№ 17 (September and October 2020)

MINSK BAROMETER

Monitoring of foreign policy and regional security

Dear readers!

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We are happy to present the seventeenth issue of the Minsk Barometer, a monitoring of the foreign policy and security situation in Belarus in the months of September and October 2020.

Russia continues to support the incumbent Belarusian authorities. Nevertheless, mutual discontent between Minsk and Moscow is growing increasingly bitter. Russia is interested in seeing the situation in Belarus stabilize, but not at any cost.

Tensions in relationships between Minsk and the **European Union** continue to aggravate. Almost all positive trends in the bilateral framework, which had been observed throughout the previous five years, were disrupted. Negative mutual rhetoric was supplemented by targeted individual sanctions imposed by both sides and threats to impose harsher measures.

China's political support for Belarus is ongoing as well. In the wake of the first wave of the COVID-19 pandemic, the intensity of contacts at various levels was restored.

The relationship with the **U.S.** continued to deteriorate, which was manifested mainly in the escalation of mutual rhetoric. The American sanctions, however, proved to be more of a symbolic nature, whereas official Minsk demonstrated its willingness to maintain ties.

Mutual negative rhetoric snowballed in Belarus's relationship with **Ukraine**; the negative background was also maintained in the media. At the same time, constructive economic engagement was preserved.

In **national security**, the incumbent authorities were heading towards building parallel and informal security structures inside the country. The situation in Belarus became an important **regional security** factor, which impacted *inter alia* NATO military activities. However, the situation became less acute as early as October.

Yours respectfully,

Dzianis Melyantsou,

Editor, Minsk Barometer
Minsk Dialogue Council on International Relations,
Belarus's Foreign Policy Programme
Coordinator

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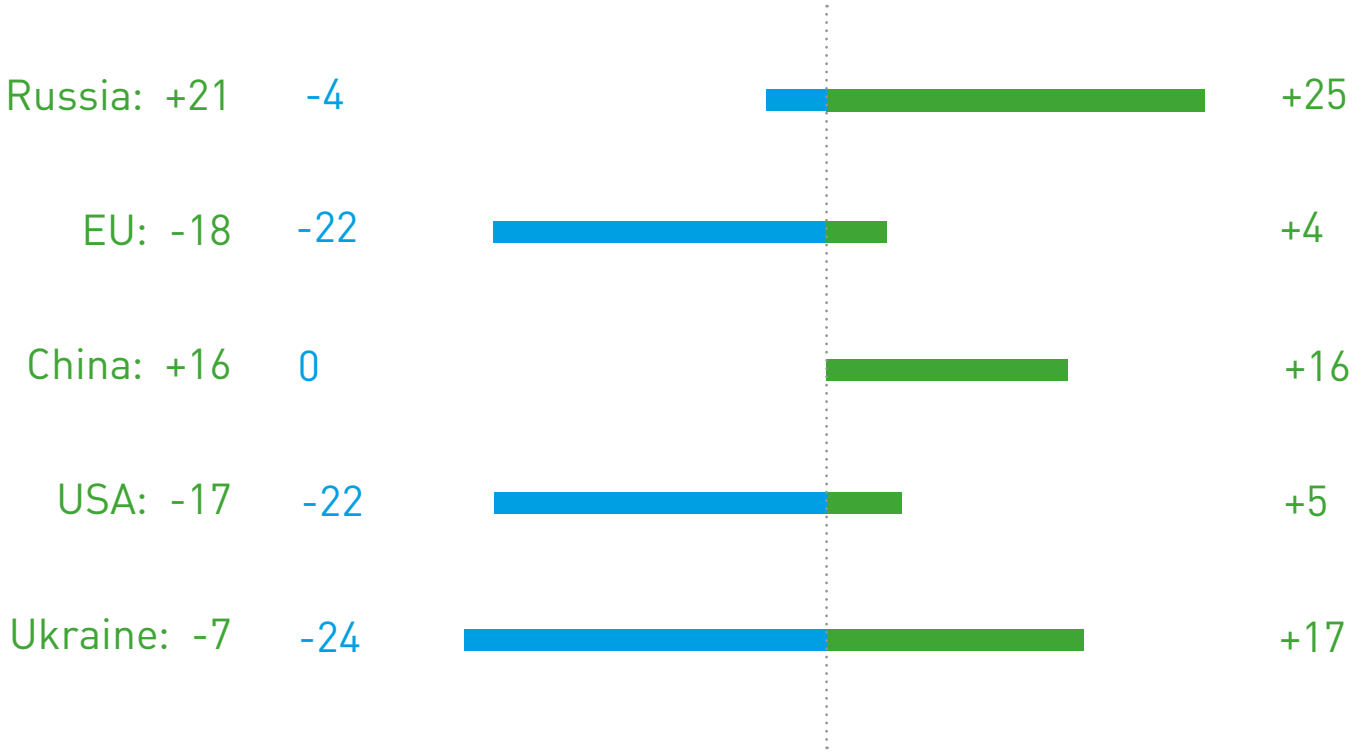
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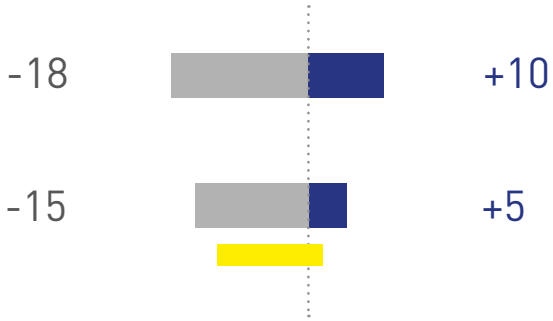
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Relations development indices:



Security:

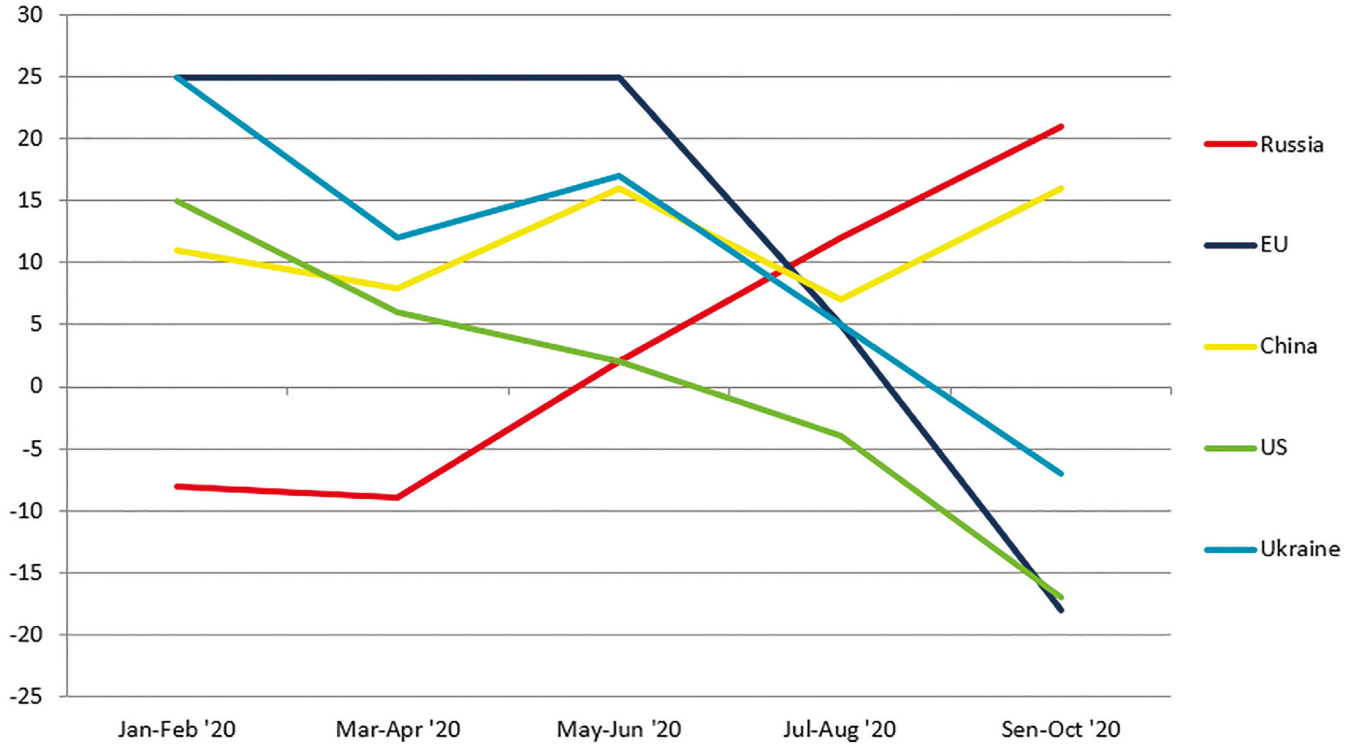


National: -8

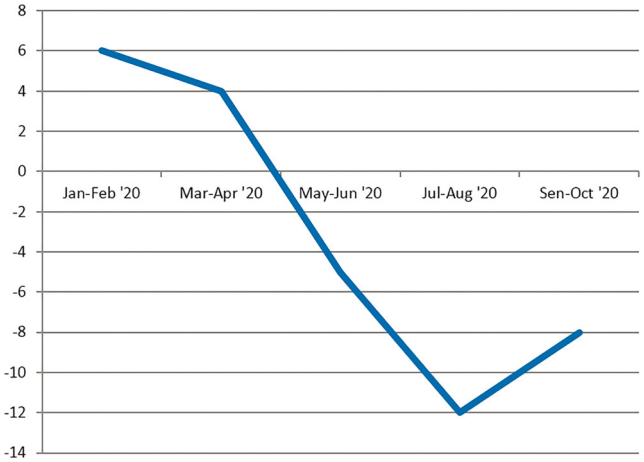
Level of regional tension: -10
(yellow level)

The yellow level implies that military and other activity is observed that is capable of leading to the escalation of tensions. The situation calls for close attention.

