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THE "BELARUSIAN BALCONY" – AN OPPORTUNITY FOR AMERICAN TRANSACTIONALISM, A SHACKLE ON EUROPEAN POLITICAL THINKING

In the wake of the war in Ukraine, the European Union's policy toward Belarus has come to be dominated by a logic of isolation and maximum pressure, which is proving increasingly counterproductive. Treating Minsk as a Russian proxy has reduced the EU's leverage while deepening Belarus's dependence on Moscow and Beijing, thereby undermining the country's traditionally multi-vector foreign policy. By contrast, the more pragmatic approach of the United States—based on limited engagement and transactional concessions—creates new opportunities for regional stabilization. This study argues that, rather than completely "letting go" of Belarus, selective dialogue and de-escalation would best serve Europe's security interests.

STRATEGIC BALANCING WITH AN EASTERN EMPHASIS – FROM MULTI-VECTOR FOREIGN POLICY TO DEPENDENCE ON RUSSIA AND CHINA

European thinking surrounding the war in Ukraine has come to dominate not only relations with Russia, but also Europe's relationship with Belarus. Belarus's isolation began earlier, following the 2020 Belarusian presidential election, which the West declared illegitimate, placing maximum pressure through sanctions at the core of Europe's Belarus policy. This approach was further reinforced after the outbreak of the war in Ukraine, when Minsk allowed Russian troops to deploy on its territory. As a result, Belarus came to be viewed as a co-aggressor in the eyes of the West, and the logic of war began to dominate relations with Minsk.

The Western strategy, however, is proving not merely ineffective but outright counterproductive. Treating Minsk as a Russian proxy and the European side's severing of ties with it has resulted in Minsk's relations—

and dependence—on Moscow and other non-EU countries growing even stronger. The strategy of maximum pressure, along with support for the Belarusian opposition in exile, is intended to facilitate the removal of the Lukashenko regime, yet it is increasingly evident that this approach is futile—and reflects a misjudgment of domestic political dynamics in Belarus and an overestimation of the opposition's influence.[1] In practice, the more the EU seeks to isolate Minsk, the more it diminishes its own influence: By letting go of Belarus, it also loses its leverage over the country, pushing it ever further into Moscow's arms. While Belarus is indeed structurally highly dependent on Moscow, it is not a subordinate state, so external pressure in the complete absence of dialogue will not force a political realignment but instead lead to a reshuffling of dependencies. Within this relationship framework, the EU is left with increasingly little room for maneuver.

All of this is strategically questionable, not least because Minsk has traditionally sought to pursue a multi-vector foreign policy. The country's geographical location naturally lends itself to a connector and transit role between the West and Russia, a role it successfully fulfilled between 1990 and 2020. It has never been in Minsk's interest to become excessively and unilaterally dependent on Moscow, which is why, in order to maximize its own room for maneuver and safeguard its interests, it actively sought to build constructive relations with the West as well. The current situation, however, has resulted in Belarus becoming increasingly exposed to Russia politically and militarily—a vulnerability that would only be intensified if the war were to end in a decisive Russian victory. Economically, Belarus is also becoming ever more dependent on China, which is present in the country through massive investments and has effectively pushed Western manufacturers almost entirely out of the Belarusian automotive market. Until recently, the foundation of Minsk's multi-vector foreign policy was foreign trade, roughly one third of which was conducted with the EU and the broader West, one third with Russia and the Eurasian Economic Union (EAEU), and one third with the rest of the world, led by China. The Western share is now being replaced by China and Russia, a shift that carries serious economic risks for the country. In this context, it would be even more important for Minsk to normalize its relations with the West.

1 Kit Klarenberg, "Leaks Expose Collapse of EU/US-Backed Belarusian 'Opposition,'" *The Grayzone*, October 29, 2025, https://thegrayzone.com/2025/10/29/leaks-eu-us-belarusian-opposition/.

"WHITE RUSSIA" AND THE WHITE HOUSE

The European Union and the United States currently approach Belarus based on different underlying assumptions: While Brussels approaches Belarus as a normative issue, Washington views it primarily as a strategic asset.

