



CHINA IN THE WESTERN BALKANS

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Checking China's Advance?

China's influence in the region has, to date, largely advanced unchecked. Peculiarly, while China expanded its economic and political foothold from modest a decade ago to substantial today, traditional Western actors such as the US, EU or individual European countries seemed more concerned about checking Russian influence in the region than Chinese. This seemed to occur despite warnings from many local pro-Western observers that the real threat to Western influence in the region was not Russia, but – potentially – China.

While the EU and US were distracted with other problems around the world, China quietly exploited the vacuum that this created. Suddenly, Chinese companies began to appear as large economic investors in the region, filling the shoes that would usually in the past have been filled by US and European companies. The case of the Smederevo Steel Plant in Serbia – formerly owned by US Steel and now owned by Chinese HBIS Group – is perhaps the clearest example symbolically. Chinese banks and financial institutions became the financiers of large infrastructure projects – in turn implemented by Chinese companies.

For local observers – used to the Balkans being the chessboard of Great Power politics – most surprising in all of this was that the EU and US seemed to do little to check Chinese influence in the region, aside from occasional cautionary warnings by US officials that government in the region should, to paraphrase, beware of Chinese bearing gifts.

Chinese influence in the region seemed to reach its zenith this year with the arrival of COVID-19 to the region in March. Like much of the rest of the world, countries in the Balkans scrambled to use what connections they had to China to secure vital medical supplies and protective equipment. None more visibly than Serbia, whose President Aleksandar Vucic seemed to proclaim a clear new pivot towards China.

But is the era of China's unchecked expansion into the region coming to an end? The US has recently swung into action in an effort to block the use of Chinese (primarily Huawei) equipment in the roll out of 5G network coverage. In August, Albania joined the US Clean Network initiative, pledging not to use Huawei equipment in the roll out of its 5G networks. The Washington Agreement on normalizing economic relations between Kosovo and Serbia also – bizarrely – contained a clause stipulating that neither side would use equipment supplied by 'untrusted vendors' in the roll out of 5G coverage, Trump Administration 'speak' for Huawei.

So far, the Chinese response has been rather muted. Indeed, Beijing finds itself in an altogether new and unfamiliar situation and may take its time to calibrate a response. For the countries of the region – caught up in the middle – the main question over the next months will be whether the US effort to constrain Huawei will remain a minor skirmish between the US and China, or whether they will find themselves caught up in a more sustained Great Power struggle for influence in which, ultimately, they will be forced to pick sides.

1.0 The Regional Picture

Over the summer, the Western Balkans have emerged as one of the major battlegrounds for the Sino-American conflict over global economic and political, but primarily technological dominance. The US Clean Network initiative, which intends to block Chinese companies like Huawei or ZTE from deploying their 5G technology abroad, has already made an impact, with Albania being the first country in the region to join. As the pressure on other countries to join accelerates quickly, China will feel under pressure to come up with a counterstrategy to avoid being excluded from the region where up to this point it had a relatively free hand.

Economic difficulties created by the coronavirus pandemic have hampered significantly some of the major infrastructure projects in which China was involved either as a lender, investor, or through its construction companies. With the approach of a new wave of the pandemic expected in the Autumn, economic activities across the region could slow down even further, which could, in turn, jeopardize the dynamic of implementation of these projects, with some of them being put on hold for the foreseeable future.

Finally, with two tight Parliamentary elections taking place in North Macedonia and Montenegro and the negotiations between Serbia and Kosovo finally continuing in both Washington and Brussels, the summer brought about several unexpected outcomes which will reshape both domestic and regional dynamics in the coming years. Many of these developments saw China being pushed into a more defensive and passive position, with the US returning to a region which had been neglected for years with several decisive and aggressive moves. Largely as a result, Beijing will likely find itself forced to rethink its regional strategy going forward, both in economic and political terms, if it wishes to preserve its newly gained position as a major player in the Western Balkans.

1.1 Main Projects

For several years now, China's presence in the region has been growing rapidly, quickly gaining ground when it comes to economic influence. Beijing has been among the major creditors in the region, especially when it comes to large-scale infrastructure projects in transportation and energy. Chinese construction companies could be found carrying out construction work across the Balkans. Nonetheless, the global economic crisis has constrained the capacities of countries to take out new loans for financing large-scale projects, or even repay previously agreed loans. Furthermore, with many disruptions in the dynamic of construction work on currently ongoing projects, and with possible negative implications that political changes that we have seen over the last couple of months could have on Beijing's interest in the region, for the first time in a while China finds itself in the situation of needing to defend its position in the Western Balkans rather than advancing its influence.