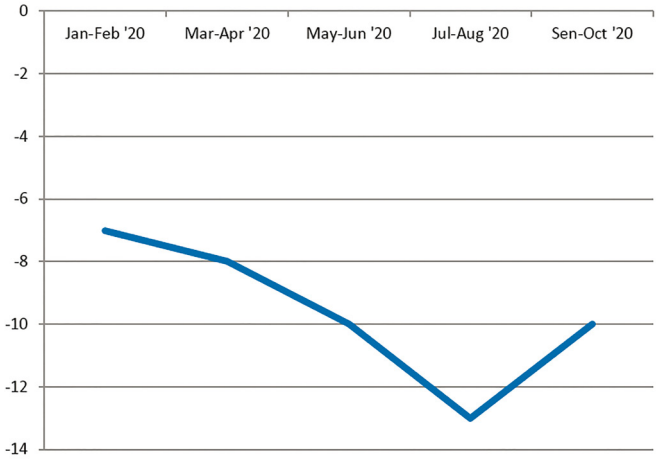
Dynamics of foreign policy indices



National security



Level of regional tension



Relationship with Russia



Aggregate index: +21
Positive points: +25
Negative points: -4

Trends

1. Communication trends in the two months under review appear to have been dissimilar: frequent in September, contacts with Russia significantly decreased in October.
2. Mutual discontent between Minsk and Moscow is growing.
3. Russia is interested in having the situation in Belarus stabilize, not at any cost, though.

Developments and processes

Political agenda

The political agenda of the bilateral relationship with Russia was predominantly determined by the political crisis in Belarus. It was also influenced by processes that were genuinely significant for Russia: the accusations of the use of chemical weapons (the poisoning of Navalny) and ensuing sanctions, the blitz revolution in Kyrgyzstan, the war in Nagorno-Karabakh, and the second wave of the COVID-19 pandemic.

After the elections, Russia stood by the incumbent Belarusian authorities. It does not imply, however, that this significantly helped Moscow and Minsk make any headway towards mutual understanding, as only an insignificant portion of many issues on the bilateral agenda was resolved during the months of September and October.

It should also be noted that Belarus entered the political crisis at the lowest point of trust in its relations with Russia – by August, the conflict with Moscow had already simmered for up to 24 months with only brief interruptions.

Only source of aid

Russia is the only country that not only unconditionally recognized Lukashenka's victory and his right to smother protests, but also supported the incumbents with real actions.

In August, Russia put together an enforcement reserve for the Belarusian authorities, supported Belarus internationally and in contacts with foreign heads of state, and sent TV professionals to replace the striking journalists of Belarusian national channels.

In September, in agreement with Lukashenka, the enforcement reserve was withdrawn, but otherwise the policy of support continued. Putin met with Lukashenka in Sochi on September 14, where he decided to lend Belarus USD 1.5 billion, supply Russian-made COVID-19 vaccine to Belarus, and endorsed the plan – proposed (or approved) by Lukashenka – to resolve the political crisis through constitutional reform and having a new election.

Air travel between the countries was restored, Russian Prime Minister Mishustin, Defense Minister Shoigu, and a number of Russian governors visited Minsk, and a forum of regions was held. Foreign Minister Uladzimir Makiej and Prime Minister Raman Haloŭčanka visited Moscow. The large-scale military exercise Slavic Brotherhood was held.

In October, Belarus received the first installment of the Russian loan, and this is where Russia's active support halted. Contacts were suspended as well – in fact, only Naryshkin visited Minsk in October, while Makiej and Lavrov had only one telephone conversation. The lower house of the Belarusian parliament ratified the agreement on mutual recognition of visas, and communication agencies agreed to bring down roaming fees (as compensation for plans to cancel roaming that had never been implemented).

Negotiations over the terms of natural gas and oil supplies are in progress, at least that is what Belarusian officials insist on; Belarus hopes to receive the second installment of the Russian loan before Christmas, but Russian executives have not made any comments on this, and Gazprom in its report noted the growing risks of gas transit through Belarus and embarked on negotiations with Ukraine and additional reservation of transit capacities.

In our previous issue, we were skeptical about both the effectiveness of the meeting between Putin and Lukashenka, and the advancement of the relationship in general, because of the completely different perspectives of the parties. Russia believes it is saving Lukashenka, which is why he has no other choice, so he should be grateful, compliant, and obliging.

Lukashenka did show his gratitude at first – especially during his meeting with Putin on September 14. However, even then he offered Putin nothing in return – except monthly anti-NATO exercises, which Russia does not particularly need. Over time, the point that it is Lukashenka that is actually saving Russia from the revolution and NATO by his actions, while the political situation inside the country is not critical completely prevailed in propaganda, Lukashenka's rhetoric, and foreign policy. These mismatching perspectives lead to mutual insults and – for the time being – petty conflicts.

Constitutional reform

At the meeting with Putin, a constitutional reform was announced to ultimately resolve the political crisis in Belarus. The Russian authorities – Putin, Peskov, Lavrov – and many others have made repeated statements regarding the constitutional reform. On aggregate, the pro-reform rhetoric gives the impression that Russia imagines that the reform will be preceded by dialogue with such sort of opposition whose engagement has potential to reduce tensions in society and appease protesters. Following the discussion, amendments to the Constitution are expected, which would redistribute power from the president towards the government, parliament, and local authorities. As soon as the amendments to the Constitution have been adopted, new presidential election will be held in Belarus. Estimates as to the duration of the reform process varied from half a year to two years.

It is hard to say whether the Kremlin's view of the solution to the political crisis in Belarus resulted from the proposals made by the Belarusian side itself or it is a mere speculation by Moscow officials, but it seems Russia perceives this option as the baseline scenario.

Military alliance

Whereas before August 9 Lukashenka personally and the Belarusian authorities generally had blamed Russia for the political disturbances in Belarus, after August 9, the West and NATO were named the authors and orchestrators of the protests. On that ground, Lukashenka asked Moscow for military assistance. Moscow confirmed its willingness to provide it in case of a military threat. During his meeting with Putin, Lukashenka suggested that joint exercises should be held in Belarus on a monthly basis, but Putin said it would suffice if both countries were following the originally agreed plans. However, Shoigu's visit

on October 16 and the *Slavic Brotherhood* exercise on September 22–29 were just in line with Lukashenka's desire to demonstrate Belarus's immunity to NATO.

Media support

Russian state TV channels were unequivocally against all dissenters in Belarus and on Lukashenka's side, i.e. strictly followed Minsk's media policy throughout August, September and early October. At the end of October, the media policy was slightly altered – the wrong of protesters, legitimacy of law enforcers, and Lukashenka's conduct started to be questioned. Comments on developments in Belarus began to feature half-hearted condemnation of excessive violence against protesters and attempts to pass off round tables organized by the authorities and meetings with KGB jail inmates as dialogue. There was also some dissatisfaction with Lukashenka's "ingratitude" and his propensity to put off political reform.

Unresolved issues

A recap: in September and October, Russia supported Lukashenka politically, financially (the USD 1.5 billion loan), and rendered media assistance. Belarus, for its part, spoke in favor of exclusive cooperation with Russia against the backdrop of military, political and media threats from the EU, NATO and the U.S., as well as pursued closer engagement with Russia in terms of joint defense.

However, progress with respect to the bilateral agenda, which has taken shape over the past 24 months, is quite modest. The few achievements include the advancement on the agreement on mutual recognition of visas, reduction of roaming charges, payment of the accrued gas debt and resumption of air travel between the countries. This notwithstanding, obstacles to free travel across the Belarus–Russia border remain significant. The USD 1.5 billion loan offered by Russia does not fully resolve the predicament of the refinancing of the Belarusian state and especially corporate debt.

The following unresolved issues persist: gas prices and gas transit via Russian territory for deliveries to Belarus, compensation for the tax maneuver concerning crude supplies, rules for Belarusian-made goods to access the Russian market, and roadmaps for integration within the framework of the Union State.

Forecast

The discrepancy in the assessment of the situation and in the overall perception of what is right and wrong has already become a reason for mutual irritation of the Russian and Belarusian authorities. However, Novembers and Decembers used to be overshadowed by conflicts over oil and gas contracts even during the friendliest spells. Therefore, one can be quite certain that mutual annoyance will only keep growing.

However, the increase in the degree of confrontation will be restrained by the COVID-19 pandemic, which will impose a significant limitation on contacts. The two countries will most likely exchange unspoken grievances mainly through their respective controlled media outlets.

Relationship with the European Union

Aggregate index: -18
Positive points: +4
Negative points: -22



Trends

1. Amidst the ongoing political crisis in Belarus, tensions continue to grow in the relationship between Minsk and Brussels; virtually all of the positive trends observed in the bilateral framework throughout the previous five years were broken.

2. Negative mutual rhetoric was enhanced by selective personal sanctions imposed by both sides and threats to introduce harsher actions.

3. Belarus's particularly tense relations are those with Poland and Lithuania.

Events and developments

As expected, the deterioration of Belarus's relations with the EU, which started after the presidential election, continued and deepened in September and October. Minsk and Brussels turned from sharply negative statements addressed to each other to the imposition of restrictions in practice, which heralds the commencement of a full-fledged diplomatic crisis.

Tensions were growing throughout the entire period under review. Official Minsk harshly responded to all the statements and decisions of the EU institutions and member states condemning the acts of the Belarusian authorities in the context of the internal political crisis. In the middle of September, the Ministry of Foreign Affairs and the Council of the Republic spoke negatively about the resolution of the European Parliament concerning Belarus, whereas the Ministry of Energy and the Council of the Republic slammed the resolution of the Lithuanian Seimas. As he spoke to the media when recording his speech for the general debate of the 75th session of UN General Assembly on September 18, Foreign Minister Uladzimir Makiej came down on the entire EU and especially the Lithuanian and Polish authorities. The Foreign Ministry of Belarus made similarly critical comments on Sviatlana Cichanoŭskaja's meetings with the leaders of the EU member states.