Lukashenko began his seventh presidential term in January 2025, shortly after Trump's inauguration. In Minsk, expectations in January 2025 were that the incoming Trump administration—should it indeed move toward détente with Moscow—would treat the enforcement of democratic norms as a secondary consideration. In the eyes of the Belarusian leadership, this raised the possibility that the political deadlock stemming from the 2020 presidential election could become partially overwritten through new elections, and that international pressure on Minsk might ease, potentially even in the absence of a de facto recognition of the results. It would be naive, however, to assume that the Belarusian leadership expected a full normalization of relations with the West; Minsk was primarily interested in the partial restoration of pragmatic cooperation, above all on an economic basis, and this openness was reflected in the official communications from Minsk.[2] This expectation appears to be slowly but increasingly borne out, although there has as yet been no formal recognition of the regime or appointment of a U.S. ambassador.

The return of Trump has in fact created a new situation: The American president has declared his goal to be ending the Russo-Ukrainian war and stabilizing Eastern Europe, thereby enabling a reprioritization of other theaters and a reduction of the U.S. presence in Europe. Accordingly, Belarus's role is also interpreted differently than before. In contrast to his predecessor Joe Biden's strategy based on isolation and sanctions, the U.S. president assesses Belarus's significance in terms of its regional relevance and within the context of Washington's relationship with Moscow.[3] From this perspective, Belarus also gains importance as a mediator: Aleksandr Lukashenko is often jokingly described as the world's best "Kremlinologist," capable—thanks to his relationship of trust with the Russian president—of presenting matters without embellishment. Minsk previously fulfilled this role with considerable success,

2 Sándor Seremet, "Már a hetedik ciklusára pályázik a belorusz elnök" [Belarusian President Seeks Seventh Term in Office], *Index*, January 26, 2025, https://index.hu/kulfold/2025/01/26/lukasenka-elnokvalasztas-belarusz-ellenzek/.

3 Mark Episkopos, "Can Belarus Be Turned?" *The National Interest*, June 12, 2025, https://nationalinterest.org/feature/can-belarus-be-turned.

providing a platform for consultations between Russia, Ukraine, and the West during the conflict in eastern Ukraine and in the initial phase of the current Russo-Ukrainian war.

The Trump administration's new approach is also driven by the recognition that, as the West withdraws, China is gaining increasing influence in Belarus and across Eurasia more broadly. As a result of strategies of maximum pressure and complete isolation, the West's ability to shape outcomes has diminished, while that of Moscow and Beijing has grown in a country that is crucial from the perspective of regional security. Accordingly, in Washington's realist, transactional, and more flexible approach, the focus is no longer on the democratization of Belarus but on stabilizing U.S.–Belarus relations.

Starting in July 2024, Minsk began the gradual release of hundreds of political prisoners in an effort to distance itself from the legacy of the events of 2020 and to relaunch dialogue with the West ahead of the January 2025 presidential election.[4] Taking advantage of Belarus's willingness to negotiate, Keith Kellogg, U.S. Special Envoy for Peace, paid an official visit to Belarus on June 21 of this year—the first such visit since 2020. According to official sources, the six-hour talks between Lukashenko and Kellogg focused primarily on bilateral relations, the Russo-Ukrainian war, and the Zapad military exercise between the armed forces of Russia and Belarus.[5] Following the meeting, a further fourteen political prisoners were granted presidential pardons in Belarus as a symbolic gesture. Most of those released were foreign nationals, among them Sergei Tikhanovsky, the most prominent opposition leader and the husband of Sviatlana Tsikhanouskaya, underscoring that the move was primarily intended to signal Minsk's goodwill toward Washington and neighboring countries. Subsequently, while en route to his meeting with Vladimir Putin in Alaska, Trump held a phone call with Lukashenko, pointing to Belarus's potential mediating role between Washington and Moscow. After the call, Trump referred to Lukashenko as "president" in a social media post. Taken together, these developments marked a significant shift given that the United States had not officially recognized the results of the 2020 Belarusian presidential election and thus had not recognized the Lukashenko government either. In September,

4 Mark Episkopos, "Desecuritizing the Belarusian Balcony: Principles for U.S.-Belarus Relations," Quincy Institute for Responsible Statecraft, August 5, 2025, https://quincyinst.org/research/desecuritizing-the-belarusian-balcony-principles-for-u-s-belarus-relations/.

