№ 12 (November and December 2019)

MINSK BAROMETER

Monitoring of foreign policy and regional security

Dear readers!

We are happy to present the twelfth issue of Minsk Barometer, which analyzes Belarus's foreign policy and security status in the two months of November and December 2019.

A year of negotiations with **Russia** over the terms of cooperation and integration yielded no results. Belarus did not manage to turn its natural gas-related bargaining chip into any tangible deal.

As expected, the parliamentary elections did not cause the relationship with the **European Union** to leave the positive track. The level of meetings markedly increased; the parties got very close to the signing of the visa facilitation and readmission agreements. The period saw cooperation with the key financial institutions – the EBRD and EIB – expand.

The main developments in **Belarus**'s relationship with China were associated with the export of Belarusian goods. A USD 500 million loan in renminbi was successfully raised.

Contacts between the **U.S.** and Belarus remained dense, the U.S. being increasingly interested in Belarus as a country seeking to give up on its exclusive focus on Russia.

The intensity of bilateral contacts with **Ukraine** has also increased. Economic engagement was actively evolving as well. At the same time, old aggravators remained: the parties' vulnerability to media attacks, and the struggle of Ukrainian and EEU businesses for markets.

Security tensions subsided a little. However, the main trend – the regional arms race – remains in place. The Belarusian government is overall quite successful in addressing the challenge of promoting the country's security in adverse circumstances. Belarus started to receive more information about NATO activities and may even be engaged in joint exercises in the foreseeable future.

Yours respectfully,

Dzianis Melyantsou,

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

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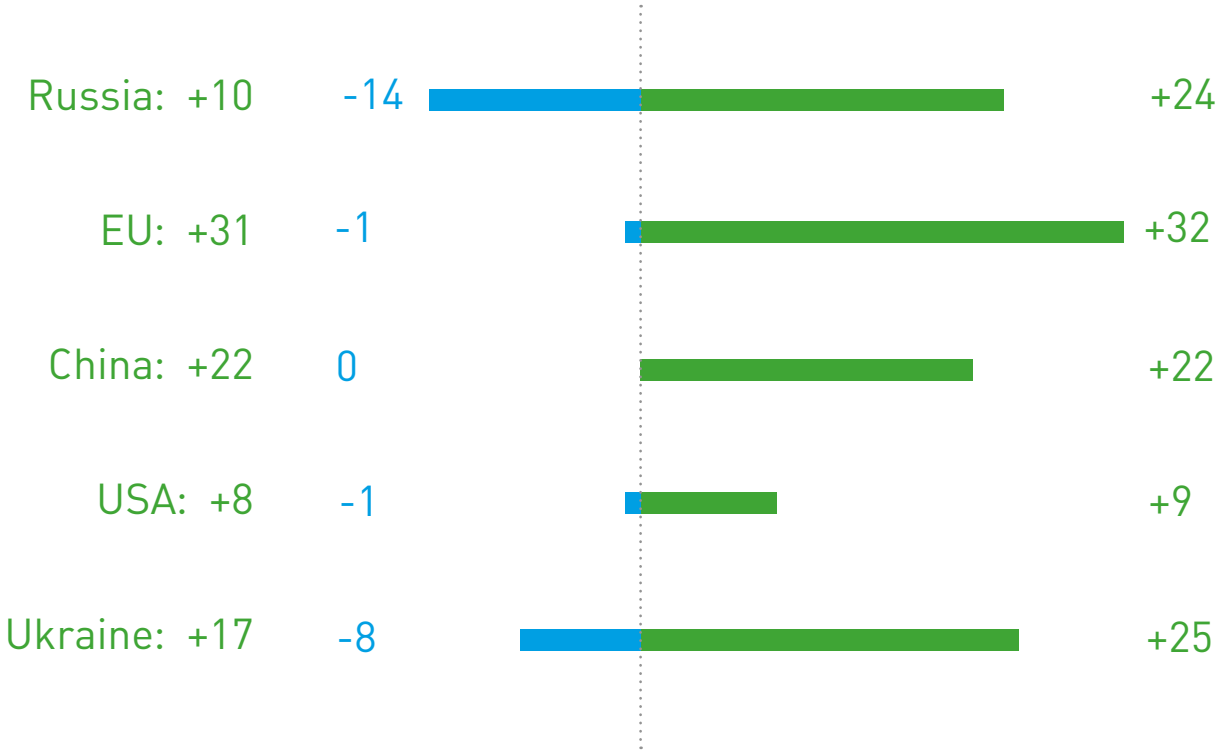
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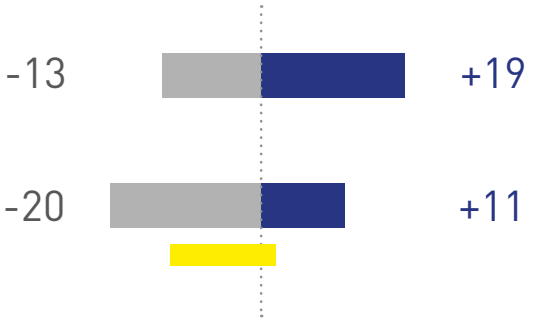
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Minsk Dialogue
Council on International Relations

Relations development indices:



Security:

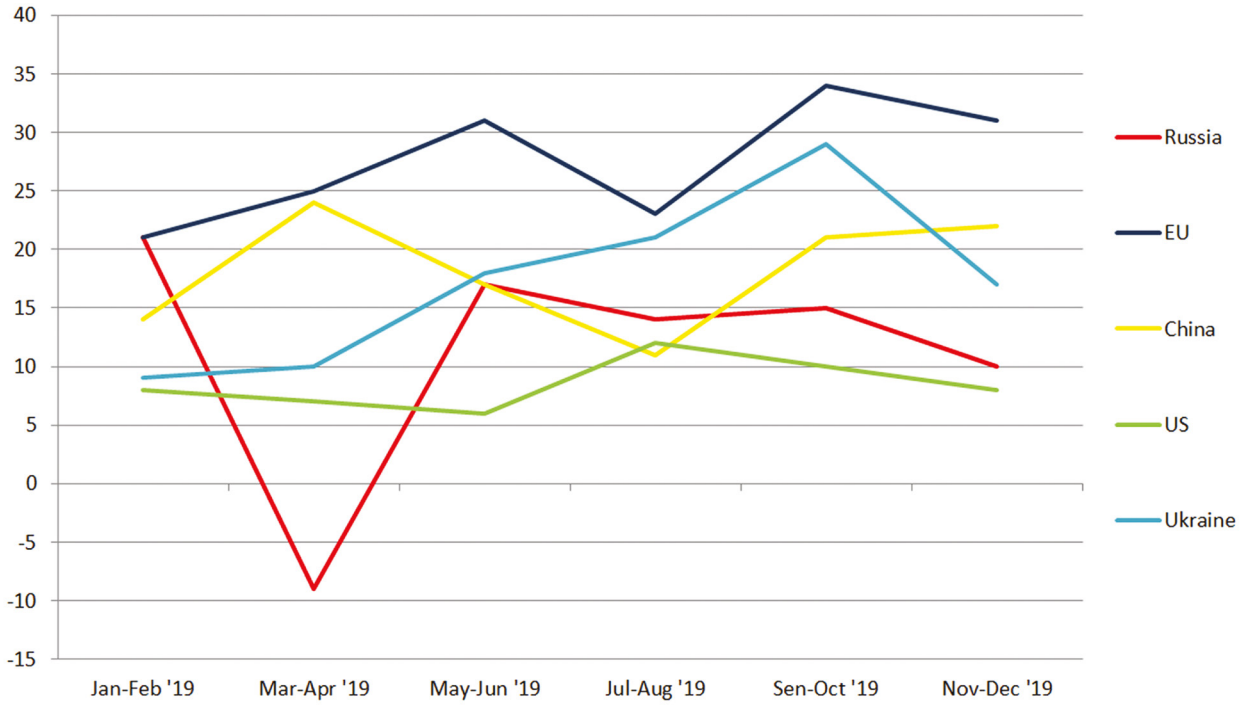


National: +6

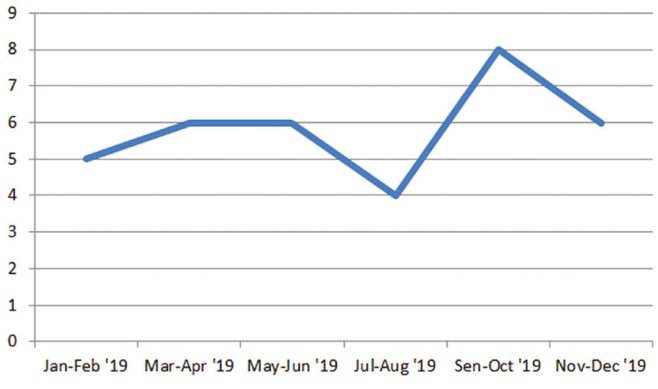
Level of regional tension: +9
(yellow level)

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.

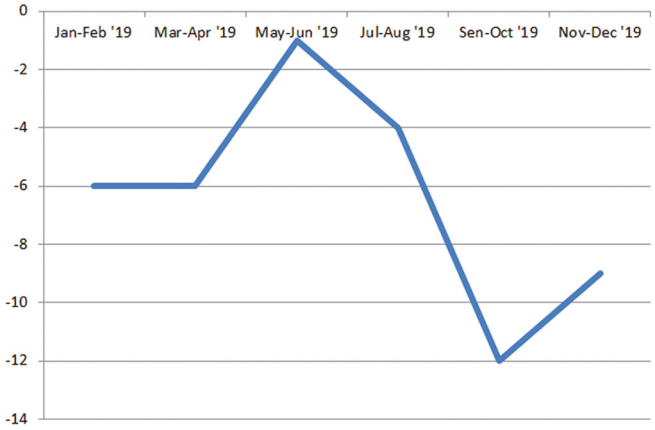
Dynamics of foreign policy indices



National security



Level of regional tension



Relationship with Russia



Aggregate index: +10
Positive points: +24
Negative points: -14

Trends

1. A year's worth of negotiations over the terms of cooperation has yielded no results – no roadmaps have been agreed, no contracts were signed for natural gas and oil supplies and transit starting in 2020.

2. Russia failed to complete its Nord Stream-2 project and started the year 2020 without the anticipated surplus of its gas transit capacity.

3. However, Russia signed 5-year contracts for natural gas and oil transit with Ukraine, launched the TurkStream pipeline and expanded ESPO-2 by 22 million tonnes per year, i.e. it ensured both partial oil and natural gas transit to Europe and expansion of oil and natural gas sales in Asia.

4. On January 1, 2020, another ban of the International Maritime Organization (IMO) on excessive sulfur content in fuels came into effect, which will reduce the demand and prices for Urals compared to lighter benchmarks.

Developments and processes

Political agenda

During the last two months of 2019, the density of contacts between the Belarusian leadership and Russia was almost as high as it was a year before and just as futile.

A recap: since the second half of 2018, Belarus sought Russia to bring its natural gas rates for Belarus closer to those applied in Russia's domestic market and to pay Belarus's oil refining sector compensation for Russia's tax maneuver. At the end of 2018, Russian Prime Minister Dmitry Medvedev stated that Russia was ready to meet Belarus's requirements only in exchange for closer integration. The two countries took one year looking for ways to find a method to approximate economic rules within roadmaps in 30 sectors of public policy, hoping to achieve a package integration program in time to celebrate the 20th anniversary of the Union State. Stepped-up negotiations of these issues during the last two months of the year did not prove successful. However, even prior to the talks it became clear that the issues that matter to Belarus the most – the reduction of oil and gas prices in 2020-2021 – are not covered by the roadmaps.