That rhetoric was expectedly followed by more serious actions. On September 29, Minsk declared the introduction of retaliatory individual sanctions against officials from the three Baltic States, which had become the first European nations to publish their lists of sanctions with respect to Belarus. Minsk traditionally did not publicize its lists. Even earlier, on September 7, Belneftekhim oil and chemistry concern confirmed that negotiations had started and preparations were underway for redirecting export flows of Belarusian oil products from Lithuania to Russian seaports. The work to reorient export flows began after

Aliaksandr Lukashenka gave instructions in August to review economic cooperation with Lithuania in response to the sanctions imposed by Vilnius. It is hard to say, though, how fast the negotiations with the Russian side will progress and what agreements will eventually be achieved. It is obvious that despite the political component of its endeavor Minsk would like to enjoy a favorable economic offer from its partners in Russia.

The key developments of the period under analysis that reflected the nature and change of the relationship between Belarus and the EU after the presidential election took place in early October. On October 1, the European Council adopted conclusions on the situation in Belarus, in which it did not recognize the official results of the election and urged Minsk to end violence and violations of civil rights and freedoms, and to start an inclusive national dialogue. The leaders of the EU member states instructed the Council of the European Union to take restrictive measures against the Belarusian authorities without delay, and called on the European Commission to prepare a comprehensive plan of economic support for a democratic Belarus. On the following day, October 2, the European Council introduced individual sanctions against 40 citizens of Belarus (Lukashenka himself was not included in the list), who, according to the EU, are responsible for repression and intimidation against peaceful demonstrators, opposition members and journalists, as well as for misconduct of the electoral process. Restrictive measures include a travel ban and an asset freeze. The former impedes the listed people from entering or transiting through the EU territories, while the latter is used against the funds or economic resources of the listed persons. In addition, the EU citizens and companies are forbidden from making funds available to those listed.

In response to the sanctions decisions made by Brussels, the Belarusian Foreign Ministry issued a very harsh statement, in which it stressed that by that decision "the European Union has alienated its neighbor." Official Minsk announced the introduction of a reciprocal sanctions list (as in the case of previously announced individual sanctions against the Baltic States, the names of those listed were not publicly announced). At the same time, the statement by the Belarusian Foreign Ministry emphasized that *"the uniform travel ban blacklist also applies within the framework of the integration associations, to which Belarus is a party."*

In addition to that, the statement by the Belarusian Foreign Ministry stressed that further application of sanctions against Belarus *"could lead to even more serious consequences, such as the withdrawal of Belarus from joint programs and projects, the revision of the level and modality of the diplomatic presence all the way up to a decision on whether to maintain diplomatic relations."* Previously, in his comments to the media, Makiej warned that retaliatory measures on the part of Minsk could also concern "the internal political operation of the state", i.e. "both the political system and the operation of foreign media accredited in Belarus." On October 2, it was announced that accreditations of the foreign media outlets working in Belarus would be cancelled and that massive re-accreditation would be carried out according to new rules. The Ministry of Foreign Affairs itself called that decision long overdue, and referred to the new rules as 'more liberal'.

The Foreign Ministry further retaliated by announcing that from now on all contacts of the EU diplomats with the Belarusian state institutions would be exclusively through the platform of the Foreign Ministry.

On the same day, Minsk recalled Belarusian ambassadors from Warsaw and Vilnius for consultation and suggested that Poland and Lithuania do the same with their respective ambassadors to Belarus. Moreover, within a week, Poland and Lithuania were urged to bring the size of their diplomatic missions in Belarus to parity with their Belarusian counterparts. For Poland, this implied a reduction from 50 to 18 diplomats, and for Lithuania – from 25 to 14 diplomats. Following media reports that Warsaw and Vilnius were not going to meet Belarus's recommendations, the Belarusian Foreign Ministry stressed that they were binding and that otherwise Minsk would declare the corresponding numbers of diplomats personae non gratae. As a result, the required numbers of Polish and Lithuanian diplomats left Belarus.

In Brussels and other European capitals, Minsk's behavior in regard to two of the EU member states aroused suspicion that the Belarusian authorities sought to break the unity of the EU's position on the situation in Belarus. The EU High Representative for Foreign Affairs and Security Policy Josep Borrell emphasized during his telephone conversation with Makiej that the unity of the EU's position would remain unshaken no matter what. To demonstrate their unity and solidarity with Lithuania and Poland, most of the ambassadors from other EU member states accredited in Minsk also left Belarus. Some of them started to return two weeks later, though.

Makiej's telephone conversations with Borrell, as well as with his Hungarian and Dutch counterparts (plus Siarhiej Aliejnik's meeting with the German ambassador after his return to Minsk) were the only events with the "plus" sign against the backdrop of the overwhelming wave of negativity.

According to the Belstat statistics agency, in January-September 2020, two-way trade between Belarus and the European Union amounted to USD 8.313 billion (down by 14.7% from January-September 2019). Belarusian exports reached USD 3.608 billion, a drop by 21.2% from the first three quarters of 2019. Imports from the EU countries amounted to USD 4.706 billion (down by 8.9% year-on-year). Belarus reported a deficit of its trade with the European Union at USD 1.098 billion.

Forecast

Based on the track record of previous diplomatic crises between Belarus and the EU, as well as on the analysis of the current pace of events inside Belarus, it is safe to assume that tensions will continue to grow in the foreseeable future. It is practically inevitable that the EU will expand its sanctions lists and consider imposing some kind of economic sanctions as well. These may include the curtailment of previously planned programs of financial support from the European Commission and cooperation with European financial institutions. Equally inevitably, in response to this, Minsk will raise the degree of anti-Western rhetoric and take retaliatory measures against the entire EU and its individual member states. Most likely, this escalation game will shape the following two months under review. The EU's sanctions pressure on Minsk will be growing stronger early next year as well should the internal political crisis in Belarus remain in its active phase.

At the same time, both parties keep voicing the need for retaining communication channels, a point that was repeatedly made during the phone conversations between Makiej and Borrell. That is, even amid the ongoing escalation of tensions in Minsk and in many EU capital cities, there remains a pragmatic desire not to burn down all bridges. This is also indicated by the relatively fast return to Minsk of the ambassadors of most of the EU member states, who had left Belarus as a token of solidarity with Poland and Lithuania. Therefore, it is quite possible that the parties will still be able to keep the Belarus–EU relationship away from the "red zone", which would otherwise signify that a return to substantive engagement would be virtually inconceivable.

Relationship with China



Aggregate index: +16
Positive points: +16
Negative points: 0

Trends

1. The intensity of contacts at different levels was restoring.

2. Active bilateral political support was provided.

Events and developments

In August and September, the Chinese side continued offering its political support to Lukashenka. In the course of a working briefing of Spokesperson for the Chinese Foreign Ministry Wang Wenbin on September 24 he said when asked by Russia's Sputnik news agency about China's attitude to the inauguration ceremony and non-recognition of Lukashenka's legitimacy as president by some countries that China "respects the choice made by the Belarusian people" and believes that "under Lukashenka's leadership Belarus has gained political and social stability." An inter-parliamentary meeting was held between Deputy Speaker of the Belarusian House of Representatives Uladzimir Mickievič (head of the working group for cooperation with the Chinese parliament) and Chairman of the Foreign Affairs Committee of the National People's Congress Zhang Yesui (head of the China–Belarus Friendship Group of the National People's Congress), where the Chinese representatives said as quoted by the Belarusian National Assembly that ***"China comes out against attempts by external forces to sow discord and chaos in Belarusian society"***, which is actually a reiteration of the statement previously made by the Ministry of Foreign Affairs. Mickievič announced preparations for Xi Jinping's upcoming visit to Belarus.

The Belarusian side, represented by Foreign Minister Uladzimir Makiej, for its part said that Belarus supported China's global information security initiative, because it was in tune with the initiative of Belarusian President Lukashenka to establish a digital good-neighborhood belt. In September, Belarusian Defense Minister Uladzimir Chrienin thanked the leadership of Russia and China for their assistance rendered to Belarus during the difficult period during a session of the defense ministers of the CIS, SCO, and CSTO.

In late October, meetings of the Commission for Trade and Economic Cooperation of the Belarus–China Intergovernmental Cooperation Committee and the Working Group for the China–Belarus Industrial Park (CBIP) were held under the chairmanship of Minister of Economy of Belarus Aliaksandr Červiakoŭ and Deputy Secretary of Commerce of China Yu Jianhua with the participation of First Deputy Prime Minister of Belarus Mikalaj Snapkoŭ. The meetings announced the creation of a working group for trade facilitation between Minsk and Beijing, as well as a feasibility study on the execution of a bilateral agreement on trade in services and investments.

On October 27, a video forum entitled "Alignment of the Eurasian Economic Union and China's Belt and Road Initiative" was held, where First Deputy Foreign Minister Aliaksandr Hurianaŭ represented the Belarusian side. He said that the drop in export supplies to the EEU and China was "quite insignificant," and noted that China helped Belarus create a production of medical goods during the pandemic. Hurianaŭ went on to say that the CBIP Great Stone was a platform for the promotion of cooperation not only with China, but also with the EEU countries, Europe, and America, whereas the Bremino–Orša Free Economic Zone was also a result of successful cooperation between Belarus and China, and on its basis the parties were planning to open an Orša–Haikou (Hainan Province)–Orša air route to strengthen the logistics component of engagement within the Belt and Road initiative. Building on the logic of his statement about the Bremino–Orša project, Belarus may consider using its EEU FEZ quota and declare that Zone the second (and final) one after the CBIP Great Stone. As for exports and two-way trade turnover in general, according to Belstat, Belarus–China trade figures had indeed been recovering (up to 80–95% in year-on-year terms) by August compared to April 2020, when exports plummeted by 53% from April 2019.

In October, Ambassador Cui Qiming concluded his diplomatic mission to Belarus (which started in 2014) and was subsequently appointed a party secretary and permanent assistant dean of the Diplomatic Academy of the China Institute of Contemporary International Relations. Cui Qiming left Belarus with a high award – at the end of September, President Lukashenka presented him with the Order of Honor while saying that he highly appreciated Cui Qiming's contribution to the promotion of the Belarus–China relationship. The Chinese diplomat, in turn, noted that relations between Belarus and China "are going through the best period in their history." It was at that meeting that Lukashenka publicly commented on the attitude of other countries to the circumstances of his inauguration ceremony. The successor to the diplomatic post, who has not yet presented his credentials in the period under review, but has already arrived in Belarus – Xie Xiaoyong (谢小用) – has extensive diplomatic experience in Russia, the SCO Secretariat, and managerial experience in China National Petroleum Corporation.