China's attempt to secure its 'investments' within the shifting political landscape is nowhere clearer than in Montenegro, where the unexpected change of government has created uncertainties concerning the future construction of the Bar-Boljare highway, as well as China's position within the small country. Leaders of the likely new governing coalition have announced their intention that both the loans with Chinese financial institutions and contracts with Chinese construction companies will be scrutinised, made public and perhaps even subject to revision. Meanwhile, several major Chinese investments in Serbia, such as the Zijin Bor Copper-Smelting Complex, HBIS Steel Plant in Smederevo, and Lindong Tire Factory in Zrenjanin, have all simultaneously come under pressure from local environmental movements. The situation is not so bright in Albania either, where major Chinese investor Bankers Petroleum has recorded losses for months due to the collapse in oil prices and export demand.

After a several months long freeze due to the coronavirus pandemic, some strategic infrastructure projects are finally on their way. In Bosnia-Herzegovina, the first group of Chinese engineers arrived from China, in order to prepare for the long-overdue construction of the Tuzla 7 powerplant which is about to start in November. The Ohrid-Kicevo highway in Macedonia is on its way to meeting the deadline for the completion of construction work scheduled for next year. Nonetheless, other projects are still on hold, such as the Banja Luka – Prijedor highway in Republika Srpska, where the Chinese contractor did not meet the deadline for finishing preparatory activities for the third time. Moreover, over the last months only some relatively minor new projects have been announced, all of which adds to the impression that China's economic expansion into the region is gaining steam.

1.2 Political Influence

After several years during which the Western Balkans have been outside the main focus of US politics, Washington has finally begun to address the growing Chinese presence in the region and launched several actions attempting to roll back Beijing's influence. This new American strategy is especially apparent in the field of telecommunications and 5G network roll-out. Until now, Chinese Huawei had established itself as the main supplier of 5G technology and equipment in the region, on its way to winning contracts for equipping networks in several countries. In response to the global 5G dominance of Beijing that was beginning to emerge, Washington has created the Clean Network initiative which prohibits signatories from buying 5G technology from untrusted (i.e. Chinese) vendors. Albania was the first country in the region to sign up to the initiative. As the pressure on other countries to follow increases, many governments are finding themselves in the increasingly uncomfortable position of jeopardizing their bilateral relations with either China or the US.

The US has also attempted to take a leading role in the political negotiations between Serbia and Kosovo. After hosting Serbian President Aleksandar Vucic and the Prime Minister of Kosovo Avdullah Hoti, the Trump Administration announced that the two sides have reached a historic agreement on normalization of economic relations. However, one of the hidden agendas behind this deal was to counter-balance the influence China has on Belgrade, which is seen by Beijing as a key regional ally. To accomplish this goal, the US administration has decided to open an office of the Financial Corporation for International Development in Belgrade, which should help counter-balance the role China has as a major lender for large infrastructural projects in the country. In return, Serbia has had to commit not to use any 5G equipment in its communication networks delivered by an 'unverified vendor', Trump Administration code for Huawei. Nonetheless, based on the developments following the Washington meeting, it is unclear whether the Government in Belgrade will be implementing its new commitments any time soon.

Aside from the rising US involvement, the position of China is constantly measured against the power of Brussels, still the most consequential external actor in regional political dynamics. Newly elected governments in both North Macedonia and Montenegro have announced that their absolute priority will be to speed up reforms necessary for joining the European Union. In case the process of accession accelerates in the following years, these countries will be urged to further harmonize their foreign policies with the EU, which more often than not would mean confronting Chinese interests in the region and beyond.

1.3 Outlook and Factors to Watch

The US pressure on countries in the region to join the Clean Network declaration will continue, especially in the NATO member countries Montenegro and North Macedonia. In the upcoming months, the crucial issue to follow will be what strategy China will adopt to preserve the appeal of the digital silk road and protect the

interests of Huawei, which up to this point has established itself as the leading supplier of 5G technology in the region. Since Washington has the political edge in most of the countries in question, Beijing might try to employ more aggressive tactics to turn its economic influence into political capital. In the uncertain context of the upcoming recession, Chinese leverage as the holder of significant foreign debt in most countries may play an important role. Also, the political weight of many capital infrastructural projects financed or built by Chinese banks and companies has proved before to be a potential threat to the stability of governments in the region. Furthermore, China might use already established channels of ‘mask diplomacy’ more prominently amidst an expected surge in coronavirus cases in the autumn, especially if it wins the race to be the first country to develop an affordable vaccine which could be produced in large quantities and delivered fast.