To clarify the political background of the negotiations, we should recall a few factors that had and still have a strong impact on their probable outcome.

1. Russia had had high hopes for having a surplus of transit capacities to deliver natural gas to Europe and crude oil to the global market starting in 2020 thanks to the introduction and/or expansion of Nord Stream-2 (natural gas), TurkStream (natural gas), Power of Siberia (natural gas), ESPO-2 (oil);

2. The U.S. is progressively imposing sanctions that affect both companies in the Russian oil and gas sector and their partners;

3. Oil production in Russia (obligations to OPEC, sanctions, discouraging taxation system) has remained at approximately the same level for more than a decade, and since there is not enough oil to fully load all spurs, Transneft is highly motivated to redirect flows from old delivery routes to those new;

4. Global limitations on sulfur content in marine fuels are constantly getting harsher, cutting Russia's premium in the European market for oil as against that Asian;

5. Due to positions of Denmark and the U.S. on the North Stream-2 project and Naftogaz's active campaign, in December 2019, Russia had to make contracts with Naftogaz and Ukrtransnafta for transit of natural gas (for a period of five years, at least 60 billion cubic meters per year) and oil (for 10 years, at least 14 million tonnes per year) on Ukraine's terms (with any possible disputes under these contracts to be considered in international jurisdictions – which is again in favor of Ukraine).

All of these factors combined maintain the strategic importance of transit countries, including Belarus, for Russia at least for the next year or two, but the Russian governing class is eager to bargain with transit countries even now.

Union Treaty

According to the leaders of the Belarusian government, consultations about the integration process were held almost every day throughout November.

On November 19, Moscow hosted a meeting of government teams, which lasted seven hours. Upon its completion, the premiers agreed to prepare new versions of the "roadmaps". Medvedev's comment implies that the year 2019 was a "warmup" before substantive negotiations. Rumas's words imply that in the scenario drafted by the premiers "not all matters have been resolved" and, specifically, decisions concerning oil and gas will have to be made by the presidents. In this context, the logic of the Belarusian side remains the same – oil and gas first, and deeper integration will follow. The position of the Russian side has not changed, either – integration first, and then oil and gas.

After the meeting of the two premiers, it became clear that the main bargaining process regarding the terms of harmonization of the "roadmaps" would be carried forward to the first half of 2020. Anyway, there was still a chance that they would be signed at least in their most general form to celebrate the anniversary of the Union State.

On December 6, Rumas and Medvedev met again to negotiate in Sochi, alongside the economic blocs of the governments of Belarus and Russia, where the parties officially reported disagreement on 16 out of the 31 "roadmaps", and on December 7, a meeting between Putin and Lukashenka followed, attended by government representatives. No statements for the media were made following the latter meeting. The head of the Russian part of the working group, Maksim Oreshkin, stated after the talks that there had been significant convergence of positions, including on gas and oil, referring to the harmonization of gas and oil supplies.

On December 20, a meeting of the heads of state and governments took place in St. Petersburg as part of the EEU and CIS summit. It never pushed the two countries towards compromise, though.

As a result, Belarus and Russia failed to agree any "deep integration" mechanism over the year, having exactly the same positions and exactly the same views of the sequence of steps as at the start of the year.

Oil and Gas

Negotiations over gas and oil prices were also intense and also futile.

Prior to the meeting of the two presidents in Sochi on December 7, the countries had agreed that the volume of oil supplies to Belarus for processing at the local refineries would amount

to 24 million tonnes in 2020, an increase by 6 million tonnes from the previous year. Judging by Oreshkin's words, the volume of natural gas supplies to Belarus in 2020 was also agreed at the meeting in Sochi, at 20 billion cubic meters.

After the Sochi meeting of the presidents, Ambassador of Belarus to Russia Uladzimir Siamaška said on December 7 that the matter of the Russian gas price for Belarus would be resolved within the next two weeks.

However, Lukashenka and Putin did not come to an agreement in St. Petersburg even as late as December 20. Lukashenka stated that the overall natural gas rate would remain at the level of 2019, and the cost of oil would also remain unchanged, at the level of 2019. That is, after the meeting in Sochi, Lukashenka was already willing to agree that Belarus's expectations regarding energy prices in 2020 would not come true.

On December 31, Lukashenka and Putin talked for about an hour. Following the conversation, instructions were provided to sign an interim protocol on natural gas supplies to Belarus covering the first two months of 2020.

However, the contract was signed neither before the end of the year nor during the first week of 2020.

The final hours of 2019 saw Gazprom CEO Alexei Miller and Belarusian Ambassador to Russia Siamaška sign a protocol on natural gas prices for Belarus for January and February 2020. Throughout January-February 2020, Belarus will be paying the same fee of USD 127 per 1,000 cubic meters of Russian gas. Amendments to the contracts for gas transit and supply were signed to extend them until 2021.

Notably, the backdrop for the negotiations was favorable for Belarus: it had already been clear in September that Nord Stream-2 would not be ready by early 2020, while the U.S. sanctions froze the completion of the pipeline altogether. Gas prices in the EU had dropped by November-December and were a little higher than the price Gazprom charged Belarus. That is, Gazprom's bargaining position in its negotiations with the transit countries was as weak as it gets in early December. Ukraine managed to benefit: the five-year contract that it signed with Gazprom was the best Kyiv could have hoped for. The Belarusian negotiating team did not have time or wish to take advantage of the situation, although Belarus had enjoyed an equally favorable position in bargaining with Gazprom. While Belarus is only the second most important gas transiter to the EU, it is the second largest buyer of Russian natural gas in Europe.

As for crude oil, the backdrop was less clear. First, because the expansion of ESPO-2 caused Transneft to have a surplus of transit capacities. Second, Russian seaports are increasingly competing with pipeline transport. Correspondingly, the significance of the Belarusian route is not so great anymore with Russia being unable to increase oil production. Third, since November, oil prices have been mostly on the rise and developments in the Middle East show that this is a medium-term trend. In other words, Russian oil companies' motivation to supply oil to Belarus and transit it through our country is currently in a downward trend.

Alternatives

In order to strengthen its negotiating positions and prepare for the future, where oil prices for Belarus are likely to approximate to those charged in Europe (or will even exceed them), in September-December the Belarusian leadership actively probed for alternative oil supplies to the country, including negotiations over deliveries from America. On December 24, Lukashenka told Alexey Venediktov of Ekho Moskvy that he did not rule out the possibility of reverse operation of the Druzhba pipeline for crude deliveries to Belarus from Poland. Active negotiations with Kazakhstan over possible supplies have been underway since September. Lukashenka's visit to Kazakhstan in October became a new incentive to expedite the talks. On December 26, Ambassador of Kazakhstan Askar Baysenbayev confirmed that there were arrangements with Russia concerning the transit of Kazakh oil to Belarus, while

a representative of Transneft did not confirm that transit to Belarus was on the company's agenda.

Media support and protests

Russian and subsequently Belarusian media continued to inflate negative expectations, describing probable and almost inevitable scenarios where Belarus loses its sovereignty completely or to a great degree. Currently, in retrospect, it seems that "forced integration" publications, e.g. "Union State Path Runs on Roadmaps" in Kommersant, are rather aimed at disrupting the roadmap deals that had already been reached by that time, as they add excessive interpretations to the known facts and focus on a very distant future. One way or another, the media were constantly warming up the scene for the negotiation process. For example, the research published by Kommersant: "Almost 90% of Belarusians support allied or partnership relations with Russia" caused apprehensions in Belarus that misconception about the sentiment in Belarus might serve as rationale for Russians to enforce the integration process.

The Institute of Sociology commented on the MGIMO research and published its own data. In response to Medvedev's criticism of Lukashenka's words about the involvement of Belarusians and Kazakhs in "wars that are not ours" statements were made by analysts Bialiajeŭ, Hihin, Ejsmant, Žuk and MP Papko. Otherwise, civil servants still refrain from defending the positions of the Belarusian negotiating team in the integration talks.

Trade, EEU, and CSTO

In January-October, two-way trade with Russia did not reach the previous year's ten-month figures. Belarusian exports were up year-on-year, whereas imports from Russia decreased. Accordingly, the trade deficit, albeit very significant at year-end, will not reach the USD 10 billion record logged in 2018 and will settle at around USD 7 billion in 2019.

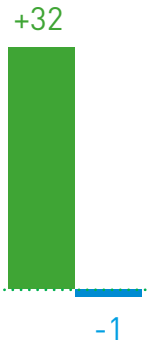
In November, four Su-30SM fighters were delivered to Belarus, out of the total 12 aircraft to be supplied.

Stanislaŭ Zas was approved for the post of the CSTO Secretary General, Michail Miasnikovič was appointed head of the EEC, Zmicier Kruty became deputy prime minister of Belarus.

Forecast

The most favorable time to have the terms of purchases of Russian oil and natural gas revised – the two final months of the year – was lost, and chances were missed. The longer the negotiations take, the slimmer the chance for Belarus to enjoy improved conditions (the main reasons behind Belarus's two-year-long protracted conflict with Russia). It is also obvious that Belarus will not address deeper integration before oil and gas contracts have been inked.

Relationship with the European Union



Aggregate index: +31
Positive points: +32
Negative points: -1

Trends

1. The parliamentary elections somewhat spoilt the overall atmosphere of the Belarus–EU framework, but did not cause the demolition of positive trends achieved in recent years.

2. On the contrary, the level of meetings markedly increased, the period was filled with events making a significant contribution to the index. Belarus's engagement with key financial institutions – the EBRD and EIB – also expanded.

3. Minsk and Brussels have fully completed their internal procedures required to sign the visa facilitation and readmission agreements. Therefore, after many years of negotiations, the parties are finally ready to ultimately resolve one of the politically significant issues and officially report quality progress in normalizing the relationship.

4. At the same time, moot points have not been removed from the agenda despite the finalization of the negotiations over the partnership priorities agreement. Lithuania, which blocks this process, sends contradictory signals, while other EU member states are growing increasingly irritated by its position.

Developments and processes

The two final months of 2019 proved to be extremely eventful for the Belarus–EU bilateral framework. Many of them were of particular importance and significance for long-term trends in the relationship.

The key background event was the parliamentary elections: any campaign in Belarus remains an important factor in the country's engagement with the EU, albeit to a lesser extent than before, since the slow normalization momentum had been building with increasing importance. It might be interrupted by some extraordinary events that Europeans would consider shocking (the likes of the developments observed in December 2010), which was not the case this time. Brussels agreed with the negative assessment of the election by OSCE/ODIHR observers and referred to the campaign as a "missed opportunity", while noting its "generally calm atmosphere."

In practice, this assessment of the Belarusian elections produced no perceptible negative impact on the progress of the relationship. On the contrary, the period under review saw a serious advancement of positive dynamics.

The main event of November and December was definitely Lukashenka's official visit to Austria. That was his first official visit (and in fact the first adequate bilateral visit) after the Belarus–EU relationship crisis of late 2010, followed by the burdensome lengthy normalization process. Some commentators called the Vienna visit a breakthrough.

Perhaps, they have the point – not in terms of its content, but in terms of its significance. It de facto brought top-level visits back to the bilateral agenda – not only in Belarus's relations with Austria, but also with the entire EU, as this visit would have been impossible if other member states had strongly recommended against it.

In Vienna, Lukashenka had talks with Federal President Alexander Van der Bellen, President of the Austrian National Council Wolfgang Sobotka, and Chairman of the Austrian People's Party Sebastian Kurz. At the time of the visit, Kurz continued coalition talks after his party won the parliamentary elections. As befits an official visit, a broad range of issues was addressed, but the focus was on economic collaboration. In the course of the joint press conference of the presidents, human rights, democracy and the death penalty were in the focus, as had been expected.