Chinese exports became the fastest growing area for the Belarusian Universal Commodity Exchange in January–September 2020. The amount of transactions with Chinese companies expanded tenfold (up to USD 2 million). The absolute result in monetary terms remains incomparably lower than the leader – Lithuania – with USD 87.4 million for the same period. It was noted that the development of the China–Europe railway connection via Belarus significantly contributed to that growth. Belarusian Railway also reported an increase in container traffic by 60% in January–September 2020 on the routes connecting China and Europe.

Great Stone

The following companies were registered as new CBIP residents during the period under review:

- SMARTBIOTECH LLC (Belarus): R&D and production of reagents for lab research;
- LLC China–Belarus Innovation Center of Industrial Technologies (a joint project of the National Academy of Sciences of Belarus, Academy of Sciences of Guangdong Province and Foshan Industrial Technology Research Institute): performance of project studies;
- CJSC Eurasian Railway Gateway: a project to arrange a bimodal railway terminal with a capacity of up to 180,000 TEU jointly with other residents of the industrial park.

Throughout July and August, the joint venture company for CBIP development conducted negotiations with the Asian Infrastructure Investment Bank, China-based logistics companies, signed an agreement with Beltelecom RUE and Bel HuaweiTechnologies LLC to launch a 5G test zone within the park and hosted the WorldSkillsBelarus 2020 national professional skills competition.

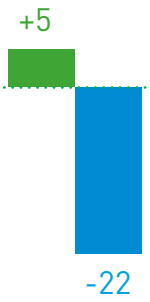
The focal point of the period for the CBIP is the placement of two issues of tokens denominated in U.S. dollars totaling an equivalent of USD 400,000 based on the www.finstore.by platform with respective annual yields of 4.5% and 3% for the first and second issues and maturity starting in 2021 (2nd issue) and 2022 (1st issue) secured by a bank guarantee of Bank BelVEB OJSC. This ICO is paired with the White Paper, which includes, among other things, data on the financial performance of the joint CBIP development company spanning the period from 2017 to Q1 2020, financial statements for the years 2018 and 2019 and analysis of the CBIP marketing concept. According to the reported data, the company was making losses in 2018 and Q1 2020 and made profits in 2017 and 2019; the value of its net assets tends to grow and so does the share of long-term liabilities amid a decrease of equity, whereas current (K1) and absolute liquidity ratios were changing in a jump-like fashion. The mission of the ICO is the construction of three production buildings for the CBIP residents. Both token issues were in demand in the market – at the end of October, no tokens were available for purchase on the www.finstore.by platform.

Forecast

Restored activities on the bilateral track have further potential to continue, but should any significant internal events occur in Belarus, or crude oil and natural gas disputes with Russia, which are believed to be traditional for the end of the calendar year, such events will override the Belarus–China agenda.

Of some interest is the new Chinese ambassador to Belarus, who will officially take up his post during the next monitored period. His acts and rhetoric will bring more clarity to certain aspects of the bilateral relationship. Furthermore, the COVID-19 pandemic as a deterrent factor that continues to affect the implementation of joint projects in Belarus will remain in place. If the ongoing trends in bilateral trade persist, we should expect at least the 2019 figures to be reached and exceeded, with certain changes in the structure of Belarusian exports.

Relationship with the U.S.



Aggregate index: -17
Positive points: +5
Negative points: -22

Trends

1. The relationship with the U.S. continued to deteriorate, which was manifested mainly in further escalation of mutual rhetoric.

2. The U.S. sanctions were more of a symbolic nature, which attests to its desire to retain the possibility for resuming relations.

3. Official Minsk also demonstrated its willingness to maintain ties and even made some goodwill gestures.

Events and developments

As soon as protests were staged in Belarus, triggered by the presidential election, and Aliaksandr Lukashenka accused the U.S. of seeking a "color revolution" in the country, the relations between Minsk and Washington deteriorated dramatically. Negative rhetoric dominated throughout the period in question.

Chronologically, the first negative topic in the bilateral relations during the period under review was the situation with the entry ban imposed on Archbishop Tadeusz Kondrusiewicz. On September 2, U.S. Secretary of State Michael Pompeo made a statement urging the Belarusian authorities to allow Kondrusiewicz to enter the country "so he can tend to his flock during the ongoing protests." He added that "all Belarusian people must be allowed to exercise their fundamental freedoms, including freedom to worship." The Secretary of State made more comments on this issue on October 13, because Kondrusiewicz had never been granted permission to enter Belarus. Overall, Pompeo was the U.S. administration's chief "speaker" on Belarus during the entire period under analysis; in September and October, he made a number of statements on the Belarusian protests.

In early September, the United States raised the issue of sanctions, although, unlike the European Union, Washington was much more restrained in this matter and preferred using the threat of sanctions as leverage rather than sanctions themselves, which can be attributed, on the one hand, to the Trump administration's insignificant interest in Belarus, and, on the other hand, by the greater geopolitical background of the Belarus–U.S. relationship, which is considered in the context of containing Russia, rather than promoting democracy. On September 3, Pompeo announced that the United States, in coordination with its partners and Allies, was "considering" additional serious targeted sanctions in connection with the situation in Belarus. He also called for immediate ***"cessation of violence against peaceful protesters and release all those unjustly detained, including U.S. citizen Vitali Shkliarov."***

Sanctions were mentioned again on September 9 in connection with the detention of Maryja Kaliesnikava and other members of the Coordinating Council. Pompeo also spoke about coordinating with the UK on sanctions after his talks with British Foreign Secretary Dominic Raab, which took place on September 17 in Washington. Pompeo again stressed the need for the release of Shkliarov, as well as the need for *"every nation – especially Russia – to respect the sovereignty of Belarus."*

The day before, on September 16, Pompeo also met with Lithuanian Foreign Minister Linas Linkevičius and thanked him for his country's "leadership in ensuring the independence and territorial integrity of Belarus and the democratic rights of its people."

On October 2, the United States imposed sanctions against 25 Belarusian individuals who, according to the U.S., were involved in acts that undermine Belarusian democracy. Given the 16 Belarusian citizens under sanctions since 2006, the total now makes up 41 names. In his statement, Michael Pompeo also warned that *"the United States will continue to demand accountability from the Belarusian government for its suppression of democracy."*

The inauguration of Aliaksandr Lukashenka as president triggered another wave of comments by U.S. officials on what was happening in Belarus. Lukashenka was not recognized as a legitimate president by the U.S. Senate Committee on Foreign Relations and the Department of State.

During the period under analysis, U.S. officials made a few more statements on the Belarusian issue. On October 15, Michael Pompeo said at a briefing in Washington that the U.S. supported protesting Belarusians. On October 23, Pompeo discussed the situation in Belarus with High Representative of the European Union for Foreign Affairs and Security Policy Josep Borrell. Following that discussion, the European External Action Service reported that the parties *"called on the Belarusian authorities to engage in a meaningful dialogue with genuine representatives of civil society, in particular with the Coordination Council established by Sviatlana Cichanoŭskaja."*

U.S. presidential candidate Joe Biden mentioned Belarus in his speeches on two occasions: on September 26 and October 28, he called Lukashenka a dictator and criticized President Trump for his lack of a clear stance on Belarus.

Public rhetoric on the part of official Minsk towards the U.S. also remained generally negative. On September 12, Minister of Defense Viktar Chrienin told the national ONT television channel that U.S. troops and weapons had been moved towards the Belarusian border. In late October, he reiterated his point about the increasing presence of the U.S. military in the region at a meeting of the joint board of Defense Ministries of Belarus and Russia.

On October 19, the U.S. Department of Commerce announced its determination that Belarus continues to be a non-market economy (NME). Minsk had asked the U.S. authorities to reexamine the status of a non-market economy in February 2020. This status enables the U.S. government to protect its businesses by applying restrictive customs and tariff measures to certain types of Belarusian products, making their export unprofitable.

Against this backdrop, Secretary of State Pompeo's telephone conversation with Lukashenka on October 24 was quite unexpected. According to the press service of the Belarusian president, the secretary of state emphasized that he remains an adherent of sovereignty and independence of Belarus and supporter of furthering engagement with this country. He also assured Lukashenka that NATO poses no threat to Belarus. They also discussed *"the fate of one of the U.S. citizens and the Republic of Belarus."* Obviously, they were talking about the political consultant Vitali Shkliarov. This was later confirmed by a spokesperson for the Department of State. According to him, *"the Secretary called for the full release and immediate departure from Belarus of wrongfully detained U.S. citizen Vitali Shkliarov."*

The phone call resulted in Shkliarov's release from custody on October 27 and return to the United States. However, he remained under investigation and signed a non-disclosure agreement. Nevertheless, that step by the Belarusian authorities can be regarded as a

goodwill gesture and a demonstration of its desire to maintain relations with the United States.

During the period under review, the return of the ambassadors continued. Despite the tense relations between the two countries, on September 22, the U.S. Senate Committee on Foreign Affairs approved the candidacy of Julie Fischer for the post of ambassador to Belarus. The following stage envisages a vote by all of the Senate members.

One more positive event was the coming of two more U.S. companies to the High-Tech Park. ITH Development (InTouch Technologies, Inc.) is planning to further develop and advance the SOLO platform, a telemedicine solution. TangoMe, Inc. is represented in Belarus by TangoMe, which intends to engage in the development of new functionality for the TangoLive streaming platform (applications for live streaming, video calls and messaging).

Forecast

If current trends in bilateral relations should continue, Washington and Minsk will not take drastic steps to escalate tensions. The conflict will remain mostly at the rhetorical level. At the same time, the parties will be looking for opportunities to continue mutually beneficial engagement at the practical level.

If Joseph Biden, an advocate of the U.S. hardline policy on Belarus, is elected president, some aggravation of the relationship will be possible. However, given that the United States is busy with domestic issues and Washington has no strategic interest in Belarus, no radical change in the new U.S. administration's approach to official Minsk will be likely.

The return of the ambassadors will continue, which will contribute to the normalization of the bilateral relations in the long run.

