BELARUS BEEHIVE 2.0
BASELINE RESEARCH

Final Report

Introduction

The study was conducted within the framework of the program "Belarus Beehive 2.0: Supporting civil society as a key driver of democratic transformation of Belarus". The program supports Belarusian civil society in conditions of repression and prepares it for democratic reforms. It is focused on the reorganization and strengthening of Belarusian civil society to expand its capabilities to influence democratic changes in Belarus. Belarus Beehive, through a set of program tools (consulting on organizational development, provision of education, mentoring and coaching, financial support for project implementation, institutional financial support, support for coalitions, etc.), seeks to change the current state of Belarusian civil society, in particular, to improve its human and organizational capacity, expand its access to financial resources, and increase its capabilities to advocate for changes in Belarus at the international, regional, and national levels. An adequate assessment of the state of civil society and the effect of Belarus Beehive's support for it requires systematic research by surveying a wide range of organizations from different sectors of civil society (hereinafter referred to as CS).

Research goals and objectives.

To provide a description and assessment of the state of civil society in Belarus according to the following criteria:

1. Description of external conditions:

- State of the environment for civil society activities (political and legal conditions) in Belarus and in places of greatest concentration of Belarusian civil society abroad;
- Assessment of the volume and availability of funding from international and private sources.

2. Description of the objective situation of civil society and its activities:

- Assessment of the activities of organizations in Belarus and abroad. What types of activities are implemented, how do they respond to threats and challenges (repression by the regime, personnel problems, difficulties with legalizing activities, etc.);

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- Assessment of the dominance of typical strategies;
- Assessment of cooperation and interaction of civil society organizations in Belarus and abroad;
- Assessment of the organizational, institutional and financial sustainability of organizations, the state of human resources.

3. Self-assessment of civil society by organizations (according to the criteria in paragraphs 1 and 2).

To assess the changes in the state of the civil society during the study period.

Provide the stakeholders with recommendations on changing Belarus Beehive's actions, tools, and approaches towards civil society, which will contribute to more effective support for civil society.

Research object and methodology.

The object of the study is the civil society of Belarus and the external environment of its existence (political, legal, financial conditions). Civil society covers any initiatives and organizations regardless of registration and level of institutionalization. The study also covers civil society organizations and initiatives of Belarusians abroad, if their activities are directly related to Belarus or Belarusians abroad. Organizations from various sectors were represented: educational, cultural, social support and protection, expert community, etc.

The study was conducted using an online survey of representatives of civil society organizations. The questionnaire consisted of several blocks: “general information”, “external conditions of civil society activities”, “cooperation and coalitions”, “self-assessment”, “forecasts”.

The study was conducted in two stages.

The first stage (E1).

Response collection – January-April 2025

Number of participants – 63.

The questionnaire consisted of two versions – Belarusian (44 responses) and Russian (19 responses).

Second stage (E2).

Response collection – December 2025 - April 2026

Number of participants – 30.

The questionnaire consisted of two versions – Belarusian (19 responses) and Russian (11 responses).

The difficulties and limitations of the study are due to the large-scale persecution by the Belarusian regime of both individual individuals and the civil society as a whole. In the context of security concerns, including cybersecurity, participants had to be recruited

through personal contacts, which increased the response collection period. This also affected the low number of participants in E2 compared to E1[1].

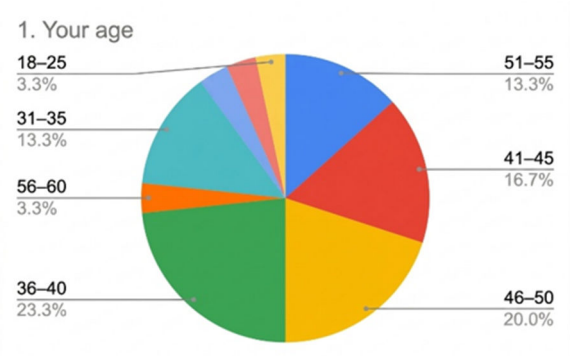
This report is based on the results of E2. The data of E1 and the comparison of the results of E1 and E2 are highlighted in a different color. Where the indicators do not differ, or differ only slightly, no comparison was made.

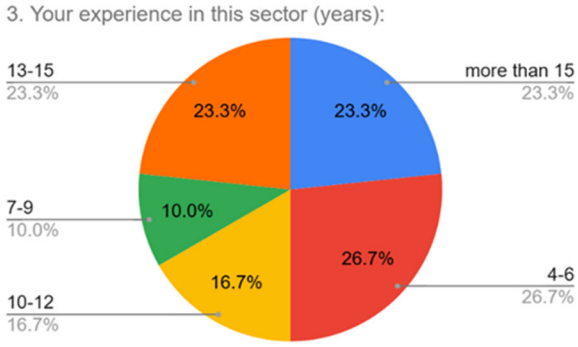
SURVEY RESULTS

GENERAL INFORMATION

Individual characteristics of respondents.

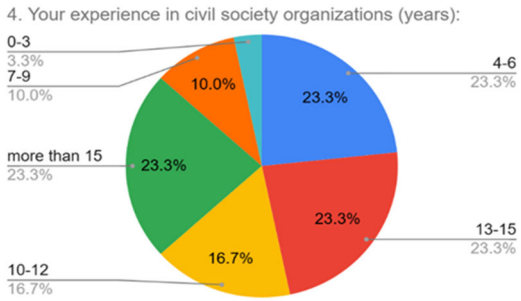
Among the respondents, the largest age group is 36-40 years old (23.3%), in second place is the range 46-50 (20%), in third place is 41-45 (16%), in fourth place are 31-35 and 51-55 (13% each). Thus, the middle age range dominates, i.e. 36-50 years old (60%). 63% have at least 10 years of work experience both in civil society sector as a whole and in their own sector of civil society. The same percentage of respondents are heads of organizations, another 30% hold project manager and equivalent positions[2].

