



**Hermes Institute of
International Affairs,
Security & Geoeconomy**

SOUTHEASTERN EUROPE

AT A GLANCE



SOUTHEAST EUROPE DIRECTORATE

“SOUTHEASTERN EUROPE AT A GLANCE” (ISSN: 2654-0304) is a weekly review of the most significant current political, economic, energy, defense, and security news of Southeastern Europe. It covers 14 countries; Albania, Bosnia & Herzegovina, Bulgaria, Croatia, Cyprus, Greece, Kosovo, Moldova, Montenegro, North Macedonia, Romania, Serbia, Slovenia, and Turkey. However Greece enjoys its own weekly review for a more detailed presentation of its current affairs (GREECE AT A GLANCE).

This ambitious newsletter aspires to become an informative “tool” for anyone who is interested in the region and wishes to have knowledge of the non-stop current developments and challenges. “HERMES” Institute is not a news agency and it is not one of its ambitions to become one but it is strongly believed that today’s events provide the necessary material to understand the future and to analyze situations that may affect in peace, stability, and growth of the region.

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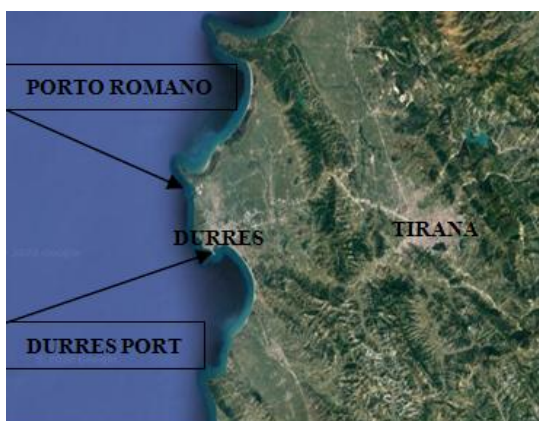


ALBANIA: May 21st, the EU and US Ambassadors to Albania have warned against derailing the justice reform in the country. On Sunday evening, the US Ambassador Yuri Kim warned against *“a back-room deal to kill justice reform.”* She wrote that the reform must go on despite it being imperfect *“I hope there is no truth to rumors of a back-room deal to kill justice reform in Albania. Reform is painful, slow and imperfect, but it is necessary, making progress and must continue.”* The EU Ambassador Luigi Soreca also wrote in social media shortly after about the need to not open fundamental issues regarding the reform, but to enhance its efficiency. Prime Minister Edi Rama replied to the US Ambassador’s message with a Shakespeare quote *“Hell is empty and all the devils are here.”* The Democratic Party of Albania (Partia Demokratike e Shqipërisë – PD) leader Lulzim Basha replied to both Ambassadors with the same message *“Any constitutional or legal changes regarding justice reform by the current Parliament are illegitimate. Such changes serve only those who use their power to twist and undermine the reform and to politically control and capture the justice system.”* In the last two days, Kim has met with Rama, Basha, and President Ilir Meta. It remains unclear what the *“rumors”* are but the issue has quickly pushed the most important Ambassadors and political leaders of Albania to react on social media this evening. Basha’s message seems to give a possible glimpse into alleged planned changes to justice reform laws by the current Parliament. However, the issue remains unclear. (www.exit.al)

- May 22nd, Albanian opposition is determined to conclude the electoral reform that will help the country toward free and fair elections, and in its EU accession path. Democratic Party of Albania (Partia Demokratike e Shqipërisë – PD) leader Lulzim Basha reaffirmed opposition’s determination to do its part in the reform. *“We will offer the Albanians a way out of the crisis by fully engaging in the completion of electoral reform as soon as possible, which will pave the way for free and fair elections, and the process of EU accession talks for Albania,”* Basha stated. He clarified that the opposition never abandoned talks on the reform, and that the Socialist majority was attempting to delay an agreement by refusing all opposition proposals. Basha’s reaffirmation of engagement to conclude the reform as soon as possible was greeted by the US and EU Ambassadors in Albania. (www.exit.al.com)

- May 23rd, Albanian President Ilir Meta has refused to decree the expansion of private oil terminal MBM into a freight port, sending the concessionary contract changes passed by the Socialist majority on April 30th, 2020 back to Parliament. The President argued that by expanding MBM’s concessionary contract, the Ministry of Infrastructure has violated fair competition procedures, seeing as the expansion was done via direct negotiation between the Government and the concessionary company. Though the Ministry considered them merely a contract expansion, the changes made to the concessionary contract have formed a new relationship between the Government and the company. Therefore, the Ministry should have opened a call for bids for a new tender and have a new competition, as stipulated by public procurement legislation. Meta also argued that the

Ministry had also infringed on the hierarchy of normative acts, as predicted by the Albanian Constitution. In June 2015, the Rama Government signed a 35-year concessionary contract for the construction and operation of an oil terminal in the Porto Romano area near Durres. The concessionary company, Multi Buoy Mooring (MBM) Port is owned by the Adriatic Bay Investment Group (SHPK) [Kastrati Group (65%) and Europetrol Group (35%)] (99%), and SALILLARI SHPK (1%). The changes to MBM's concessionary contract would allow the oil terminal operator to anchor and store ships carrying a variety of other trade goods. (www.exit.al)



Map of Porto Romano

(Photo source: www.hermesresearch.eu)

COUNTRY ASSESSMENT :

Political and social turmoil remains in Albania continuing a long institutional and constitutional crisis. Non-transparent and non-consensual actions of the Government and Tirana Municipality in the National Theater case have increased public outrage. Moreover, Police violent reaction against citizens' protests has strongly criticized not only by Albanian political actors, but also by the international community.

The state's crisis has also to do with institutional functions such as the electoral and justice reform which would guarantee a more democratic, transparent and accountable country. Besides, these reforms are necessary preconditions before the first intergovernmental conference with the EU. There is a sense that Albanian political actors (governmental and opposition) do not promote implementation of the reforms for reasons connected with political power, control and corruption. Amid social turmoil, Parliament's boycott and political and judicial crisis, Albania seeks to forward its EU integration and achieve national stability, economic growth and citizens' prosperity; goals that are questionable under current situation. Above all, it should be underlined that corruption, organized crime (and especially links of state's politics with organized crime), money laundering and smuggling remain as "open sores" for the country.



BOSNIA & HERZEGOVINA:

May 22nd, Russia has consistently advocated the withdrawal of the foreign protectorate mechanism in Bosnia and the abolition of the function of the High Representative, as well as the transfer of all competencies to local authorities, Russian Ambassador to Bosnia Peter Ivanctsov told the Russian Gazette, adding it is absurd that the country is still under observation by international community's administrator who represents himself as above Bosnia's democratically elected institutions. "We are not the only ones criticizing him (the High Representative). Many Bosnian political forces do so as well, showing strong dissatisfaction with the High Representative's behavior and they are in favor of abolishing his function," Ivanctsv said Srna news agency

reports. He said that *“the existence of the High Representative has no practical meaning since peace and stability have reigned in the country for a long time, Bosnia has long shown itself to be a responsible and respected member of the international community, the country was elected as a member of the UN Security Council, and it even chaired the Committee of Ministers of the Council of Europe.”* Ivantsov claims that *“situation in Bosnia will change for the better when conditions are created for all peoples to feel at home in their country instead of being subjected to constant pressure just because they have their own opinion on any important issue.”* The Ambassador stated that *“rummaging through the country's Constitution will only open the Pandora's box”* which consequences can be uncontrolled and dangerous, and that is why there is no need for *“Dayton Two.”* Following a bloody war from 1992 to 1995, Bosnia, Serbia and Croatia signed the *“Dayton”* Agreement in Paris, which laid the ground for lasting peace in the country and which also contains the country's Constitution. The Constitution claims that Bosnia is a country of three constituent peoples, Bosniaks (Muslim Bosnians), Serbs and Croats, and others and that the High Representative will be set in place to oversee the civilian implementation of the Agreement and react to any unconstitutional behavior by Bosnian politicians. Later, the High Representative gained the so-called *“Bonn Powers”* through which he enforces his and the community's decisions aimed at preserving the country's peace. The Constitution also subdivided the country internally into the Bosniak - Croat shared Federation (FBiH) entity, Serb-dominated Republika Srpska (RS) entity and the Brcko District, not dominated by either of the constituent peoples. Speaking about the relations

between Bosnia and the Russian Federation and the possibilities of expanding bilateral cooperation, Ivantsov said that Russia is one of the key investors in the country and one of its leading foreign trade partners, but that there are certain differences of opinion, primarily those of a political nature. *“I would like to see a more constructive understanding of Russia's role in a number of politicians in Bosnia's Federation entity,”* Ivantsov said. He pointed out that Russia's ties with the Republika Srpska entity deserve special attention, *“where the highest level of trust, friendly and fraternal relations have long been ensured.”* *“Political contacts between the local Serb and Russian state leaders are traditionally intense, which we will continue to be encouraged and expanded,”* Ivantsov emphasized. (www.ba.n1info.com)