2.0 Albania

2.1 Main Projects

The productivity of Bankers Petroleum, a company which represents the biggest Chinese investment in Albania, has been heavily hit by the recent crisis in oil prices and exports. The company's contribution to the Albanian economy is considerable, although the oil and gas sector, in general, has been negatively affected by the fall in oil prices. Exports of minerals and fuels fell by 22% in July, and over the last 7 months, this sector has shrunk by 22%. Bankers Petroleum, the country's largest exporter, which temporarily suspended production in April and May, announced by the end of May that activity had gradually returned to normal. In June, the company announced that almost 95% of the wells in the Patos-Marinza field have been put back into operation and have resumed crude oil production. However, even in July exports were down, while sales to Spain – which is the main export destination for Bankers – fell by 7.3%. Additionally, there was a decline in hydroelectrical production as a result of dry summer weather, which also harmed demand. Nevertheless, representatives of the company have repeatedly confirmed that Bankers plans to continue making long-term investments in Albania.

2.2 Political Influence

China has persisted with efforts to strengthen its soft power, employing the so-called 'mask diplomacy' by donating more medical supplies to Albania throughout the summer. Bai Yunbin, the political counsellor of the Chinese Embassy in Albania, met with Albana Fico, the director of the Albanian Institute of Public Health on July 30th to hand over another batch of medical supplies to help Albania combat the pandemic. The medical supplies include 10,000 COVID-19 test kits. Bai

said he hoped that the donation could enhance Albania's testing capacity and support the country's efforts in fighting against the disease, asserting the willingness of Beijing to further expand the anti-pandemic cooperation between the two countries. Fico expressed sincere gratitude for China's support, saying that the improvement in testing capacity is the key to epidemic prevention and control in the battle against COVID-19.

However, the most significant foreign policy event in recent months was Tirana's decision to join the American-led Clean Network initiative, pledging not to use 5G technology bought from or installed by Chinese companies, including Huawei. This represents a major strategic shift from developments in the field of telecommunications up to this point. As recently as November 2019, Vodafone Albania carried out a 5G network test in Tirana using Huawei equipment, but the company has denied having a contract to establish and operate the entire network with Huawei equipment. The US Embassy in Tirana and the US Secretary of State responded publicly to this development, highlighting the risks of operating such a network constructed by Chinese companies.

Such diplomatic pressure by the US produced a result in August when Albania decided to join the Clean Network "to address long-term threats to data privacy, security, and human rights allegedly posed by the Chinese Communist Party." Notably, the Network excludes members from utilizing any 5G services from untrusted IT vendors, including Huawei and ZTE. Telekom Albania CEO Emil Georgakiev said that "5G networks will play a critical role in the lives of individuals and businesses, with any malfunction of infrastructure or leakage of data having a devastating impact on society. That's why Telekom Albania continues to show its commitment to the highest standards of network security for our customers and our partners by using only trusted equipment, and we are proud to be a 5G Clean Network partner."

2.3 Outlook and Factors to Watch

The following months will show if there is going to be a Chinese response to the decision of the Government in Tirana to join the Clean Network initiative. Although Beijing is well aware that the leverage that US diplomacy projects in Albania outpaces by far the political clout of the Chinese side, the real danger lies in the dangerous precedent this decision could set for other countries in the region, especially the other two members of NATO – North Macedonia and Montenegro. No reaction by Beijing would make it easier for other countries to join the Network without fear of repercussions. Therefore, it will be interesting to follow what implicit message China might send to other countries in the region through its relations with Tirana.

Also, with the Parliamentary elections scheduled for next spring, it is likely that some of the major projects involving Chinese companies, such as oil production in the Patos-Marinza field or the concession for operating Tirana Airport, might become an important topic in the campaign. With losses in oil exports piling up and the recent history of problems concerning airport security measures still unresolved, they might prove an easy target for opposition parties to demonstrate the incompetence or corruption of a Government that has made such deals.

3.0 Bosnia and Herzegovina

3.1 Main Projects

The construction of the Banja Luka–Prijeđor highway, a major infrastructure project, has again been delayed, not once but twice. In mid–July, it was announced that the Chinese construction company SDHS–CSI BH did not fulfil four conditions of the concession agreement for the Banja Luka–Prijeđor highway for the second time. Nonetheless, the Government of the Republika Srpska entity again decided to extend the deadline for preparing the necessary documentation to start construction on that road. Namely, the deadline for the Chinese to complete the project design of the highway, to obtain location conditions, complete the environmental impact assessment and prepare a feasibility study, as well as to define certain annexes to the Concession Agreement, expired initially on December 13th last year. The second deadline was until June 13th this year, but since it was not met the second deadline was set for September 30th, due to the effects of the coronavirus which has been recognized as a force majeure.

However, despite the fact that by mid–September it was clear that the Chinese company will yet again not be able to meet the set deadlines for developing the project, the RS Government agreed to give them yet more time, extending the deadline for a few months and justifying everything with the coronavirus. Prime Minister Viskovic also confirmed that there was a problem with the route of the highway around Kozarac, where the route needed to be changed due to protests and demands of the local community, which slowed down the preparation of project documentation.