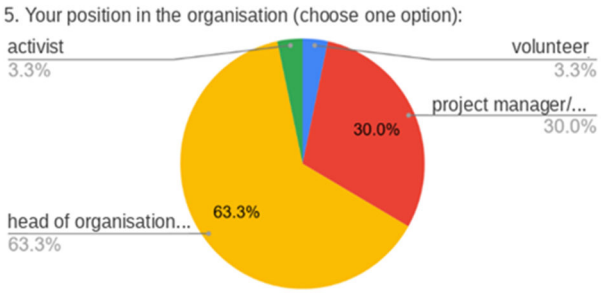




[1] It should also be taken into account that between E1 and E2 (spring 2025 – spring 2026) the persecution of civil society in Belarus and abroad intensified, and the number of organizations continued to decline. As of May 2025, 1,936 organizations had been liquidated or were in the process of liquidation since the post-election crisis of 2020; as of May 2026 the figure was already 2,033 (according to Lawtrend data: https://www.lawtrend.org/monitoring-issledovania/ezhemesyachnye-monitoringi).

[2] Some respondents gave a higher number in response to question 3 than in response to question 4. This may have been the reason for a misunderstanding of the essence of question 3, where “sector” could be understood as a field of activity in general (e.g. education), and not the civil society sector.





Characteristics of organizations.

According to the sectors of the public service, the distribution is as follows (in brackets - the corresponding percentage on E1):

Culture sphere - 23% (17%)

Education - 20% (17%)

Civil society development - 13% (13%)

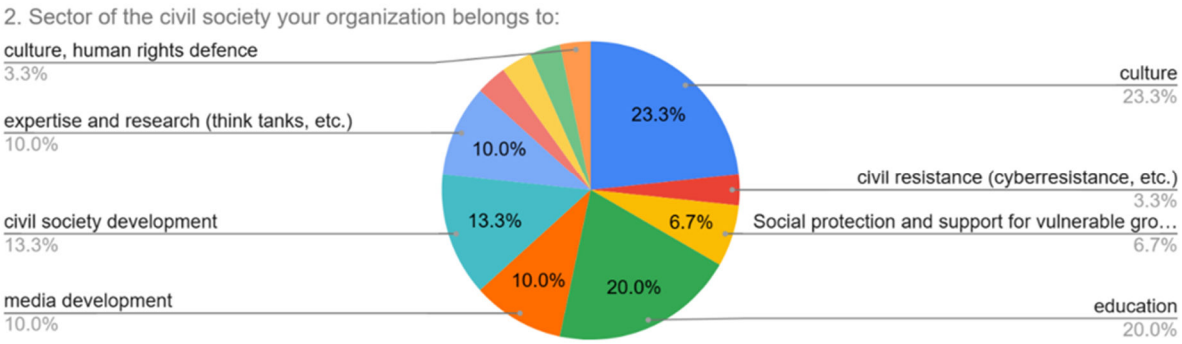
Media development - 10% (6%)

Expert and research activities - 10% (9%)

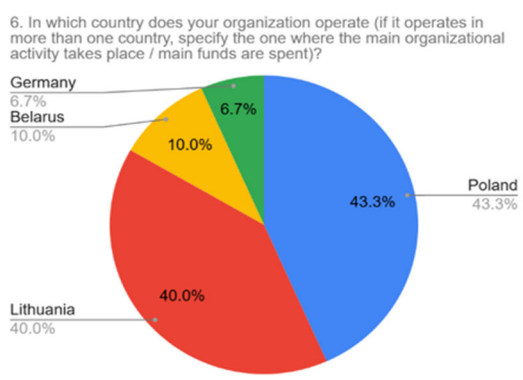
Social protection and support for vulnerable groups - (7%) 13%

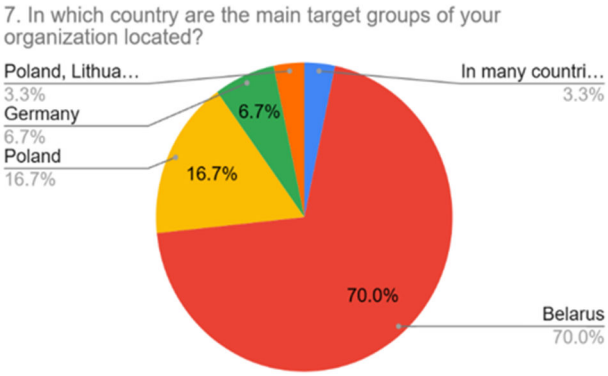
(the rest made up 3% each, which corresponds to one respondent).

Compared to E1, the share of the sectors culture, education, media development increased the most. The largest decrease was shown by environmental protection (from 11% to 3%) and social protection and support for vulnerable groups (from 13% to 7%). The category local initiatives and urbanism, represented by one respondent in E1, is absent altogether. The category trade unions is absent in both stages.



10% of organizations operate in Belarus (E1 22%). The majority operate in Poland (43%) and Lithuania (40%; E1 30%). Some organizations are active in more than one country. At the same time, the target audience of 70% of organizations is located in Belarus. The connection with Belarus is indicated by the frequency of its mention when answering the question "In which other countries does your organization operate?" – 55%. Other frequent answers were Poland, Lithuania, Germany and Georgia.

