

July 2013

PollingMemo

Presidential midterm: better than
yesterday, worse than the day before

KEY FINDINGS

The findings of the most recent public opinion poll carried out by the Independent Institute of Socio-Economic and Political Studies (IISEPS) in June 2013 are a reflection of the overall picture of the political, economic and social sentiment of the Belarusian population as of the middle of Aliaksandr Lukashenka's current, fifth presidential term. In June 2013, the share of the respondents who believe that Belarus is on the wrong track, at 45.5%, remained above the proportion of those thinking that things are moving in the right way, at 39.6%. Nevertheless, there is a definite trend towards a gradual narrowing in the share of negative evaluations of the country's development path. These figures differ a lot from those logged in June 2011, during the first year of Lukashenka's current presidential term, when more than 60% of the population thought the country was on the wrong track, and only 26% were optimistic about the road that the country had taken. However, despite the recent progress, the share of positive evaluations has not reached the level recorded during the initial months of new terms (45.3% in March 2001 and 54% right after the presidential election of December 2010).

The same holds for the balance of optimistic and pessimistic expectations of the future. Eighteen per cent of the Belarusians believe that the socioeconomic situation will improve in the 12 months to come (which compares to 12% during the most difficult period—in June 2011—and 30% in March 2011). Twenty-four per cent of the respondents think that the situation will aggravate, the same as in March 2011, whereas in June 2011, their share stood at 55%.

For all that Aliaksandr Lukashenka managed to restore his electoral rating to 40%, which de facto corresponds to his rating at the very start of his current presidential term. This is quite surprising, one reason being that the majority of the respondents agree that Lukashenka failed to effectively deal with the economic crisis: just as in June 2011, about 60% of the respondents said that the country's economy is in a crisis. BISS supposes that the increase in the electoral rating cannot be directly attributed to the wage push alone any longer, but should rather be accounted for by the perceived stability, as almost half of the Belarusian population (49%) believes that the economic situation will not change in the next 12 months.

Despite the absence of significant changes in the level of support for the opposition, the findings of the poll pertaining to the new initiative “Popular Referendum”, which involves the civil campaign “Tell the Truth!”, movement “For Freedom”, Belarusian Social-Democratic Party (Hramada) and the BPF Party exceeded expectations: 52% of the respondents support the idea; only 32% speak against it. Fifty-seven per cent of the Belarusians said they were ready to give their signatures in support of the referendum, and 22% said they were ready to become activists of an advocacy group.

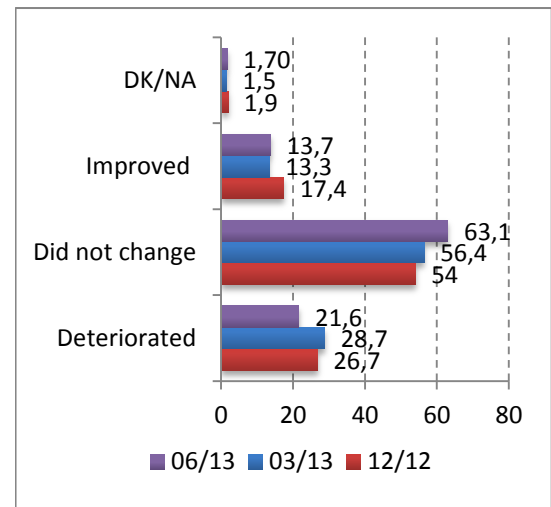
The geopolitical orientations of the population achieved a balance in June 2013 with 41% of the Belarusians supporting Russia and the European Union each when asked to select only one of the two international integration options. BISS believes this situation to be predictable, because the perceived stability reinforces this distribution, whereas economic disturbances and growing demand for reforms encourage the pro-EU choice.

The perceived stabilization also shapes the respondents’ attitude to reforms: they become less reliant on the role of foreign capital and Belarusian entrepreneurs in the development of the economy; in the meantime, modernization rhetoric can be a reason behind the reduction in the population’s interest in liberal reforms, as it effectively substitutes for the “cardinal change in the model”: 50.2% of the respondents agree with this.

ECONOMICS

In June 2013, certain changes in the economic self-sentiment of the population can be observed, which also influence the perception of the economic situation as a whole and the public opinion on socioeconomic issues. Altogether, the economic situation as viewed by the population can be described as “longed-for stabilization”, because the share of those whose financial situation did not change is significantly growing for the account of those whose financial situation deteriorated in the previous quarter. Personal evaluations of the financial situation are highly subjective, as overstocks, loan burden and rhetoric about ways to cut budget spending fail to produce an adverse impact on economic self-sentiment.

Chart 1. Answers to the question “How did your financial situation change during the last three months?”



For the first time this year, we observe a marked increase in the proportion of those who agree that the situation in the country is developing in the right way amid a reduction in the share of those thinking that the country is on the wrong track. The five-point increase in the share of the respondents who said that the country is on the right track looks quite significant as against the findings of previous opinion polls, when the proportion of those responding this way consistently remained at about 35%. The share of the respondents who believe that the economy is in a crisis continued to go down, to reach 60%.