- May 22nd, Una-Sana Canton (USK) will not serve as a courtyard for solving the issue of migrations in this part of Europe, Mayors of Bosnia's northwestern region said on Friday, stressing that they would be taking care of the interests and safety of the canton's citizens. *“We will not engage in some correspondence but will be acting in line with constitutional competencies and take care of the interest and safety of our citizens,”* USK Prime Minister Mustafa Ruznic said, noting that migrant camps Miral and Bira, located in urban zones in privately owned facilities, will have to close down. Suhret Fazlic, the Mayor of Bihac, the canton's administrative center, said the importance of the EU and international organizations was important but that everyone must act professionally and resume cooperation. *“Also, I must warn all actors in the process that I will not hesitate to open ‘new Vucjak camps’ if Bihac gets again exposed to*

unbearable pressure of migrants and is left to deal with it alone,” said Fazlic, referring to the infamous Vucjak camp that was closed down last year mostly under the pressure of international organizations who found it inadequate for migrants. But, the correspondence with the EU got heated after a letter that EU Ambassador in Bosnia Johann Sattler addressed to the country's Security Minister Fahrudin Radoncic and Ruznic, expressing concern over the transport of migrants to the new camp outside Bihac. Sattler asked the Ministers to stop the transport of migrants from the Bira center to the new camp Lipa, particularly the unaccompanied minors, noting that this camp was set up for adult men only. He expressed worries over respect for the rule of law and human rights in the migration management by local authorities, calling the recent actions “*unacceptable.*” “*Temporary center ‘Lipa’ was set up as a response to the needs stemming from an extraordinary situation caused by COVID-19 crisis, and its capacities have been filled. However, the USK Police keep bringing migrants to the site without any coordination with our implementing partners. Everything said was contrary to the agreements between the USK authorities and implementing partners and the EU at the moment of formation of the Lipa centre,*” said the letter published by local media. The note sparked the USK Prime Minister's reaction who said he was saddened by “*Sattler's false and malicious accusations.*” Neither the USK Government nor any other authority has banned the transport of minors to adequate centers, moreover, the USK did everything to protect them as a particularly sensitive category, said Ruznic. “*The comment of His Excellency about the lack of coordinated activities within the migrant crisis management with partners from*

EU is completely vague since we know that the formation of the task force for coordination of the activities and control of the migrant crisis in the USK is continuously convening at least once a week and that the representatives of the IOM and the UNHCR are regularly invited and attend those meetings,” he said. “*We did not hear about the concern of His Excellency over so drastic threat to the lives, health and property of the USK citizens. Does His Excellency think that the USK citizens should not enjoy fundamental human rights and freedoms in their own land and expect adequate protection of the state?*” the USK Prime Minister asked in response to Sattler's letter. In addition, he asked if this was an attempt to “*displace local population using the migration of these distressed and unhappy people.*” “*The authorities and citizens of the USK are particularly interested in what did His Excellency do about the implementation of the European Commission's conclusion regarding the migrant crisis, which refers to the obligation of a balanced accommodation of illegal migrants on the whole territory of Bosnia and Herzegovina and not only in the USK, as it used to be, as well as conclusion that all migrant centers set up in the privately-owned facilities must be closed and organized at locations owned by the state,*” Ruznic said. (www.ba.n1info.com)

- May 22nd, Bosnia's local elections initially called for October 4th, 2020 will be postponed for November 15th, 2020 N1 has learned in the Central Election Commission. The postponement is a consequence of the lack of the state budget and inability to plan the essential procurement procedures for the electoral process, according to sources. According to the Election Law, local elections are financed from the state budget and

the budgets of local communities in Bosnia and Herzegovina. It was estimated that this year's vote would cost some 4.5 million euro. The Central Election Commission (CEC) decided earlier this month to call the local election across the country, except in Mostar, the southern ethnically divided town that has not seen elections since 2008 due to law provisions that were marked as unconstitutional and have not been changed to date because of political disagreements. (www.ba.n1info.com)

COUNTRY ASSESSMENT :

Local elections rescheduled for November 15th, 2020 instead of October 4th, 2020, as initially was planned due to lack of financing sources. This is another consequence of the state's inability to adopt its 2020 budget. Bosnia remains (together with Serbia) the vulnerable part of the Western influence in Southeastern Europe and Russia tries to penetrate through various ways. Currently, Republika Srpska enjoys privileged relations with Russian Federation and actually Bosnian Serbs are the "long hand" of the latter in maintaining a narrow influence in the country. Political instability, poor economic performances, entities' rivalries, and problematic framework of state's structure (due to Dayton Accord) have left Bosnia far behind other Western Balkan countries towards the EU. Furthermore, nationalistic rhetoric and actions from the three entities creates certain conditions of mutual mistrust and work as a factor of potential destabilization. Muslim countries such as Turkey, Saudi Arabia, Qatar, and Iran maintain a permanent presence through financial donations and investments. Migration issue turns to become a problem of

social turbulence for the regions which hosts reception structures for migrants.



BULGARIA: May 18th, Foreign Direct Investment (FDI) in Bulgaria in the first three months of the year stood at 254.4 million euro, the equivalent of 0.4% of the Gross Domestic Product (GDP), statistics from the Bulgarian National Bank (BNB). In the same period of 2019, FDI was 148.6 million euro, but the BNB originally reported an outflow of 254.4 million euro, which was revised later. Investment in equity, including in the real estate sector, showed an outflow of 46.5 million euro (compared to an outflow of 443.6 million euro in January - March 2019) and re-invested earnings was 179.8 million euro, compared to 156.9 million euro in the same period of last year. Net receipts from real estate investments by foreign companies totaled an outflow of 0.3 million euro in January - March, compared to an inflow of 2.2 million euro during the same period of last year. The Central Bank data showed 121.2 million euro in investment inflows as debt instruments, recorded as the change in the net liabilities of Bulgarian companies towards their foreign investor owners, compared to 435.3 million euro in the first three months of 2019. Such financial flows include financial loans, suppliers' credits and debt securities, BNB said. By country, the largest direct investment in Bulgaria in the first quarter of 2020 came from the Netherlands (190 million euro), Israel (40 million euro) and the United Kingdom (16.6 million euro). Notable net outflows were recorded towards Austria (-25.6 million euro) and Portugal (-17.4 million euro). According to preliminary figures, Bulgarian investment abroad increased by 5.2 million euro

in January-March, compared to 54.1 million euro in the same period of last year, BNB said. (www.sofiaglobe.com)

- May 21st, the Vice President of the European Commission, responsible for the economy in the interest of the people, Valdis Dombrovskis praised Bulgaria as the only country that meets the criterion for the EU budget deficit, BGNES reported. At the same time, he added that recommendations have been made to Bulgaria and 10 other Member States regarding money laundering. The report on Bulgaria says that the challenges in the fight against corruption remain and there are still no convincing results from criminal prosecutions in such cases at the highest levels of Government. Citing Bulgaria among one of those to which the Commission makes a recommendation in this direction, EU Commissioner Dombrovskis clarified *“The problems are the same ones that were identified in previous years. You know, there have been a series of money laundering scandals across Europe. We see that progress on the recommendations is uneven - some countries have made significant progress, others it is limited. Member States must take determined action to close the door on dirty money, which harms public finances and financial stability.”* The document says that Bulgaria must speed up procedures for effective support for small and medium-sized businesses, as well as ensure their continued access to finance and flexible payment. Despite strong economic growth and a record low level of unemployment, Bulgaria is slowly catching up with other member states and poverty and income inequality levels are still among the highest, the report said. It is also emphasized that insufficient investment is an obstacle to

modernizing the economy. Access to health care is limited due to the uneven distribution of scarce resources and the poor coverage of health insurance. Bulgaria continues to be among the member states with the highest number of deaths due to pollution, the document said. (www.novinite.com)

- May 21st, Ukraine lodged an official protest on Wednesday, after Bulgaria’s Parliament criticized a planned reform to divide the Bolhrad region in Ukraine’s southern Odessa district into five sections. The area is home to a large ethnic Bulgarian community. The Ukrainian Foreign Ministry rejected Bulgarian claims that this decision would undermine the rights of the country’s ethnic Bulgarian minority. *“Protection of the rights and freedoms of representatives of all national minorities is among the fundamental priorities of Ukraine,”* the Ministry said. Ukraine Foreign Minister Dmytro Kuleba held a telephone conversation on the issue with Bulgarian Deputy Prime Minister Ekaterina Zaharieva late on Wednesday. They spoke after Bulgaria’s Parliament unanimously adopted a declaration voicing concern about the Bulgarian community in Ukraine. The Bolhrad region, also known by its Russian name Bolgrad, is home to several hundred thousand Bulgarians. The town at its center was founded by Bulgarians in 1821. The community continued to settle there throughout the 19th century, turning it into an important hub for the Bulgarian diaspora. Data vary, but the number of ethnic Bulgarians, sometimes known as Bessarabian Bulgarians, is estimated to be as high as 300,000, comprising around 61% of the population of the region. The Bulgarian parliamentary declaration said it feared the new territorial division threatened *“the integrity of the*

200,000-strong Bulgarian diaspora in the Bolhrad region,” and called on the Bulgarian authorities to demand an intergovernmental meeting. It was a priority issue that should be resolved in the spirit of the good relations between the two countries, and in compliance with European values, the statement read. In an interview for Bulgarian National Television on May 20th, 2020 the Bulgarian nationalist politician, Valeri Simeonov, said he was sure as many as 400,000 people in the Bolgrad region were Bulgarians. He also questioned whether Bulgaria should continue to support Ukraine’s aspiration of joining the EU in the circumstances. (www.balkaninsight.com)

COUNTRY ASSESSMENT :

Bulgaria’s economy is at risk although it enjoys a dynamic which has stopped due to COVID-19 pandemic. Economic situation may affect not only the Bulgarian effort to enter the ERM2 mechanism; the “waiting room” before the eurozone, but also the political stability of the country. Dispute with North Macedonia on “Macedonian” language and “Macedonian minority” may disrupt bilateral relations between the two countries. Bulgaria pushes North Macedonia to abandon its views if the latter wishes to start accession negotiations with the EU. Migration poses a national security threat but currently situation is under control since migrant and refugee flows coming from Turkey are not increased. Nevertheless, situation is closely monitored by Bulgarian authorities. Corruption and organized crime remain significant obstacles for the country’s development and should be addressed decisively. The country pays special attention to energy security developing several projects.