Relationship with Ukraine



Aggregate index: -7
Positive points: +17
Negative points: -24

Trends

1. Mutual negative rhetoric expanded significantly.
2. The negative media background remained in place. Ukrainian media pay special attention to the coverage of protests in Belarus and criticism of the authorities, while Belarusian state media traditionally speak about the threat coming from Ukraine.
3. In the economic sphere, constructive engagement was preserved.

Events and developments

Politics

The negative agenda in political communication, which emerged in July and August, started dominating in September. Neutral interviews with politicians and officials about the advancement of bilateral relations are rare and should all be perceived with a certain degree of positivity. Otherwise, most of the events can be characterized as an exchange of diplomatic and media blows. Moreover, some of them were delivered on international platforms, or triggered actions intended to embarrass partners. For example, on September 23, the minister of foreign affairs of Ukraine wrote in his Facebook and Twitter accounts that Ukraine did not recognize Lukashenka as Belarus's legitimate president. The following day, the Belarusian Foreign Ministry issued a response in the form of an official statement that criticized Ukraine's foreign policy and alluded to its lack of independence. On September 24, President Volodymyr Zelensky stated, while commenting on developments in Belarus, *"unless the authorities start a dialogue with the people, there will be no authorities."* On October 14, Ukraine's Ambassador to Belarus Igor Kizim received an official note of protest from the Belarusian Foreign Ministry in connection with the Decree of the Ukrainian president facilitating the employment of IT specialists from Belarus.

The specific nature of the exchange of biting signals and statements deserves a special mention. For its harshest statements the Ukrainian side mostly made use of either interviews of its officials to the media, or social networks. Official documents were virtually nonexistent. The Belarusian side, on the contrary, chose to "formalize" the conflict, delivering notes of protest, making official statements on the website of the Foreign Ministry and so on.

The media background of September and October can be described as extremely negative, both from the perspective of the Belarusian authorities and the opposition.

Most of the Ukrainian media welcomed the Belarusian protests, while pointing out that repression was inadmissible. Accordingly, the Belarusian authorities were criticized, and in October, some leading publications began to refer to Lukashenka as "self-proclaimed president". However, there was no unequivocally positive agenda on the new generation of the Belarusian opposition, either. This was primarily due to pro-Russian (as seen by Ukrainians) statements made by a number of opposition leaders. In Belarus, on the other hand, the state media emphasized the potential threat from the Ukrainian direction and cited developments in the neighboring country as a negative example. Opposition resources were rather neutral, sharing their bewilderment as to why Ukraine was not actively "standing up for the people".

Economy

Unlike politics, economic cooperation between the two nations was showing positive trends. Anyway, the majority of developments followed previously paved paths and both sides notably achieved significant progress in this area. When it comes to new projects, only those with preparatory phases completed earlier were launched. Those include new trolleybus assembly facilities from Belarusian components (under the PTS brand – we mentioned the establishment of the plant in some of the previous Barometer issues) or the launch of a new line to assemble municipal vehicles using MAZ kits in Kremenchug. The latter is noteworthy, as the plant is located in the city, which hosts the production facilities of one of the competitors of the Belarusian manufacturer – Ukraine's KrAZ – which in 2020 commenced bankruptcy proceedings. It was KrAZ that was the main competitor of MAZ in the market for military contracts and tenders for the supply of municipal vehicles. Also in the automotive industry, Belarusian manufacturers notably continue to improve their positions in the Ukrainian market, gradually increasing their share. Some of the examples follow.

- On September 9, it was reported that the Ministry of Defense of Ukraine was purchasing another batch of MAZ-Bohdan trucks worth UAH 100 million;
- On September 30, the Kyiv city administration opened a tender for gas-powered buses. Belarus is the only supplier of such vehicles to the Ukrainian market;
- On October 2, the official sales statistics confirmed MAZ's leadership in the market for trucks weighing over 3.5 tonnes. The Belarusian manufacturer controls 18.8% of the total amount of new deliveries of this class of vehicles amid the revival of sales;
- On October 7, BelAZ was reported to have been awarded a contract to supply dump trucks to ArcelorMittal;
- On October 20, a batch of 57 buses from Minsk Automobile Plant (MAZ), delivered under a contract with the Kyiv city administration, was officially presented to the public;
- On October 23, Ukroboronprom defense industry concern announced that it was turning to the MAZ (MAZ-Bohdan) chassis for the design of new vehicles;
- On October 26, it was reported that Kharkiv was planning to acquire 50 PTS trolleybuses (a joint Belarus–Ukraine venture based in Brovary).

Belneftekhim's organizations strengthened their foothold in Ukraine as well. Service Oil, a Ukrainian subsidiary of the Belarusian concern, became the main contractor for DTEK Oil&Gas's new drilling program for gas and oil wells. The monetary value of the scope of work for 2021–2022 is UAH 3 billion (about EUR 100 million).

Large-scale construction of roads in Ukraine has created a strong demand for bitumen. Ukraine imports more than 70% of bitumen that it uses. Belarus accounts for 88% of Ukraine's bitumen imports. However, political tensions between the two countries could have adjusted trade in this commodity. In the midst of the "Hasid crisis" – several checkpoints were closed for cargo traffic on September 17 – groups of pilgrims were flocked in the neutral zone. Bitumen suppliers changed delivery routes, but due to the new border-crossing regulations, enhanced inspection and document checks by the Ukrainian side, there

were large lines at the border. Bitumen imports from Belarus were unblocked as late as September 21, exactly one day after the end of the "Hasid crisis".

New promising areas for cooperation include the decision of the Ukrainian government to allow Dnipropetrovsk Aggregate Plant PJSC to export and import military goods between Belarus and Ukraine.

Ukraine traditionally imports increased amounts of potatoes in autumn. In contrast to previous years, Belarus is the prime supplier with deliveries totaling more than USD 20 million. Its closest competitor, the Netherlands, had supplied twice as little by the end of September.

On the other hand, Belarusian suppliers are still facing problems in the market for oil products. Oil wars with Russia, instability of supplies, and lobbyism of Medvedchuk's organizations in Ukraine affected the statistics – Belarus's share in the Ukrainian diesel fuel market dropped from 53% to 37%. Given the factor of aggravating political relationship, the recovery of sales volumes may become an extremely difficult process for Belarusian traders.

Forecast

The year 2020 will conclude in the track identified by the August developments. Political confrontation will continue, and the media background will be extremely negative. At the same time, no rapid collapse of economic cooperation is expected – the partners honor their earlier agreements.

At the same time, several projects that both countries find quite significant have been put on hold. Negotiations over the expansion of regional cooperation and promotion of industrial cooperation are still incomplete, i.e. the agenda for the planned Forum of the Regions has been frozen. The situation is further complicated by media attacks launched by Ukrainian companies (and competitors from other countries) against Belarusian suppliers, which tend to intensify.

The protraction of the political confrontation for longer than until the end of January 2021 therefore might cause a sharp decline in the Belarus–Ukraine relations, not only political, but also economic.

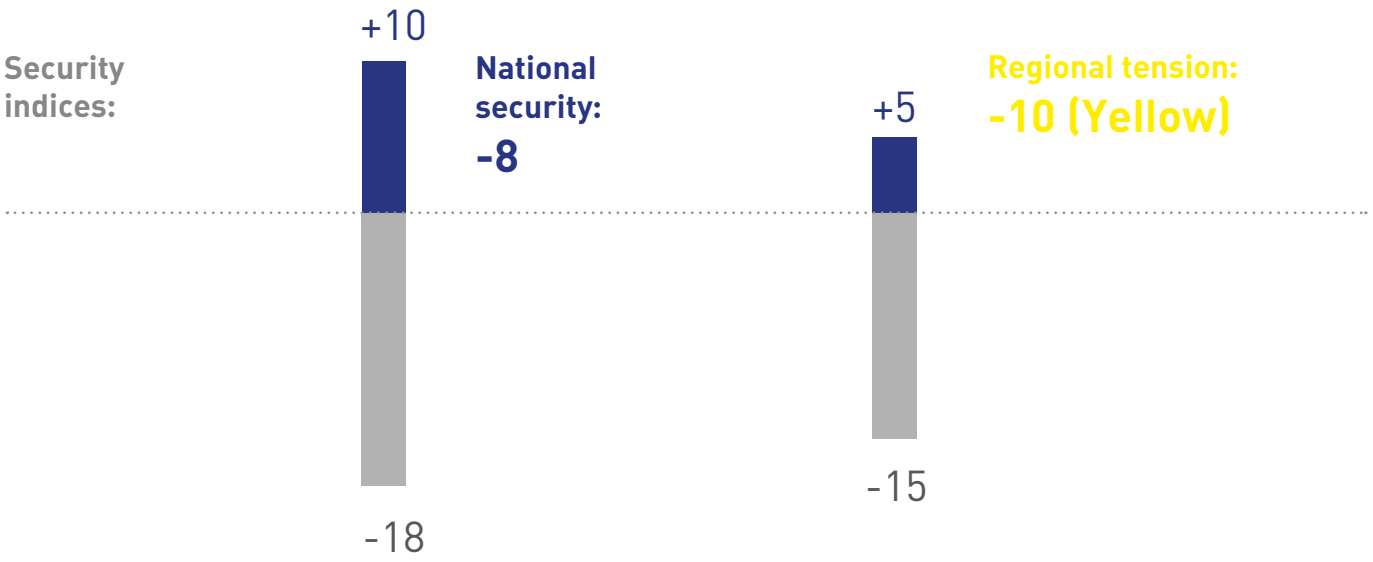
On the other hand, Minsk and Kyiv may as well approximate their positions as early as by the end of spring 2012, provided the two countries manage to attain a new format of cooperation, start making effort to overcome issues and create new engagement platforms. There are several prerequisites for this:

- Belarus will be interested in intermediaries for its dialogue with Western countries as it seeks to overcome the internal political crisis. Ukraine already played this role in 2008–2010 and today it can "monetize" this function to strengthen the legal capacity of its policies across Europe.

- Belarus is interested in preserving the Ukrainian market as an alternative to that Russian. The deterioration of its relations with the EU calls for the involvement of "intermediary jurisdictions" to sell its products. Ukraine is interested in developing its industry, entering new markets and creating new jobs.