Regardless of these delays, Milorad Dodik, the Serbian member of the Bosnian State Presidency and the delegation of the Government of the Republika Srpska entity met in late August with the representatives of the same Chinese company, Shandong

Hi-Speed Group, to negotiate the potential construction of the Vukosavlje-Raca section of the planned highway connecting Belgrade and Banja Luka. However, there was no mention of why the Chinese side was failing to respect the deadlines from the concession contract on the construction of the Banja Luka-Prijedor highway. After the meeting, Prime Minister Viskovic pointed out that the construction of the highway that will connect Banja Luka and Belgrade is a strategic priority of the RS Government and welcomed the interest of the Chinese company to participate in the construction of the section from Vukosavlje to Raca.

On the part of international Corridor Vc running through the Federation BiH (FBiH) entity, six sections of around 40 kilometres are currently being built, their total value being around 400 million euros. When it comes to the tender for the construction of the Mostar South-Buna section of the same highway, subsection Tunnel Kvanj-Buna, the Autoceste FBiH public company has announced that five out of nine received procurement bids were from China. So far, companies from China and Azerbaijan have been hired to construct the Pocitelj-Zvirovici highway subsection. Adnan Terzic, director of the public company Autoceste FBiH, has stressed that tenders for the construction of this highway in Bosnia are monitored and approved by the European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD) as the loaning institutions.

There have also been new developments in the construction of the Tuzla 7 thermal powerplant. After a few months of delay due to the inability of the Chinese construction company to proceed with project activities due to difficulties related to the coronavirus pandemic, the first group of Chinese engineers in charge of construction arrived in Bosnia in early August. Bosnian companies have carried out preparatory work, and construction will now be taken over by Chinese contractors. Construction work itself is expected to begin in November.

This thermal power facility is being built by the Chinese consortium China Gezhouba Group Company Limited Beijing and Gedi-Guandong Electric Power Design Institute. The total value of the project for the construction of Block 7 of the Thermal Power

Plant in Tuzla is 722 million euros - 15% of the funds will be supplied by Elektroprivreda BiH, while the rest is a loan from the Chinese Exim Bank. The loan guarantee was given by the House of Representatives of the Parliament of the Federation of BiH in 2019, while the rest of the funds will be provided by Elektroprivreda BiH from its budget and other sources.

However, this funding agreement is problematic for the Energy Community, which has warned of the violation of protocols that have to do with state aid, such as the guarantees of FBiH for a loan taken from the Chinese bank. Another problem for the Energy Community concerning the Tuzla 7 project is the fact that the legal obligation to tax carbon dioxide emissions has still not put in place and that according to Elektroprivreda's own investment study it is predicted that this obligation will be introduced only in 2035, and even then the price will be as little as seven euros per ton. However, Senad Salkic, the Executive Director for capital investments of Elektroprivreda BiH, has rejected accusations of any irregularities related to the project. Many local observers believe that the real problem is that the project is being carried out via Chinese loans and construction companies.

The construction project for the hydroelectric power plant Dabar had seen a breakthrough, with the most important part of the supply tunnel for the future hydroelectric power plant - which is the main object of the project - finally breached. The value of the tunnel construction is more than 60 million euros. In September, Elektroprivreda RS, the main electric power utility of the RS entity, launched a tender for a €14.3 million bank loan. This loan will be used to finance the completion of the concrete lining of the water tunnel of the future 160 MW hydropower plant Dabar according to Bosnian media. The contract for the construction of the remaining facilities of HPP Dabar has already been signed in May with China Gezhouba Group.

3.2 Political Influence

In July, the Bosnian Serb member of the Bosnian State Presidency, Milorad Dodik, met with the Ambassador of the People's Republic of China, Yi Ping. Dodik and Ping agreed that relations between Bosnia-Herzegovina and China are very good since they have been built on mutual trust for a long time. The Chinese Ambassador conveyed to the Serbian member of the Bosnian Presidency once again the gratitude of Chinese President Xi Jinping for his support for China's position on the issue of Hong Kong. Dodik, on the other hand, thanked China and its President for the assistance that this country provided to RS and Bosnia in the fight against the coronavirus pandemic and the solidarity which they showed. During the meeting, the two also discussed projects in Republika Srpska implemented by Chinese companies, such as the construction of a hospital in Doboj, the Banja Luka-Prijedor and Doboj-Vukosavlje highways, as well as the Dabar hydroelectric power plant.

In September, Ambassador Ping also met with the current Chairman and the Bosniak representative on the Bosnian Presidency Sefik Dzaferovic, to discuss overall relations between the two countries. Relations were evaluated as very good, with significant space for further development in the mutual interest. It was jointly assessed that, despite the coronavirus pandemic, progress has been made in preparation for the implementation of large projects in several Bosnian cities in which Chinese companies are participating. Dzaferovic has also underlined the significance of Chinese assistance in medical equipment to Bosnia-Herzegovina during the pandemic. The two also talked about marking the upcoming 25th anniversary of the establishment of diplomatic relations between Bosnia and China, which will be accompanied by a series of activities, as well as the visit of a high-level Chinese delegation to Sarajevo.