Modernization of Armed Forces is a top priority for Bulgaria and huge armament projects are ongoing (fighter jets, armored vehicles, vessels etc). However, military operational capability of the state is questioned especially in the Air Force. Bulgarian Armed Forces are far from NATO standards.



CROATIA: May 18th, the ninth assembly of Croatian Parliament ended its last session on Monday with the majority of MPs voting for the Parliament’s dissolution prior to the parliamentary election. It is now up to President Zoran Milanovic to determine the date of the election, which has to be held within 30 to 60 days of Parliament’s dissolution, meaning the election will be held as early as June 21st and no later than July 12th, 2020. Meanwhile, the Zagreb city opposition spent the night outside the Parliament building protesting against Parliament dissolving without passing a law on the reconstruction of the city after the center was devastated by an earthquake in late March. Representatives of six opposition parties and their sympathizers jeered at the arriving MPs on Monday morning, with city Councilor and leader of the Zagreb je Nas (Zagreb is Ours) party, Tomislav Tomasevic, saying that those in power had had enough time to draw up the bill, put it to public consultation, and pass it today. “Lex Agrokor was adopted in three weeks and they have not been able to adopt this in two months,” Tomasevic said. If the Parliament is dissolved, the law can be adopted only in September or October, and until then citizens are left hanging, he said, adding that the HDZ cared more about a few more seats than about the people affected by the earthquake. Given that some 26,000 people have

reported damage caused by the earthquake, this is a defeat of this Parliament, said Rada Boric of the New Left (Nova Ljevica - NL) party. Tomasevic said the reason was the political trade-offs between the Mayor Milan Bandic and the ruling Croatian Democratic Union (Hrvatska Demokratska Zajednica – HDZ) party's Zagreb branch. (www.hr.n1info.com)

- May 20th, parliamentary elections will be held on July 5th, 2020 President Zoran Milanovic announced on Wednesday. The election for the tenth Parliament will be held on July 5th in Croatia and on July 4th and 5th abroad, in Croatia's diplomatic and consular offices. Decision on the election takes effect on June 2nd, 2020. Parties and independent slates and candidates will then have 14 days to submit their slates to the State Election Commission (DIP), which then has 48 hours to publish the list of valid slates and candidates, whereby official electioneering begins. Although Croatia has few new COVID-19 cases per day and a good epidemiological situation, the July election, because of the epidemic, will be held somewhat differently than all previous elections. DIP together with the Croatian Institute of Public Health, will define how the vote will take place. Voters will elect 151 MPs, of whom 140 in ten constituencies in Croatia, three will be elected by expatriates and eight by ethnic minorities. The slates must have at least 40% of candidates of each sex, otherwise they will be disqualified and those proposing them face a 50,000 kuna (6,600 euro) fine. Campaign costs must not exceed 1.5 million kuna (198,000 euro) per constituency. Parties running in all ten constituencies can spend HRK 15 million. This parliamentary election will be the third in which voters can give a preferential vote. (www.hr.n1info.com)

- May 20th, at Thursday's cabinet session, Government adopted a decision to take out two loans with the World Bank. The first loan, valued at 200 million euro, will be used for reconstruction efforts in Zagreb following the March 22nd, 2020 earthquake, as well as strengthening the national response to COVID-19. The second, valued at 275.9 million euro, is intended for a broader response to the coronavirus crisis and to support economic recovery. Speaking at Thursday's Cabinet session, Prime Minister Andrej Plenkovic said that according to estimates by Zagreb University's Faculty of Civil Engineering, the reconstruction of buildings damaged by the earthquake to the maximum necessary seismic level would cost a total of 13 billion Euro. *"It is important for our citizens, especially those living in Zagreb, to understand that the reconstruction of Zagreb by these standards will cost us roughly the same as building 25 Peljesac Bridges,"* Plenkovic said. Meanwhile, Deputy Prime Minister and Finance Minister Zdravko Maric said that he had approached the World Bank in early April with regard to the second loan deal, a 275.9 million euro package to strengthen Croatia's response to the coronavirus crisis and to support recovery. *"A loan proposal has been prepared that enables quick access to liquidity for the needs of the state budget, and refers to the support program defined in nine measures, which deal with two key areas: mitigating the immediate social and economic impact of the crisis and laying the foundations for promoting inclusive and sustainable recovery,"* Maric said. (www.glashrvatske.hrt.hr)

COUNTRY ASSESSMENT :

Croatian Parliament was dissolved on June 18th, 2020, while the President Zoran Milanovic announced parliamentary elections on July 5th, 2020. Elections are called in a rather critical point of Croatian economy which is expected to suffer due to COVID-19 measures. The Government has already announced the agreement with the World Bank for two loans (of 200 and 275.9 million euro respectively) for tackling the March 22nd earthquake consequences and the coronavirus pandemic. In this context, the new Government emerged by the July 5th elections will have to receive critical decisions for Croatia's future. Croatia – Slovenia border dispute remains active, but COVID-19 pandemic and pre-electoral period in Croatia have downsized current situation. Croatia implements a policy of Armed Forces' modernization trying to form a reliable and well equipped force according to NATO standards. However, the current COVID-19 pandemic may affect the ambitious modernization plans due the economic repercussions in the country. Croatian Air Force is far from NATO standards and actually the country lacks an operational air power.



CYPRUS: May 20th, the Government's decision to withdraw a state-backed borrowing scheme to support the economy sparked a bitter war of words on Wednesday with the administration and opposition parties trading accusations over who was to blame. Even the usually composed Government Spokesman Kyriacos Koushos appeared irked by the opposition's rhetoric, suggesting they were doing everything they could so that President Nicos Anastasiades would fail. Finance Minister Constantinos Petrides said he pulled the bill after

opposition parties made it unfeasible with their amendments. "Are they worried perhaps that Anastasiades would again succeed to get Cyprus out of the economic crisis?" Koushos said in reference to the 2013 bail-in crisis. Speaking on a morning radio news show on the state broadcaster, Koushos rubbished claims, mainly by Democratic Party (Δημοκρατικό Κόμμα - DIKO), that the Government did not want the opposition amendments because through the bill the loans would be going to Democratic Rally (Δημοκρατικός Συναγερμός - DISY) supporters and Government cronies. Koushos said it was the opposition that proposed leaving out the banks and funding the businesses directly even if the state has neither the money nor the capability to do so. "People need to realize that the 2 billion euro do not belong to the state," he said, adding that it was the President personally who convinced banks to agree to the scheme and undertake part of the risk. He said the Government made numerous concessions across the board, but opposition kept coming up with amendments. After two months of haggling, the bill had been expected to go to Parliament on Friday with the Government not knowing what amendments would be approved. "Isn't it tragic?" he said. Koushos said come what may the administration would present a new plan next week to help businesses. "No one will prevent us from getting Cyprus out of the economic crisis," he said. In its reaction to the withdrawal, DIKO has focused on the matter of the auditor-general, which the party wanted to appoint as an observer in the lending process. Koushos said it was a substantive matter, but it was at the bottom of the list. At the end of the day they wanted Parliament to tell the Government how to govern, the Spokesman said. DIKO Spokesman Giorgos

Solomou accused the Government of withdrawing the bill because it did not want transparency. *“It is obvious that DIKO’s demand for the Auditor-General’s participation as an observer in the supervision committee spoiled the party with the state guarantees on the backs of taxpayers,”* DIKO Spokesman said. *“The Government of golden passports, jets, and the collapse of the co-op bank is not allowed to object to audit and supervision,”* Solomou said. He said the Government and ruling DISY bore the entire blame for the failure. Main opposition Progressive Party of Working People (Ανορθωτικό Κόμμα Εργαζόμενου Λαού - AKEL) leader Andros Kyprianou said he was saddened by the Government’s reaction and the fact that it attributed ulterior motives to opposition parties. Kyprianou accused DISY of not respecting Parliament, something it had demanded when in opposition. *“Of course, I want to remind people that DISY never applied when in power what it said when in opposition.”* Leader of AKEL suggested that even if the Government proposal was adopted *“we have absolutely no doubt that it could not support the economy because it could not be implemented in practice.”* (www.cyprus-mail.com)

- May 21st, the European Commission has warned that *“Cyprus retains the capacity to service its ESM debt, but challenges have increased as a result of COVID-19”* and warns that risks to the fiscal outlook are clearly on the downside, *“including the implications of a recession that is sharper than currently expected, higher tax revenue elasticities, and the eventual costs of policy measures, including those implying contingent liabilities, to tackle the impact of COVID-19.”* More specifically, according to the

post program surveillance report on Cyprus, adopted today by the College of Commissioners, after several years of remarkably strong growth the global outbreak of COVID-19 is tilting the Cypriot economy into a deep recession in 2020. The Commission notes that *“Cyprus had enjoyed a period of strong growth in the aftermath of its banking crisis, with real GDP increasing by a quarter from 2014,”* however, since mid-March 2020, *“the coronavirus pandemic, which has led to border closures, lockdown measures and the cessation of all non-essential business, including hotel and other tourist accommodation, have had a major impact on the Cypriot economy.”* *“The crisis is expected to impact in particular two key pillars of the economy, tourism and shipping. According to the Commission’s spring forecast, real GDP is projected to fall by around 7.5% in 2020,”* the reports states. *“It is expected that exports of goods and services will contract significantly. Investment in construction may hold up somewhat better, thanks to the fact that a number of large projects are already under way and due to stretch over several years. Cyprus has adopted a fiscal stimulus plan that should help mitigate the contraction.”* According to the report *“With exports declining more sharply than imports the current-account deficit is set to widen further (to around 11% of GDP).”* (www.cyprus-mail.com)