Furthermore, a major business forum was held during the visit; the Belarusian president delivered a speech. As a result, numerous business agreements were announced, most of which are still tentative. Belarusian Steel Works (BMZ) notably reached export agreements worth about EUR 100 million. A declaration on the deepening of cooperation, including the introduction of the 5G broadband network, was signed with A1, a "veteran" of the Belarusian market.

The next most significant event was the investment forum of the Eastern Partnership countries, which was held under the auspices of the EBRD in London. It is noteworthy that the initiative to hold the forum had come from Belarus, and the official delegation was led by Siarhiej Rumas. During his visit, he met with European Commissioner Johannes Hahn. In the new European Commission, he is responsible for budget issues, so the discussion was mainly focused on the future cooperation between Belarus and the European Commission. Meetings with the management of the EBRD and the European Investment Bank were also held. Following the latter, an agreement was reached to increase the EIB investment portfolio in Belarus up to EUR 550 million, an agreement to expand sustainable energy use was signed, along with EIB agreements with Belarusbank and Belagroprombank.

An agreement was reached with the EBRD in London to allocate about EUR 27 million to implement a project to improve water quality in Belarus. More ambitious documents were signed in the follow-up of Rumas's meeting in Minsk with First Vice President of the EBRD Jürgen Rigterink on December 3. A loan agreement worth EUR 259 million was signed for the reconstruction of 12 bridges and the M3 highway. The EBRD also provided funds in Belarusian rubles to state-run Dabrabyt Bank, as well as signed a memorandum of understanding with Belorusneft on the construction and expansion of the network of charging stations for electric vehicles. Furthermore, the Belarusian government has been actively discussing with the EBRD the lingering privatization of Belinvestbank, which has recently stalled due to serious differences the parties had in estimating its value. The premier insisted that Minsk's bringing the deal to its logical conclusion was in the country's best interests. Overall, the parties expect that the EBRD's investment in Belarus may reach EUR 400 million in 2019, exceeding the previous year's record high of EUR 360 million.

Other notable events of the period include the first ever visit of the foreign minister of Belarus to Sweden, which took place on November 5 and had both bilateral and multilateral agendas. As part of the former, Uladzimir Makiej held talks with Foreign Minister of Sweden Ann Linde and the speaker of the Riksdag of Sweden, whereas the multilateral track comprised a high-level meeting on the prospects of the Eastern Partnership attended by foreign ministers of all of the six partner countries. In his speech, Makiej emphasized Minsk's position and proposals within the framework of the initiative (the proposals were listed in the previous Minsk Barometer issue), the main one being the need to achieve specific and clear results for citizens of the participating countries.

Even more remarkable is the return visit of the Swedish foreign minister, who arrived in Minsk together with her Finnish counterpart on November 25. That was the first visit of an incumbent foreign minister of Sweden to Belarus since 1992. The Finnish minister,

on the other hand, arrived as a representative of the presiding country in the EU Council. Opening the meeting with the two ministers, Lukashenka stated that he considered it to be "a positive development" that the visit took place following the parliamentary campaign in Belarus. Apparently, official Minsk perceived the visit as a confidence-building measure pursued by Stockholm, Helsinki and the entire EU.

Also at a meeting with the foreign ministers of Sweden and Finland, the Belarusian president focused on small and medium states. Specifically, he spoke about the need to "get closer to each other" in times of geopolitical tensions between the big players. In recent years, this idea has been repeatedly voiced in many speeches of the Belarusian leadership. It is obvious that Minsk is trying to have them implemented in practical moves. In this context, cooperation with such countries as Austria, Sweden, Finland and Switzerland acquires additional meaning for Belarus.

Another important aspect of that meeting is the proposal of the Finnish minister concerning the possibility to build up the safety of the Belarusian NPP nuclear power project and, consequently, the trust between Vilnius and Minsk through the work in the trilateral Finland-Lithuania-Belarus format. This proposal was preceded by Lukashenka's request that Finland should share its experience in ensuring the safety of its similar station currently under construction (by the same Russian contractor), Hanhikivi-1. A few days later, Lithuania, using a presidential advisor as its mouthpiece, rejected the proposal, stressing that the entire EU, not its individual countries, should be involved in any format of negotiations.

In Brussels, positive expectations prevail about the possibility to find solutions to the conflict over the Astraviec Nuclear Power Plant, which would lift Lithuania's embargo on the signing of partnership priorities between Belarus and the EU. To some extent, the statement by Lithuanian Foreign Minister Linas Linkevičius indicates that there is "light at the end of the tunnel" – at the very end of December, he voiced a cautious opinion that Vilnius should move away from its "excessively radical position" on Belarusian NPP. He must have referred to the previously declared goal to prevent the NPP from being put into operation.

Another aspect of the Belarus–Lithuania relationship during the period under review is the participation of an official delegation of Belarus led by Deputy Prime Minister Ihar Pietryšenka in the solemn reburial of the remains of the rebels of 1863. The event can be viewed from two perspectives: both as a reflection of the long-term process of the rethinking of the history of the Belarusian state by the authorities and as a signal to Vilnius that there is good will in order to develop bilateral relations. The latter is evidenced by the fact that Minsk was presented at a high political level, despite contradictory and even insulting statements made by Lithuanian officials regarding the possible invitation of Lukashenka.

Forecast

It is likely that the agreements on visa facilitation and readmission will ultimately be signed in January 2020. On November 18, the Council of the EU approved the decision to sign the agreement on visa facilitation with Belarus. On December 19, it approved the agreement on readmission with Belarus. However, according to the spokesman for the Belarusian Foreign Ministry, the EU asked for three more weeks "for technical verification of the text of the agreement."

After the signing ceremony, the documents will have to undergo the ratification procedure by the National Assembly of Belarus and the European Parliament, respectively. They will come into effect on the first day of the second month following the exchange of notices on

the parties' compliance with the ratification procedures. It means that citizens of Belarus will have to pay EUR 80 for a Schengen visa approximately until early summer, as its cost will increase from the current EUR 60 from February 2. Minsk addressed to Brussels a proposal to temporarily "freeze" the visa fee for Belarusian citizens until the agreement on visa facilitation has come into effect, but it is unlikely that the EU will be able to find such a possibility.

Many European diplomats expect that rapid progress is now possible for the agreement on partnership priorities, which is currently blocked by Vilnius. Indeed, Lithuania observes growing irritation of other member-states and EU institutions with its uncompromising position and understands that after the launch of the NPP its "radical position" will only enhance this irritation and will make many Lithuanian arguments senseless. Moreover, the U.S. explicitly refused to support Lithuania's position, which greatly weakened Vilnius's stance on this matter.

However, Lithuanian elites in general and specific politicians holding key government positions have invested too much political capital in the fight against the Belarusian nuclear power project. Media campaigns against the nuclear power plant have also had a profound impact on the perception of the topic in Lithuanian society. Therefore, one can hardly expect Lithuania to make significant concessions fast and without additional conditionality.

Relationship with China



Aggregate index: +22
Positive points: +22
Negative points: 0

Trends

1. The main developments reported in the period were related to the export of Belarusian goods to China and outlook for its promotion.

2. The intermediate result of financial and credit cooperation is the USD 500 million loan for Belarus denominated in renminbi.

Developments and processes

In early November, a Belarusian delegation took part in the 2nd China International Import Expo (Shanghai). Minister of Agriculture Anatol Chacko went on a working visit to China to participate in the event, on which Belarus had pinned high hopes. During the meeting with representatives of General Administration of Customs of China, the parties continued negotiations with a view to extending the list of agricultural products and foodstuffs from Belarus with accreditation in the Chinese market and signed a protocol concerning quarantine requirements for Belarusian poultry. The Expo also featured the Belarus-China business forum, where the Chinese side was represented by Vice Minister of Commerce of PRC Yu Jianhua.

In mid-December, the second Belarusian-Asian forum was held in Hong Kong. The Belarusian delegation of the Ministry of Economy (Deputy Minister Aliena Piarminava), Ministry of Industry and Administration of the Great Stone China–Belarus Industrial Park (CBIP) combined its participation in the forum with visits to Hong Kong and Shenzhen companies – China Merchants, ZTE, China Mobile, Huawei – that are either current or prospective residents of the Great Stone Park. The discussion was predictably focused on the results of the residents' operation in 2019, presentation of the CBIP's opportunities and advantages, as well as promising projects in Belarus.

In November, the Belarusian side ratified two agreements: on the abolition of visa requirements with Hong Kong (an amendment to the earlier agreement) and on road transportation of passengers and freights, which simplifies procedures for processing documents required for such trips. The former agreement was discussed by the parties throughout 2019. As a result, Belarus and Hong Kong agreed on a 30-day visa-free stay instead of the 14 days under the original agreement. Despite the fact that the benefits of the extended stay lose some of its value due to the current protest movement in Hong Kong, the engagement with Hong Kong is quite exciting in terms of Belarus's cooperation with a number of Asian countries (South Korea, Singapore, Japan, etc.) and search for multilateral cross-country opportunities for cooperation.

An important event reported in December was the commitment of a five-year USD 500 million renminbi-denominated loan to Belarus (about 22% of the total planned utilization of foreign loans in 2020). Under the terms of the loan agreement, funds will be transferred to the account of the National Bank of Belarus at the China Development Bank Shanghai branch, which entails a number of financial costs for servicing such a foreign account. If the parties are satisfied with

the way this "trial" loan works, Belarus will be able to enjoy better options in terms of sources of external loans. However, in the medium term, the Chinese side might approach the position of international financial institutions, which provide financing subject to certain conditionality.

Great Stone

The months of November and December were not very eventful. In November, the number of residents of the park increased to the anticipated 60, and Swiss Carrosserie HESS AG (Hess Great Stone Ltd.) launched the production of modular electric passenger vehicles. In addition, a delegation representing the CBIP worked in a separate pavilion at the 2nd China International Import Expo in Shanghai.

Other projects

During the period under review, Belarusian State University was active in the Chinese dimension. BSU Rector Andrej Karol visited China several times and signed cooperation agreements, memorandums of understanding with a number of Chinese universities, as well as opened the Center of Belarusian Language and Culture at the BSU Training Center in Sanya, Hainan.

In early November, a new potassium nitrate-making plant was opened, a joint project of Belaruskali and China's Migao Corp. Ltd. Potassium nitrate, a new export product in the Belaruskali lineup, is expected to increase the company's export revenues, and cooperation with Migao Corp. Ltd. in potash fertilizer processing will continue.

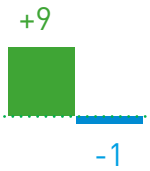
In December, Bremino Group LLC announced the construction of a 62-hectare Silk Road international commercial town within the special economic zone Bremino-Orša with the involvement of Chinese Shaanxi Zhongqiao Silk Road Technology Development Co. Ltd. The project envisages the construction of a trade and expo facility for wholesale and small-scale wholesale trade and is positioned as another Belt and Way project.

Forecast

Whereas engagement between regions became de facto one of the focus areas in bilateral relations in 2019, the year 2020 will officially become the year of regions of Belarus and China. Belarusian regions have already accumulated some experience in cooperating with Chinese counterparts – both at the level of executive committees and at the level of individual corporate exporters with support coming primarily from the Ministry of Agriculture. If Belarus's export lineup should expand, profits may grow as well. However, prospective exporters to China still need to keep in mind the stringency of accreditation and certification procedures in China and understand their own rational threshold in the scope of export.