5 "Lukashenko Meets with U.S. Special Envoy Keith Kellogg," *Belarusian Telegraph Agency*, June 21, 2025, https://eng.belta.by/president/view/lukashenko-meets-with-us-special-envoy-for-ukraine-169137-2025/.

in exchange for the release of prisoners, Washington also lifted certain sanctions imposed on the Belavia airline.

The process of rapprochement experienced stagnation as concrete measures initially emerged only on Minsk's side, U.S.–Russia talks on ending the war in Ukraine stalled, and from the European side there was not only a lack of reciprocity but not even minimal openness toward Belarusian gestures. The normalization process, however, eventually regained momentum: On December 13, Lukashenko and the U.S. special envoy for Belarus, John Coale, oversaw the release of 123 political prisoners in Minsk, while Washington lifted sanctions on Belarus's main export commodity, potash. The partial lifting of potash sanctions was not merely a political gesture but also a decision of considerable significance from the perspective of global agricultural markets. Belarus accounts for nearly one fifth of global potash production, and as a key component of fertilizers, potash is indispensable to maintaining global agricultural output. The loss of Belarusian exports in recent years contributed to rising fertilizer prices, which particularly affected European agriculture, where producers are already facing high energy and input costs. The sanctions thus burdened not only Belarus but also indirectly affected European food production and prices as well, while alternative supply sources were only partially available and at higher cost.[6] In this sense, Washington's decision to selectively ease sanctions may serve not only to "reward" Belarus but also, over the medium term, to reduce China's dominance in global fertilizer markets and supply chains. Although the partial return of Belarusian potash to the global market does not eliminate China's weight in fertilizer markets, it does reduce Beijing's bargaining power while reducing Belarus's one-sided dependence on the East.

By rebuilding relations with Belarus, the United States is therefore not merely able to point to a politically marketable achievement: It simultaneously reopens a channel of political communication with the Kremlin beyond the issue of Ukraine alone and advances its economic interests, which will affect not only domestic agriculture but also, to some extent, rebalance the disproportionate influence of its strategic competitor, China.

6 Julia Campbell and Taylor Zavala, "US-Belarus Potash Trade May Soften MOP Pricing Outlook," *Argus*, December 15, 2025, https://www.argusmedia.com/en/news-and-insights/latest-market-news/2765900-us-belarus-potash-trade-may-soften-mop-pricing-outlook.

REGIONAL ESCALATION

In contrast to U.S. efforts to end the war and the rapprochement between Washington and Minsk, relations between the European Union and Belarus are moving in the opposite direction. The EU has clearly committed itself to the prolongation of the war and therefore seeks to keep Washington engaged in the conflict (and in Europe's security architecture), while aiming for an outcome that can be framed as a Ukrainian victory—or at least as a draw that does not render Ukrainian resistance meaningless. In the EU's view, Belarus is a co-aggressor, and relations with Minsk are entirely subordinated to a pressure-based approach toward Russia that seeks to raise the strategic costs of ending the war as much as possible. Dialogue with Minsk is therefore ruled out—particularly given that Poland and the Baltic states, despite having the most direct stake in normalization with Belarus, consistently advocate a hard-line approach toward both Moscow and Minsk. With regard to Belarus, the absence of political dialogue and the strategy of isolation turn otherwise manageable security and neighborhood issues into escalation crises, especially since relations between Belarus and its neighbors already contain tensions that provide political leadership with pretexts for maintaining a frozen relationship and justifying further isolation.

One example is illegal migration. According to the Lithuanian State Border Guard Service, from the summer of 2021 to the present, more than 200,000 attempted illegal border crossings have been recorded by migrants traveling from Belarus into Lithuania, Latvia, and Poland.[7] By comparison, this figure pales alongside the number at Hungary's southern border, where more than four times as many attempted illegal crossings occurred over the same period, yet the issue remains the subject of serious debate. In the West's view, the migration crisis forms part of a Moscow-motivated, Minsk-executed campaign of hybrid warfare aimed at destabilizing neighboring countries. Minsk, however, argues that it was the EU that invited the migrants and that Belarus is under no obligation to protect Europe, particularly as the EU has torn up all previous agreements on migration and is attempting to strangle the country with sanctions.