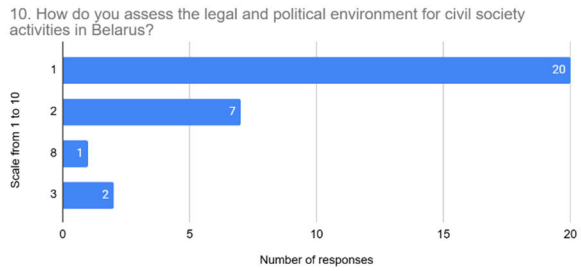


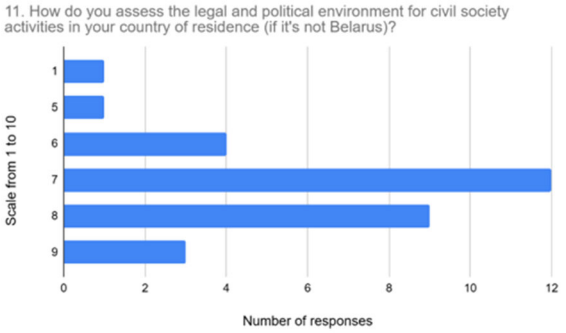


77% have official status in the country where their main activity takes place. Among those whose main activity is in Belarus (n=3), 67% have official status.

EXTERNAL CONDITIONS OF CIVIL SOCIETY ACTIVITIES

The political and legal conditions for the activities of civil society organizations in Belarus are assessed by 66% (E1 52%) as extremely unfavorable. The remaining answers, except for one, were distributed in the range of 2-3 on a 10-point scale (1 - extremely unfavorable, 10 - very favorable[3]). Outside Belarus, on the contrary, the majority of respondents find such conditions quite favorable: 33% (E1 53%) assessed them in the range of 8-10, 40% - at 7.





The share of those who assess political and legal conditions in Belarus as extremely unfavorable has increased significantly. The share of those who assess such conditions as 8-10 outside Belarus has decreased very significantly.

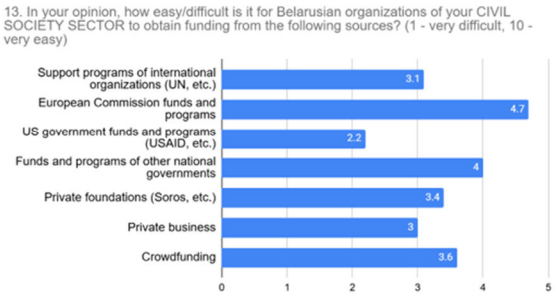
The situation with **funding** looks rather pessimistic (questions 12-14). In assessing the availability of funding for the entire CS from seven different sources on a scale from 1 (very difficult to obtain) to 10 (very easy to obtain), the maximum average value was 4.7 – this is how access to funds from the European Commission was assessed[4]. Access to funds from the US government is seen as the most difficult – 2.2.

The assessment of access to funding to cover specific needs of organizations is approximately the same. The most difficult thing is to find funds for institutional funding,

[3] One answer of "8" appears to be accidental.
[4] Excluding "don't know" answers.

support for staff, office, etc. (average value 2.3), the easiest – for support of new projects (5.0, E1 4.2) and for work with target groups (5.3, E1 4.5). The average value showed a slight increase for all needs of organizations, except for institutional funding.

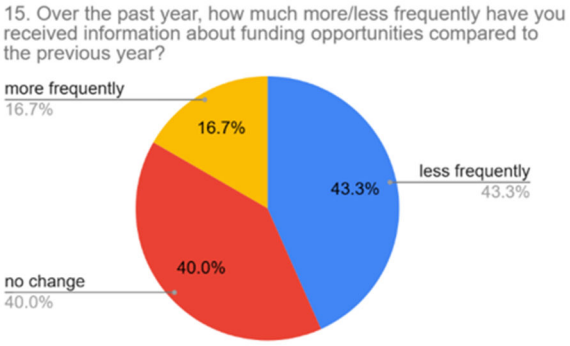


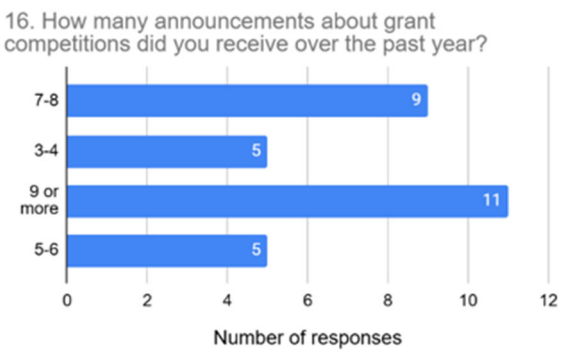




Over the past year (compared to the previous one), 43% (E1 52%) began to receive information about funding opportunities less often, 16.7% (E1 11%) - more often. The remaining 40% did not see any changes. The relative majority of respondents - 37% (E1 28%) - received “9 or more” messages about grant support opportunities. 33% (E1 22%) submitted 9 or more applications. Only 7% (E1 11%) submitted 1-2 applications. There are no those who did not submit a single application.

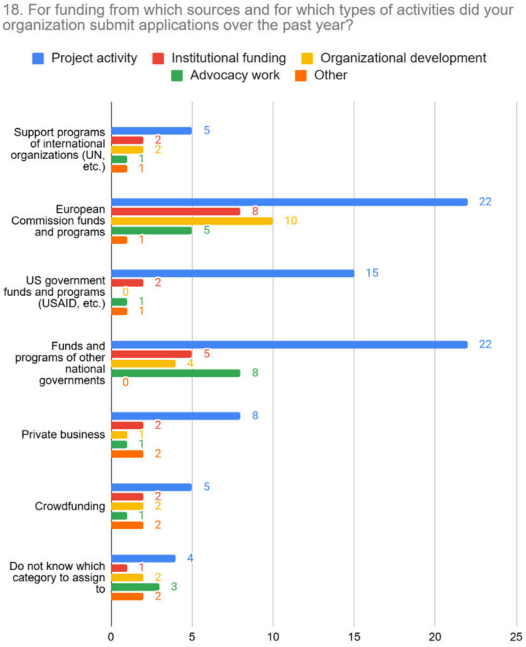
Overall, the picture with grant opportunities has improved slightly compared to E1. The number of those who received more messages about funding opportunities over the past year has increased. The average number of applications submitted has also increased.