Overall, 2020 will be an important year for the development of the Great Stone Park. The factors that will remain highly relevant include the park's ability to gain the required pace, financing, and attract flagship investors who will encourage expansion and investment. The Chinese side will continue to provide financial assistance for the development of the CBIP as much as possible, but should there be few positive developments, it is possible that China will request more benefits or adjustments to the format of operations. Belarus's contribution to the development of the park may take the form of further promotion of the idea of the EU-EEU-Belt and Road alignment given its presidency in the EEU in 2020, as well as contracting of financing from international organizations and normalization of relations with the EU. However, tangible progress in these areas is unlikely during the next 12 months and calls for significant time and efforts.

Relationship with the U.S.



Aggregate index: +9
Positive points: +8
Negative points: -1

Trends

1. The density of contacts between the U.S. and Belarus remains high.
2. The U.S. appears to be increasingly interested in Belarus as a country that seeks to move away from its exclusive focus on Russia.
3. The results of the parliamentary elections in Belarus did not spoil the relationship.

Developments and processes

The period under review started with the visit of Deputy Foreign Minister Alieh Kraŭčanka to Washington, DC from October 29 to November 1.

The pivot of the visit was another round of the Belarus-U.S. dialogue on human rights. Representing the U.S. in the course of the dialogue were Assistant Secretary of State for Democracy, Human Rights and Labor Robert Destro, officials at the Department of State and government agencies.

Also during his visit, Kraŭčanka met with Philip Reeker, Acting Assistant Secretary of State in the Bureau of European and Eurasian Affairs, and Bill Keating, Chairman of the Subcommittee on Europe and Eurasia of the Committee on Foreign Affairs of the U.S. Congress. The parties addressed bilateral cooperation development as well as the situation in the region.

Meetings were held with Paul Packer, Chairman of the Commission for the Preservation of America's Heritage Abroad, and Eric Stewart, President of the American-Central European Business Association (ACEBA).

The deputy minister also had a traditional meeting with representatives of the U.S. analytical community[1].

At the end of November, two events dedicated exclusively to the Belarus issue were held in Washington, a truly rare occasion for the U.S., given the low weight of Belarus in the world politics and Washington's previously low interest in Eastern Europe in general and specifically in Belarus.

On November 20, for the first time in eight years, the Helsinki Commission under the U.S. Congress held a hearing entitled "Not-So-Good Neighbors" focused on Russian's influence in Belarus. As it was said at the hearing, the reason was the strengthening of Russian propaganda and dissemination of false information aimed at the destruction of Belarus's sovereignty.

1 Scores for the visit were given in the previous report, since most of the meetings organized in the scope of the visit took place in October.

The event was addressed by Sofya Orlosky, Senior Program Manager for Eurasia at Freedom House, Franak Viačorka, Research Media Analyst at U.S. Agency for Global Media, Brian Whitmore, Senior Fellow and Director of the Russia Program at the Center for European Policy Analysis (CEPA) and Andrei Yeliseyeu, Head of Monitoring Unit, International Strategic Action Network for Security (iSANS), Research Director at EAST Center.

Against the backdrop of the points made by the Belarusian participants about the increasing Russian influence and their criticism of the Belarusian government, the accents in the address by Brian Whitmore are interesting:

- Belarus is strategically important to the West and its importance will grow. It is in the interests of the West to strengthen the sovereignty of Belarus

- After 2014, Lukashenka and some Belarusian elites were concerned about the danger of Russia's takeover.

- The West should send a clear message that the sovereignty of Belarus is inviolable, and Russia's aggressive actions will cost much, including new sanctions.

- The U.S. could invest in the high-tech sector of Belarus, taking the niche that emerged in the wake of the reduction of Russian subsidies.

The second event ("The West and Belarus: A Mutual Rediscovery") was organized by the Jamestown Foundation and was held at the Carnegie Endowment for International Peace in Washington, DC, on November 21. The level of representation of both the U.S. and Belarusian sides was quite high. The key panel of the conference was represented by Ben Hodges, Former Commanding General, United States Army Europe, Alieh Kraučanka, Belarus's Deputy Foreign Minister responsible for the U.S. and EU dimensions, and George Kent, Deputy Assistant Secretary for European and Eurasian Affairs, U.S. Department of State, who is the chief negotiator with Minsk (in 2019, he visited Belarus on three occasions).

The event highlighted the growing importance of Belarus for the U.S. in the Eastern European region, mainly due to the facilitation of negotiations on Ukraine, but also because of its "situational neutrality". The U.S. participants noted a marked improvement in bilateral relations over the past few years. Diplomatic messages (which have already become traditional) that the U.S. does not demand that Minsk choose between the East and the West were also voiced, and Kraučanka emphasized that Russia is Belarus's strategic ally and partner, whereas with the U.S. and the European Union the main objective is to normalize the relationships. Belarusian experts focusing on the Belarus-U.S. relations also spoke at the event.

The conference was attended by representatives of the U.S. Department of State and the U.S. Department of Defense, a number of leading think tanks, media and NGOs, and foreign embassies in Washington.

On November 22, Deputy Foreign Minister of Belarus Kraučanka took part in a round table with the participation of U.S. business groups, organized under the auspices of the American-Central European Business Association (ACEBA). Kraučanka also held meetings with John Erath, Deputy Senior Director for European Affairs at the U.S. National Security Council, and Dawn Shackleford, Assistant U.S. Trade Representative.

On November 20, U.S. Secretary of State Michael Pompeo made a statement regarding the progress and results of the Belarusian parliamentary elections. It is characteristic that the statement begins with the recognition of the peaceful conduct of the November 17 parliamentary elections in Belarus and the high number of accredited local and international observers. However, referring to the findings of the OSCE/ODIHR Election Observation Mission, Pompeo said that "serious questions remained with respect to obstacles to party registration, deregistration of candidates, the integrity of the early voting process, non-transparent and non-verifiable vote tabulation, non-pluralistic election commissions, criminal sanctions for defamation, and a restrictive media environment and legal framework." In the statement, Pompeo reiterates that the U.S. unequivocally and firmly supports Belarus's sovereignty and independence.

On December 3, the Central House of Officers in Minsk hosted a meeting of representatives of the Defense Ministry of Belarus and the Department of Defense of the United States. According to the press service of the Belarusian ministry, "the parties exchanged views on topical issues of regional security, as well as discussed the status and prospects of bilateral cooperation in the military sphere." It is hard to understand the real goals and objectives of the visit from the succinct official report, but it can be assumed that this meeting of the military was a continuation of the briefing for the Belarusian Ministry of Defense on the deployment of American troops in Lithuania and the upcoming NATO exercises.

On December 9, it was reported that the U.S. and Belarus signed a bilateral Open Skies agreement. According to the U.S. Department of State, this document establishes rules to facilitate growth of an efficient, market-based international civil aviation system and will help create additional opportunities for travelers and businesses. This is the first agreement of this type reached by the U.S. and Belarus.

In an interview to the Russian radio station Ekho Moskvy, Lukashenka once again referred to possible purchases of American crude in case Belarus and Russia fail to agree acceptable terms of supply with Russia: "*Oil reverse is what I can do, it is the cheapest route; they offer it via Poland, take Saudi or American oil. Whichever is cheaper. Buying from the market. In Gdansk. Reverse the pipe; I have three pipes of the Druzhba system. With Russia. In the first phase, I take one pipe. And I deliver crude to the refineries in the reverse mode.*"

At the end of December, Michael Pompeo was reported to have plans to visit Belarus early in 2020. On December 30, it was announced at a briefing in Washington that he intended to discuss with Lukashenka "the ongoing normalization of bilateral relations and exchange of ambassadors."

Forecast

In 2020, Minsk will continue to focus on improving its relations with the United States. This will be especially important if disagreements with Russia over further integration and energy prices should persist. A high level of diplomatic communication will be maintained in the coming months, and the exchange of ambassadors may be completed by the end of the year.

Trial supplies of American oil to Belarus will be possible within 2-4 months, which will be aimed at demonstrating an alternative to Russian hydrocarbons and strengthening Minsk's negotiating position in the eastern front.

Relationship with Ukraine



Aggregate index: +17
Positive points: +25
Negative points: -8

Trends

1. The intensity of bilateral contacts increased, the two countries started discussing practical aspects of joint programs. For example, in logistics, work is currently underway to expand the potential circle of participants.

2. The old irritants that hinder the promotion of cooperation still remain in place: the vulnerability of the parties to media attacks, Belarus's position on international platforms, and the struggle of Ukrainian and EEU businesses for markets.

Developments and processes

Politics

The months of November and December 2019 were marked by further intensification of bilateral contacts. The last two months of 2019 saw the following:

- on November 21, a meeting of the working group (headed by the energy ministers of the two countries) addressing cooperation in the fuel and energy sector. The participants discussed trade in crude and oil products, logistics, peat extraction and, what really matters to Belarus, cooperation in power generation and sales. The following day, Oleksiy Orzhel, the Ukrainian fuel and energy minister, said that the Ukrainian government expected to buy electricity from the Belarusian Nuclear Power Plant;

- on 22 November, the Ukrainian and Belarusian premiers met on the sidelines of the EBRD investment summit to discuss the implementation of joint projects and the search for new areas for cooperation;

- the 23rd meeting of the Belarus-Ukraine Demarcation Commission;

- on December 12, a meeting of the commission for industrial cooperation development. The Belarusian delegation to Kyiv was led by Minister of Industry Aliaksandr Aharodnikaŭ. The meeting focused on the operation of existing and creation of new assembly plants in Ukraine;

- on December 13, the 27th session of the Intergovernmental Belarus-Ukraine Mixed Commission for Trade and Economic Cooperation;

- on the same day, a regular session of the Belarus-Ukraine expert forum;

- on December 18, a working meeting of the chiefs of the State Border Committee of Belarus and the State Border Service of Ukraine in Lviv. The topic for the meeting is cooperation between the agencies in 2020, improvement of mechanisms of border crossing by citizens.

By the number of working meetings the months of November and December 2019 saw a new record high throughout the entire period of monitoring.

At the same time, there were several other events in the humanitarian, media and public policy fields. Some of them, such as the creation of new discussion and cultural platforms, can become a basis for long-term cooperation programs. Below are the most important ones:

- On November 11, the Honorary Consulate of Ukraine in Belarus was opened in Viciebsk;

- On November 22 , the fifth congress of the All-Ukrainian Association of Belarusians took place in Ukraine, attended by Ambassador of the Republic of Belarus in Ukraine Ihar Sokal;

- On November 23, Minsk played host to events commemorating the victims of Holodomor in Ukraine;

- On December 23, Ukrinform published an interview with Ambassador Sokal. The ambassador noted the increase in trade turnover, Ukrainian export supplies and a decrease in the share of mineral products in mutual trade (while the share of other commodities expanded). Commenting on the humanitarian sector, he noted that six Ukrainian channels had already been authorized to broadcast in Belarus (there was only one a year before);

- On December 29, the Belarusian ambassador to Ukraine took part in the exchange of detainees between Ukraine and the unrecognized DPR and LPR. Since there were two Belarusians on the exchange lists from the Ukrainian side, the ambassador was invited to propose that the Belarusian nationals return to their homeland.

The Ukrainian media also positively perceived the rallies in support of the sovereignty and independence of Belarus. This is a predictable attitude, given the track record of the last five years and the anxiety of part of Ukrainian society about the security of the country's northern borders. This can be confirmed by the dissemination of reports about Lukashenka's and Putin's intention to create a single state – this is how reprints from Kommersant in early December 2019 were interpreted.

