

ANALYTICAL NOTE

«Great Stone»: a dual-use node in Chinese-Belarusian cooperation

Product characteristics	Content
Product type	Analytical note (open document for publication)
Subject	The Great Stone Industrial Park; the ATS joint venture (NAS of Belarus / AVIC) for UAV production; assessment of cooperation in dual-use areas.
Date	4 July 2026
Methodology	The note was prepared by collecting information from open sources with subsequent analysis. Verified facts (what official sources directly report) are separated from analytical assessments; assessments are marked in the text. Source wording is conveyed in paraphrase; verbatim quotation was not used. The term «dual-use» denotes proven civilian and potential or actual military applicability.
Sources	State media and official resources of the PRC (Xinhua, Xinhua Silk Road, CGTN, Global Times, China Daily), state and official resources of Belarus (BelTA, president.gov.by, belarus.by, industrialpark.by, economy.gov.by, vpk.gov.by, nasb.gov.by). The full list is provided in the endnotes.

Key facts about the Great Stone Industrial Park

- «Great Stone» (the China-Belarus Industrial Park) is a special economic zone covering 112 km², ~25 km from Minsk, the flagship project of the Belt and Road Initiative in Europe and the largest overseas industrial site of the PRC.¹
- Investment parameters of the park: declared resident investments — \$1.5 billion (early 2025);¹⁸ actually attracted — about \$1 billion, with a target of at least \$3 billion within two years of the park administration's target horizon (2025–2027) and 50% growth in exports of goods and services.¹²
- Production of unmanned aerial vehicles is an officially declared line of the park's activity.² The key joint venture is CJSC «Aviation Technologies and Systems» (ATS), established in April 2018 by the National Academy of Sciences of Belarus (NASB) and the Chinese state aerospace corporation AVIC.³
- The products of CJSC «Aviation Technologies and Systems» are publicly declared as having civilian positioning: agricultural drones, platforms for the needs of the Ministry of Emergency Situations, autogyros, and a UAV bench-testing complex.⁴

External factors to be considered in the current context

- Military unmanned topics in Belarus are publicly articulated outside the Chinese track: the main themes of the «National Security. Belarus-2026» exhibition (Minsk, 17–19 June 2026, organized by the State Secretariat of the Security Council and the Presidential Property Management Directorate) were unmanned technologies, countering drones and electronic warfare; the State Military-Industrial Committee and 13 organizations of its system displayed strike unmanned aerial systems, while Russian manufacturers displayed strike and reconnaissance systems.¹¹

- Ukrainian unmanned capabilities are generating mirror demand in the region. On 26 May 2026, the commander of the Unmanned Systems Forces of the Armed Forces of Ukraine, Robert «Madyar» Brovdi, publicly announced the identified «first 500 targets» on the territory of Belarus in the event of its entry into the war.¹⁹ Ukrainian achievements in the UAV field are fueling the intentions of Minsk and Moscow to balance in mirror fashion; interceptor drones are emerging as a distinct promising direction — at the Minsk exhibition, in particular, the «Rokot» complex for intercepting medium- and heavy-class UAVs was displayed.¹¹

1. The Great Stone Industrial Park on the agenda of the Xi Jinping–Lukashenko meeting (China, 29 June 2026)

In the Belarusian official report on the meeting, Lukashenko cited «Great Stone» as an example of successful cooperation between Minsk and Beijing, noting that the lion's share of foreign investment in the park belongs to Chinese companies, and added: «We are ready to act in this direction».¹³ In the same context, he thanked Xi for supporting the «Years of Industrial Cooperation» 2026–2027 initiative and remarked that Belarus uses Chinese technologies in all areas of economic development.⁵

According to official publications, Xi Jinping characterized the relationship with the formula «China and Belarus are iron friends» and stated that it is at a historic peak;⁵ Lukashenko replied that this was exactly the kind of global cooperation the parties had previously spoken of and, in his words, had even dreamed of on the eve.¹³ The official Chinese account of the meeting (Xinhua) does not name the park directly but records «tangible progress in key cooperation projects» and high-quality cooperation within the Belt and Road Initiative - the flagship of which in the bilateral context is precisely «Great Stone».¹⁴

The final communiqués of meetings at this level are tightly edited texts in which every specific detail is a deliberate choice. Against the backdrop of predominantly framework wording (strategic communication, sovereignty, multilateral mechanisms), «Great Stone» is one of the few specific topics named in the Belarusian account.¹³ This is an indicator that the park remains a priority instrument of bilateral relations; combined with the «unmanned systems» priority for 2026–2027, this increases the significance and importance of monitoring precisely this site going forward.

2. The unmanned systems track

2.1 The ATS joint venture

In April 2018, the Belarusian-Chinese joint venture CJSC «Aviation Technologies and Systems» (ATS) became a resident of the park with a mandate to develop and produce UAVs.⁸ The analytically decisive detail is the composition of its founders.