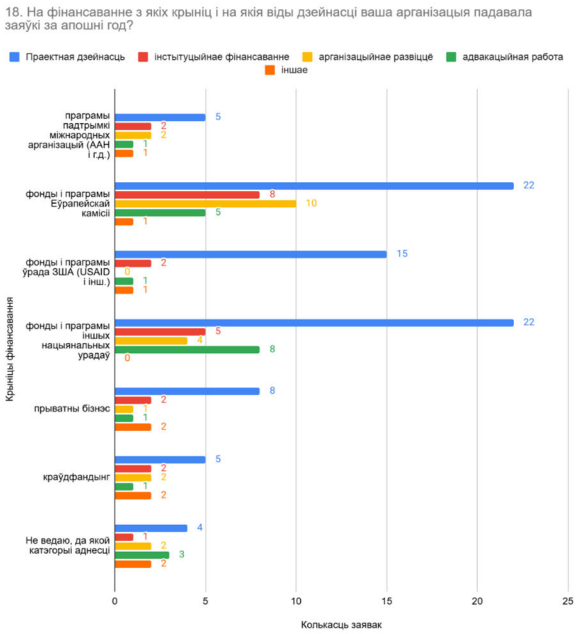






The distribution of applications by type of activity and funding sources was as follows (see the graph). Project activities dominate among the types of activities, while the European Commission and national government programs noticeably dominate among the funding sources.





STRATEGY

73% (E1 68%) of organizations operate in accordance with local legal norms. Among the reasons that do not allow full compliance with local legislation, the difficulties of working with people in Belarus and with Belarusian citizens in general, the specifics of Lithuanian legislation regarding VAT, and the lack of legal knowledge are mentioned. In response to the question “How would you describe the relationship between civil society organizations and the authorities in Belarus?” no one chose the option “the authorities cooperate and facilitate work”, and only one respondent answered that “the authorities do not hinder work”. 40% (E1 25%) believe that no activity is possible in Belarus due to obstacles from the regime, another 40% (E1 59%) see legal activity as impossible.

In general, there is a noticeable outflow of personnel in the civil society sectors. 43% (E1 32%) observe a slight decrease, another 20% - a significant one. A slight increase was noted by 17% (E1 22%).

Answers to the question "What strategies dominate in your civil society sector" (multiple choice) were distributed as follows:

Orientation on the diaspora and on arranging life in the diaspora – 60% (E1 41%)

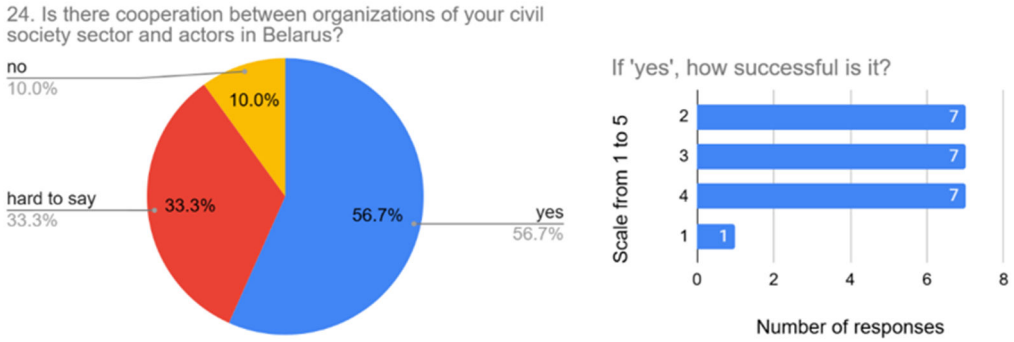
Expectation of changes in Belarus – 53% (E1 28%)

Working for changes in Belarus – 50% (E1 71%)

Adaptation to existing conditions in Belarus – 30% (E1 49%)

The share of those who consider any activity in Belarus impossible has increased significantly – from 25% to 40%. Apparently, this happened due to a decrease in the share of those who consider legal activity impossible – from 59% to 40%. The already difficult situation with human resources has worsened. The share of those who observed a slight decrease in the number of people employed in the sector over the past year has increased (from 32% to 43%), with a simultaneous decrease in the share of those who observed a slight increase (from 22% to 17%). The vision of the dominant strategy in the sector has changed dramatically. If E1 showed the preference for working for changes in Belarus, then E2 demonstrates the dominance of orientation towards the diaspora and expectations of changes in the country, although the percentage of choosing to work for changes in Belarus remains high – 50%.

COOPERATION AND COALITIONS

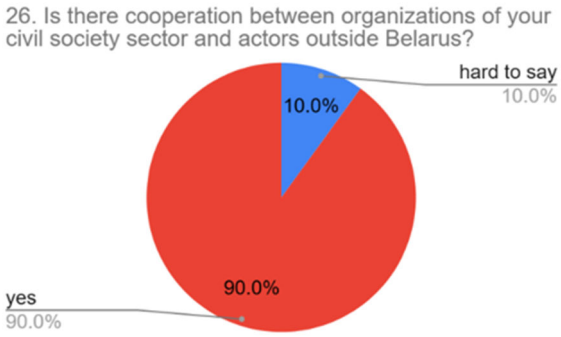


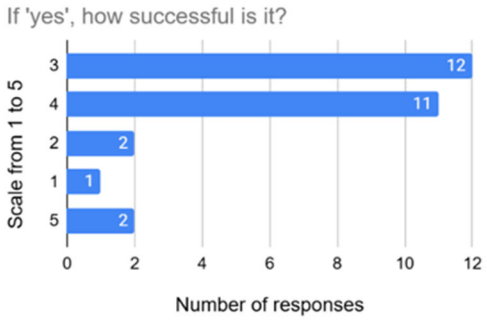
To the question "Is there cooperation between organizations in your civil society sector and actors in Belarus?" 57% answered positively, 10% (E1 14%) - negatively. Across the entire sample, no one rates the success of cooperation at 5. The bulk of the answers were evenly distributed between grades 2, 3 and 4[5].