Also notably, the traditional negative factors affecting the relationship included Belarus's voting on resolutions associated with the conflict between Ukraine and Russia on international platforms, as well as Russia's attempts to legitimize the LDPR, including by way of arranging meetings of separatist leaders with European politicians.

Economy

The end of the year is as a rule a period when deals are made for the upcoming 12 months. However, in case of Belarus and Ukraine, most agreements were signed at the Forum of the Regions. Nevertheless, there were several events worthy of our attention in the reporting period:

- Ukrainian automotive market analysts noted that MAZ had strengthened its position as the leading supplier of municipal vehicles to Ukrainian cities;

- The administration of Mariupol reported about the purchase of 15 trolleybuses with autonomous capability. In 2019, Ukrainian cities purchased 196 trolleybuses (of which 28 are used EU-made vehicles). Of the total, 29 are BKM-made trolleybuses, 44 are Dnipro trolleybuses assembled from Belarusian kits and four are Vinnytsia-made VTK trolleybuses, also designated as MAZ-Eton assembled in Ukraine. Belarus therefore controls 39% of the trolleybus market in Ukraine, or 45% of the Ukrainian market for new trolleybuses;

- MAZ won the tenders for the supply of buses to Ternopil and Ivano-Frankivsk. The contract to purchase 10 MAZ buses for Kryvyi Rig is also an important one. The auction was held under the "financial leasing" lots, rather than "buses". This is the Ukrainian scheme for bypassing ProZorro tenders where there are risks that bidders might challenge the outcomes.

The negative developments of November and December 2019 include the temporary

suspension of purchases of Belarusian electricity by Ukrainian companies, which was announced by market participants on December 1, 2019. On the one hand, the suspension can be attributed to pricing, while on the other, purchases of electricity in foreign markets are obviously politicized.

Another negative factor is the imposition by the Eurasian Economic Commission of anti-dumping duties on zinc-coated rolled product supplies from Ukraine. While this is not a sovereign decision of the Belarusian government, any possible retaliation from the Ukrainian side will target Belarusian companies.

Forecast

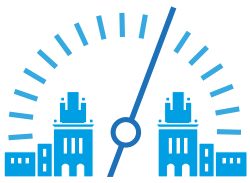
The developments of November and December 2019 showed the parties' interest in developing both trade relations and long-term cooperation programs. The increased intensity of meetings of working groups in various areas suggests that by mid-spring 2020 Belarus and Ukraine may announce the commencement of several large-scale programs.

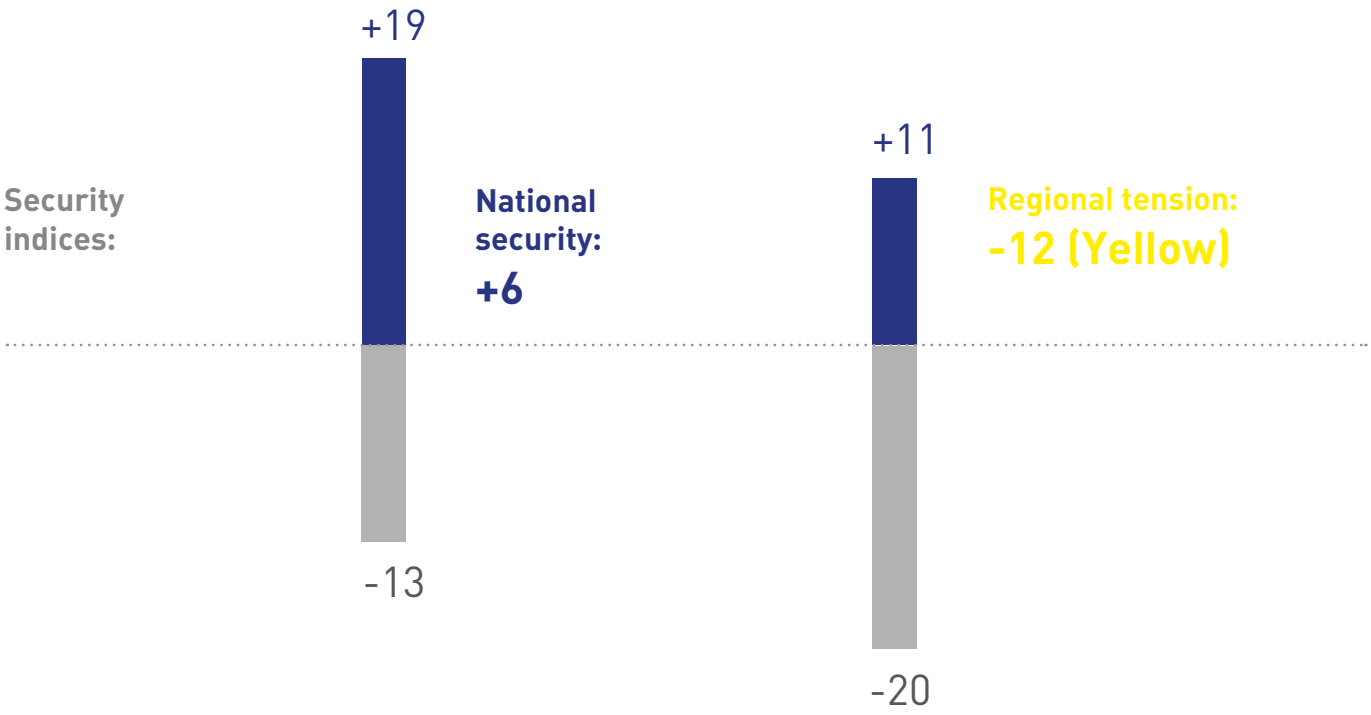
In one of the key areas – the E-40 transport corridor – active discussions of implementation mechanisms will likely take place in winter, whereas practical implementation might start as early as March-April 2020. At least, Ukraine's active search for additional partners (specifically, Georgia) points to potential positive developments in the near future.

Against the backdrop of the oil and gas confrontation between Belarus and Russia, oil transportation, oil refining, and the launch of the Odessa-Brody pipeline will at least be actively discussed at various levels. Crude oil pumping on this route depends primarily on the political will of the Belarusian and Ukrainian parties.

At the same time, both countries remain highly vulnerable in the media sector. Embassies (both in Belarus and Ukraine) intensified their humanitarian activities and contacts with journalists. So far, however, these efforts look more like a buildup of activities without a clear medium-term media policy. Therefore, for the winter-spring of 2020, vulnerability to media attacks remains a highly relevant forecast.

Security Barometer: status of national and regional security





Trends

1. Tensions in the region have subsided a little. Studious efforts were made to settle the conflict in the east of Ukraine. The confrontation in the region has objective constraints, though, since the countries of the region have limited means, and the powers outside the region (the U.S. and Germany in particular) draw the lines they would not cross for now. The region is basically of parochial value for the West and even the United States. This is evidenced by the limited investment in Ukraine.

2. The regional arms race caused primarily by the actions of Poland and Russia remains the main trend.

3. The Belarusian government generally copes with the challenge to shore up national security in the complicated environment. Minsk has to revise many aspects of its defense policy. Belarus has long been staying away from the regional arms race, but recent developments have nudged it to increase military spending, somewhat restrategize national defense, and begin rebuilding the army again.

4. Minsk considers it important to diversify security enhancement efforts towards the West, yet stubbornly seeking closer cooperation with the regional actors, despite provocative actions of its neighbors. Minsk manages to achieve a lot even amid the regional confrontation. Contacts with the neighboring and western countries are becoming more stable. Belarus began to receive more information about NATO's activities, and even does not rule out having joint exercises.

1. National security

Overall status of national security

Reframing defense policy. On December 19, the Security Council of Belarus approved a new national defense plan and an army development concept for the period to 2030. "*The emphasis is put on preventing aggression and on strategic deterrence,*" said State Secretary of the Security Council Stanislaŭ Zas, "*We pay more attention to this than in the previous plan, as well as to possible destabilization of the country. This is our reality. It usually starts with the destabilization of the situation*." It is also planned to increase defense spending to 1.5% of GDP within the next ten years.

Acting Chief of General Staff Aliaksandr Valfovič says the conflicts in Syria, Ukraine, Bolivia and Venezuela were analyzed when the defense plan was worked on. Although the possibility of a large-scale war cannot be disregarded, it is not considered yet. No country is considered as a possible aggressor. In an interview with Zviazda military newspaper, Zas said that the immediate threat to the country was rather coming from the economy, and the president upheld this view as well.

Speaking about the army construction concept, Zas said that the country remained committed to maintaining the current composition and the structure of the armed forces, combat training enhancement, rearmament, and modernization. Minister of Defense Andrej Raŭkoŭ said that the number of personnel would remain unchanged at 65,000 servicemen. But these comments are unlikely to relate to a restructuring of the armed forces in accordance with the current tasks, the more so as (as Valfovič told Zviazda) some immediate response units have been formed to control sections of the national border in case of emergency, and it would take just 90 minutes to secure strategic locations together with the police.

In the December interview with Ekho Moskvy, Lukashenka took a cautious stance on security issues. He said once again that Belarus was Russia's outpost, and that Ukraine's accession to NATO would not enhance security in the region, but he did not consider this even a potential threat. He said Russia and the entire region would face a major threat, if "radical nationalists" would come to power with lethal force in Ukraine.

Mobilization capacity. On November 12, the Council of Ministers approved the regulation on conscription and active duty recall, which embodies provisions of the law of deferments. The military conscription rules got even more stringent, and deferments were finally abolished in the next spring draft.

Assistant to the Minister of Defense for Ideology Leanid Kasinski told Belarus-1 TV channel on November 11 that a new package of incentives for those mustered out of service was prepared. It includes housing and health care preferences.

Army's mobilization chief Aliaksandr Škirenka told STV channel on November 21 that over a quarter of Belarusian army personnel was composed of contract soldiers and sergeants. He also spoke about a considerable reduction in the number of conscripts fit for military service: only 34% in the spring draft of 2018 against 51% in the spring of 2016. Unarmed service is chosen by few.

Border control. President Lukashenka said on November 14 that Belarus and Russia needed a new border protection agreement, if *"the Russian leadership was willing to address this aspect." "If the Russians do not want this, then we should be prepared, as we are now, to defend our interests in the name of the Republic of Belarus, separately."* The agreement on joint actions aimed at protecting the state border of Belarus was signed in 1995, and it has been automatically extended every five years.

Secretary of State Stanislaŭ Zas emphasized that this was not about withdrawing from the agreement, but *"some provisions were executed in a perfunctory manner, or not to the extent necessary." "This is a joint effort to develop infrastructure, to equip the forces involved in the state*

border protection," he said. At the same time, problems of transit to Russia through Belarus were pointed out.

Government call system. On November 21, President Lukashenka held a meeting on the development of the government call system. He said the KGB of Belarus designed *"communications systems and data encryption centers inaccessible to foreign intelligence agencies"*, in particular landline communications for the country's top leadership. The mobile communications system was undergoing tests.

Army training

Little information was published about particular combat training. It was reported in early November that the 120th infantry brigade reinforced with tanks and artillery took part in a battalion tactical training with live firing.

At a seminar with heads of media outlets, Defense Minister Andrej Raŭkoŭ said, *"Over the past three years, we have increased the intensity of operational and combat training activities by 20% and doubled unannounced inspections with moving the troops to the state border."*

Commenting on the results of the academic year, the special-operations force command reported in November on the mandatory inclusion of the artillery component in all exercises (starting from the company level), and the expansion of the involvement of engineer units. The airborne troops now practice parachute jumping as a combination of maneuvers, rather than individual sky dives. Night jumps are widely rehearsed together with airborne landing on designated platforms.

