversation with Minister for Foreign Affairs of Sweden Ann Linde	+1
2 April	Ratification of agreements with the EU on visa facilitation and readmission by the House of Representatives and the Council of the Republic of the National Assembly	+2
9 April	Lukashenka signs the law on ratification of agreements with the EU on visa facilitation and readmission	+1
16 April	Kruty has a video conference call with EBRD Vice President Alain Pilloux	+1
22 April	Makiej has a telephone conversation with High Representative of the EU for Foreign Affairs and Security Policy Josep Borrell	+1
23 April	Lukashenka has a telephone conversation with President of Lithuania Gitanas Nausėda	+2
29 April	Kraučanka's telephone conversation with German Foreign Ministry's Commissioner for Eastern Europe, the Caucasus and Central Asia Michael Siebert	+1

Date	Event	Point
March-April	Positive materials in the official media and statements of the country's leadership regarding the EU. Specifically, Lukashenka's gratitude to the EU for willingness to provide material support for Belarus	+1
April	A number of negative statements of the Belarusian president addressed to the EU member states for criticizing Minsk's methods to address the pandemic	-1
Total		**+25**

Relationship with China

Date	Event	Point
24 March	President of Belarus Lukashenka meets with Ambassador of China to Belarus Cui Qiming	1
1 April	Arrival of the first batch of Chinese humanitarian aid in Belarus	1
8 April	Signing of a memorandum on strategic cooperation between the Ministry of Agriculture of Belarus and the working committee of the Association of Small and Medium Enterprises on the Belt and Road Initiative (BRI)	1
14 April	BSEU and Zhejiang Shuren University sign a framework agreement on cooperation	1
14 April	Interview with Chinese Ambassador to Belarus Cui Qiming for BelTA on measures of mutual assistance between Belarus and China	1
17 April, 26 April	Cargoes with humanitarian aid from Chinese agencies and companies arrive in Belarus, aid from Belarusian companies arrives in China	2
29 April	Interview with Ambassador of Belarus to China Snapkoŭ for BelTA on joint endeavor of Belarus and China “when storming COVID-19”	1
Total		**+8**

Relationship with the U.S.

Date	Event	Point
5 March	Workshop "Priorities of International Parliamentary Cooperation in Conditions of Building a Multipolar World for the Development of the Republic of Belarus". Statements by Kraučanka on cooperation with the U.S.	+1
5 March	Solemn event at the Foreign Ministry celebrating the fiftieth anniversary of the coming into effect of the Treaty on the Non-Proliferation of Nuclear Weapons attended by Chargé d'affaires a.i. of the United States	+1
13 March	Telephone conversation between Michael Pompeo and Uladzimir Makiej. Willingness of the U.S. to begin supplying oil. Statement on U.S.' support for Belarus's sovereignty	+2
17 March	U.S. Embassy in Belarus suspends nonimmigrant visa issue	-1
27 March	Lukashenka supports Trump's approach to quarantine	+1
28 March	U.S. to provide USD 1.3 mln for Belarus to fight COVID-19	+1
March	Department of State's report on the status of human rights in the world in 2019, in which Belarus is named an authoritarian state, where numerous human rights violations are committed	-1
20 April	Trump nominates Julie D. Fisher as Ambassador to Belarus	+1
April	Three American companies become residents of HTP	+1
Total		**+6**