To the question "Is there cooperation between organizations of your civil society sector and actors outside Belarus?" 90% (E1 79%) answered positively and only 10% (E1 6%) answered negatively. The assessment of the success of such cooperation looks more positive than

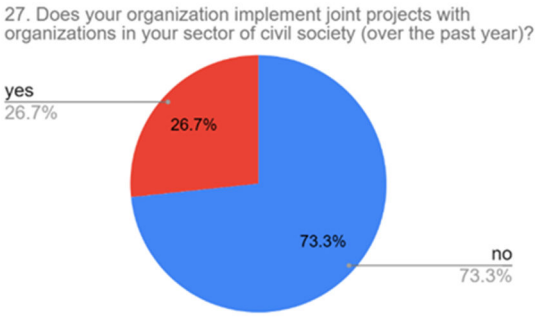
[5] More people responded to the clarification "If 'yes'..." than gave a simple "yes" to the corresponding question.

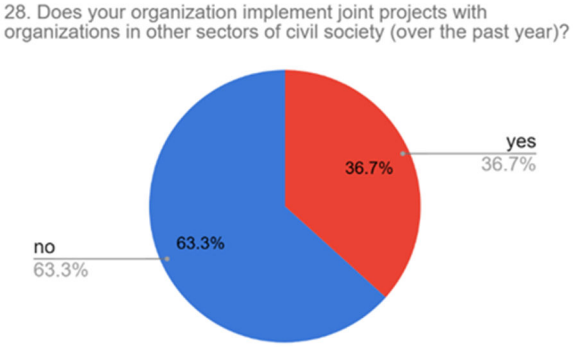
with organizations in Belarus. Across the entire sample, 43% (E1 53.8%) assess the success of cooperation for 4 and 5, and 40% (E1 36.5%) for 3.



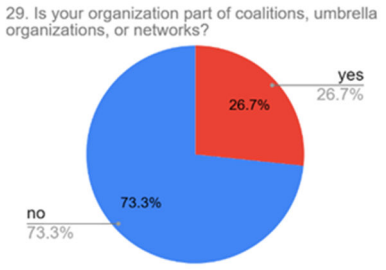


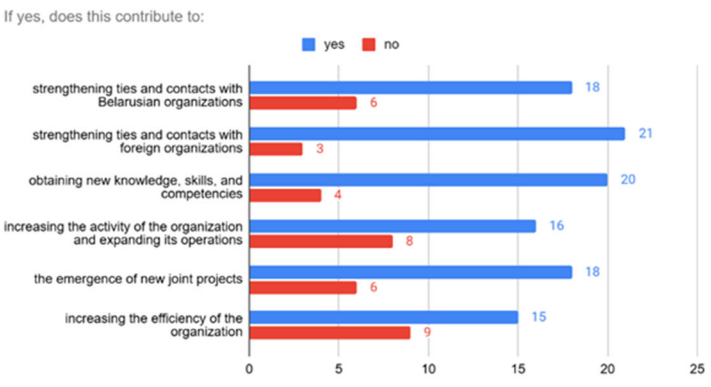
73% (E1 68%) said that their organization implements joint projects with organizations from the SAME CS SECTOR (during the last year). Regarding joint projects with organizations from OTHER CS SECTORS, this figure was 63%.

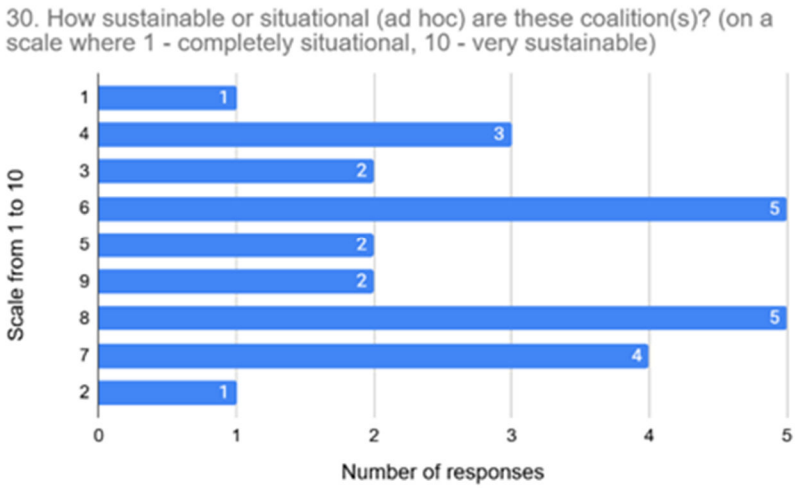




73% (E1 60%) of organizations are members of coalitions/umbrella organizations/networks. This generally has a positive impact on the state of organizations in the six proposed aspects. Coalitions contribute least to increasing the efficiency of organizations, most to strengthening ties with foreign organizations (E1 - strengthening ties with Belarusian organizations). The stability of such coalitions is on average quite high: on a scale from 1 (absolutely situational) to 10 (very stable), the answers in the range of 6-9 significantly prevail (E1 - almost equally distributed along the median (1-5 and 6-10)).







Overall, E2 shows more cooperation between organizations than E1. The decrease occurred only in the assessment of the success of cooperation between organizations and actors outside Belarus. More respondents believe that there is no such cooperation (E2 10%, E1 6%), and fewer see it as successful (a decrease in the positive assessment of cooperation from 54% to 43%). It is noteworthy that the weight of the positive effect of participation in coalitions/umbrella organizations/networks is shifted to strengthening ties with foreign organizations instead of organizations in Belarus.