The reconstruction of the large Brest training range was completed at the end of 2019. The configuration of the terrain of the Losvido training ground near Vitebsk was changed. Its firing range was increased from 500 to 1,100 m for sharpshooters' training.

"Belarus is ready for joint exercises with NATO. Negotiations on the possible formats are underway," Chief of General Staff Alieh Bielakonieŭ said in December, *"But we want NATO to keep in mind that Russia remains our strategic ally."* The Ministry of Defense said in late December that such exercises would be purely "*peacemaking*." The ministry stressed that no decisions had been made regarding this point, and the parties are yet in talks. "*There is no regular dialogue between our military leadership and NATO executives in charge of the military component. NATO applies certain restrictions to Belarus. The* [information] *security agreement has not entered into force.*" The agreement was signed back in 1995, but "its entry into legal force is blocked by NATO."

Equipment of the national army

According to the minister of defense, the funds allocated to strengthen the Belarusian army will be used to develop unmanned aircraft, electronic and radar reconnaissance, modernization of strike aircraft, cannonry and rocket artillery. "*The procurement of ammunition, primarily anti-aircraft and anti-tank guided missiles, and other high-precision ammunition is on the priority list,*" he said. Also, the army will discard obsolete equipment and materiel.

In November, Belarus received four Su-30SM fighters from Russia. An agreement to supply 12 aircraft worth USD 600 million was signed on June 20, 2017. "*Initially, we tried to reach an agreement on Russia's assistance in this matter,*" says Secretary of State of the Security Council Stanislaŭ Zas, "*We were proposed to deploy a Russian air base in exchange, so we began to rely on our own capabilities. This is the beginning of the phased re-equipment of our air force with new types of aircraft.*"

In November, Raŭkoŭ said that in 2019, the army received nearly 520 pieces of new and upgraded weapons and military and special-purpose equipment. For the first time, he announced the supply of the modernized 9M113M antitank guided missiles, most likely of Russian manufacture. It is planned to purchase the Ataka antitank missiles from Russia in 2020-2021.

International contacts of the Belarusian army and security agencies

Head of the Defense Ministry's International Military Cooperation Department Alieh Voinaŭ said in an interview with the Belarusian Military Newspaper that the number of international military cooperation events in 2019 increased by 20% from around 500 in 2018 to over 600 in January-November 2019 (140 with the participation of Russia in 2019).

Voinaŭ spoke about a progress in creating a "good neighborhood belt", as evidenced by the four-party meeting of the deputy chiefs of General Staff of Belarus, Ukraine, Poland and Lithuania. "*We expect a significant advancement in the relationship with the United Kingdom and Germany in 2020. We also hope that the so-called "ice age" in our relationship with Poland will become water under the bridge,*" he said. Belarus's accomplishments made it possible to "*acquire data on multinational headquarters and battalion tactical groups in Poland and the Baltic States*" on a regular basis.

The West and NATO. The official visit of Italian Chief of General Staff Enzo Vecchiarelli to Belarus on December 4-5 was the main diversification achievement. Chief of General Staff of Belarus Alieh Bielakonieŭ informed that the parties discussed possible solutions that would enable the Belarusian military to become part of the UN contingent in Lebanon commanded by Italy.

The meeting of representatives of the Belarusian Defense Ministry and the U.S. Department of Defense on December 3 in Minsk was the second most important contact in the western direction. The composition of the delegations has not been publicized. On November 5, representatives of the Defense Ministries of Belarus and the United Kingdom met in London to address bilateral military cooperation matters. They signed an inter-ministerial military cooperation plan for 2020.

On November 12, Hrodna hosted consultations between the Defense Ministries of Belarus and Poland on the planning of bilateral military cooperation. Attending the event was Director of the Department of Military Foreign Affairs of the Ministry of Defense of Poland Tomasz Kowalik. The parties signed an inter-ministerial plan of military cooperation events in 2020. Head of the International Military Cooperation Department of the Defense Ministry of Belarus Alieh Voinaŭ and Lithuanian Defense Ministry's Defense Policy Director Robertas Sapronas held negotiations on December 4 in Minsk.

Post-Soviet area. On November 13-14, a delegation led by Belarusian Army Signals Commander Alieh Miščanka took part in a special operational assembly of the senior staff of the Russian Signal Corps.

Consultations on the draft CSTO military cooperation plan for 2021-2025 were held on November 19-21 at the Joint Headquarters of the Collective Security Treaty Organization in Moscow. Secretary of State of the Security Council of Belarus Stanislaŭ Zas participated in the 7th meeting of the secretaries of the CIS Security Councils held on November 20 in Moscow. Acting Chief of General Staff Aliaksandr Valfovič took part in a regular session of the CSTO Military Committee held on December 13 in St. Petersburg. The arms control advisory group of the Defense Ministries of Belarus and Russia sat on December 17-19 in Moscow.

The Joint Council of the Transport Troops of Belarus and Russia held a session on December 14 in Sluck at the headquarters of the 30th railway brigade. Representatives of the Standing Committee of the Union State and Belorussian Railways took part in the event.

President Lukashenka and Defense Minister Raŭkoŭ participated in the CSTO summit on November 27-28 in Bishkek. The parties discussed international security, reinforcement of the Tajik-Afghan border, cooperation with the UN, CSTO defense capacity buildup, and the celebration of the 75th anniversary of the victory in the Great Patriotic War of 2041-2045.

The Ministry of Defense of Belarus notably did not provide any reports on two important joint events scheduled for December. Respective information was only published by the Russian side.

First, a group of Belarusian officers took part in an operational-mobilization seminar with the leadership of the Russian Western Military District (WMD) in the Leningrad Region chaired by

the WMD commander and attended by the commanders of the Baltic Fleet, combined arms and tank armies, and the air force and air defense group.

Second, almost simultaneously, another group of Belarusian officers made a three-day visit to the Kantemirovskaya Tank Division stationed in the Moscow Region. The program included over a dozen joint lectures and demonstrational field exercises under the leadership of WMD Tank Army Commander Sergei Kisel. The event was attended by more than 200 officers of the two countries.

China. A delegation of the Belarusian air force and air defense visited China on December 2-6. On December 9-12, head of the International Military Cooperation Department of the Defense Ministry of Belarus Alieh Voinaŭ took part in the wrap up-meeting of the international military cooperation chiefs of the member states of the Shanghai Cooperation Organization in Beijing. The parties adopted a plan for bilateral military cooperation with China.

2. Regional Security

Overall situation in the region

The conflict in the east of Ukraine. The situation in Donbas has improved. After a meeting of the Normandy Four, whose work was blocked in 2016, President of Ukraine Volodymyr Zelensky said on November 19 that "the war in Donbas must be stopped by means of diplomacy alone." After that, on November 20, Russia returned to Ukraine the ships captured in 2018.

It became known in late December that Ukraine addressed Germany, asking for military assistance. The request was turned down. The United States remains the main source of aid to Ukraine. Since the beginning of the conflict through June 2019, the U.S. provided military assistance worth USD 1.5 billion to Ukraine, but the sale of the Javelin guided antitank missiles was the only deal with weapons of relatively big caliber. America's share in assistance rendered to Ukraine is estimated at 70% to 90%. However, Ukraine is by no means a priority for the United States. At the Defense consultations in Kyiv, the U.S. was represented by a deputy assistant secretary of defense.

NATO. Increased military spending by the European members of NATO was reported at the London summit of the organization on December 3-4. They will allocate USD 130 billion more in 2020 than in 2016. Along with global terrorism and potentially, China, "*Russia's aggressive actions constitute a threat to Euro-Atlantic security*", reads the NATO's London Declaration. The NATO members thus "*remain open to dialogue and a constructive relationship with Russia when Russia's conduct makes this possible.*" An updated defense plan for the Baltic States and Poland was approved at the summit.

On December 20, U.S. President Donald Trump endorsed the defense budget for the fiscal year 2020. The U.S. military spending increased by USD 20 billion. Up to USD 738,734.3 million were allocated to finance the European Security Initiative aimed at increasing the U.S. military presence in Europe. Military assistance to Ukraine will amount to USD 300 million (USD 50 million more than in 2019). Military assistance to the Baltic States will total USD 175 million (for the first time, USD 50 million was allocated to strengthen their air defense).

Russia. Addressing foreign military attachés in December, Chief of General Staff of Russia Valery Gerasimov said, "*Military activity is intensifying in the Baltic States and Poland, in the Black and Baltic Seas, and the intensity of military exercises of NATO is increasing. Their scenarios suggest NATO's targeted preparation for the deployment of its forces in a large-scale military conflict.*" He emphasized, however, that the General Staff did not see prerequisites for an outbreak of a large-scale war in the period to 2050, and proposed to resume dialogue with NATO and to take a number of confidence-building measures.

Neighboring countries. "*We must understand that in the face of current threats, there is no alternative to the intensive strengthening of our defense potential,*" Polish Minister of Defense Mariusz Blaszczak wrote in a very tough policy statement. "*Everyone who says otherwise is an irresponsible person. No one can guarantee us security unless we do it ourselves with our well-thought-out policy of building alliances and a consistent increase in our defense capacity. In the hierarchy of numerous external threats Russia's aggressive militaristic policy is the biggest one for us.*"

Exercises and confidence-building measures in the region

Increasing number of exercises. Russian President Vladimir Putin said in early December that the number of exercises increased by 25% in 2019. The year 2019 saw more than 100 command and staff exercises, 800 tactical exercises with the land forces, almost half of which were bilateral. The Russian Ministry of Defense reported that the intensity of combat readiness inspections of combined arms units of the Western Military District increased by 25% in 2019 from the previous year to more than 70.

The Defense Ministry of Ukraine also reported an all-time high number and scale of air defense exercises: 150 events in 2019.

Expansion of the British mission. In early November, the UK Ministry of Defense announced the extension of the Operation Orbital training mission to Ukraine for another three years until March 2023. British instructors have trained more than 17,500 Ukrainian servicemen since 2015. So far, the mission mainly focused on retraining the land forces and marine corps. Right after the decision on the extension was made, it was announced that the air force and the Navy will be covered as well. Retraining of the naval aviation personnel will be the next step.

Dynamic. In the period under review, 11 relatively large regional exercises conducted by Russia were reported, and the same number was conducted by all other countries taken together (*See Table 1*). This information is incomplete, especially with regard to Russia and Poland.