In the case of Zapad, the joint military exercise held every four years by Russia and Belarus, conducted between September 12–16 this year, it was all but inevitable that tensions would increase—especially in light of the fact

7 Hanna Kaltyhina, "Over 200,000 migrants denied entry by Poland, Lithuania, and Latvia since crisis began," *Belsat*, November 4, 2025, https://en.belsat.eu/89842682/over-200000-migrants-denied-entry-by-poland-lithuania-and-latvia-since-crisis-began.

that Moscow launched its invasion of Ukraine after the 2021 Zapad. Minsk introduced a number of changes to the execution of this year's exercise as a gesture toward the West and with de-escalatory intent: Compared to 2021, only half as many troops participated in operations on Belarusian territory—6,000 Belarusian and 1,000 Russian soldiers—offensive drills were omitted, the exercise was moved eastward from the western part of the country, and a record number of observers were invited, despite the fact that this would not have been required given the low number of participants.[8] The attempt at transparency, however, did not yield positive results for Minsk: On the NATO side, only the United States, Türkiye, and Hungary sent observers. Poland closed its borders citing Zapad, the European Union—led by Kaja Kallas—condemned both the exercise and the observer states,[9] and Western media coverage related to Zapad was dominated by reports that either exaggerated or underestimated the number of participating troops but were in any case negative toward Belarus.

The situation was further exacerbated by the Russian drone incident in Poland. On the night of September 9–10, twenty-three Russian drones entered Polish airspace.[10] The reasons behind the incident can largely only be speculated about, but it is likely not unrelated to the fact that Russia simultaneously launched a large-scale drone attack against Ukraine. The Belarusian chief of the general staff officially announced that the Polish and Lithuanian armed forces had been notified that Russian drones were heading toward Polish airspace; the Polish prime minister, however, denied this. The Polish chief of the general staff and the Lithuanian deputy minister of defense, meanwhile, confirmed that Minsk had indeed informed them about the approaching drones.[11] The incident illustrates that while "mil-to-mil" contact and information sharing could otherwise be viable between Belarus and its neighbors (and were active and effective prior to the war), political-level considerations override official military channels and de-escalation efforts.

8 Yauheni Preiherman, "Belarus Downsizes Zapad-2025 to Reduce Escalation Risks," The Jamestown Foundation, June 11, 2025, https://jamestown.org/belarus-downsizes-zapad-2025-to-reduce-escalation-risks/.

9 Kaja Kallas, "Statement by the High Representative on Behalf of the EU on the Joint Strategic Military Exercise ZAPAD-2025," Council of the European Union, September 17, 2025, https://www.consilium.europa.eu/en/press/press-releases/2025/09/17/statement-by-the-high-representative-on-behalf-of-the-eu-on-the-joint-strategic-military-exercise-zapad-2025/.

10 "Emergency Briefing on Drone Incursion into Poland," Security Council Report, September 12, 2025, https://www.securitycouncilreport.org/whatsinblue/2025/09/emergency-briefing-on-drone-incursion-into-poland.php.

11 Paulius Perminas, "Lithuania Confirms 'Hotline' with Belarus after Russian Drone Incursions into Poland," *LRT*, September 17, 2025, https://www.lrt.lt/en/news-in-english/19/2681570/lithuania-confirms-hotline-with-belarus-after-russian-drone-incursions-into-poland.