- May 24th, only Turkey continues drilling in Cyprus, all the others have left because of the pandemic, Turkish Foreign Minister Mevlut Cavusoglu said on Sunday, supporting that it is up to the Greek Cypriot side to reach a compromise with the Turkish Cypriots. He said if there was an agreement between the Greek and Turkish Cypriots on natural gas, Ankara would reconsider

its 'licensing' agreement with the north, but would continue drilling southwest of Cyprus. Speaking to Turkish TV station Attalia DIM TV, he said the Greek Cypriots continue to ignore the rights of the Turkish Cypriots with their one-sided drillings. *"If the Greek Cypriot side had taken into account the proposals of the 'TRNC' and had learned to share, these tensions would not have existed,"* he said. In April the Turkish drillship "Yavuz" arrived in waters to the southwest of the island, the sixth illegal drilling operation by Ankara in Cyprus' economic waters. The areas reserved by Turkey fall inside what Ankara claims is its own continental shelf to the south and southwest of the island. The Turkish Minister stressed that Ankara's priority is always diplomacy. *"Unfortunately, when we said diplomacy, they saw it as a weakness. And we sent our ships, we started our drilling. Now everyone is gone. Who's there? Only Turkey is there,"* he added. *"And the message in the countries of the eastern Mediterranean is that Turkey is here. You have to work with Turkey."* But he said Turkey is as strong at the negotiating table as it is at taking action. *"Turkey has the power to protect both the interests of the Turkish Cypriots and the Turkish state. If the 'TRNC' says 'we agreed and our rights are guaranteed, no more drilling is needed' then we will reconsider the licensing in the areas given to us by the 'TRNC' but again there are the drillings on the continental shelf southwest of Cyprus. That is where our dominance is. And I do not negotiate sovereign rights with anyone,"* the Minister concluded. (www.cyprus-mail.com)

COUNTRY ASSESSMENT :

Cyprus is sliding into an economic recession and such situation brings political conflicts and

tension. Government's decision to withdraw a bill for supporting financially businesses after the COVID-19 pandemic measures caused strong reactions by opposition. Besides, the EC has foreseen that Cyprus will enter into recession, despite its impressive economic growth for several years. Cyprus continues to react diplomatically against the Turkish drills in the Cypriot Exclusive Economic Zone (EEZ) denouncing Turkey's aggressive behavior against international law. In this effort it enjoys the EU support but only in rhetorical level since the union lacks of comprehensive military capabilities. Cyprus cannot stop the Turkish activity so far, failing to protect its sovereign rights. Turkey has simply refused to withdraw from a region that it is considered as its strategic extension where vital geostrategic and geoeconomic interests are at stake. Cyprus lacks adequate military means (especially aeronautical forces) to deter Turkey from continuing its activity. However, it is not expected escalation of situation in the near future since energy companies have postponed their scheduled drills within the Cypriot EEZ. It is certain that Turkey will not accept "fait accompli" in a region considered as part of its strategic interests. Besides, Turkey maintains a significant military force on the island (Army Corps size) which poses a permanent threat against the Cypriot republic. As long as part of Cyprus remains under Turkish occupation and Turkish troops (equipped with heavy weapons) are deployed in the island, Cyprus faces an existing direct threat against its national security and sovereignty. Illegal migration is a challenge for Cyprus especially if migrant flows will be increased during summer.



GREECE: May 20th, Prime Minister Kyriakos Mitsotakis will announce steps to revive the economy in a televised address on Wednesday. These steps will be mainly focused on tourism but will also concern other sectors affected by the coronavirus pandemic. Measures, both long-term and seasonal for the summer months, will be based on two pillars: fiscal interventions of 7 billion euro and liquidity of 10 billion euro. In his address Mitsotakis is expected to lay out the general framework of the roadmap to restart the economy this year and trigger a dynamic recovery in 2021, before handing over to the four Ministers that will implement the plan to elaborate on the specifics – namely Finance Minister Christos Staikouras, Development Minister Adonis Georgiadis, Labor Minister Yiannis Vrotsis and Tourism Minister Haris Theocharis. According to sources, the Government will reduce VAT for bars, cafes and restaurants to 13%, while VAT reductions will also be approved for hotel accommodation charges. Moreover, worker salaries, in the tourism, catering and industrial sectors, will also be subsidized through the European Union's SURE program, from which Greece expects to receive a total amount exceeding 1.4 billion euro. Initially, however, as the Finance Minister has already stated, money to subsidize work will be drawn from national resources until the SURE program is activated. What is certain, however, is the Government's intention to ensure that the state will help those who work seasonally in the tourism sector by subsidizing their salaries and helping with their insurance contributions. At the same time, the prospect of helping out real estate owners who received only 60% of the rent on their properties due to the Government

lockdown is also being examined. The Government is looking at reducing their ENFIA property tax. Announcements are also expected on Wednesday from the Tourism Minister regarding specific dates for reopening the borders to road tourism from Balkan countries, which could happen earlier than initially expected. According to the plan, the Government will seek to increase road tourism with its northern neighbors and especially with countries such as Bulgaria, which, like Greece, also have low rates of confirmed cases of coronavirus. (www.ekathimerini.com)

- May 22nd, Athens has lodged a demarche with Ankara over its presentation of a section of Greek territory in the southern Evros border region as Turkish, diplomatic sources said on Friday. The decision was taken by Foreign Minister Nikos Dendias. The area in question, Melissokomeio, is near the southern part of the Evros River. It is located at a point that floods every year after the autumn and, on maps of 1923 according to which the borders were drawn, is shown as belonging to Greece. However, members of Turkey's Police Special Forces have had a steady presence in the area in recent weeks and are blocking the preparatory work of the Hellenic Army's geographical service in view of the expansion of a border fence to the southern section of the Evros River to avoid a repeat of the scenes in March when thousands of migrants amassed at the Evros border region trying to cross into Greece from Turkey. The surge at the border occurred after Ankara said it would not stop migrants from crossing into Europe if they wanted to, sparking tensions with Athens and Brussels. The dispute is not new and has arisen because the riverbed of the Evros has moved and in its place now is a swamp,

which dries up in summer and floods in winter, creating an islet there. Turkey has exploited the change in the riverbed's location to claim an area of about 1.6 hectares. On a practical level, Athens cites the maps with which the borders with Turkey were drawn in 1923 and since then some parts of it have been reaffirmed, precisely because of the need to calculate the changes that have taken place due to the change of the river flow in some places. (www.ekathimerini.com)

- May 24th, Athens on Friday remained on increased diplomatic alert following recent developments in Libya where Turkey appears to be consolidating its presence and taking on a kingmaker role after halting Khalifa Haftar's forces which are waging a battle in the west of the country against the Tripoli-based Government. Turkey's moves have in turn sparked a strong reaction from Russia, which has strengthened its presence in the eastern coastal region of Cyrenaica. In Athens, senior Government officials are reportedly skeptical about a view being aired within NATO circles that Turkey's increased presence in Libya could serve to offset Russia's influence in the region. The latest developments were discussed in a phone call late Thursday between Greek Foreign Minister Nikos Dendias and Libya's Parliament Speaker in the east, Aguila Saleh. According to diplomatic sources, the two men discussed the need for a peaceful solution to the crisis and stressed the importance of appointing a new special envoy of the United Nations Secretary-General as soon as possible. They also reiterated that the arms embargo must be adhered to and denounced the maritime border deal between Turkey and the Tripoli-based government as invalid and a source of instability. Sources also said that Saleh analyzed his eight-

point proposal, which includes, among other things, the establishment of a new Presidential Council to represent the three provinces of Libya, as well as the appointment of a committee of experts to draft the country's new constitution. Dendias had earlier talked with US Ambassador to Libya Richard Norland at Washington's request. Meanwhile on Friday, Athens lodged a demarche with Ankara over its challenge to Greek sovereignty in an area in the southern part of the Evros River where Special Forces of the Turkish Police have been deployed in recent weeks. The area was placed in dispute after a change in the riverbed caused by recent flooding. At the same time, Defense Minister Nikos Panagiotopoulos said Friday that Turkey's "*dangerous maneuvers*" in the Aegean are not conducive to good-neighborly relations and "*increase the risk of an accident.*" He added that Turkey's behavior has been raised with NATO. (www.ekathimerini.com)

COUNTRY ASSESSMENT :

The Greek Government announced its plan for supporting businesses and strengthening market's liquidity after the COVID-19 pandemic. Greece's economy is strongly based on tourism which has badly affected by the virus spread globally. An economic recession in the coming autumn could not be excluded. Greek – Turkish relations are the main concern of Greece since the latter is seeking to escalate security situation in the borders (land borders in Evros and sea borders in the Aegean). Moreover, Turkish plan to start hydrocarbon drills south of Crete in the context of the recent agreement between Turkey and Libya regarding maritime zones it may escalate tension between the two countries towards a "hot" incident. Greece seeks to avoid "fait accomplis" in a

region where its Exclusive Economic Zone is located according to the international law. As long as it avoids declaring its EEZ in mutual agreements with its neighbors, Greece will have to address situations like this one. Consolidated presence of Turkey in Libya is a new source of concern for Greek foreign policy and security. Under current situation in Eastern Mediterranean and Aegean Sea Greece, Greece is obliged to strengthen and modernize its Armed Forces operational capability.