3.3 Outlook and Factors to Watch

As in the other countries of the region, the strategic decision regarding vendors for the roll out of 5G networks will have major repercussions on Bosnia and Herzegovina's relations with both China and the US for the foreseeable future. Although Bosnia still has some way to go until 5G coverage is rolled out, some telecom operators have started testing 5G networks experimentally a few months ago. After Albania decided to join the Clean Network initiative, pressure from Washington on other countries of the region is expected to rise in the following months. Nevertheless, the position of Sarajevo is quite different when compared to other countries such as North Macedonia or Montenegro. As a non-member of NATO, Bosnia is not as vulnerable to direct institutional pressure from the US. Furthermore, China is deeply involved in several infrastructure projects of strategic importance to both Sarajevo and Banja Luka, so it is less likely that they will risk spoiling bilateral relations with Beijing. Finally, making any kind of decision to exclude Huawei and other Chinese suppliers is much more difficult in the context of the Bosnian system of ethnic power sharing where – in essence – three ethno-political blocks, who struggle to agree over much simpler things, will need to generate a consensus. Strong incentives exist for one group to act as spoiler in an attempt to curry favour with China.

Sources from the Chinese Embassy in Sarajevo conveyed to media their position is that "all countries should, based on mutual respect and trust, provide an open, fair, and non-discriminatory environment for cooperation in building 5G networks, to seize the great opportunity for development brought by the new scientific and technological revolution. For many years, Chinese companies have been actively participating in construction in this area in B&H, contributing to its socio-economic development. We hope that the two sides, adhering to the golden principle of 'joint consultations, joint contributions, and common interests', will continue to develop cooperation for mutual benefit, to push forward the revival of the economy and social development of Bosnia and Herzegovina."

Officially, B&H institutions did not yet discuss this topic with either the US or Chinese authorities, nor their companies. The Ministry of Communications has stated that they were still waiting for the regulation of this area and that they believe that the introduction of the 5G network will be preceded by a serious expert analysis of the impact on the environment, to remove the fears and doubts of the population. Such an analysis could serve to buy valuable time to avoid making any politically costly and hazardous decisions.

4.0 Kosovo

There have not been new developments in the bilateral relationship between Kosovo and China. Kosovo remains the only place in the Western Balkans in which there are no known Chinese economic investments or any major projects. China has been a firm supporter of Serbian territorial integrity and advocates resolving the Kosovo issue exclusively within the legal scope of UN Security Council Resolution 1244. Chinese officials state that they would only accept a solution that would be acceptable to both parties. Despite this, it remains unclear if the Chinese government would be inclined to use its veto in the UN Security Council and stop the acceptance of Kosovo into the UN even if such an agreement is made between Belgrade and Pristina, since - in their view - this could set a dangerous precedent which could affect their disputes and open political issues, most notably with Taiwan.

5.0 North Macedonia

5.1 Main Projects

The construction of the highway Kicevo – Ohrid remains the key project involving Chinese companies, as well as one of the strategic priorities for the newly elected Zaev Government in Skopje. Setting out the goals of his ministry in the new government, Minister of Transport and Communications Blagoj Bocvarski announced that more intensive construction of the highway Kicevo – Ohrid remains the main infrastructure priority in this Government’s term, alongside other projects such as the reconstruction of the road from Struga to the Kafasan border crossing, the construction of a new highway from Gostivar to Kicevo, the highway Skopje–Blace, and several local express roads.

On September 23rd, Bocavski met with Zhang Zuo, Ambassador of the People's Republic of China to the Republic of Northern Macedonia to discuss the need for cooperation on the completion of the highway Kicevo – Ohrid in the spirit of bilateral economic cooperation between the two countries. The Minister said that "China is our long-term partner in the implementation of major capital projects", and called for joint involvement in the completion of this strategically important road. Bocvarski also informed the Ambassador regarding the upcoming major capital projects that will be implemented on Corridors 8 and 10.

The pace of work and problems with the construction of the Kicevo – Ohrid highway was also an important topic during the campaign for the Parliamentary elections held in July. Igor Janusev, the Secretary-General of the main opposition party VMRO–DPMNE, under whose government the construction deal with the Chinese side was negotiated, accused the ruling SDSM party and its leaders Zoran Zaev and Ljupco Nikolovski of having failed to finish the highway by 2020 as they promised at the beginning of their last term. On top of that, Janusev raised allegations of

corruption by asking where the additional €150 million that were spent on construction went if the highway is not completed.