Table 1. Exercises in the region

Date	Place	Name and subject	Scale	Note
28 October-8 November	Ukraine, Zhytomyr Region	20th Maple Arch-2019 command and staff exercise	Unknown	Ukraine's airborne troops, 300 military personnel of Georgia, Canada, Lithuania, Poland, Macedonia, and Montenegro
28 October - 10 November	Latvia	Furious Axe	Latvian units + 500 foreign troops	Latvian armed forces and NATO Battlegroup Estonia
October - November	Ukraine, exact area unknown	Final tactical air defense exercise with live firing	Unknown	Buk and S-300 systems
4-14 November	Latvia, Irbe Strait	Exercises with Standing NATO Mine Countermeasures Group 1		With the participation of Latvia, Denmark, Norway, the UK, the Netherlands and Germany
4-18 November	Lithuania, Pabrade, near the Belarusian border	Main stage of Iron Wolf – 2019 – II exercise	Around 4,000 military personnel of 11 NATO member states and over 1,000 pieces of equipment	With the participation of Lithuania, Belgium, the UK, Germany, the Netherlands, Norway, Poland, Portugal, the U.S., the Czech Republic and Estonia
Mid-November	Ukraine	3rd international brigade command and staff exercise	Over 100 officers	With the participation of officers of the Lithuanian Military Academy, at the National University of Defense of Ukraine
Mid-November	Russia, Leningrad Region	Anti-sabotage exercise	Infantry group of the Western Military District of Russia, about 500 military personnel, about 30 pieces of equipment	
Mid-November	Russia, Leningrad Region	Exercise with air defense units of the Western Military District of Russia	Around 150 military personnel and 30 pieces of equipment, including the S-400 and Pantsyr-C1	

Date	Place	Name and subject	Scale	Note
Mid-November	Russia, Leningrad Region	Artillery exercise	Around 1,000 military personnel, 250 pieces of equipment	Mortars, howitzers, multiple rocket launchers, and helicopters
19 November	Russia, Leningrad Region	Exercise with two units of an infantry brigade of the Western Military District of Russia		Practiced fire support for mobile defense from howitzers and multiple rocket launchers
Around 20 November - 5 December	Ukraine, Odessa and Mykolaiv Regions	Bilateral command and staff exercise	57th infantry brigade of the Ukrainian army	
Late November	Ukraine, Bukovyna	Tactical exercise with live firing	Battalion tactical group of the 80th assault combat battalion of the Ukrainian army	
1 December	Ukraine, Black Sea	Ukrainian-French exercise	Priluki patrol boat of the Ukrainian Navy and the French Commandant Birot corvette	
3-6 December	Estonia	7th NATO Cyber Coalition cyber security exercise	Nearly 700 civilian and military cybersecurity experts from 27 NATO member states, 6 partner states and the EU	
Early December	Russia, Kaliningrad Region	Exercise with Baltic Fleet's logistics units	Over 400 military personnel, about 100 pieces of equipment	Over 2,400 tonnes of cargo transported on public roads
Early December	Russia, Voronezh, Belgorod, Bryansk, Smolensk, Kursk, Tambov and Moscow Regions	Command and staff exercise with communications units of the combined arms army of the Western Military District of Russia	Over 600 military personnel, about 100 pieces of equipment	
9-13 December	Russia, Ryazan Region	Operational assembly of the airborne forces command of Russia	100% of the Airborne Forces leadership, over 800 military personnel, 150 pieces of equipment in the tactical episode	Under the leadership of Colonel General Andrei Serdyukov, Commander of the Airborne Troops
Mid-December	Russia, Leningrad Region	Special tactical exercise with an infantry brigade of the Western Military District of Russia		UAVs, electronic warfare equipment, artillery, and armored vehicles. The main part of the operational-mobilization assembly of the Western Military District leadership, possibly, with the participation of a group of Belarusian officers
Late December	Ukraine, Mykolaiv Region	Bilateral command and staff exercise with live firing		Involved airborne troops and aircraft of the armed forces of Ukraine
Late December	Russia, Baltic Sea	Torpedo firing exercise	Aleksin small anti-submarine ship and Boyky corvette	

Date	Place	Name and subject	Scale	Note
Late December	Russia, Moscow Region	Exercise with infantry units of the tank army of the Western Military District of Russia with live firing	Around 1,500 military personnel and 300 pieces of equipment	Around 60 tanks and over 110 armored infantry carriers
Late December	Russia, Baltic Fleet	Baltic Fleet's air defense exercises to repel airstrike	Over 200 military personnel and 20 pieces of equipment	Including S-400, S-300, Pantsyr-S, up to 10 jets and helicopters

The number of reported confidence-building measures reduced to five. (*See Table 2*)

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
4 November	-	-	Negotiations of State Secretary of the Security Council of Belarus Stanislaŭ Zas and head of the Polish National Security Bureau Pawel Soloch on security and confidence-building measures
11-15 November	Belarus	Denmark	CFE, two military units inspected
12-14 November	Lithuania	Belarus	Under the Vienna Document 2011 and Agreement on Additional Confidence-Building Measures, the 19th infantry brigade inspected
18-22 November	Belarus	Poland	Under the Agreement on Additional Confidence-Building Measures supplement to the Vienna Document, inspection of a district and one military unit
19-21 November	Belarus, Canada	Georgia	Inspection of a military unit subject to monitoring in accordance with provisions of the CFE

Regional forces buildup

Arms race limits. In December, Russian Deputy Prime Minister Yuri Borisov said that the Russian army would not massively procure the latest T-14 tanks and Boomerang armored infantry carriers because of their high cost, and will continue utilizing the T-72 tanks.

The Polish Navy also experiences financing shortages. Although the new Ślązak patrol corvette was added to the Polish fleet on November 28, it will remain the only ship of this series that has been phased out due to the lack of funding. Two submarines will most likely be decommissioned without replacement in 2020. Back in 2018, former head of the Maritime Operations Center of Poland Adam Mazurek said that the state of the Polish Navy was "fatal", and the service life of 90% of the ships was nearing the end.

Land forces. In January-November 2019, the Western Military District of Russia received more than 780 armored vehicles, including 35 BMP-2mod armored infantry carriers, more than 40 T-72B3M tanks and 10 BMP-3 and BTR-80 armored infantry carriers.

It was announced in November that the Ukrainian army was supplied with the first 100 adjustable missiles for the Olkha multiple rocket launchers. The Olkha will replace the Smerch launchers and Tochka-U tactical guided missile systems.

In late November, Lithuania signed a contract on the supply of 200 Oshkosh multipurpose joint light tactical vehicles worth around EUR 145 million. The deliveries will begin in the second half of 2021.

On December 26, Minister of Defense of Ukraine Andriy Zahorodniuk said that Kyiv signed a contract on the supply of the second batch of American Javelin portable antitank guided missile launchers.

The rearmament of the Russian missile brigades of the Western Military District with the Iskander-M tactical ballistic missile systems was completed in December. The Iskanders replaced the Tochka-U tactical guided missile systems. In late December, the Yelnya infantry division (Smolensk Region) began the rearmament with the 152 mm MSTA-SM self-propelled howitzers, which replaced the 122-mm 2C1 Gvozdika.

Russian Strategic Missile Forces Commander Sergei Karakaev said in December that the proportion of new missile systems in the strategic missile forces would reach 76% in 2019, and all systems of Soviet manufacture would be replaced within the next four years.

Air force. Seventeen aircraft were supplied to the air defense units of the Western Military District of Russia in January-November 2019, including six Su-35 fighters, two Mi-28B attack helicopters, one Mi-26 military transport helicopter, three An-26 military transport aircraft, and one Su-24MR reconnaissance aircraft.

The Ministry of Defense of Ukraine informed that the serviceability of aircraft had tripled since 2014.

On December 20, the Polish special forces received four American S-70i Black Hawk helicopters worth USD 20 million each. Previously, three such helicopters were supplied to the Polish police.

UAVs. According to official reports, the total time in the air of unmanned aerial vehicles of the combined arms army of the Western Military District of Russia increased 3.5-fold (other sources reported a 20% increase) in 2019 to compare with 2018. During combat training sessions, the time in the air totaled 1,000 hours (over 1,200 hours according to other sources). The time in the air spent by UAVs of the tank army of the Western Military District in the 2019 academic year doubled to 5,500 hours. Despite the confusion, apparently, this is about the large-scale introduction of non-strike UAVs.

Air defense. In November, the air defense regiment of the Russian Baltic Fleet's army corps (Kaliningrad Region) received the Tor-M2 air defense systems. The anti-aircraft missile regiment of the Russian air defense division (Leningrad Region) completed the rearmament with the S-400 air defense systems in mid-December.

Infrastructure development. It was reported in December that the Polish Defense Ministry would once again allocate PLN 500 million for the construction of roads in 2020. The same amount was provided for this purpose in 2019. The project details are classified. According to official information, Poland planned to build over 150 km of roads of "defense significance, which are priority for national defense and for the fulfillment of allied obligations."

The Russian Ministry of Defense stated that 80 military infrastructure facilities were put into operation in the Western Military District in 2019 to accommodate newly formed units. Defense facilities were also under construction in the Bryansk and Smolensk regions on the border shared with Belarus.

Forecast

The situation in the region will improve somewhat, in particular, thanks to the fading of combat operations in the east of Ukraine. Cautious attempts to improve the troubled NATO-Russia relationship should not be ruled out. Meanwhile, Minsk is likely to show stronger determination to step up its cooperation with the West, being by no means eager to provoke Moscow.

In response to problems in the relationship with the Kremlin in other areas, Minsk will take advantage of security issues, seeking to escape Moscow's pressure. Belarus and Russia will continue difficult negotiations on Russian military facilities in Belarus, the agreement on border protection, the military doctrine of the Union State, which has not been adopted yet, etc. Judging by the buildup of Russian forces in the regions that border on Belarus, the rearmament of its troops (including the Strategic Missile Forces) with systems without Belarusian components, etc., the Russian leadership is going to reduce the role of Belarus as a military ally. Moscow will actually be pushing Minsk towards greater autonomy in terms of defense.

Although Belarus is building up its contacts with the West and NATO while maintaining the alliance with Russia, the country will pursue a relatively independent defense policy, striving for neutrality. Minsk will stay away from regional trends (militarization, the arms race, close integration with larger states and blocs, etc.) wherever possible.

A decision on the involvement of Belarus's contingent in UN peacekeeping operations will be made very shortly. Minsk has long sought to reach a new level of security contacts, and has finally found ways to cope with this task.

Appendix 1

Catalogue of events underlying the relations development indices

Relationship with Russia

Date	Event	Point
4-5 November	Hihin, Papko, Bialiajeŭ, Ejsmant, Žuk on "wars that are not ours"	+1
5 November	Rumas on the approval of 31 roadmaps by December 1	+1
13 November	Makiej on foreign policy priorities: Russia is an ally	+1
15 November	Lukashenka, Lappo and Zas on border protection and revision of the 1995 treaty	-1
17 November	Emotional statements by Lukashenka on integration issues ("why the hell do we need this union") and Medvedev's reply	-2
18 November	Joint board session of the Foreign Ministries, program for concerted action	+1
18 November	Congratulations from Lavrov on successful conduct of the elections	+1
20 November	Forum "Union State 2030 – Trajectory of the Future"	+1
21 November	Meeting of the Parliamentary Assembly of the Union State	+1
25 November	Visit by the governor of the Kaliningrad Region	+1
27 November	Approval of the draft budget for 2020 with gas prices unchanged from 2019	+1
4 December	National Academy of Sciences' data on public opinion on Russia	+1
5 December	Lukashenka: "Russia is our strategic partner"	+1
6 December	Meeting of Rumas and Medvedev	+3
7 December	Meeting with Putin in Sochi	+3
11 December	Oil balance of 24 million tonnes signed	+2
18 December	Phone conversation between Rumas and Medvedev	+1
20 December	EEU and CIS summits, meeting between Putin and Lukashenka	+3
23 December	Kruty: integration package agreed, 2-3 matters left	+1
24 December	Lukashenka's interview to Ekho Moskvy, negative statements about integration and Russia's actions	-1
26 December	Food supply balances agreed	+1
27 December	Transit contract between Russia and Ukraine	-2
31 December	Protocol on natural gas prices for the first two months of 2020	+1

Date	Event	Point
November-December	No compensation for dirty oil (all Russian counterparties received it)	-2
November-December	No integration roadmaps agreed	-1
November-December	Restrictions on supplies of Belarusian products lifted	+1
November-December	No contract for gas and oil	-3
November-December	Visa agreement not inked, postponed for next year	-1
November-December	Extension of the agreement on Russian military bases brought up	-1
Total		**+10**