KOSOVO: May 18th, the EU's Special Envoy to the Belgrade - Pristina dialogue Miroslav Lajcak said on Monday that he discussed situation in Kosovo with caretaker Prime Minister Albin Kurti. Lajcak wrote on social media that they discussed progress made in containing the spread of the coronavirus, current political situation, resumption of dialogue, and the need for liberalization of the visa regime with the EU. "Very good talk with acting Prime Minister Albin Kurti," he wrote. (www.rs.n1info.com)

- May 20th, Kosovo President Hashim Thaci met with Quint Ambassadors (France, Germany, Italy, UK, US) and the Head of the EU office to discuss economic renewal in the coronavirus pandemic and the need for functional institutions, a press release from the President's Cabinet said. Thaci expressed disappointment with the Zagreb Summit because liberalization of the visa regime for Kosovo citizens was not on the agenda. That attitude towards Kosovo is disappointing and demoralizing for both the citizens and politicians, he is quoted as saying. The press release said that Thaci stressed the need to show respect for independent institution. The US and UK Ambassadors called on Tuesday the Kosovo

authorities to enforce a Constitutional Court ruling confirming that the Serbian Orthodox Church monastery Visoki Decani owns the land it lies on which has been disputed by local authorities. (www.rs.n1info.com)

- May 22nd, Kosovo's President Hashim Thaci denied the outgoing Prime Minister Albin Kurti's claims that Pristina and Belgrade had an agreement on the exchange of territories but said his dream was that Presevo, Bujanovac and Medvedja, three municipalities in southern Serbia with a majority of ethnic Albanians, join Kosovo, the KoSsev website reported on Friday. He said he was convinced that the US would encourage "a final agreement" with Belgrade. "I dream about Presevo, Medvedja and Bujanovac becoming a part of Kosovo's territorial integrity without any compromise," Thaci told TV Klan Kosova, adding there were no talks or agreements that would include the exchange those three municipalities for a part of northern Kosovo with a local Serb majority. "Whoever speaks about the exchange (of territories) does that for internal use, since that has never been on the agenda anywhere, let alone in Washington," Thaci told the TV. He described Kurti's accusations that he made a secret deal with Belgrade as rumors and said that what happened in Washington was "a show of goodwill to resume dialogue" on the normalization of relations between Belgrade and Pristina. (www.rs.n1info.com)

COUNTRY ASSESSMENT :

Political instability and uncertainty remain in Kosovo, while LDK, AAK and NISMA held consultations for forming a Government. Under these circumstances it is almost impossible to talk for progress in the Kosovo – Serbia dialogue and

negotiation for normalizing mutual relations. The EU and US special envoys push for dialogue restart. It is assessed that after a new Kosovo Government formation and the new Serbian Government after the June 21st elections, dialogue will start again. Fight against corruption, organized crime, money laundering and trafficking, establishment of rule of law, accountable and transparent state institutions, and functional public administration are the main challenges for Kosovo towards its European path.



MOLDOVA: May 19th, “I will think a lot whether I still remain in office of Prime Minister, if we do not have parliamentary majority,” the Prime Minister Ion Chicu said when asked about his plans in the context of the political crisis in Moldova and a possible dismissal of the Government he leads. “I would have been surprised, if six months before the presidential elections these phenomena present in the society now did not take place. Such phenomena always occur in Moldova. Unfortunately, political corruption is as at home in Moldova’s Parliament and I do not think that the COVID-19 virus influenced it. We had ‘wholesale’ procurements and sales of lawmakers also in the last Parliament; we have them now too and I hope much they will no longer be,” Chicu said. According to the Prime Minister, political struggle goes “to the last cartridge” in Moldova. “I do not know what are they fighting for. Some of them, maybe, - for money, the others – to escape from jail. Yes, life of MPs is more complicated; they make politics, they should draw voters. Unfortunately, destabilization is not ruled out or, if the parliamentary majority disappears, I will think a lot whether I still remain Prime Minister,”

Chicu stressed. The Prime Minister also warned about the complicated situation in Moldova in the wake of the COVID-19 pandemic crisis. “No Cabinet, even if it is in full powers, is not able to solve everything just as the citizens expect. But if you dismiss this Government and leave it without powers, it would be a catastrophe; therefore, I say that I will think whether I remain in such circumstances. As if you go to Parliament without being sure that the initiatives, drafts will be backed by a parliamentary majority deals with a quite difficult situation. I do not think that we will be able to further work in such conditions,” Chicu said. At the same time, the Prime Minister said that, as citizen of Moldova, he did not want destabilization of situation. “Yet, if it nevertheless happens, I hope that better people than we will be found, who will manage the situation in the country correctly and efficiently,” the Prime Minister added. (www.moldpres.md)

- May 21st, presidential election will take place on November 1st, 2020. The President Igor Dodon’s proposal was approved in Parliament today. Decision was elaborated with reference to Article 78 of the Constitution and Article 109 of the Electoral Code.



Moldovan President, Igor Dodon
(Photo source: www.presedinte.md)

The Moldovan President's mandate expires on December 23rd, 2020. Under the legislation, the Parliament has the power to determine by decision the date of elections for the position of President at least 60 days before the election day. Decision shall enter into force on August 15th, 2020. (www.moldpres.md)

- May 22nd, under the pretext of the coronavirus-caused state of emergency extended until June 1st, 2020 in the Transnistrian region, the Tiraspol administration is trying to establish a border in the Security Zone. For this, the regional authorities are blocking the work of military observers, maintains the Moldovan delegation to the Joint Control Commission (JCC, the supervisory body for the Joint Peacekeeping Forces). The delegation reported today that it again raised this problem at the ordinary JCC meeting held in Bendery city on May 21st, 2020. Moldova fingered at the obstacles to the free movement of people and motor vehicles being put by the Transnistrian side as a result of the unlawful unfolding of border-guard stations and technical installations around the populated areas situated on the eastern Dniester River side but remaining under the Moldovan jurisdiction. "Tiraspol's actions are complicating the mechanism of monitoring in the Security Zone. This causes Moldova citizens' mistrust in the existing mechanism of the peacekeeping operation on the Dniester," maintain Chisinau representatives. Insisting on the liquidation of the unlawful border stations and on de-blocking of the military observers' activities, the Moldovan delegation put forward an idea to include diplomats from the OSCE Mission to Moldova into the group of military observers within the Joint Peacekeeping Forces. Presently the group includes the

representatives of Chisinau, Russia, Ukraine and Transnistria. The Moldovan delegation put forth yet one more initiative – to include into the work agenda the question of studying and assessing the activities of the Joint Military Command on ensuring the functioning of peacekeeping mechanisms. But that initiative was not supported at the Thursday's meeting. The Transnistrian side rejected even the Russian representatives' proposal to analyze situation in the Transnistria Security Zone after the appearance of the new unlawful border stations. Tiraspol has been rejecting this initiative yet since summer 2019. (www.infotag.md)

COUNTRY ASSESSMENT :

Political uncertainty reigns in Moldova since the Chicu Government is not so stable enjoying a fragile parliamentary majority. Rapid political developments are not unlikely including early parliamentary elections. Presidential elections announced for November 1st, 2020. The President, Igor Dodon is the absolute dominant of state's politics and any further political development should have his approval. Moldova has become a field of the ongoing rivalry between the West (namely the EU and NATO) and Russia for influence. The country is considered by the US and EU of great strategic importance being in the soft underbelly of Russia. On the other hand, Moldova is considered by Russia as an important region for its national security belonging by principle to its sphere of influence. Although the President Igor Dodon maintains troops in Transnistria which are considered by pro-western forces as violating Moldovan sovereignty. The frozen conflict of Transnistria is always a "running sore" for the country working as a

potential factor of destabilization. Corruption, lack of transparency and accountability reign in public administration and state's politics.



MONTENEGRO: May 18th,
“Anybody who is not able to accept independent and sovereign Montenegro is against the question of autocephalous Montenegrin Church. They want monopoly. Serbian Orthodox Church is not entitled to appropriate somebody else's property, avoid financial inquiries, evade taxes and assemble unlawfully hundreds of its priests in Montenegro. Its Heads are not entitled to lead popular uprisings. Enough with that circus. They will have to be who and what they are: religious community as part of the society and nothing more than that,” Montenegro's President, Milo Djukanovic, in the press conference organized on the occasion of marking two years since taking up on his President duties. *“The law has brought up the question of the survival of Montenegro. Specific structures want to take Montenegro's destiny into their hands. That would mean bringing Montenegro to the Serbia's altar. Do not offer us bloody formulae for the future of Montenegro and the Balkans,”* Djukanovic said. *“We have renewed the state. It is time we renewed the Church. We have offered solution of one Orthodox Church which will bring together all Orthodox believers. If SPC rejects that, it will be a national Serbs in Montenegro. But then we are going to create a church of national Montenegrins. And we will make sure such Church is autocephalous,”* Djukanovic said. He stated that SPC should stop undermining Montenegro. *“Even today, SPC claims that Montenegrin Church has never existed, although documents state otherwise. SPC is trying to*

establish monopoly over orthodoxy in Montenegrin, which is turning into great-Serbdom,” the President said. He said that Bishop Joanikije and priests of the SPC had jeopardized public health and human lives. President pointed out these statements on Montenegrin stability came from the most relevant political addresses. One of them is that Montenegro was an anchor of stability in the Balkans and the other is that Montenegro is the greatest democratic project of Europe after the fall of the Berlin wall. (www.cdm.me)