The Belarusian founder is the National Academy of Sciences of Belarus (NASB), a state scientific institution that is simultaneously engaged in strategic programs. In particular, NASB is the state customer of the Belarusian Space Apparatus (BKA, an Earth remote sensing satellite, in orbit since 22 July 2012), while its subordinate UE «Geoinformation Systems» is the national operator of the satellite system; the BKA operates as part of the joint Russian-Belarusian ERS orbital group.²⁰ This dual role of NASB (the civilian-industrial and strategic-military tracks) reduces the reliability of a purely civilian reading of its participation in the drone direction.

The Chinese founder is AVIC (Aviation Industry Corporation of China), the largest state aerospace and defense corporation of the PRC. According to the account of Belarusian state media, AVIC is a manufacturer of military and civilian aviation (fighter and transport types) specializing in avionics, unmanned aerial vehicles, and simulators, with a turnover comparable to Boeing and Airbus.³ Thus, the Chinese partner of the park's flagship drone enterprise is a state aerospace-defense giant whose core competencies encompass military UAVs, not a purely civilian company — this is a direct channel for the transfer of the relevant technologies and know-how.

The JV's location is the Great Stone Industrial Park (an SEZ) with a preferential tax and customs regime and access to the EAEU market; its time of creation (April 2018) precedes the «unmanned systems» priority of 2026–2027 by roughly eight years, meaning the direction had been developing long before its recent public institutionalization.

2.2 Publicly declared products (civilian positioning)

- Multirotor and hybrid fixed-wing UAVs, in partnership with leading drone manufacturers, with proprietary developments in electronics and software.⁴
- Agricultural drones and platforms for the needs of the Ministry of Emergency Situations.⁶
- Autogyros (small manned aviation).⁴
- A proprietary UAV bench-testing complex for incoming/outgoing inspection of aircraft and onboard equipment.⁴

2.3 Recent developments and the institutional framework

Around 2 July 2026, a Chinese delegation visited Belarus to expand cooperation in unmanned technologies; the Belarusian side declared readiness for broad cooperation — from new materials to the practical application of drones; agricultural drone production was demonstrated at «Great Stone».⁶ Chronologically, this is consistent with the relevant priority of the bilateral agenda.

This refers to the arrangement under which Belarus and China declared 2026–2027 the «Years of Industrial Cooperation». It is a framework bilateral format with three publicly defined priority sectors: microelectronics and instrument-making; **unmanned systems**; medicine.⁵ Thus, the unmanned track has received the status of an officially enshrined priority of interstate industrial cooperation, not merely of individual commercial projects; «Great Stone», with its existing drone production, is the natural site for its implementation.

3. Dual-use assessment

The unmanned track of cooperation through the node is consistently positioned as civilian (agriculture, emergency situations). Open sources do not confirm the production or development of military UAVs in the park. At the same time, three factors indicate that it may be a node for the joint development and production of dual-use items:

Factor	Assessment
Provenance of ATS from AVIC	The Chinese partner is a state aerospace and defense corporation whose core competencies include military UAVs; this is a direct channel for the transfer of technologies and know-how.
Interchangeability of components	Airframes, autopilots, flight software, and the testing complex are by their nature suitable for both civilian and military end use.

Factor	Assessment
The dual role of NASB	The Belarusian partner sits at the intersection of the civilian-industrial and strategic-military tracks (satellite programs, state R&D), which reduces the reliability of a purely civilian reading.

An additional contextual factor: the documented demand of the Belarusian military establishment for unmanned and counter-drone capabilities (see «External factors») creates a domestic potential end user for the products and competencies formally being developed within the civilian contour.

[ASSESSMENT] We assess it as **very likely** that the node at «Great Stone» has a concealed military-industrial orientation regardless of its publicly declared civilian purpose and corresponding labeling. This is an analytical assessment: any further claim of military production must rest on the identification of specific military platforms, end users, or contracts, which the current body of open sources does not provide.

4. Assessment of Russian involvement in Chinese-Belarusian cooperation through the park's UAV node

[ASSESSMENT] Likewise as **very likely** we assess the concealed involvement of Russia in Chinese-Belarusian cooperation through the park's UAV node. Grounds: the state of strategic relations in the PRC–Russia–Belarus triangle; Russia's political control over Belarus and their common defense framework of the Union State, whose current Military Doctrine Putin and Lukashenko approved in November 2021 and, at the Supreme State Council in December 2024, supplemented with the Security Concept and the treaty on security guarantees;²¹ the shared interest of the three states in developing modern unmanned systems; as well as the context of the «National Security. Belarus-2026» exhibition, where the unmanned component was formed predominantly by Russian manufacturers (Rostec, «Kalashnikov»)¹¹. The existing Russian-Belarusian cooperation of NASB in the satellite field²⁰ is an additional indicator that Minsk's strategic scientific-technical projects rarely remain outside Russian participation. This is an analytical assessment; there is currently no direct open-source confirmation of Russian participation specifically in the park's drone node.

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