Relationship with the EU

Date	Event	Point
4 November	Kraŭčanka's visit to Warsaw, talks with Deputy Foreign Minister Marcin Przydacz, participation in the meeting of the bilateral Belarus-Poland expert format	+1
4 November	Zas meets with Chief of the National Security Bureau of Poland Paweł Soloch	+2
5 November	Makiej visits Sweden, participates in a high-level meeting on the occasion of the 10th anniversary of the Eastern Partnership	+2
11-12 November	Lukashenka's official visit to Austria	+3
12 November	Dapkiunas's meeting with Latvian Ambassador Einars Semanis	+1
13 November	Belarus Economic Forum in Munich	+1
18 November	Official presentation to Lithuania of the results of the Belarusian expert examination of materials from the possible burial site of Kastuś Kalinoŭski's brother	+1
21-22 November	Rumas participates in the EBRD investment summit for the Eastern Partnership countries in London, meets with European Commissioner Johannes Hahn, EBRD and EIB management	+2
21 November	Agreement signed to create a Belkommunmash assembly plant in the UK	+1
22 November	Second loan agreement signed between Belarusbank and the EIB, as well as a financial contract between Belagroprombank and the EIB	+1
22 November	Belarusian delegation led by Deputy Prime Minister Pietryšenka participates in the solemn ceremony of the burial of the remains of participants in the 1863 uprising	+2
25 November	Lukashenka and Makiej meet with Swedish Foreign Minister Ann Linde and Finnish Foreign Minister Pekka Haavisto	+2
29 November	5th meeting of the twin cities of Belarus and Poland in Maladziečna	+1
3 December	Rumas meets with First Vice President of the EBRD Jürgen Rigterink, EUR 259 million loan agreement signed for the reconstruction of 12 bridges and the M3 highway	+2
4-5 December	Makiej's meetings on the sidelines of the OSCE Ministerial Council in Bratislava with the foreign ministers of Bulgaria, Latvia, the Netherlands, Estonia and Poland, as well as participation in an EaP working breakfast organized by the new EU High Representative for Foreign Affairs and Security Policy	+2
5 December	Kraŭčanka meets with the Director for Eastern Europe, Caucasus and Central Asia of the Federal Foreign Office of Germany, Michael Siebert	+1
6 December	Kraŭčanka meets with British Ambassador Jacqueline Perkins	+1
9 December	Minister of Transport and Communications Avramienka meets with Minister for Infrastructure of Sweden Tomas Eneroth	+1
11 December	XI Forum of Polish Investors in Minsk attended by Minister of Antimonopoly Regulation and Trade Kaltovič	+1
17 December	Dapkiunas meets with Ambassador of the Netherlands Daphne Bergsma	+1
17-18 December	8th meeting of the Belarus-EU Coordination Group in Brussels	+1
20 December	Kraŭčanka meets with Ambassador of Ireland Peter McIvor	+1

Date	Event	Point
23 December	Critical remarks by the Belarusian Foreign Ministry on the protracted process of internal harmonization of the texts of the visa facilitation and readmission agreements in the EU	-1
November-December	Positive materials in the official media and statements of the country's leadership regarding the EU	+1
Total		**+31**

Relationship with China

Date	Event	Point
1-6 November	Continuation of Snapkoŭ's visit to China, meetings in Eximbank, Tianjin, with member of the Politburo of the Central Committee of the Communist Party of China Guo Shengkun	+2
5 November	Minister of Agriculture Chacko visits China	+2
6 November	Opening of a Belarusian pavilion at the 2nd China International Import Expo, Shanghai; Belarus-China business on the sidelines of the expo	+1
6-7 November	Deputy Minister of Economy Piarminava visits China to participate in the 2nd China International Import Expo	+2
7-9 November	Days of Minsk in Shanghai	+1
8 November	Belarus-China Agriculture Forum, Chengdu city	+1
11 November	Ratification by the Belarusian side of the agreement to exchange visa requirements between Hong Kong and Belarus (extension of the visa-free stay for up to 30 days)	+1
12 November	Signing of the agreement on the establishment of twin-city relations between Minsk and Shanghai	+1
13 November	Ratification by the Belarusian side of the agreement on international road transport of passengers and freights between Belarus and China	+1
14 November	2nd International Scientific and Practical Conference "Experience of the Chinese policy of reform and openness and its relevance for the Belarusian model of sustainable socioeconomic development" at BSU Confucius Institute in Belarus	+1
2 December	Opening of the Yanka Kupala Center of Belarusian Language and Culture at the BSU Training Center in Sanya, Hainan	+1
2-6 December	A Belarusian Air Force and Air Defense delegation visits China	+1
3 December	Signing of a partnership agreement to open a joint English-language postgraduate school in 2020 between BSU and Foshan University, Guangdong	+1
11 December	Belarus-Asia Forum, Hong Kong	+1
13 December	Signing of the conformity assessment cooperation agreement with China Certification and Inspection Group	+1
20 December	Belarus takes RMB 3.5 billion 5-year external loan from the Shanghai branch of China Development Bank	+2
21-23 December	Deputy Head of the International Department of the CPC Central Committee Qian Hongshan visits Belarus	+1
27-28 December	Belarusian delegation participates in the 4th International Cultural Industries Fair 2019, Sanya, Hainan	+1
Total		**+22**

Relationship with the U.S.

Date	Event	Point
20 November	U.S. Congress hearings on Russia's influence in Belarus	+1
20 November	Pompeo's statement on parliamentary elections in Belarus	+1 -1
21 November	Jamestown Foundation conference "The West and Belarus: A Mutual Rediscovery"	+1
21-22 November	Kraŭčanka visits Washington	+1
27 November	Kraŭčanka meets with U.S. Charge d'Affaires in Belarus Jenifer Moore	+1
3 December	Representatives of the Defense Ministry of Belarus, U.S. Department of Defense in Minsk	+1
3 December	U.S., Belarus sign a bilateral Open Skies agreement	+2
24 December	Lukashenka announces possible purchases of American oil in an interview to Russian radio station Ekho Moskvy	+1
Total		**+8**

Relationship with Ukraine

Date	Event	Point
8 November	MAZ's leadership in Ukraine's municipal vehicle segment	+1
5 November	Mariupol buys MAZ vehicles	+1
5 November	New Ukraine-Belarus training project on cultural diplomacy and Belarus-Ukraine relationship	+1
6 November	People's Servant series on Belarus-1	+1
11 November	Opening of the Honorary Consulate of Ukraine in Viciebsk	+1
21 November	Meeting of the working group on cooperation in the fuel and energy sector	+1
22 November	Ukrainian government expects to buy energy from Belarusian Nuclear Power Plant	+1
22 November	Rumas and Honcharuk meet in London	+1
22-23 November	Events (in Belarus) in commemoration of the victims of the Holodomor in Ukraine	+1
23 November	Ternopil buys BKM-made trolleybuses	+1
30 November	Ukrainian media reports "Putin and Lukashenka create a single state	-1
1 December	Ukrainian companies suspend electricity import from Belarus	-1
3 December	EEC imposes anti-dumping duties on rolled products from Ukraine	-1
3-5 December	23rd meeting of the Demarcation Commission	+1
6 December	Lukashenka expressed condolences in connection with the tragedy in Odessa	+1
6 December	Negative media response in Ukraine after the meeting of representatives of the DPR and LPR with a member of the German parliament in Minsk	-1
9 December	Negative media response in Ukrainian media after Belarus voted against UN resolution on the militarization of the Black and Azov Seas	-1
11 December	New samples of machinery on the MAZ chassis are presented by Ukrainian manufacturers	+1
12 December	Belarusian Ambassador invited to participate in the meeting of GUAM Prime Ministers (as an observer)	+1
12 December	Meeting of the working group for industrial cooperation development	+1
13 December	27th meeting of the Inter-governmental Belarus-Ukraine mixed commission on trade and economic cooperation	+1
13 December	Belarus-Ukraine expert forum	+1
17-20 December	Discussion in the Ukrainian media of a DW film about political assassinations in Belarus	-1
18 December	Media negativity after Belarus voted against the UN General Assembly resolution on the Crimea	-1
18 December	Meeting of the chiefs of the Ukrainian Border Guard Service and the State Border Committee of Belarus in Lviv	+1
23 December	Interview with Ambassador of Belarus Sokal to Ukrinform	+1

Date	Event	Point
23 December	Belarus increased non-mineral export to Ukraine	+1
23 December	Arrest of a group that made counterfeited products under Belarusian brands	+1
23 December	Six Ukrainian TV channels currently available in Belarus	+1
23 December	BKM wins a tender in Ivano-Frankivsk	+1
26 December	Ukrainian media reports that Lviv deputies request the city administration to stop purchasing Belarusian-made vehicles (media manipulation)	-1
28 December	Agreements on lease services with Ukrainian companies	+1
29 December	Belarusian Ambassador participates in the exchange of detained persons (as part of the implementation of the Minsk agreements)	+1
Total		**+17**

Appendix 2

Catalogue of events underlying the security indices

Date	Event	National security	Regional tension
November-December	Developments in the conflict in the east of Ukraine	+1	+1
November-December	11 exercises conducted by Russia in the regions that border on Belarus (*see Table 1*)	0	-3
November-December	11 exercises of NATO member states and Ukraine in the region that borders on Belarus (*see Table 1*)	-3	-3
November-December	Unknown number of exercises of the Polish armed forces	-3	-3
November	5 confidence-building events (*see Table 2*)	+3	+3
Early November	Extension and expansion of the British Operation Orbital mission	-1	-1
Early November	Battalion tactical training exercise with the 120th infantry brigade of the armed forces of Belarus	+1	0
5 November	Task meeting of representatives of the Defense Ministries of Belarus and the UK	+1	+1
7 November	Policy statement by Polish Defense Minister Błaszczak on defense issues	-2	-2
12 November	Belarusian-Polish military consultations	+1	+1
12 November	Information about supplies of 9M113M guided anti-tank missiles to the Belarusian army	+1	0
13-14 November	Participation of the Army Signals commander of the armed forces of Belarus in the assembly of the Signal Corps leadership	0	0
21 November	Meeting on the development of the government call system with the president of Belarus	+1	0
November	Belarus received four Su-30SM jets from Russia	+2	0
Late November	Lithuania signed a contract on the supply of 200 Oshkosh JLTVs	-1	-1
November	The army corps of the Baltic Fleet of Russia received Tor-M2s	0	-1
2-6 December	Visit of a delegation of the air force and air defense of Belarus to China	+1	0
3 December	Meeting of representatives of the Belarusian and U.S. defense ministries	+1	+1

Date	Event	National security	Regional tension
3-4 December	NATO summit in London	0	-1
4 December	Negotiations of the Ministries of Defense of Belarus and Lithuania	+1	+1
4-5 December	Official visit of the chief of General Staff of the Italian armed forces to Belarus	+1	+1
18 December	Russian Chief of General Staff Gerasimov addressed foreign military attachés	0	+2
19 December	Adoption of a new defense plan and a concept of the Belarusian armed forces construction for the period to 2030	+2	0
20 December	Polish army received Black Hawk helicopters	-1	0
Late December	Completion of the reconstruction of two Belarusian military training grounds	+1	0
Late December	Participation of groups of Belarusian officers in an assembly of the senior staff of the Western Military District of Russia in the Leningrad Region and in exercises in the Moscow Region	+1	-1
Late December	Re-equipment of missile brigades of the Western Military District of Russia with Iskander-Ms	0	-1
Late December	Re-equipment of the infantry division stationed in the Smolensk Region with 152 mm MSTA-SM self-propelled howitzers	0	-1
-	Considerable increase in activities with UAVs of the Western Military District of Russia	0	-1
December	Continued construction of secret military roads in the east of Poland	-1	-1
December	Commissioning of Russian military infrastructure at the Belarusian border	- 1	0
Total		**+6**	**-9 (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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