However, all this may be possible under one condition – the two countries need to reject the emotional component in political communication and prioritize rationality in their arguments.

Security Barometer: status of national and regional security



Trends

1. The securitization of political processes accelerated amid radicalization of the parties to the internal political conflict. The incumbent authorities apparently seek to establish additional security institutions without an official status.

2. Regional security was undermined by breaches of several tacit agreements, which was most vividly manifested in the use of strategic aviation by NATO and the Russian Federation.

3. The situation in Belarus became an important regional security factor that, among other things, influences NATO's military activity. The regional security situation became less acute, though, as soon as October.

4. The Kremlin has so far been the primary and, perhaps, only geopolitical beneficiary of the internal political crisis in Belarus.

1. National security

Overall status of national security

Ongoing protests continued to undermine the national security situation. Numerous attempts to block roads and disrupt city and railway traffic were the most vivid examples.

The national authorities act rather inconsistently when dealing with this issue. On the one hand, the government tries to conceal some incidents; while on the other hand, President Lukashenka said on October 27 that Belarus was facing a threat of terrorist attacks. All of those involved in the confrontation are becoming radicalized. The State Border Committee claimed on October 28 that four armed activists of an anarchist movement were detained near the Ukrainian border. They are suspected of attacking the building of the State Committee of Judicial Examinations, the Salihorsk District Prosecutor's Office, and of setting the building of the Mozyr Traffic Police Department on fire.

The authorities turned to the expanded application of the army. The Interior Ministry's troops, which are usually engaged during mass riots, were reinforced with army units, including servicemen of the 120th brigade, who were seen on September 6 guarding several facilities in downtown Minsk during mass protests staged by the opposition. Special operations units, probably of the 5th brigade, were also sighted in Minsk on September 12, 13 and 20.

The authorities tend to involve state-affiliated public entities in the forceful crackdown on the opposition. Statements by certain "veterans of security agencies" and the Belarusian Union of Officers in support of the incumbent authorities were released on October 19. When appointing presidential assistants/chief regional inspectors on October 29, Lukashenka called on to strengthen volunteer public security patrols, involving former servicemen, and, possibly, to arm them.

Personnel reshuffles in security agencies. On September 3, Valier Vakulčyk, who had been heading the KGB for eight years, was appointed state secretary of the Security Council of Belarus. He was replaced by Ivan Cierciel. The dismissal of State Secretary of the Security Council Andrej Raŭkoŭ (in office since January 20, 2020) is notable. Ivan Kubrakoŭ was appointed interior minister, and Michail Hryb took charge of the Minsk city police on October 29. Despite the fact that Karajeŭ and Vakulčyk were appointed aides/inspectors in the Brest and Hrodna Regions, respectively, what really happened was a replacement of the security bloc chiefs.

The Belarusian leadership began to build a parallel security hierarchy. The president appointed presidential aides/chief regional inspectors to the Hrodna and Brest regions and Minsk city on October 29. Lukashenka tasked them with safeguarding public security in the regions and stressed that an "army component" would be within their jurisdiction, as they should rely on the local military and collaborate with other law enforcers. The president actually demanded that they "seal off the border." Entry in the country was indeed prohibited on October 29, inconsistently, yet on a large scale, including for Belarusian citizens. Only the border with Russia remained open. The State Border Committee said in September that border guards were reinforced with tactical reserves.

Increasing role of Russia. After his meeting with President Putin in Sochi on September 14, Lukashenka said that he "had to build up the joint defenses of the Union State in recent days together with the Russian president and the defense minister." According to official sources, Lukashenka emphasized the provocative nature of NATO's activities, but, contrary to some interpretations, intensification of military exercises was not on the agenda. Putin just said that *"certain events were scheduled for almost every month throughout the year in both Belarus and Russia. We will do everything as we planned."* The following day, the 60 Minutes talk show on Rossiya TV channel aired the footage of the Russian law enforcement reserves formed following Putin's order to support Belarus redeployed back from the Belarusian border.

Following talks with Russian Defense Minister Shoigu on September 16 in Minsk, Lukashenka said that he had asked Putin for supplies of some kind of weapons, which the Kremlin immediately denied. Shoigu complained that only 30% out of 130 joint events planned for 2020 had taken place. "We need to reach at least 70 percent by the end of the year," he said. This is probably a consequence of the tensions in the bilateral relationship, which emerged before the escalation of the post-election crisis in Belarus.

This trend continued on October 27, when Defense Ministers of Belarus and Russia Chrienin and Shoigu agreed not only on the West-2021 exercise, but also on the priorities set for the application of the joint regional troops for the entire period of Lukashenka's next term in office (until 2025). A little later, during the operational command and staff training on October 28, Defense Minister Chrienin said that the number of joint events with the Russian military increased to 160 from 120 in 2019 under the plan for the new academic year.

Russian Foreign Intelligence chief Sergei Naryshkin visited Minsk on October 22 to take part in a joint session of the Russian Foreign Intelligence Service and the Belarusian KGB. Naryshkin also met with President Lukashenka. In September and October, Naryshkin accused the West, the Baltic States and Poland of orchestrating provocations in Belarus. Speaking about external threats, Naryshkin also mentioned constitutional reform in Belarus. *"I am sure that stability is important to Belarus. Constitutional reform that has already begun will give answers to many questions,"* he said.

Training and equipment of the army

Further efforts were made to improve skills of the military personnel. Addressing journalists at a workshop held on October 21, Defense Minister Chrienin announced a reorganization of the military medicine department at the Belarusian State Medical University into a military medical institute with a tactical medicine center. It is also planned to open a reserve officer training departments at the Belarusian State Technological University and Brest State Technical University, which will increase the number of reserve officers by 400 per year. Later, Council of Ministers' decree No. 616 of October 30 granted a 40% discount on vocational training to dischargees from military service.

In September-October, the Belarusian army conducted 16 battalion exercises and combat training events.

Although those events were mostly routine field exercises at local training grounds, Minsk's accompanying rhetoric was quite belligerent. However, as soon as September 12, President Lukashenka said at a meeting with security officers that he was inclined to stop the escalation of tensions with NATO. He said that if NATO forces stationed in Poland and Lithuania had finished their exercises, Belarus *"should respond adequately." "We cannot afford keeping armed forces there for long, if we do not really need them there,"* he said. The defense minister said that, given the recent developments, *"the package of measures taken during the exercise in the Hrodna tactical area had been stopped, and the units returned to their home stations."*

International contacts of the Belarusian army and security agencies

On September 4, Defense Minister Viktar Chrienin took part in a meeting of the defense ministers of the CIS, SCO and CSTO member states in Moscow. *"Incited by the leadership of such states as Poland, Lithuania, the Czech Republic and Ukraine, various destructive forces attempted to seize power in an unconstitutional way,"* he stated in his report. He thanked the military and political leadership of Russia, China and other states represented at the meeting for assistance rendered to Belarus "in this difficult time."

Head of the Defense Ministry's International Military Cooperation Department Alieh Voinaŭ met with U.S. Charge d'Affaires Geoffrey Giauque on September 10 to discuss the military and political situation in the region.

A scheduled biannual exercise of the CIS Joint Air Defense was held on September 11. It involved anti-aircraft missile and radio-radar units and Belarusian and Russian air force crews.

On October 1, Brest hosted a meeting of the Coordination Committee of the CIS Chief Signal Officers attended by representatives of Kazakhstan, Russia and Tajikistan.

Chief of General Staff of Belarus Aliaksandr Valfovič went to Uzbekistan for a regular session of the CIS Chiefs of Staff Committee on October 29-30, and held cooperation talks with the leadership of the Defense Ministry of Uzbekistan.

Joint exercises. Belarus participated in the Russian Caucasus-2020 strategic command and staff exercise on September 21-26 with 80,000 personnel at all major military ranges in southern Russia and in the Black and Caspian Seas. Around 1,000 servicemen were delegated by Armenia, Belarus, China, Myanmar, Pakistan and the Iranian Navy. Belarus sent a battalion tactical group with 30 tanks and infantry combat vehicles and six 2S1 Gvozdika systems.

The Slavic Brotherhood exercise was held on September 14-25 near Brest. Its scale unexpectedly quadrupled to 6,000 personnel after the visit of the Russian defense minister to Minsk. The exercise was supplemented with **several unprecedented elements.** For example, on September 23, twenty Russian military aircraft delivered 40 pieces of combat materiel and 265 paratroopers from Ivanovo (a 1,500 km flight), which proceeded to their mission immediately after landing. Belarusian and Russian units practiced mass landing using strategic aviation. For the first time, this type of exercise comprised an additional exercise of an entire branch of the Belarusian armed forces – a special tactical exercise of the signal corps on September 21-25.

Importantly, an anti-terrorist operation was officially practiced during the Slavic Brotherhood exercise, whereas the task set to the signal corps was eloquently described as "a strategic defensive operation of the armed forces." In particular, units of the 56th signal regiment were said to *"support the aviation of the Russian aerospace forces and accompanied the landing of troops."*

Apparently, Minsk yielded to Moscow's pressure this way. It should not be viewed as some new established and consistent position of the Belarusian government, given the situation with the CSTO Indestructible Brotherhood exercise held on October 12-16 near Viciebsk, which was the smallest in the entire history of this exercise: only 900 servicemen from Belarus to compare with 3,500 personnel from six countries in 2019.

2. Regional Security

Overall situation in the region

The ceasefire between the warring parties in eastern Ukraine agreed on in July was generally respected throughout September and October. However, both NATO and Russia made several risky steps in the region, in particular, by expanding the use of strategic aviation. Russian Air Force Commander-in-Chief Sergei Surovikin reported in September that American B-52 strategic bombers made a flight to the area of the Estonian Tapa training range over the Baltic and North Seas and back, reaching the cruise missile release range to simulate a missile strike on targets in the Kaliningrad Region and other western regions of Russia. He said that the number of NATO flights near the Russian border had increased in August by 30% against the previous year. The U.S. B-52H bombers flew over Ukraine to the border of annexed Crimea on September 4, 14 and 23. The Ukrainian Air Force Command said that this patrolling would be regular.