The response came immediately from the Deputy Prime Minister of the Republic of Northern Macedonia and Minister of Defence, Radmila Sekerinska, who inspected construction works on the highway on July 7th, less than 10 days before the Parliamentary elections held on July 16th. "The highway Kicevo - Ohrid as promised, started, and after 4-5 years of rule of VMRO DPMNE we saw that they left a project with no project documentation, no calculations, no plan, the only thing they did was made a contract so they could get €15 - €18 million commission. As a government, we inherited an obligation that was started but placed on its head. The highway Kicevo - Ohrid is proof of how difficult it is to get something out of the mud that is left without a project, without a plan, without documentation, and without order." In the words of Sekerinska, it was the incumbent Government that secured complete documentation and all the necessary means for work to go ahead: "While VMRO DPMNE left a project thanks to which the Kicevo - Ohrid highway would be without a single junction, we managed to put 9 junctions in the project that will provide communication to the population living between these two municipalities and we started working on several sections, one of which we can see here." Sekerinska concluded that it is expected that the highway with complete infrastructure - including 9 junctions - will be completed by the end of 2021.

5.2 Political Influence

North Macedonia held a very tense and unpredictable Parliamentary election on July 15th. With a tight race between the two main rival political groups, the incumbent centre-left SDSM and the centre-right opposition VMRO-DPMNE, the uncertainties about the future of Macedonian domestic and foreign policy were high. Ambassador Zhang Zuo had several high-level bilateral meetings just before the vote and especially in the aftermath of the elections. At the beginning of August, then Prime

Minister Oliver Spasovski met with Zuo, highlighting the solidarity and good cooperation between the two countries during the pandemic caused by COVID-19. Prime Minister Spasovski thanked the People's Republic of China for assistance in medical and sanitary materials and for sharing experiences in dealing with the virus and expressed hope for further cooperation. A joint commitment was also expressed for the development of cooperation within the 17+1 initiative, in the areas of agriculture, infrastructure, energy, education, and culture.

Immediately after Parliament was constituted, Zuo met with the newly elected Speaker Talat Xhaferi on September 1st. Xhaferi and Zuo discussed the new parliament's composition, the election of the new Government, as well as the upcoming election of working groups including one in charge of promoting cooperation with Chinese lawmakers. Xhaferi expressed hopes that the establishment of the new government will ensure the continuation of bilateral projects. Finally, once the deal to form the Government was made, Zuo met with Zaev on September 10th to hand over the note of congratulations from Prime Minister Li Keqiang on the electoral victory. Zaev thanked Keqiang, Zuo, and the Chinese people for the timely assistance and support for North Macedonia during the pandemic, which reaffirms the good bilateral relations. During the meeting, Prime Minister Zaev explained the foreign policy priorities of the new Government in Skopje: "We have joined NATO and we are expecting a start of the EU accession negotiations. Regardless of our strategic Euro-Atlantic commitment, we are prepared for cooperation with all friendly countries, including the People's Republic of China, especially in the field of the economy." The two discussed more active cooperation in the field of education, culture and economy, both in bilateral relations and within the 17+1 initiative.

In addition, as part of the effort to reaffirm good bilateral relations, China has continued to supply North Macedonia with the necessary medical equipment to fight the spread of the coronavirus. In mid-July, a donation of medical supplies from China was handed over to the Army of the Republic of North Macedonia. The donation - worth €250,000 - consists of 62,000 protective masks, 3,000 visors,

6,000 protective suits and kits, gloves, infusion pumps, etc., that have arrived by express train from China to Europe. The handover ceremony was attended by the Defence Ministry's State Secretary Dragan Nikolic and Ambassador Zhang Zuo, who stressed that the donation is a symbol of cooperation between the two armies and that the Chinese people sincerely support the Macedonian people in the fight against the virus.

5.3 Outlook and Factors to Watch

Zoran Zaev returns as Prime Minister of North Macedonia after his Social Democrats (SDSM) and the Democratic Union for Integration (DUI) won a slim majority of votes in the Parliamentary elections sufficient to form a coalition government. Zaev promised to make the implementation of reforms needed to speed up the country's EU accession process a priority. Given Skopje's clear EU-oriented aspirations, in the upcoming months it will be interesting to follow how the Zaev Government will manage its relations with Beijing while at the same time harmonizing its foreign policy with EU positions.

One of the issues which could set the tone of relations between the two countries might be possible pressure from Washington that Skopje should follow the example of Tirana and join the Clean Network initiative. For the youngest NATO member which joined the alliance this spring, it might be difficult to reject such a demand. This development has already been suggested by the President of North Macedonia after the country's Security Council meeting in September when he announced that "when it comes to the security implications regarding 5G technology in our country, as a NATO member, we are obliged to strictly follow all protocols. The conclusion in this area is that the government and other relevant institutions should consistently apply NATO rules and recommendations." On the other hand, such a decision could harm any future major infrastructure projects which would involve cheap Chinese

loans, hence the Government in Skopje will be under pressure to carefully balance its priorities.