Chart 2. Answers to the question “Do you think things are developing in the right or wrong way in our country?”

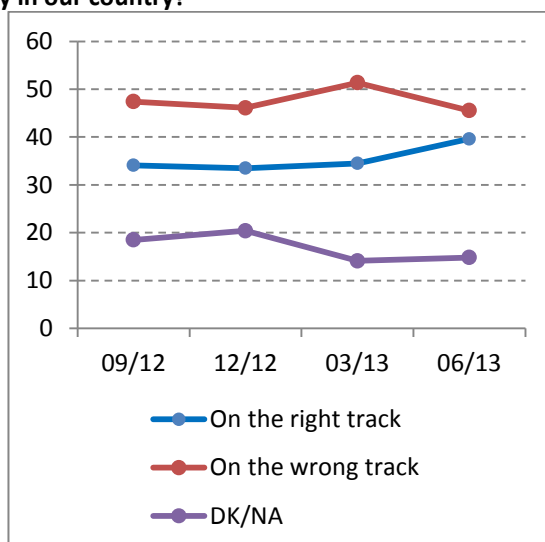
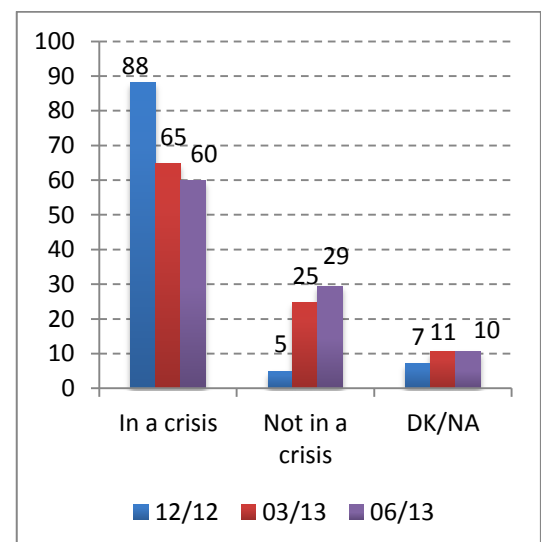


Chart 3. Answers to the question “Do you think the Belarusian economy is in a crisis?”

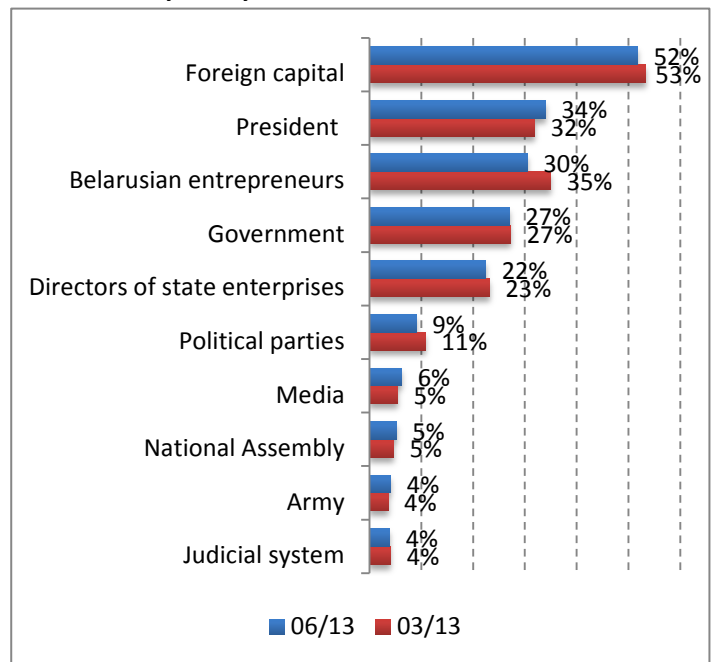


The population's interest in economic liberalization is going down, albeit quite slightly, against the backdrop of perceived stabilization. The Belarusians still rely on foreign capital injections for economic development; however, the share of such respondents shrank, and so did the proportion of those who rely on private business for economic advancement. Meanwhile, the share of those relying on the president for this matter was seen to increase.

Modernization rhetoric might have weakened the orientation

towards liberal reforms, as most of the respondents—50.2%—agree that the “Belarusian economy requires modernization rather than a dramatic change in the economic model.”