Meantime, as part of the Slavic Brotherhood-2020 exercise, two Russian Tu-160 strategic bombers flew along Belarus's border shared with NATO members and Ukraine. Six long-range Tu-22 bombers flew over the territory of Belarus in September and performed bombing raids at the Ružany range near Baranavičy. Although the Russian long-range aviation resumed regular flights in the international airspace in 2007, it had stayed away from continental Europe.

The repercussion of these steps is enormous, and it is unlikely that the confrontation will ease off any time soon. The proposal made by Russian President Vladimir Putin on October 26 can be viewed as part of this trend. He suggested that Russia and NATO stop using intermediate- and shorter-range missiles in Europe, but Germany and the United States declined.

Exercises and confidence building measures in the region

Progress. Twenty-two relatively large exercises conducted in the region by Russia and 18 by other countries combined were identified in the period under review. This information is definitely incomplete, especially with respect to Poland and the Baltic States.

Despite the repeated official denials by Lithuania, the presidential election in Belarus probably influenced the schedule of exercises of the U.S. troops in Lithuania. American units arrived in Lithuania ahead of schedule (in early, not in mid-September) and stayed longer than planned prior to the election in Belarus (almost two months instead of two weeks). Lithuanian Defense Minister Raimundas Karoblis emphasized the real threat of the stationing of Russian troops in Belarus.

Belarus invited a big group of foreign military attachés to observe the Slavic Brotherhood exercise, and, on September 21, notified the OSCE member states of the exercise, although the scale of the exercise did not require notification.

Regional forces buildup

Russia announced a reduction in conscription by 10% because of the pandemic, and Ukraine reduced it by 1,500 people, since the number of those willing to serve as contracted professionals has increased.

Poland. Polish Minister of National Defense Mariusz Błaszczak said on September 30 that he was coping well with his task to increase the numeric strength of the Polish army. He said as he opened the new academic year at the Military University of Ground Forces in Wrocław that the number of applicants for training at the university had been growing from year to year. The Polish parliament amended on October 8 the national budget towards an increase in defense spending in 2020 by PLN 3 billion to PLN 52.9 billion despite the growing budget

deficit. Additional funds will be spent to modernize the army. The money not spent in 2020 may be used to finance the army next year.

On October 20, the Polish air force received two more Italian-made M-346 Master training aircraft. Their total number increased to ten.

On September 9, Latvian Defense Minister Artis Pabriks said that he had addressed the U.S. military with a proposal to deploy additional American troops in Latvia and Poland. This matter will require long negotiations, though. According to Pabriks, he had proposed this before the crisis in Belarus broke out.

Lithuania. On September 7, Lithuania and Germany signed the agreement, under which Germany will allocate EUR 500,000 to build new arsenals in most of Lithuania's army compounds. As reported on September 28, additional elements of German air force's technical infrastructure, probably, a permanent facility, had been arranged at the air base in Šiauliai, Lithuania. The Lithuanian army received 142 new Unimog U5000S trucks of German Daimler-Benz manufacture on October 21.

Estonia. It was reported on October 9 that the first pair of the 155 mm/52 K-9 Thunder self-propelled howitzers were delivered to Estonia from Korea in late August. Purchases of ammunition were partially financed from the U.S. military aid.

Ukraine. Judging by a series of exercises in southern Ukraine, Kyiv had made the force buildup in the Black Sea region its priority. It became known on September 13 that the United Kingdom was going to lend GBP 1.25 billion to Ukraine for 10 years to finance the construction of eight missile boats (400 tons in draught). The Ukrainian defense minister visited the UK on October 7. The parties signed a memorandum of intent, which, among other matters, covered this loan. A berth was opened in the Pivdenny ("Southern") port on October 2 for the permanent accommodation of Ukrainian naval boats as part of Kyiv's plan to arrange a naval base there. Under the Canadian Operation UNIFIER military training program for the Ukrainian military, instructors arrived in Ukraine in October for the first time to train Ukraine's naval personnel.

On October 22, Ukraine began receiving new H145 helicopters manufactured by Airbus Helicopters. Fifty-five helicopters, including thirty-four H125 and H145, are expected to be delivered to Ukraine. Kyiv intends to use them as combat helicopters.

During the Joint Effort-2020 exercise held in September, for the first time, Ukraine used the Neptun anti-ship tactical ballistic missile system and tested the upgraded missile designed for the Vilkha multiple launchers. Kyiv also decided on the off-schedule procurement of the Neptun system as soon as this year.

Russia. According to October reports, the army corps of the Russian Baltic Fleet deployed in the Kaliningrad Region was reinforced with 30 upgraded T-72B3M tanks. In September, the Kantemirovskaya Tank Division (Moscow Region) commissioned two new dormitories for more than 400 servicemen each and a canteen for 500 servicemen.

Forecast

The region will remain one of the focus areas of confrontation between the West and Russia. Both sides will above all try to secure their achievements. For instance, Moscow will seek to increase its influence in Belarus, and NATO will strive to bring its military presence and activity in the region to a new level.

In general, the region will remain largely destabilized, and the crisis in and around Belarus will strongly contribute to the processes that keep the regional security situation unbalanced.

The trend towards building parallel and informal national security institutions amid radicalization of some segments of the opposition will maintain the internal political situation unstable, which will weaken the government and lead to the Kremlin's increased influence on the country.

Despite the recent concessions to the Kremlin in the defense sector, the Belarusian incumbents will try to retain the country's autonomy in this area even in this difficult situation, while making attempts to ease tensions in its relationship with NATO at least to some extent.

Appendix 1

Catalogue of events underlying the relations development indices

Relationship with Russia

Date	Event	Score
1 September	Lukashenka: "we will preserve our common fatherland"	+1
1 September	Negotiations over the opening of transport communication	+2
2 September	Makiej's visit to Moscow	+2
3 September	Mishustin's visit to Minsk	+2
7 September	Belneftekhim on Russian seaports	+1
8 September	Lukashenka's interview for RT	+1
10 September	Lukashenka meets with Mezentsev	+1
14 September	Lukashenka meets with Putin in Sochi	+3
14 September	Putin: Russia to extend USD 1.5 bln loan to Belarus	+2
14 September	Peskov: Russia will withdraw its reserve of law enforcers	-1
16 September	Siluanov on lending terms	-1
16 September	Shoigu's visit to Minsk	+1
18 September	Air service restored, entry into Russia allowed	+1
20 September	Rapota on intensification of work on roadmaps	+1
20 September	Russian Foreign Ministry on lending conditions	-1
22-29 September	Slavic Brotherhood joint exercise	+1
25 September	Visits of the governors of Irkutsk and Leningrad Regions	+2
28-29 September	Forum of Regions via video conference	0
2 October	Russian Foreign Ministry on the Belarusian sanctions list	+1
6 October	Gazprom's memorandum on transit risks in Belarus	-1
22 October	Naryshkin's visit to Minsk	+1
27 October	Phone conversation between Makiej and Lavrov	+1
27 October	Meeting of Defense Ministries' boards	+1
September–October	Russia's foreign policy support for the Belarusian leadership	+2
Total		**+21**

Relationship with the EU

Date	Event	Score
8 September	Makiej's telephone conversation with Dutch Foreign Minister Stef Blok	+1
15 September	Negative statement by the Council of the Republic about the resolution of the Lithuanian Seimas	-1
17 September	Negative comment by the Belarusian Foreign Ministry on the European Parliament's resolution on the situation in Belarus	-1
18 September	Negative statement by the Presidium of the Council of the Republic about the European Parliament's resolution	-1
18 September	Makiej's negative statements about Lithuania, Poland and the entire EU during the record of his speech for the general debate of the 75th session of the UN General Assembly	-1
18 September	Negative comments by the Belarusian Foreign Ministry on the EU in connection with the resolution on Belarus by the UN Human Rights Council	-1
19 September	Negative comments by the Belarusian Foreign Ministry on Cichanoŭskaja's participation in events held in Brussels	-1
24 September	Harsh statement by the Ministry of Energy on the resolution by the Seimas of Lithuania concerning the safety of the Belarusian nuclear power plant	-1
29 September	Imposition by Belarus of retaliatory restrictive measures against the Baltic EU member states	-3
29 September	Negative comments by the Belarusian Foreign Ministry on the meeting of French President Emmanuel Macron with Cichanoŭskaja and on activities of official Vilnius	-1
2 October	Statement by the Belarusian Foreign Ministry condemning the decision of the EU Council to impose sanctions on Minsk; Minsk introduces a reciprocal list of sanctions against the EU officials; transfer of all contacts between the EU diplomats and Belarusian state institutions exclusively to the Belarusian Foreign Ministry	-3
2 October	Recall of Belarusian ambassadors to Vilnius and Warsaw for consultation; proposal (demand) of the Belarusian Foreign Ministry that Lithuania and Poland recall their ambassadors for consultation and bring their diplomatic missions in Belarus to parity with those Belarusian in their respective countries	-3
3 October	Slashing statement by the Belarusian Foreign Ministry about Lithuania's and Poland's reluctance to reduce the number of their diplomats in Belarus	-1
6 October	Phone conversation between Makiej and Hungarian Minister of Foreign Affairs and Trade Péter Szijjártó	+1
9 October	Phone conversation between Makiej and EU High Representative for Foreign Affairs and Security Policy Josep Borrell	+1
29 October	Aliejnik's meeting with German Ambassador Manfred Huterer	+1
September–October	Numerous negative materials in the official media and statements by the country's leadership about the EU; direct accusations hurled against individual EU member states of interference in Belarus's internal affairs and attempts to exert military influence	-4
Total		**-18**