- May 19th, European Commissioner Olive Varhelyi told the European Parliament Foreign Policy Committee on Tuesday that a peaceful, European solution needs to be found in Montenegro. *“A state cannot function without respect for freedom of confession and the important thing is to find a peaceful, European solution in Montenegro,”* he said. Varhelyi said the problem is not new. *“This is the current problem but it is also a problem that repeats itself. I was in Montenegro when the crisis escalated and I tried to mediate between the state and the Church to find a solution acceptable for all sides,”* he said. He said that the Church held a religious service despite the measures to combat the coronavirus pandemic and the state sanctioned that behavior by arresting the priests. He called the Church to respect the measures and the authorities to secure freedom of confession during the crisis. Varhelyi said he would continue trying to calm situation and help find a European solution for Church - state relations in Montenegro. Serbian Orthodox Church Bishop Joanikije and a group of priests were arrested in the northern town of Niksic following a saint's day religious service which was attended by a

large group of the faithful. The Church and the Montenegrin authorities have been at odds since the law on freedom of confession was adopted late last year. The Church claims that intention of the law is to seize Church properties. (www.rs.n1info.com)

- May 21st, Moscow today accused Washington and Podgorica of “escalating tensions” over the Serbian Orthodox Church (SPC) in Montenegro. At a regular press conference, Foreign Ministry Spokeswoman Marija Zaharova said that the Police in Montenegro “with the justification that the quarantine measures were violated,” used tear gas to disperse the rally on May 12th, 2020 in Niksic on the day of St. Vasilije Ostroski. “Another escalation of tension in Montenegro is provoked by the authorities’ harsh actions towards SPC believers and raises serious concerns. We are convinced that it is necessary to resolve all issues within a constructive dialogue, respecting standards and international documents, rules and norms,” Zaharova said. She accused the US of having “an obvious intention to bring a schism into the Orthodox world, to destroy the integrity of the spiritual space in the Balkans.” According to her, on May 19th, 2020 the American Ministry of Foreign Affairs pointed out the importance of respecting human rights in the religious sphere, and supported “harsh measures of the Montenegrin authorities.” She warned that ignoring the opinion of the Serbian Orthodox Church, the artificial division of people and believers, and interference from the side “threaten to lead to great earthquakes that could flood the region.” At the press conference, Zaharova did not mention that the liturgy in Niksic was in contradiction with the measures of the Montenegrin authorities in the fight against

the coronavirus epidemic, including the ban on mass gatherings. Bishop Joanikije of Budva - Niksic and eight priests of the Serbian Orthodox Church (SPC) were detained and then released from detention, where they spent 72 hours due to violation of the ban on public gatherings. (www.vijesti.me)

COUNTRY ASSESSMENT :

Civil turmoil is ongoing in Montenegro threatening state’s stability. Struggle between the Montenegrin Government and the Serbian Orthodox Church which also controls Montenegro’s believers is getting harsher and harsher. The Government openly says that the Church is clearly promotes the Serbian interests while the Church claims that the state seeks to “amputate” its competencies and its religious power. In fact the Montenegrin President openly speaks for a new autocephalous Church of Montenegro. One should take into consideration that Montenegro has a significant number of pro-Serbian population, while the majority of the country’s population in Orthodox Christians. The fact is that Montenegrin citizens are divided and this is dangerous for the state. Escalation of protests may cause more problems in Montenegro’s stability. There are concerns that coming autumn will be a hard one due to the COVID-19 consequences in the state’s economy. So the Government seeks to call for elections in late summer or beginning of autumn. Opposition looks divided without a common stance but there are several parties which will boycott the elections protesting for lack of democratic values, media freedom and establishment of an authoritarian regime by the ruling DPS. Relations between Montenegro and Serbia continue to move

on the edge of tension, since Montenegrin Government accuses Serbia of intervening in its internal affairs. Corruption, smuggling (especially cigarettes) and money laundering are dominated in the country setting significant obstacles and risks for every investor. Such situation has strongly affected progress of accession negotiations with the EU. Montenegro needs more concrete reforms in the field of justice, rule of law, fight against corruption, money laundering, and organized crime, public administration transparency and accountability in order to become a stable and attractive investment environment. The coming elections in the country should be seen as a democratic stress test. The country focuses on strengthening its Armed Forces by purchasing modern equipment.



NORTH MACEDONIA: May 18th, the second political party leaders' meeting in North Macedonia President's Office today finished without an agreement on the date for the parliamentary elections. The largest opposition party, Internal Macedonian Revolutionary Organization – Democratic Party for Macedonian National Unity (Внатрешна македонска револуционерна организација – Демократска партија за македонско национално единство - VMRO-DPMNE) has opted for the end of August or beginning of September, while the Social Democratic Union of Macedonia (Socijaldemokratski Sojuz na Makedonija – SDSM) is all for the end of June. According to VMRO-DPMNE, the late date will expose the citizens to least health hazards from the coronavirus. (www.meta.mk)

- May 18th, the EU and the Western Balkans will hold the Economic and Financial Dialogue on

Tuesday, which is to focus primarily on the socio-economic consequences from the crisis triggered by the COVID-19 pandemic, MIA reports from Brussels. The draft-conclusions of the Council of the EU regarding North Macedonia note that structural weaknesses have been exacerbated by the COVID-19 pandemic, highlighting the strong need for continued structural reforms. Effective and well-coordinated structural reforms, according to the conclusions, will contribute to mitigating the impact of pandemic and accelerate the post-crisis economic recovery. The EU and the Western Balkans have economic dialogues on regular basis to look into the region's progress in terms of economic and financial reforms and the preparedness of the hopefuls to tackle challenges once they join the EU, says MIA's Brussels correspondent. It would be vital for North Macedonia to further efforts to tackle corruption, improve the rule of law, and enhance transparency to better tackle the consequences from the crisis, according to the EU. Strengthening the public health sector is one of the key structural reforms North Macedonia should focus on in the future. North Macedonia submitted its Economic Reform Program 2020-2022 in February. The policy guidance set out in the conclusions of the Economic and Financial Dialogue of May 2019 has been "*partially implemented,*" it is noted, even though economic growth strengthened in 2019, driven by firming domestic demand and supported by expansionary policies. North Macedonia's macroeconomic picture has been put at risk by the coronavirus crisis, both at domestic level and because of the country's reliance on the EU – its main trade partner. Due to the emerging state of play, EU's 2019 projections are no longer valid. The EU is aware that as a result of the recovery measures

and global recession, North Macedonia will face difficulties to implement public debt reduction, but it says it expects the authorities to reprioritize its reduction once the initial shock dissipates. In conclusion, the recent progress in the labor market is welcomed; however, the authorities are warned that the crisis may put jobs at risk, including those in the informal sector. (www.republika.mk)

- May 20th, European Commissioner in charge of enlargement Oliver Varhelyi announced that the negotiating framework for North Macedonia and Albania will be prepared in June. This framework then needs to be approved by the individual EU member states. Speaking before the European Parliament AFET Committee, Varhelyi also said that the progress reports on the candidate countries will be postponed for September because of the coronavirus epidemic and its effect on the ability of the countries to implement reforms needed for enlargement. In September, Varhelyi said, the EU will also likely come out with an investment plan for the Balkans. North Macedonia is likely to face pressure from Bulgaria for concessions linked with historic and national identity issues before the negotiating framework is approved. (www.republika.mk)

COUNTRY ASSESSMENT :

Political tension continues in North Macedonia due to inability or reluctance of political leaders to reach a commonly accepted date for the parliamentary elections. Former Prime Minister and leader of SDSM seeks to call for elections on June, while opposition wants elections end of August or beginning of September due to COVID-19 pandemic. Consequently, a long rhetoric has broken up for the elections date. Although the

country has a caretaker Government situation is not stable since the Parliament has been dissolved and there is no elected Government to handle major state's issues. The Bulgaria – North Macedonia dispute is getting worse for the latter endangering the opening of accession negotiations with the EU and threatening the European perspective of the country. Moreover, it strengthens nationalistic rhetoric in North Macedonia giving spare place for populist voices amid pre-electoral atmosphere. However, it should be noted that North Macedonia is reluctant due to internal political reasons to fully implement the agreements with Greece and Bulgaria which have been set as preconditions by the EU for the country's European future. The country should focus on reforms regarding justice, rule of law, fight against corruption and money laundering, public administration, and respect of human rights in order to accelerate its European integration process.