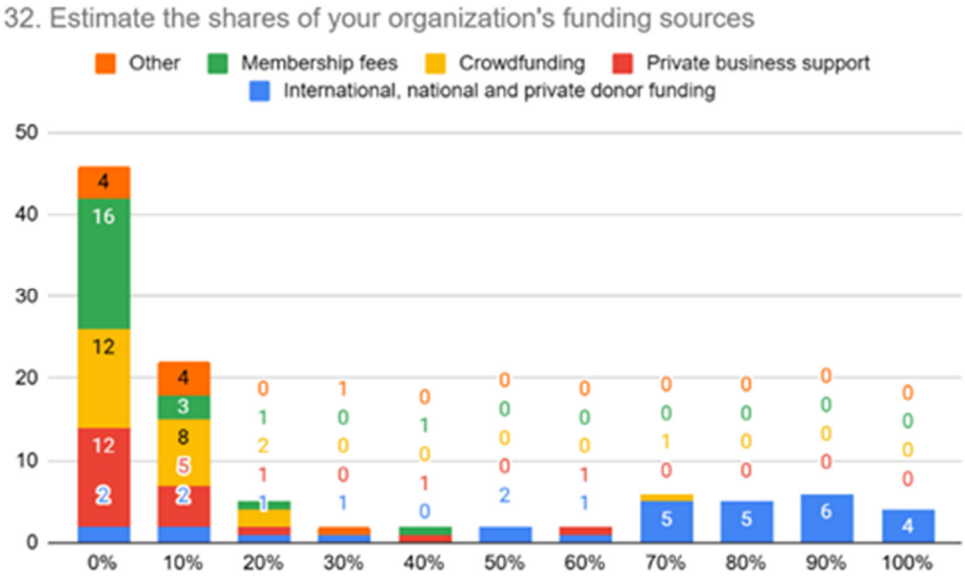
SELF-ASSESSMENT

There are **no very financially stable** (9-10) organizations. Only one respondent rated such stability at 8. The share of the range above 5 is 33% (E1 21%), the share of the range 1-3 is 43%.

In the budgets of organizations, international, national and private donor funding noticeably prevails over all other options. 13% (E1 30%) of organizations are fully financed from this source, for another 53% it makes up 70-90% (E1 44%) of the percentage of financing. Among the “other” were named income from the provision of services (n=3) and “private donations” (n=1)[6].

[6] The relevance of the results may be affected by the fact that not all respondents answered the relevant question appropriately. Despite the inclusion of an "other" option, the total for seven cases amounted to 90% instead of 100%; for two other cases, it was 80%; and for individual cases, it was 60%, 20%, 10%, and 0%. One respondent left the question unanswered, while another failed to specify the content for the "other" option.







77% (E1 71,5%) believe that both foreign and domestic organizations should distribute donor funds in their civil society sector.

In the activities of the majority of organizations over the past year, the tendency to adapt to the current situation rather than prepare for changes in Belarus has prevailed (on a scale from 1 - “adaptation” to 10 - “changes”). 57% (E1 68%) are in the range 1-5. However, the advantage is less than in E1.



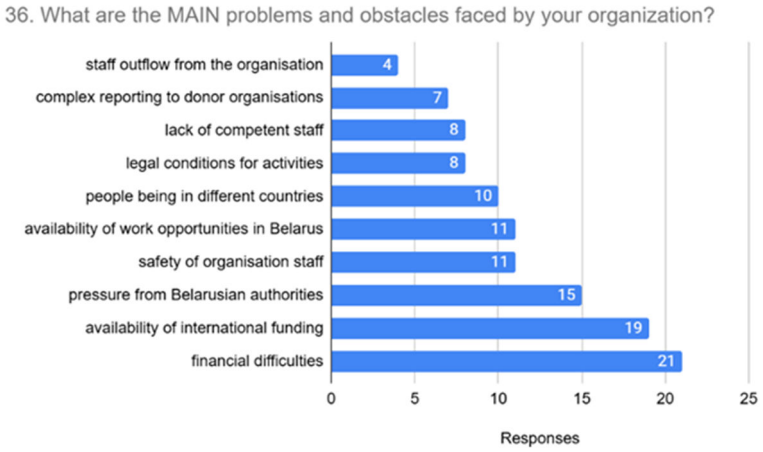
In assessing the sustainability of their own organizations (on a scale from 1 – “very unstable” to 10 – “very stable”), average values prevail. However, the share of those who fall into the range of 1-5 is very high – 47% (E1 55%).



In 20% of organizations, there is no shortage of specialists. The most in-demand are financial specialists – 37% and external communications specialists – 33%. The smallest shortage is security specialists – 7%. IT specialists, who were the most in-demand in E1 (40%), ended up in sixth place together with project managers – 20%.

Among the **main problems and obstacles** (question 36), the availability of international funding stands out – 63% (E1 71%), financial difficulties – 70% (E1 87%) and pressure from the Belarusian authorities – 50% (E1 55%). The least problematic are the personnel issues and reporting to donor organizations.

The three most problematic areas have maintained their positions compared to E1. However, the percentage of both options related to funding has significantly decreased. This decrease can be partially explained by the low number of respondents whose organizations are located in Belarus. In E1, there were n=14 of these, in E2 – n=3. 13 out of 14 such respondents in E1 named finance in response to this question. On the other hand, the improvement may be associated with changes in the actual situation with funding..



Among the main needs (question type – free text) 57% (E1 84%) named those related to financing, 43% (E1 24%) - to the organization of processes and strategic planning, 20% - to personnel, 13% (E1 8%) - to security/pressure from the Belarusian authorities and the difficulties of working in Belarus.

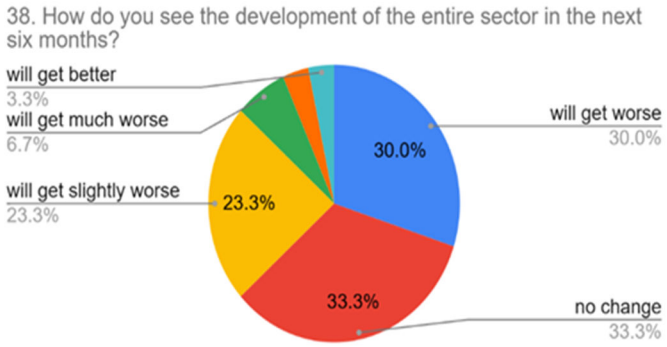
Here again, there is a decrease in the percentage of those who named finances as the main problem. Nevertheless, this remains the most popular answer. The share of those who are concerned about the long-term development of the organization has increased sharply.