Many observers have linked the Polish border closure to the incursion of Russian drones, although in official communication Zapad constituted the primary justification.[12] The hermetic Polish border closure, however, did not last long, and China played an important role in its eventual lifting. Belarus serves as the European entry point of the northern Eurasian transport corridor connecting China to Western Europe. Goods shipped from and to China therefore cross the border between Belarus and Poland when moving from the EU to the Eurasian Economic Union and vice versa.[13] The closure effectively froze a transport route handling annual trade flows worth approximately $25 billion. Poland's rationale appeared logical: By closing the entry point, Warsaw sought to exert pressure on China to influence Moscow over the Russo-Ukrainian war and, above all, to pressure Minsk over the migration crisis. During his visit to Poland, Wang Yi pledged to consult with Minsk, while Beijing simultaneously expressed concern over the closure, warning that it could have serious negative consequences for the functioning of the Belt and Road Initiative and cause supply disruptions in Europe. The maneuver, however, did not unfold as planned: China did not exert pressure on Minsk, while the Polish economy and Polish companies felt the impact of the closure. As a result, following the conclusion of Zapad, Warsaw gradually began lifting the border closure, although Chinese transit through Poland remained significantly reduced.

Another source of tension is illegal cigarette trafficking from Belarus into Lithuania and Poland. This year alone, hundreds of cigarette-smuggling balloons and drones were intercepted. Vilnius and Warsaw view these incidents as provocations and part of hybrid warfare, arguing that increasingly strict measures and retaliatory steps are required. Citing the disruptive impact of the balloons on civilian air traffic, Lithuania closed its border with Belarus in October and declared a state of emergency on December 9.[14] Minsk, by contrast, maintains that the Belarusian authorities have no connection to the balloons, that by its very nature smuggling requires two parties, and that Belarus's neighbors are over-securitizing the issue for political gain. At present, the situation appears to be easing: U.S. special envoy John Coale reported that Lukashenko had pledged

12 "Poland has closed its border with Belarus," Ministry of Interior and Administration of the Republic of Poland, September 12, 2025, https://www.gov.pl/web/mswia-en/poland-has-closed-its-border-with-belarus.

13 "New Alternatives as China-Europe Rail Faces Disruption at Poland-Belarus Border," Dimerco, September 24, 2025, https://dimerco.com/news-press/new-alternatives-as-china-europe-rail-faces-disruption-at-poland-belarus-border/.

14 Chris Powers, "Lithuania to Declare 'Emergency Situation' over Belarus Balloons," *Euractiv*, December 5, 2025, https://www.euractiv.com/news/lithuania-to-declare-emergency-situation-over-belarus-balloons/.

to rein in the balloons in an effort to normalize relations with neighboring countries.[15]

The dynamics unfolding in the region point more toward the management of escalation than toward its deliberate intensification: Military exercises and the hybrid pressure tools discussed above are interpreted as threats by European capitals and met with punitive measures, even when Minsk demonstrates flexibility—such as by reducing troop numbers, inviting observers, or releasing political prisoners—and seeks a controlled diplomatic opening. For the time being, Brussels is attempting to maintain isolation, while Minsk is exploring limited avenues for re-engagement. Caution on both sides is understandable: From Belarus's perspective, excessive openness could signal to the EU that its pressure-based strategy is effective; conversely, for the EU, "engagement" carries reputational costs. Absent a strategic shift on the EU's part, these security frictions will persist and will be shaped primarily by terms set by Minsk and Moscow.[16]

CAN THE "BELARUSIAN BALCONY" BE SECURED?

The term "Belarusian balcony" in regional security thinking refers to Belarus's distinctive geographical and military position. The country is deeply embedded within the security space of Baltic states, Poland, and Ukraine. From its territory, both Kyiv and the Suwałki Gap, as well as the core security zones of the Baltic states, are directly accessible. In this sense, Belarus is not merely a neighboring state but a potential forward platform whose military status—regardless of whether it is offensive or defensive in nature—appears as an existential security issue for surrounding countries, much as Ukraine is embedded within Russia's sphere of interest.

At the core of the criticism repeatedly leveled against Belarus and its leadership lies the fact that Belarus did not become Ukraine—neither in 2020 nor thereafter. In the interest of fairness, however, it must also be acknowledged that, from Moscow's perspective, Ukraine's original sin is precisely that it did not become Belarus, or at least did not remain a pre-Maidan Ukraine following

15 Andrius Sytas, "US Says Belarus Agreed to Stop Balloon Flyovers into Lithuania," *Reuters*, December 13, 2025, https://www.reuters.com/world/europe/us-says-belarus-agreed-stop-balloon-flyovers-into-lithuania-2025-12-13/.