ROMANIA: May 19th, at a joint sitting on Tuesday, Parliament's standing bureaus approved a letter from President Klaus Iohannis informing Parliament that he approved the participation of the Romanian Armed Forces with people, means and equipment in two humanitarian assistance missions in Moldova and the United States of America. "Amidst the ongoing pandemic generated by the infection with the SARS-CoV-2 virus and the ascending trend of the epidemiological situation caused by the infection with the virus, global measures, as well as firm action have been taken in the field of public health which result has been the limitation and interruption of economic and social activities and the restriction of fundamental rights and

freedoms. The pandemic soon became a challenge to the world community,” reads the letter. According to the document, in a spirit of solidarity, Romania has considered it necessary to provide support to prevent the spread, facilitate containment and eliminate the effects of the epidemic generated by this virus through the delivery of medicines, equipment and healthcare professionals. President Iohannis informed Parliament that he approved, in accordance with the constitutional provisions and Law No.121/2011 on the participation of the Armed Forces in missions and operations outside the Romanian state, at the proposal of the Prime Minister and after consulting with the Supreme Council for National Defense (CSAT), the participation of the Romanian Armed Forces in two humanitarian assistance missions in Moldova and the US. The support mission in Moldova entails the establishment at the level of the “*Dr. Carol Davila*” Central Military Emergency University Hospital of a medical team consisting of up to 12 doctors and nurses who can travel on order, for a period of two weeks in support of medical activities in a hospital in Chisinau; support for the evacuation of Moldovan soldiers infected with COVID-19 from war zones in the Balkans and Mali; the provision of a C 27 Spartan aircraft for three flights for the transport of medical supplies, at the request of the authorities of Moldova from EU countries or Turkey to Chisinau, within 20 hours of flight; providing a decontamination group for personnel, equipment and land, upon request. According to Agerpres, the support mission in the US consists of a medical team made up of up to 12 doctors and nurses, who will travel on order, for a period of up to 30 days, in support of medical activities to a hospital in the US. (www.nineoclock.ro)

- May 20th, Romania's opposition leader, Marcel Ciolacu, reiterated his party's intention to file a no-confidence motion against the Liberal Government of Prime Minister Ludovic Orban. Ciolacu, who is the President of the Social Democratic Party (Partidul Social Democrat - PSD), confirmed in a recent TV statement that “*several parliamentary parties*” support this initiative, Hotnews.ro reported. Two smaller parties, PRO Romania (PRO România - PRO) and the Alliance of Liberals and Democrats (Alianța Liberalilor și Democraților - ALDE), hinted that they agreed with overthrowing the Government of Orban. Liberal Ministers face increasing pressure as the economic problems have accumulated. The Government has also been widely criticized for the way it managed the Nadlac border point, where tens of thousands of people flocked over the weekend to enter the country. The Minister of education was also criticized after she could not present a feasible solution for delivering online learning to 250,000 students without access to the Internet or the necessary technology. (www.romania-insider.com)

- May 22nd, “*Normally and predictably,*” the Romanian reformist alliance Save Romania Union (Uniunea Salvați România - USR) - Freedom, Unity and Solidarity Party (Partidul Libertății, Unității și Solidarității - PLUS) will form the ruling coalition with the (currently ruling) National Liberal Party (Partidul Național Liberal - PNL), after the parliamentary elections, USR president Dan Barna said in an interview for Digi24. However, dialogue between PNL and USR has been increasingly difficult lately. The leaders of the two parties have been attacking each other almost daily in the Parliament, Digi24.ro commented. “*We are re-entering the*

logic of the election campaign,” Barna explained. “Whenever PNL acts like the [former ruling] Social Democrats, we will comment about this. When you appoint waiters to rule hospitals, we will speak up. When the measures are correct, we will support them, when they act in the style of the old USL [Liberals' past alliance with Social Democrats], we will protest,” Barna explained the attacks against PNL. Dan Barna claims that the parties “have already entered the logic of the election campaign,” as two rounds of elections will take place this year unless the second wave of the pandemic defers the plans. (www.romania-insider.com)

COUNTRY ASSESSMENT ■ :

Political situation in Romania is rather stable and certain since opposition threatens to file a motion of no-confidence against the Government of PNL. Besides, PNL enjoys a fragile majority in the Parliament. Nevertheless, it should be considered that PNL was seeking to hold early elections aiming to get the parliamentary majority. It is not still certain that PNL has the same goal since it has to address the wear and tear of time in power. Romania enjoys advanced upgrade in US and NATO strategic plans due to its geographical position located close to Russia. Consequently, Russia reacts in this close military cooperation between the two countries and the Alliance perceiving it as a threat against its national security. Romania keeps strengthening its Armed Forces seeking to achieve NATO standards.



SERBIA: May 19th, the Head of Serbia's Government Office for Kosovo Marko Djuric said on Tuesday that Pristina outgoing Prime Minister Albin Kurti feared the

continuation of dialogue on the normalization of relations with President Aleksandar Vucic, the FoNet news agency reported. *“To avoid dialogue, he (Kurti) and his Cabinet introduce new taxes, fabricate reasons to prevent that from happening. They will probably more like to have their across the table their like-minded. It is known who are their friends and like-minded in Belgrade,”* Djuric told pro-regime Pink TV. The EU representative to Belgrade – Pristina dialogue Miroslav Lajcak wrote on social media last Friday that he agreed with the Democratic League of Kosovo (Lidhja Demokratike e Kosovës - LDK) leader Isa Mustafa that talks should resume normalizing relations with Serbia. Kurti has said that the US President Donald Trump's Special Envoy to Belgrade - Pristina dialogue Richard Grenell wants an agreement between Pristina and Belgrade till September, but that he does not focus on the content. *“Grenell has asked for an express agreement and my impression is he has not meant anything bad for the Kosovo Albanians. (But) when you want something fast, pressure increases. He is in a hurry to get an agreement, and he is less focused on its content,”* Kurti said, adding *“we should not rush.”* *“Belgrade - Pristina dialogue should be well prepared under the EU and US auspices because when Washington is involved, there is mediation, while when it is only the EU, you have facilitation,”* KoSSev quoted Kurti as saying. He added he was against the idea of division of Kosovo, saying that was Vucic's intention. (www.rs.n1info.com)

- May 19th, the US Ambassador to Serbia Antony Godfrey urged on Tuesday all parties to run in the June 21st, 2020 general vote because *“different views and stands should be presented in a new Parliament,”* the Beta news agency reported.

Speaking to the Belgrade Prva TV, Godfrey said the US *“supports Serbia's goal to join the EU, and to develop and become a prosperous country with matured democratic institutions; that there is a peace and that the trade with neighbors raises.”* He did not want to comment Bosko Obradovic, an opposition leader's hunger strike, adding he did not receive his letter which Obradovic said had sent to 300 addresses in Europe, US and Russia. Asked about situation with media in Serbia, Godfrey said *“there are things which Serbia should work on,”* and that both Serbia's President and Prime Minister Aleksandar Vucic and Ana Brnabic respectively agreed with. *“I think there is still a lot to be done regarding the media scene in Serbia to secure better access and equal coverage,”* the Ambassador said. Godfrey added he expected the elections in Serbia to be fair and democratic. Asked how that would be possible with such media situation, he said he hoped that *“media freedom will be at the highest level during the campaign.”* *“That is important not only because of the OSCE evaluation of the atmosphere but more than that because the people who want to cast a ballot, wish that a new parliament to have a full legitimacy, i.e., that all views are represented,”* Godfrey said. Speaking about a solution to Kosovo issue, he reiterated that the US supported the Belgrade – Pristina dialogue as a safe way to find a solution, *“but only if both sides want it.”* *“Serbia should rely on itself and dialogue, while the US and EU are here to help,”* Godfrey said. (www.rs.n1info.com)

- May 20th, Serbian President Aleksandar Vucic talked with Patriarch Irinej about situation of the Serbian Orthodox Church in Montenegro and current circumstances there. He discussed with Patriarch Irinej the completion of works on the

Church of St. Sava and announced the completion of construction works this year. *“As far as situation in Montenegro is concerned, we understand the position of the Serbian Orthodox Church. We have to be more careful, because we do not want to do what they did to us,”* he said, adding that he did not want to interfere in the country's internal affairs, as Montenegro violated the territorial integrity of Serbia when it recognized the independence of the so-called Kosovo. Vucic thinks that it is unreasonable for politicians to found new Churches and pointed out as interesting the fact that politics interferes with Church organization and essentially spiritual things. *“They do not stop there, but try to confiscate property,”* he said, adding that this is very hard for the Serbian people that someone is trying to create a new Church in Montenegro. *“The goal is for the Serbian people to disappear from Montenegro in a decade,”* he concluded in response to the Patriarch's doubts about the *“expulsion of the Serbian people”* and added that *“there will be no new ‘Storms’.”* (www.b92.net)

COUNTRY ASSESSMENT :

Serbia faces several internal and external challenges. The country is in the middle of the pre-electoral campaign amid political tension. Opposition threatens to boycott elections while the international community has focused on Serbia's electoral procedures and media freedom aiming to secure fair and free elections. Undoubtedly, the elections of June 21st, 2020 will be a democratic stress test for the country. Restart of dialogue with Kosovo is far since political uncertainty reigns in both Pristina and Belgrade. Although the EU and US push for dialogue restart it is assessed that it is very difficult to see tangible

results before new stable Governments to be established in both, Kosovo and Serbia. Relations with Montenegro are in a sensitive phase due to the latter's persecutions against the Orthodox Church clerics. Serbia has declared its intention to protect the Serbian Orthodox Church and the Serbian population in the neighboring country. The EU has raised serious concerns over Serbia's effectiveness on independence and accountability of the judiciary, freedom of expression, prevention of corruption and the fight against organized crime. Serbia pays special attention in improving operational capabilities of its Armed Forces declaring towards all sides that they are the power of the state. It implements an ambitious armament program mainly supported by Russia.