6.0 Montenegro

6.1 Main Projects

During the campaign for the Parliamentary elections, the Prime Minister of Montenegro, Dusko Markovic, visited the first section of the Bar-Boljare highway which is being built from Podgorica to Matesevo, stating that almost 90% of the works have been completed and that he expects the highway to be operational next year: "The level of earthworks is over 90%, tunnels are breached and works on tunnels were performed at a level of over 95%, the same goes for hydro-mechanical installations". The outgoing Government had also announced that they were preparing to build the Matesevo-Andrijevisa and Smokovac-Farmac sections of the highway under a public-private partnership model. In line with this plan, Montenegro has applied for a €55 million loan in November 2018 to build the Matesevo-Andrijevisa section, which represents 20% of the total project cost. An additional 20% would be provided through a loan from the European Bank for Reconstruction and Development (EBRD), and 60% would be provided by private partners.

Nevertheless, international financial institutions have repeatedly warned of the economic and fiscal unsustainability of the highway project. The IMF stressed that caution was needed in implementing the next phases of the project until feasibility, cost-benefit, and financing studies were fully conducted. In the context of the crisis caused by the COVID-19 pandemic, which has seriously affected Montenegro, the highway project is in a new state of uncertainty and there is no sign of when it could be successfully completed. No one is ready to finance further work without state guarantees, which, at the current level of public debt, will be impossible. On top of this, with repayment of loans taken from Chinese banks for completion of the first phase of this project of strategic and political importance for the departing Government about to commence, Podgorica is getting ever closer to falling into

Beijing's debt trap, particularly as a major economic downturn induced by the coronavirus pandemic wreaks havoc with the public finances.

In these circumstances, the allegations aired in some Montenegrin media in late September that Serbia is in the final stages of negotiations with Chinese officials to buy the loan from their Exim Bank for the construction of the first section of the Bar-Boljare highway have gained considerable attention among the Montenegrin public. Allegedly, in case of a favourable outcome of the negotiations with Belgrade, China would get to build a section of the highway that goes through Serbia, and Serbia would become, until the end of the loan payment, the 'de facto' owner of the part of the highway that goes through Montenegro. Also, in case Montenegro cannot repay the mentioned loan, local media speculate that one of the options would be for Montenegro to rent a part of the highway through its territory to Serbia, similar to what Sri Lanka did when it leased one of its ports to China for 99 years because it could not repay the loan it took from them.

The Ministry of Finance of Serbia has denied the allegations published by Montenegrin media that Serbia is close to an agreement with China to buy the Montenegrin debt for the highway. It should be kept in mind that this story might also be just a narrative serving the internal political struggles in post-election Montenegro, which seek to paint Serbia as a constant threat to Montenegro's political and economic sovereignty. Nonetheless, it will be interesting to follow how reactions to this story unfold in the months to come.

6.2 Political Influence

In the diplomatic arena, some important bilateral meetings took place during the summer. The President of the Montenegrin Parliament, Ranko Krivokapic, travelled to Beijing for an official visit in late August. Krivokapic's visit has been organized to mark the establishment of bilateral relations between the two parliaments and serves as the first high-level official visit to China since the restoration of

Montenegrin independence. In addition, on July 13th, Montenegro's statehood day, President Xi Jinping sent his congratulations to the President of Montenegro, Milo Djukanovic, and the Montenegrin people, praising the decisive measures the Government took to control the spread of the coronavirus pandemic. Xi added that "China and Montenegro support each other and unite against the pandemic, and relations between the two countries are deepening."

China has continued providing help in medical supplies for the fight against Covid-19. At the beginning of July, the Deputy Prime Minister and President of the National Coordination Body for the Fight against Infectious Diseases (NKT), Milutin Simovic, met with Chinese Ambassador to Montenegro Liu Jin. The Embassy of the People's Republic of China, through the Chinese Red Cross, provided 40,000 medical and 15,000 N95 masks. At the end of July, the Chinese Embassy in Montenegro donated €45,000 euros to the Clinical Centre of Montenegro. At the event, Ambassador Liu Jin stated that the two countries have continued to deepen their mutual friendship and that he believes "the two states and the two nations will continue to move side by side, without fear of difficulties and obstacles." In response to that, Erakovic, the director of the Clinical centre, expressed his gratitude saying that "the Chinese people have supported Montenegro and the Montenegrin health care system before, for which we sincerely thank them, with a wish for good health and prosperity of their country in all fields."

Besides 'mask diplomacy', the Chinese Government has been expanding its soft power by providing scholarships to Montenegrin students. At the beginning of September, the Chinese Embassy in Montenegro handed out letters of acceptance to Montenegrin students who received a scholarship from the Chinese Government for the 2020/2021 academic year, who will study at top Chinese universities. As they said, since 2015, almost a hundred Montenegrin students have been financed by scholarships from the Chinese Government to study at top Chinese universities.