16 Balázs Jarábik, "Belarus at the Border: The Limits of Reengagement," Carnegie Endowment, December 17, 2025, https://carnegieendowment.org/russia-eurasia/politika/2025/12/belarus-political-perspectives.

a multi-vector foreign policy. In Moscow, Ukraine's sovereignty is questioned on the grounds that it coordinated its every move with Brussels and previously also with Washington, while in Brussels, Belarus's sovereignty is called into question because of the Russia–Belarus Union State and coordinated foreign policy. Coordination and full subordination, however, are not one and the same: On a number of issues, Belarus has made decisions within its own competence, one of the clearest examples being that it did not deploy a single soldier against Ukrainian forces, not even during the Kursk incursion. In the case of Ukraine, the EU emphasizes autonomous strategic decision-making, but in the case of Belarus, it tends to interpret every move as a reflection of Russian intent, disregarding the regime's own risk-management logic.

As a result, the EU's Belarus policy is rigid and inconsistent, and thus counterproductive: Its attempts at pressuring Belarus—aimed at democratizing (that is, toppling) the regime and pulling the country out of Russia's sphere of influence—have produced precisely the opposite effect. The regime has stabilized, and dependence on Russia has deepened. Whereas Minsk previously looked to Brussels as a counterweight to sustain its strategy of strategic balancing, it now turns to Beijing.

Belarus signaled openness to recalibrating relations and took the steps that lay within its own authority but did not entail a loss of face, yet reciprocal responses failed to materialize, and the lifting of sanctions on the U.S. side proved more difficult than expected, although the issue was corrected following appropriate signals from Minsk. All of this led to the strengthening of voices in Minsk arguing that normalization with the West is a dead end. The steps taken by the Trump administration and the visit by John Coale were intended to address this perception.

The European Union's Belarus policy is failing not because it is insufficiently tough, but because it misinterprets the nature of Belarusian agency. This policy has led to a strategic dead end: Pressure aimed at toppling the regime has not meaningfully weakened the power structure centered on Lukashenko, while it has accelerated Belarus's geopolitical and economic drift eastward. Several de-escalatory and confidence-building steps taken by Minsk within its own authority failed to elicit reciprocity from European capitals. At the same time, the absence of political dialogue means that every Belarusian move is interpreted through a securitized lens, which in a self-fulfilling manner increases the

risk of escalation in a region where Minsk has explicitly sought to minimize military involvement. By contrast, the U.S. approach treats Belarus not as a democratization project but as a geopolitical node—one that can serve as a conduit between Washington and Moscow and retain its role as an important transit corridor in trade between China and Europe. While this strategy does not resolve the Belarus question on its own, it can contribute to minimizing regional escalation. For the EU, the challenge lies in whether it can shift from ideological rigidity toward a more flexible, interest-based approach before Belarus slips irreversibly out of Europe's sphere of influence.

Belarus's current behavior is guided by a logic of risk management rather than escalation intent: The regime's primary objectives are survival, the avoidance of external military entanglement, and the preservation of room for maneuver.[17] While normalization matters to Minsk, however, it does not matter enough to jeopardize regime stability. Many in Belarus believe that the openness of the 2015–2020 period merely laid the groundwork for the 2020 revolution. Given Belarus's role as a "balcony," the EU also has a vested interest in normalization, yet its normative approach makes it politically risky. Political dialogue implies offering the Lukashenko regime legitimacy, which for now remains a red line, particularly as Brussels regards the Tsikhanouskaya couple as the legitimate interlocutor. Dialogue with them, however, is unacceptable for Belarus. Nevertheless, engagement with Minsk is not synonymous with accepting or supporting the regime. The "Belarusian balcony" must be understood and kept stable so that it does not collapse onto its fearful neighbors as a result of a destabilization that places it under actual Russian influence and transforms it into a real military staging ground.

17 Balázs Jarábik, "Belarus at the Border: The Limits of Reengagement," Carnegie Endowment, December 17, 2025, https://carnegieendowment.org/russia-eurasia/politika/2025/12/belarus-political-perspectives.

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