SLOVENIA: May 18th, the ruling coalition's majority in Parliament has been reduced to 46 out of 90 seats after MP Gregor Zidan defected from the Modern Centre Party (Stranka Modernega Centra - SMC) to join the opposition Social Democrats (Socialni Demokrati - SD). Zidan did not comment on the move, but the SMC expressed surprise, while adding that the latest defections would consolidate rather than weaken the Deputy group. Zidan's departure comes after Jani Moderndorfer left for the opposition List of Marjan Sarec (Lista Marjana Šarca – LMS) (www.sta.si)

- May 19th, junior coalition parties rushed to put on a show of unity after two Modern Centre Party (Stranka Modernega Centra - SMC) MPs defected to the opposition, and amid speculation about an imminent Government reshuffle. The coalition's majority in Parliament has been reduced to 46 out of 90 seats after Jani

Moderndorfer joined the ranks of the Marjan Sarec (Lista Marjana Šarca – LMS) and Gregor Zidan defected to the Social Democrats (Socialni Demokrati - SD). Commenting on the latest defection, Janja Sluga, the Head of the SMC Deputy group, attributed it to the opposition's desire to bring down the Government, saying that the offers some SMC MPs keep getting to defect “*have crossed all limits of propriety.*” (www.sta.si)

- May 22nd, visiting Slovenia's only nuclear power plant on Friday, Infrastructure Minister Jernej Vrtovec announced that a decision about whether to build a second nuclear generator in Krsko would be made by 2027 at the latest. But first economic and expert studies must be performed to help Slovenia make this decision. Vrtovec said that he was in favor of nuclear energy, also adding that any bias could be dangerous and irresponsible before all issues are addressed and safety is guaranteed. (www.sta.si)

COUNTRY ASSESSMENT :

Ruling coalition of SDS enjoys a fragile parliamentary majority of 46 MPs in a 90 seats Parliament. Lately, there is a wave of MPs leaving coalition parties for the opposition. In other words, if another MP leaves, the ruling coalition loses majority and early elections could be announced. The Government focuses on “restarting” the country's economic activity after the COVID-19 pandemic. Migration is considered as a major threat against the country and additional measures will be taken for strengthening border control. Slovenia – Croatia dispute regarding the Piran Bay is still active but without tension or escalation due to COVID-19 pandemic. The Slovenian Foreign Minister made

statements which show good will for improvement of bilateral relations between the two countries. The Slovenian Armed Forces face problems mainly in the field of modern equipment and manning. The annual report on the Armed Forces operational readiness released by the Armed Forces Chief of Staff is disappointing since it assessed that the Armed Forces have limited operational capabilities in war time namely they cannot accomplish their mission.



TURKEY: May 20th, Turkey secured a tripling of its currency-swap agreement with Qatar, the Central Bank said on Wednesday. The deal is valued at 15 billion US dollars and will provide Turkey with much-needed foreign funding to reinforce its depleted reserves and help steady the Turkish lira. Ankara had been urgently seeking access to funds from Doha and elsewhere to head off a potential currency spiral and analysts say tens of billions of dollars might be needed. A senior Turkish official told Reuters that talks are continuing. Turkey's Central Bank said the deal with its Qatari counterpart - which raised the existing foreign-exchange (FX) limit from the equivalent of 5 billion US dollars - would support financial stability and trade. The lira touched a historic low earlier this month as investors fretted over a drop in the Central Bank's net FX reserves and Turkey's relatively high foreign-debt obligations, accelerating Ankara's overseas funding search. Reuters reported last week that officials from Turkey's treasury and Central Bank had appealed to counterparts in Qatar and China about expanding existing swap lines, and to the United Kingdom and Japan about possibly establishing them. Turkey has a roughly 1.7 billion US dollars swap facility with Beijing.

“Talks on swaps are continuing, and especially some are in a very positive situation. We expect positive results from them soon as well,” the senior Turkish official said before the Central Bank's announcement. The official, who requested anonymity, characterized some of the conversations as ongoing and others as on hold. The lira has rallied over the last eight trading days on expectations of new funding. Some analysts said the volatility and a 14% drop so far this year risked escalating as in 2018, when Turkey's currency crisis shook emerging markets. The lira was 0.1% weaker at 6.7900 versus the US dollar at 13:17 GMT. *“The extra 10 billion US dollars is a drop in the ocean compared to Turkey's external funding needs,”* especially given hard-hit tourism and trade have widened the current account deficit, said Jason Tuvey, senior economist at Capital Economics. *“We could see pressure on the lira start to mount again”* if the Bank of Japan and Bank of England rebuff Turkey, he said. Net FX reserves at the Central Bank have fallen to 26 billion US dollars from 40 billion US dollars this year, in part due to state bank FX interventions to help stabilize the lira, analysts say. Turkey's 12-month foreign debt obligations are 168 billion US dollars. Goldman Sachs analysts said the boost from Qatar *“only closes roughly a third of the funding gap we see for 2020.”* (www.aljazeera.com)

- May 21st, Turkey has warned that attacks on its interests in Libya by renegade military Commander Khalifa Haftar's forces will have *“grave consequences”* after advances by the country's Turkish-backed Government. Ankara has provided military support to the internationally recognized Government of National Accord (GNA) in Libya, which has been

battling to fend off a year-long offensive by Haftar's forces to take control of the capital Tripoli. Turkish Foreign Ministry Spokesman Hami Aksoy on Thursday said Haftar's Libyan National Army (LNA) had received warplanes with “*foreign support*” and that they had vowed to target Turkish positions in Libya with an air campaign. “*In the event Turkish interests in Libya are targeted, this will have very grave consequences,*” Aksoy said on Thursday, adding that the LNA's statements were “*delusional.*” Turkish presidential Spokesman Ibrahim Kalin was also quoted as saying by broadcaster NTV that attacks on Turkish positions would prompt heavy retaliation. In what could be their most significant advance for nearly a year, the GNA took control of the al-Watiya airbase southwest of Tripoli on Monday. Earlier on Thursday, GNA military spokesman Mohamed Gnnu said the Tripoli-based administration of Prime Minister Fayeze al-Sarraj continued to target several LNA positions in western Libya, including the city of Tarhouna, Haftar's last stronghold near the capital. Turkey's state-run Anadolu Agency said the GNA carried out five air operations against forces loyal to Haftar in the past 24 hours. A day earlier, the LNA announced it was withdrawing 2-3km (1-2 miles) to ease conditions for the Tripoli residents at the end of Ramadan, the Muslim holy month of fasting. Turkish drones and air defences appear to have played a key role in GNA advances in recent weeks, with repeated claims of attacks on LNA supply chains from the east. Turkey's Defense Minister Hulusi Akar on Wednesday said “*the balance in Libya changed significantly*” as a result of Turkish training and advice. Since 2014, Libya has been split between rival factions based in Tripoli and in the east, in a sometimes chaotic war that has drawn in outside

powers and a flood of foreign arms and mercenaries. Haftar's LNA, backed by the United Arab Emirates, Egypt, and Russia, has been unable to make significant progress since early on in its campaign. But it still controls eastern and southern Libya, including most of the country's oil facilities, and the city of Sirte, at the center of Libya's Mediterranean coastline. Turkey, which has had frayed ties with the UAE and Egypt for years, has accused Abu Dhabi of bringing chaos to the region through its interventions in Libya and Yemen, and has called on Russia to halt its support for Haftar. (www.aljazeera.com)

- May 23rd, Turkey said on Saturday it would not allow any “*fait accompli*” on its border with Greece after Athens complained to Ankara in a dispute over the exact boundary of the Evros River that divides the two countries. “*In spite of our warnings and proposals of cooperation, Greece initiated land-leveling activities on May 13th, 2020, and violated our contractual land border. This violation was immediately intercepted by our relevant authorities through the necessary measures,*” the Foreign Ministry said in a statement. Ankara has informed Greece that the riverbed “*has significantly changed due to natural and artificial reasons*” since 1926 when the border was established and that technical coordination was needed for a solution. Greek Foreign Minister Nikos Dendias said on Wednesday there was a “*dispute*” with Ankara, saying, “*The riverbed has changed.*” The Turkish Ministry added that the dispute could be resolved through talks between the two countries' technical delegations – a proposal Ankara had offered to Athens. “*We will by no means allow any fait accompli on our borders,*” the Ministry warned. In March, thousands of migrants faced off with

riot Police at the Greek border after Turkey opened its doors for migrants to leave its territory for Europe. (www.dailysabah.com)

COUNTRY ASSESSMENT ■ :

Qatar offered economic support to Turkey which desperately looks for funding in an effort to save Turkish lira. However, the 15 billion US dollars of Qatar are not enough and more funding is needed. Turkish officials are currently negotiating with UK and Japan for more funding since the Qatari funds could cover a third of the Turkish needs. In the field of external policy, it seems that Turkey has stabilized the Syrian front, while Libyan forces of Fayeze al-Sarraj backed by Turkey are gaining ground against General Khalifa Haftar. Turkey invests significant national interests in Libyan soil and its strategic alliance with Sarraj strengthens Turkish presence in Eastern Mediterranean Sea providing strategic depth in the country. One should follow very carefully the harsh rivalry between Turkey and UAE which is behind several regional fronts (for instance, Libya) and it may affect Turkish policy in Middle East and North Africa. Turkey maintains its claims in the Aegean Sea and Cypriot Exclusive Economic Zone violating constantly their sovereign rights. In the east Mediterranean front, Turkey will not accept "fait accompli" in the region and is expected to react violently if balance of power is jeopardized. The country continues to face several restrictions in freedom of expression and human rights. Elected MPs, Mayors, journalists and thousands of citizens are in custody or convicted by the state Courts. Local and international observers claim the country moves towards an authoritarian regime with thousands of citizens being persecuted. Turkey develops an ambitious

armament project aiming at becoming self-sufficient in defense sector; if it succeeds it will set the base to become a regional military super power. Without any question, Turkey has the characteristics of a regional superpower and it tries to act like one.

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NOTE

■ *Stable situation. No security risk.*

■ *Rather stable situation. Security risk is monitored.*

■ *Major concerns over stability and security. Significant security risk in specific regions. Low tension incidents.*

■ *Imminent major incidents regarding stability and security. Violent incidents or armed violence in specific regions. Ongoing tension or crisis. High security risk.*

■ *Evolving or ongoing crisis including major armed violence or violent/armed conflict. Civil, inter-state or non –state actors war.*