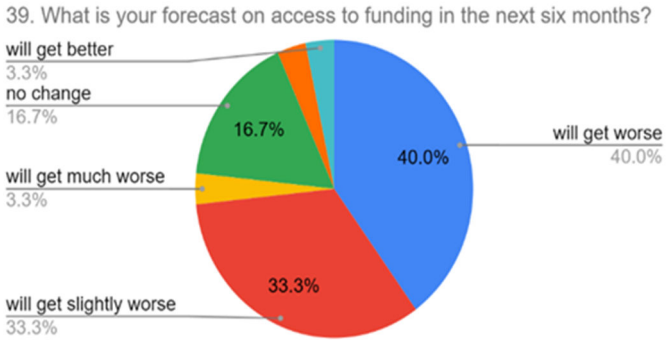
FORECASTS

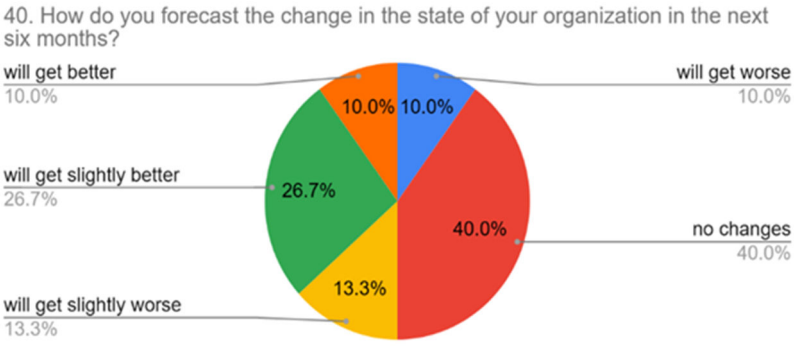
The absolute majority sees the development of the entire sector in the next six months pessimistically. No one chose the answer option “it will get much better”. Only about 7% believe that it will get better or it will get a little better. All other answers are distributed in the range between no change and it will get much worse. Overall, 60% expect a deterioration (E1 81%). There is even more pessimism regarding the situation with access to financing: 77% expect a deterioration.

As for the forecast for the state of their own organization in the next six months, there is much more optimism here, which is dissonant with the forecast for the general public sector and access to financing. The share of those who believe that “it will get better” and “it will get a little better” is as much as 37% (E1 25%).

The forecasts look generally more optimistic than in E1, with the exception of the assessment of the situation with access to financing. The share of those who are optimistic about the future of their own organization has increased significantly - from 25% to 37%. The decrease in the percentage of those who expect the state of the public sector to deteriorate was mainly due to a sharp increase in the share of respondents who do not see any changes in the near future - from 10% to 33%.







SUMMARY

The sample is dominated by respondents with significant experience in the civil society sector (10 years or more). The majority of respondents (65%) hold positions of heads of

organizations. By sectors, organizations in the fields of culture (23%), education (20%) and civil society development (13%) predominate. Only 10% (n=3) of organizations conduct their main activities in Belarus, which contrasts with 22% in E1. At the same time, 70% of the entire sample have their main target audience in Belarus, which indicates a high connection with the country (the same indicator was demonstrated by E1).

Such a small number of respondents "from Belarus" makes the differentiation between them and respondents outside the country largely irrelevant, although E1 showed a large difference between these categories in the answers to a number of questions in the questionnaire. The same circumstance can explain some of the differences in the results of E1 and E2, for example, regarding financing issues.

77% have official status in the country where their main activity takes place. Compared to E1, the share of those who consider the political and legal conditions for the activities of civil society organizations in Belarus to be extremely unfavorable has increased. At the same time, the percentage assessing such conditions outside Belarus as very favorable has significantly decreased. The first can be explained by the increased pressure and persecution of civil society organizations by the Belarusian regime, and the second by a certain deterioration in the situation of the Belarusian diaspora in the main countries of its presence, primarily in Lithuania.

The vast majority of respondents consider the funding situation to be quite difficult both in their sector and in civil society as a whole, although some improvement can be observed compared to E1. The most difficult thing is to find funds for institutional funding, staff support, office, etc., the easiest, but still difficult, is for project activities and work with target groups. Over the past year, 43% began to receive notifications about funding opportunities less often, while in E1 the corresponding percentage was 52%. More respondents than in E1 received 9 or more notifications about grant opportunities. The same applies to the share of those who submitted 9 or more grant applications. Among the sources of funding in E1 and E2, the European Commission programs and national government programs prevail.

The situation with personnel, which was already quite difficult, has worsened. The share of those who see a decrease in the number of people in their sector has increased, and the percentage of respondents who see an increase has decreased. There is a shortage of qualified personnel in various fields. IT specialists, who were the most in demand in E1 (40%), were in sixth place together with project managers – 20%. Financial specialists (37%) and external communications specialists (33%) came in first place. It can be concluded that some difficulties – recruitment of personnel, problems with organizing processes, strategic planning and institutional support, etc. – could be overcome with sufficient funding. A separate difficulty remains the political climate in Belarus, which affects the work of organizations.

There have been noticeable changes in how respondents see the dominant strategies in their civil society sector. While in E1 70% believed that working for change in Belarus prevails, in E2 this option is given 50%, while the focus on the diaspora came in first place

with 60% (it is important that the focus on the target audience in Belarus has not decreased, see above).