**Chart 4. Answers to the question
“Who/what do you rely on for Belarus’s economic advancement?”**



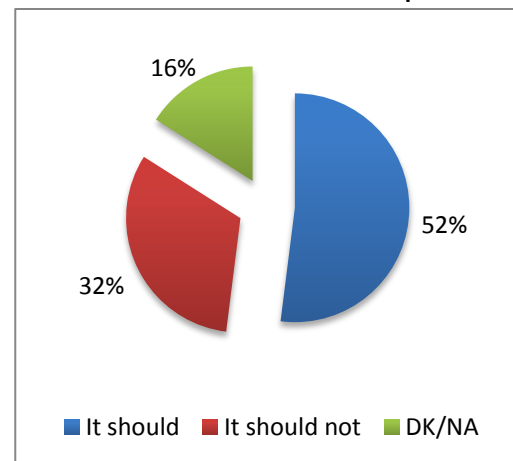
POLITICS

The impressive increase in wages in late 2012 did not have the anticipated positive impact on the behavior of the president's electoral rating, which suggested that the political business cycle did not have any influence on the electoral support for the president anymore. However, the findings of the IISEPS poll conducted in June indicate that economic factors still influence the level of the respondents' confidence in the president and their willingness to vote for him. Although the share of those whose financial situation did not change during the three months prior to the poll increased, it was not the reason why A. Lukashenka's rating improved. The improvement was mostly due to the sense of stabilization, because for the first time this year, the proportion of people who believe that the Belarusian economy is not in a crisis and is moving in the right direction increased.

The perceived stabilization of the economy tells on the index of confidence in the president, which is formed by the difference between those who trust the president and those who do not trust him: in December 2012, the index stood at minus 0.101, whereas by June 2013, it had gone up to 0.083. Of all of the reviewed institutions—the government, opposition political parties, independent think tanks and the media—the president enjoys the highest level of confidence, at 48.9%.

As was mentioned above, A. Lukashenka's electoral rating markedly increased. In June 2013, it was at 40.9%, which compares to not more than 35% throughout the year 2012. The ratings of opposition politicians are still unable to compete with that of the head of state: only 9.5% of the respondents are ready to vote for U. Niakliajeŭ, and 6% of the Belarusians would vote for A. Sannikaŭ and A. Milinkievič each. However, the "Popular Referendum" initiative gets surprisingly positive feedback from the population. Asked whether a new referendum about Belarus's future development is called for, 52.3% of the respondents answered in the affirmative. Even more people, 57.5%, are ready to put their names under the initiative, while 22% of the respondents potentially agreed to be involved in advocacy groups and collect signatures in favor of the referendum.

Chart 5. Answers to the question
"In your opinion, should Belarus hold a new referendum about its future development?"



GEOPOLITICS

The geopolitical orientations of the Belarusians are traditionally linked to their attitude to the economic situation: the stronger they feel the need for liberal reforms, the larger the share of those advocating the European choice. Judging by the change in the proportion of those supporting the European choice, who were more numerous than those speaking in favor of integration with Russia in the second half of 2012 and first half of 2013, we can assume that the demand for reforms and economic liberalization was strong. In June 2013, amid tentative perceived stabilization, when the devaluation expectations that persisted at the start of the year did not come true, the share of proponents of integration with the EU became almost equal with that of those supporting integration with Russia, at 41% and 40.8%, respectively.

Chart 6. Answers to the question
"If you had to choose between integration with Russia and joining the EU, what would you prefer?"

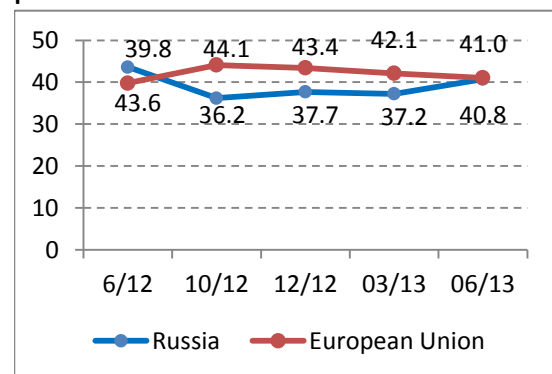
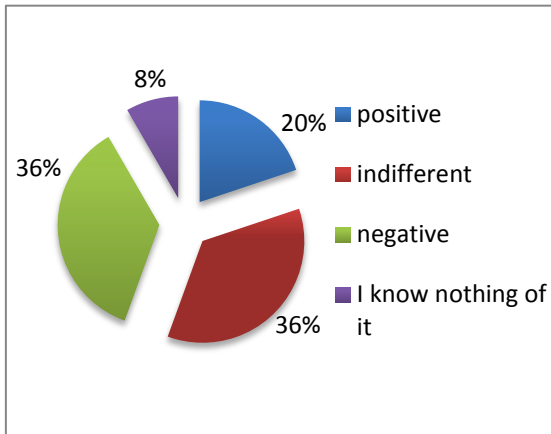


Chart 7. Answers to the question
“S. Shoygu has said recently that a Russian airbase
may be deployed in Belarus. What is your attitude
to this possibility?”



Despite the increase in the share of proponents of the Russian choice, the population is cautious about military integration with Russia. The debate over the deployment of Russian airbases in Belarus is an important issue when it comes to Belarus’s relations with its neighbors. The Belarusians are divided on this matter; however, given the high share of those who said they do not care about it (36%) and those with a negative attitude to this issue (36%), it is safe to say that the positive evaluation is expressed quite poorly, as only 20% of the population spoke in favor of that project.