Relationship with China

Date	Event	Score
3 September	Lukashenka congratulates Xi Jinping on the 75th Anniversary of the Victory over Japanese Militarism and the end of World War II	+1
3-4 September	Belarus-China innovation forum "From joint projects to integrated ecosystem" (SCST and the Government of Jilin Province)	+1
7 September	Round table (videoconference) "Belarus-China relations in conditions of modern geopolitical turbulence" (Belarusian Institute for Strategic Studies)	+1
9 September	Belarus-China Logistics Workshop "New Possibilities for Supply Chains along the Belt and Road Route" in the framework of the China International Fair for Trade in Services (2020 CIFTIS)	+2
17 September	Meeting between Belarusian Foreign Minister Makiej and Chinese Ambassador to Belarus Cui Qiming	+1
24 September	Videoconference between deputy speaker of the House of Representatives, head of the working group for cooperation with China's parliament Mickievič and Chairman of the Foreign Affairs Committee of the National People's Congress Zhang Yesui	+1
24 September	Lukashenka meets with Ambassador of China to Belarus Cui Qiming and presents the Order of Honor	+1
29 September	Online forum on trade, economic, and investment cooperation in petroleum chemistry between Belarusian and Chinese companies	+1
1 October	Lukashenka congratulates Xi Jinping on the National Day of the People's Republic of China	+1
1 October	Simplified accreditation procedure for companies from China and Singapore at the Belarusian Universal Commodity Exchange comes into effect	+2
13 September	First China-Belarus Youth Competition of Research and Innovation Projects at BNTU's Polytechnic park	+1
15 October	CBIP Great Stone recognized as the best special economic zone within the Belt and Road Initiative in the global ranking of free economic zones in 2020 (according to fDi magazine, Financial Times group)	+1
21 October	Cooperation agreement signed between the Minsk branch of the Belarusian Chamber of Commerce and Industry and the China Foreign Trade Centre	+1
27 October	Participation of First Deputy Minister of Foreign Affairs of Belarus Hurjanaŭ in the forum "Alignment of the Eurasian Economic Union and China's Belt and Road Initiative" (videoconference)	+2
30 October	Meeting of the Commission for Trade and Economic Cooperation of the Belarus-China Intergovernmental Cooperation Committee and the Working Group on the China-Belarus Industrial Park, chaired by Belarusian Minister of Economy Červiakoŭ and Deputy Secretary of Commerce of China Yu Jianhua, with the participation of First Deputy Prime Minister of Belarus Snapkoŭ	+1
Total		**+16**

Relationship with the U.S.

Date	Event	Score
2 September	U.S. Secretary of State Michael Pompeo urges the Belarusian authorities to allow Archbishop Metropolitan Tadeusz Kondrusiewicz of Minsk and Mahilioŭ to enter the country	-1
3 September	U.S. and its partners in Europe are jointly considering serious targeted sanctions in connection with the situation in Belarus	-1
9 September	Pompeo: the U.S. mulls additional sanctions	-1
12 September	Chrienin: increased flights along the Belarusian border are observed	-1
16 September	Pompeo meets with Lithuanian foreign minister and thanks him "for leadership in ensuring the independence and territorial integrity of Belarus and the democratic rights of its people"	-1
17 September	Talks between Pompeo and Raab. Statement about coordination of sanctions and demand to release Shkliarov.	-1
22 September	U.S. Senate Committee on Foreign Relations approves the nomination of Julie Fischer as ambassador to Belarus	+1
23 September	U.S. Senate Committee on Foreign Relations: Lukashenka's secret inauguration proves he has lost legitimacy	-1
24 September	Department of State: the U.S. does not view Lukashenka as president after inauguration	-1
25 September	Cichanoŭskaja and representative of the Department of State discussed "potential involvement of the U.S., EU and Russia in the organization of dialogue on the new elections"	-1
26 September	U.S. presidential candidate Biden calls Lukashenka a dictator and criticizes Trump for having no clear position on Belarus	-1
2 October	U.S. Secretary of State on human rights violations in Belarus	-1
2 October	The U.S. imposes sanctions against eight Belarusian officials	-3
3 October	Pompeo: the U.S. will continue to impose sanctions on the Belarusian authorities	-1
10 October	83 new corporate residents of High-Tech Park, including those with U.S. capital	+1
13 October	The U.S. Secretary of State again calls on the Belarusian authorities to allow Archbishop Kondrusiewicz to return to Belarus	-1
15 October	Pompeo: the United States supports protesting Belarusians	-1
20 October	The U.S. decides to keep the status of Belarus as a non-market economy	-2
24 October	The EU and the U.S. urge the Belarusian authorities to begin a dialogue with "real representatives of civil society"	-1
24 October	Pompeo has a 30-minute telephone conversation with Lukashenka	+2

Date	Event	Score
27 October	Chrienin: the number of NATO military exercises and the U.S. military presence in the countries bordering on Belarus are growing	-1
27 October	U.S. citizen Vitali Shkliarov, a political advisor, is released	+1
28 October	Joe Biden harshly criticizes Lukashenka	-1
Total		**-17**

Relationship with Ukraine

Date	Event	Score
3 September	Belarus controls 88% of bitumen imports to Ukraine	+1
4 September	Kuleba participates in an Arria formula meeting of the UN Security Council	-1
9 September	Ukrainian Ministry of Defense orders MAZ trucks	+1
9 September	Belarusian ambassador speaks at investment forums in Kyiv and Odessa	+1
10 September	Kizim's interview about the need to maintain trust	+1
10 September	Harsh interview with Kizim, who accuses the Belarusian side of provocation	-1
14–20 September	'Hasid Crisis' on the Belarus-Ukraine border	-1
15 September	Statement by Ukrainian Foreign Ministry about the border crisis	-1
16 September	Statement by the Office of the President of Ukraine about the border crisis	-1
16 September	Statement by the Belarusian Foreign Ministry about the border crisis	-1
17 September	Problems with bitumen supplies from Belarus to Ukraine	-1
18 September	Statement by the Minister of Foreign Affairs of Ukraine (in the UN) on inadmissibility of Russian interference in Belarus	+1
21 September	Sokal interviewed by Ukraine Business Review	-1
21 September	Bitumen supplies from Belarus unblocked	+1
23 September	Statement by the Ukrainian foreign minister about Lukashenka not being recognized as legitimate president	-1
24 September	Sharp statement by the Belarusian Foreign Ministry in response to Ukraine's position (on Lukashenka's legitimacy)	-1
24 September	Zelensky's statement "unless the authorities start a dialogue with the people, there will be no authorities"	-1
24 September	Protest Poster Exhibition in Kyiv	-1
25 September	Kizim's comment to Tut.by with confirmation of the postponement of the Forum of the Regions	-1
30 September	Kuleba's statement and answer to the question why he did not attend the inauguration	-1
30 September	Briefing by Kuleba – Lukashenka will not be called president	-1
30 September	DAZ entitled to trade military products with Belarus	+1
29 September	Belarus is the leading potato supplier	+1
30 September	Kyiv intends to buy gas-powered buses from Belarus	+1
1 October	Belarusian ambassador summoned to Ukraine's Foreign Ministry to give explanations	-1
2 October	MAZ controls 18% of the Ukrainian truck market	+1
2 October	New production of municipal vehicles on the basis of MAZ kits in Kremenchug	+1

Date	Event	Score
4 October	Decree by President Zelensky on facilitation of employment of IT specialists from Belarus	-1
7 October	Deliveries of BelAZ to ArcelorMittal	+1
8 October	Belarus lost a significant portion of Ukraine's diesel fuel market	-1
14 October	Belarusian Foreign Ministry's note of protest	-2
19 October	DTEK Oil&Gas announces drilling program worth UAH 3 bln with Belarusian Service Oil	+1
20 October	Major delivery of Belarusian buses to Kyiv	+1
20 October	Metinvest to use MAZ for transportation of employees to mining processing plants	+1
23 October	Ukroboronprom concern begins to design vehicles on MAZ chassis	+1
26 October	Kharkiv to purchase 50 PTS trolleybuses (Belarusian-Ukrainian brand)	+1
28 October	Kizim's statement about anti-Ukrainian rhetoric in the Belarusian media	-1
30 October	Statement of the Ministry of Foreign Affairs of Ukraine that Belarus "closed the border for Ukrainians"	-1
September–October	General negative media background in both countries	-2
Total		**-7**

Appendix 2

Catalogue of events underlying the security indices

Date	Event	National security	Regional tension
September-October	Truce in eastern Ukraine	+1	+1
September-October	18 exercises of Ukraine and NATO	0	-1
September-October	22 exercises of Russia	0	-2
September-October	Application of the army in the internal political confrontation in Belarus	-3	-1
September-October	Radicalization of protest	-2	0
29 October	Building of a parallel security hierarchy in Belarus; involvement of non-state groups and their possible arming	-1	0
September-October	16 exercises of the Belarusian army	+3	0
4 September	Acceleration and expansion of U.S. exercises in Lithuania	-1	-1
9 September	Statements by the Latvian defense minister on the request to station U.S. troops in Latvia	-1	-1
10 September	Meeting between head of the Department of International Military Cooperation of the Defense Ministry Vojnaŭ and the U.S. chargé d'affaires a.i.	+1	+1
12 September	Statement by President Lukashenka on the need to end the escalation of confrontation with NATO	+1	+1
14-25 September	Belarusian-Russian Slavic Brotherhood exercise	-3	-3
15 September	Disbandment of the Russian security forces reserve originally formed to be sent to Belarus	+1	+1
September-October	Use of strategic aviation by NATO and Russia in Belarus and the region	-3	-2
16 September	Visit of the Russian defense minister to Belarus	-2	-1
Mid-September	Belarus invites foreign military attachés to observe the Slavic Brotherhood exercise and notifies the OSCE of the exercise	+1	+1
8 October	Polish parliament's decision to increase military spending	-1	-1
12-16 October	Indestructible Brotherhood exercise of the CSTO in Belarus	+1	0
22 October	Russian Foreign Intelligence director's visit to Minsk	-1	-1
October	Decision to expand training of officers and military medics at Belarusian universities	+1	0
27 October	Session of the Joint Board of the Ministries of Defense of Belarus and Russia	0	-1
Total		**-8**	**-10 (Yellow)**

Appendix 3

Colour scale of regional security tensions

Colour Value	Numerical Value	Interpretation
White	higher than -1	Low likelihood of escalation. A 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. The situation calls for cautious attention.
Yellow	from -7 to -12	Military and other activity is observed that is capable of leading to an escalation of tensions. The situation calls for close attention.
Orange	from -13 to -17	Military preparations in the region. Growing tensions. The situation is threatening.
Red	-18 and lower	A dramatic escalation of tensions. The conflict is virtually unavoidable. A pre-war situation.

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