Relationship with Ukraine

Date	Event	Point
3 March	Interview with Ambassador of Ukraine to Belarus Kizim focusing on the promotion of tourism including as "people's diplomacy"	+1
5 March	Kryvyi Rih and Dnipro receive Dnipro trolleybuses assembled from Belarusian kits	+1
3-4 March	Working meeting of Belarusian and Ukrainian NOC leaderships in Kyiv	+1
8 March	Temporary ban imposed (until the end of quarantine) on the purchase of electricity from Belarus	-1
9 March	Bobruiskagromash signs an agreement on establishing assembly facilities in Ukraine to manufacture tractor trailers	+1
9 March	Brest road companies repair and build roads in four Ukrainian regions	+1
10 March	First tanker with Azerbaijani oil for Belarus arrives in Odessa. Transportation via the Odessa-Brody oil pipeline starts	+1
11 March	Belarusian road companies lodge a complaint against the terms of Ukravtodor tender. There are indications of artificial ousting from the market	-1
13 March	Delegation of Brest Region in Lviv and Lviv Region – discussion of cooperation development	+1
16 March	Kyiv buys 200 MAZ buses	+1
16 March	Specialized shops for sale of Belarusian confectionery products open in Kyiv	+1
1 April	Ambassador of Ukraine shows gratitude for assistance in the return of Ukrainians (in an interview with Belarusian media outlets)	+1
1 April	Ukraine joins EU sanctions against Belarus	-2
10 April	National police resumes purchases of Belarusian fuel from Ukrainian traders	+1
18 April	Belarus is among TOP-7 suppliers of agricultural machinery to Ukraine	+1
19-21 April	Attempted hoax that major forest fires in Ukraine were started by subversive groups sent from the territory of Belarus	-1
21 April	Statement of the Ukrainian Ministry of the Interior on the study of Belarus's forest fire prevention experience	+1
22 April	Telephone conversation between ministers of foreign affairs of Belarus and Ukraine	+1
22 April	Belarus became top supplier of potatoes to Ukraine, with supplies growing tenfold in volume terms	+1
23 April	National Academies of Sciences of Ukraine and Belarus announce a competition to award best scientific research	+1
24 April	Ambassador of Belarus Sokal meets with Minister for Communities and Territories Development of Ukraine Chernyshov	+1
Total		**+12**

Appendix 2

Catalogue of events underlying the security indices

Date	Event	National security	Regional tension
March-April	Continued combat operation in the east of Ukraine	-2	-2
March-April	Defender Europe NATO exercise	-2	-2
March-April	5 other exercises of NATO and Ukraine	-1	-1
March-April	15 Russian exercises	0	-1
March	3 confidence-building measures	+1	+1
1-14 March	Belarusian-British peacekeeping exercise near Viciebsk	+1	+1
3 March	Increased call up and training of reservists in Poland	-1	-1
9-25 March	Second stage of the comprehensive combat readiness check of the Belarusian army (regular troops and territorial defense)	+4	0
Mid-March	Beginning of the use of the Bayraktar TB2 strike UAVs by the Ukrainian army	0	-1
25 March	Joint air force and air defense exercise of Belarus and Poland	+1	+1
Early March	Beginning of rearmament of the Russian Western Military District with T-90M tanks and Terminator tank support combat vehicles	0	-1
Early March	Exercise with the 11th infantry brigade of Belarus	+1	0
Early March	Exercise with the 19th infantry brigade of Belarus	+1	0
Early March	Exercise with the 38th assault battalion of Belarus	+1	0
Early March	Reports about the U.S.'s intent to withdraw from the Treaty on Open Skies	-2	-2
7-9 April	Exercise with the 6th infantry brigade of Belarus	+1	0
Mid-April	Exercise with the 11th infantry brigade	+1	0
Total		**+4**	**-8 (Yellow)**

Appendix 3

Colour scale of regional security tensions

Colour Value	Numerical Value	Interpretation
White	higher than -1	Low likelihood of escalation. Non-threatening situation
Green	from -2 to -6	Presence of military activities, which do not pose a direct threat and will not necessarily lead to the escalation of tensions. Such a situation calls for cautious attention.
Yellow	from -7 to -12	Military and other activity is observed that is capable of leading to the escalation of tensions. The situation calls for close attention.
Orange	from -13 to -17	Military preparations in the region. Growing tensions. Situation is threatening.
Red	-18 and lower	Sharp escalation of tensions. The conflict is virtually unavoidable. A pre-war situation.

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