Overall, E2 shows more cooperation between organizations than in E1. It is important that coalitions and networks have become more stable. The decrease occurred only in the assessment of the success of cooperation between organizations and actors outside Belarus. More respondents believe that such cooperation does not exist (E2 10%, E1 6%), and fewer see it as successful (a decrease in the positive assessment of cooperation from 54% to 43%). It is noteworthy that the emphasis on the positive effect of participation in coalitions/umbrella organizations/networks is shifted to strengthening ties with foreign organizations instead of organizations in Belarus.

The assessment of the state of their own organizations by respondents generally corresponds to the assessment of the civil society and its sectors. The majority considers their organizations to be financially unstable. However, E2 showed a greater share of respondents who assessed the financial stability of their organizations at 6 or higher (33% versus 21%). In the budgets of organizations, international, national, and private donor funding noticeably outweighs the shares of other sources.

The forecasts for the state of their sector in the short term (for six months) are pessimistic, especially in terms of financing - the majority believes that it will get worse. However, the degree of pessimism regarding their own organizations is much lower. At the same time, E2 shows a certain increase in optimistic sentiments, except for the forecast regarding financing.

Conclusions and recommendations.

The political and legal conditions for the activities of civil society organizations are assessed as quite difficult, and the perception of the situation has deteriorated both in Belarus (repression and politically motivated persecution) and abroad (a worsening climate for the Belarusian diaspora). The halving of survey participation between E1 and E2, which is explained by security concerns and the need to recruit respondents through personal contacts, is also a “soft” indicator of the closing of civic space.

The financing situation is seen as equally difficult for civil society as a whole and for individual sectors. However, over the year (spring 2025 – spring 2026) there is some improvement in the assessment of access to funding to cover certain needs of organizations, as well as in the availability of grant opportunities and the number of grant applications submitted. There is also a certain increase in the average assessment of the sustainability of their own organizations. However, at both stages of the survey, no organization considered itself genuinely stable.

Although there has been a general improvement in the situation with personnel over the past year, the vast majority of organizations have a shortage of specialists. It can be assumed that personnel problems are caused not so much by the objective situation of the labor market as by the lack of funding and by security-related threats. The most in-demand are

precisely those staff members who are difficult to retain on project-restricted grants. Thus, the project-based funding structure itself may contribute to the personnel problem.

In the assessment of the dominant strategies of civil society, the share of orientation toward the diaspora has increased, as expected, while the share of work on preparing for changes in Belarus has decreased. This reflects the objective situation and the current needs of organizations in arranging life and work in the host countries rather than a change in strategic vision. The orientation toward the target audience within Belarus has remained unchanged. The somewhat reduced emphasis of respondents on preparing for changes in Belarus may also be linked to a shift in international funding priorities, which can indirectly affect the strategic focus of organizations.

However, if the operating environment in the main host countries (in particular Lithuania and Poland) also becomes less favorable, organizations may face double pressure: more energy is required to remain viable where they are based, while at the same time they are expected to maintain their programmatic focus on Belarus.

The positive impact of support from Belarus Beehive can be seen in the positive trends regarding the coverage of organizations by cooperation and coalitions (networks, umbrella organizations), among other things, in increasing their sustainability. However, the benefits of coalitions are shifting away from ties directed at Belarus and toward ties with organizations abroad.

Funding of civil society is limited to a small number of available sources. Programs implemented by the European Commission and national governments predominate both among the sources that organizations turn to and among the applications they submit. A sector that depends so heavily on one or two types of donors is vulnerable to changes in the priorities or budget parameters of either of them.

A number of the positive changes observed between E1 and E2, especially regarding access to funding, application activity, the stability of coalitions and organizational stability, may be linked to the support provided by the Belarus Beehive program. However, in order to establish a direct causal link between the observed effects and this support, future surveys should divide respondents into those who received support and those who did not.

The main needs and problems of civil society remain issues related to: 1. funding; 2. institutional development, strategic planning and organization of processes; 3. pressure from the Belarusian authorities and security.

Based on the above analysis, **the following recommendations for donors and large intermediary NGOs can be offered**:

Funding structure

- Provide core and institutional funding, not only project funding. This is the type of support that is hardest to access, and most donors are reluctant to provide it. A flexible, multi-year core-support instrument addresses the problem ranked highest in the study more directly than advisory support alone.

- To diversify funding sources, coordinate the provision of reserve or bridge funding among donors, so that a reduction or delay in funding from a single major source (such as the European Commission or USAID) does not immediately trigger a wave of organizational failures.
- Calibrate expectations for civil society development to the actual state and strategies of the sector. None of the surveyed organizations rated its financial stability at 9–10. Consequently, funding criteria that require a high level of stability risk excluding the very organizations that support programs are meant to serve.

Human resources and organizational capacity

- Fund staff retention, not only training. Staff shortages are most acute in roles related to finance and external communications – functions that are continuous and systemically important, yet difficult to sustain through project-based funding. Co-financing mechanisms aimed specifically at these roles would close the gap identified by the study more effectively than general organizational development training.
- Provide funding for security and cybersecurity support as a distinct, permanent budget line rather than an optional add-on.

Scope of advocacy and support to coalitions

- Extend advocacy support to the operating environment of exiled civil society organizations in their host countries. The decline in favorable ratings of conditions outside Belarus (noted especially in Lithuania) suggests that registration, tax and legal-status issues in the main diaspora hubs are becoming a constraint in their own right and require direct engagement with host-country governments.
- When funding coalitions or networks, set clear expectations for maintaining ties with organizations and actors inside Belarus. The data suggest that, if left unmanaged, the benefits of coalition membership shift toward ties among organizations outside Belarus.

Monitoring and Feedback

- Invest in the civil society sector's own capacity to conduct safe and representative research.
- Periodically check whether reporting requirements match the actual administrative capacity of partner organizations. Organizations already experience a shortage of staff in the finance function; reporting expectations should be reviewed and not left without feedback and improvement.