Nevertheless, the main political question for bilateral relations between the two countries in recent months is whether Chinese companies will have their place in the

future development of the 5G network in Montenegro, whose launch was planned for 2022. However, with the new US-led Clean Network initiative expected to gain steam across the region, it is more than likely that the next government in Podgorica will be pressured to renounce suppliers such as Huawei or ZTE. The American Embassy confirmed that they had discussed 5G with the outgoing Government. Furthermore, an undisclosed NATO official confirmed to the Montenegrin newspaper Vijesti that member countries regularly discuss threats and challenges arising from new technologies, including communication networks such as 5G. "Huawei has a significant share of the communications technology market, and allies must consider the security implications this can have. Some Member States have publicly expressed concern about Huawei's technology, and NATO takes the Allies' concerns seriously."

On the other hand, Chinese diplomats in Podgorica expect Montenegro to make an independent decision on the issue, pointing out that Huawei is a private company and not affiliated with the Chinese Government. Matija Otasevic, the spokesman of the biggest telecommunications operator in the country, Crnogorski Telekom, has pointed out that in the first phases of implementation, 5G is not technically an independent network but implies upgrading of new functionalities to the existing 4G: "Since, in the first phase, the existing 4G network will be upgraded, Telekom will use technology already implemented by existing partners, namely Nokia in the core part of the network, and Ericsson in the part of the antenna network." She also said Telekom would continue to follow a multi-supplier strategy to avoid dependence on individual producers, without implying who these suppliers might be.

6.3 Outlook and Factors to Watch

The Parliamentary elections which took place in September brought about the biggest political earthquake in the recent history of the country. For the first time since Montenegro gained its independence in 2006, and for the first time since the fall of Communism in 1990, the ruling DPS, led by its leader and current President Milo Djukanovic, lost an election to a heterogeneous opposition organized in three separate and ideologically quite diverse coalitions. Although the opposition leaders made an overall agreement on the general orientation of foreign policy, many important issues remain to be determined.

Some of these issues are crucial for relations between Beijing and the next government in Podgorica. The new government's main goal is to gain the trust of the EU and 're-energise' the accession process, which might have implications for economic relations with China. On the other hand, publishing the loan agreements with Chinese banks - which some members of the newly formed coalition promised - might turn out to be a major blow to the Sino-Montenegrin future partnership. However, China does hold a large part of Montenegrin public debt, hence the new Government of Montenegro cannot allow itself any major political clash with Beijing.

Undoubtedly, the most important political question in the following months will be the stance the next government will take concerning the construction of the Bar-Boljare highway. The opposition parties have so far heavily criticized the project, calling it unnecessary and the biggest corruption scandal in the history of the country. Now that they are about to assume power, it remains to be seen how much of that criticism was just opposition rhetoric, or whether some parts of the deal will indeed be renegotiated with the Chinese side.

The Prime Minister-designate and the nominal leader of the largest of the three opposition coalitions, For the Future of Montenegro (ZBCG), Zdravko Krivokapic, stated in one of his first post-election interviews that the new government will implement all of Montenegro's international obligations and that Montenegro's

international partners can be sure that the country would not make moves that would jeopardize Montenegro's position and regional stability. A similar tone could be heard from the leader of the smallest of the three opposition coalitions, Dritan Abazovic, who said that nothing related to the national interest of Montenegro can be brought into question, as well as what the main foreign policy obligations are. Abazovic added that "we will face major economic problems since our foreign debt will reach 100% by December 31st, and then next year the instalments for the highway are coming."

Nonetheless, regardless of claims on foreign policy continuity and recognition of previously taken obligations, Krivokapic has also announced that all international contracts will be subject to scrutiny and control. "Wherever a deviation from what is in the public interest is established, we will take appropriate measures to protect that interest by terminating all harmful contracts, by prosecuting those responsible." He went on to specifically point out the contract on the construction of the highway as one which will be scrutinized by the new government: "One kilometre of highway in neighbouring countries costs seven million [euros] per kilometre and more than 20 million in Montenegro. These are the questions we will open when we have an insight into the agreement. All contracts the former government has entered into must be made public. It may be necessary to renegotiate these agreements with China - for the benefit of both sides", Krivokapic said.

7.0 Serbia

7.1 Main Projects

Over the last several years, Serbia has concluded several important agreements with Chinese companies in the field of telecommunication, most prominently with Huawei. Major state-owned telecommunication company Telekom Srbija agreed on the development of the 5G network with Huawei, while the Ministry of Internal Affairs ordered one thousand cameras for face recognition and surveillance, but the contract with Huawei has not been made publicly available until today. The Government of Serbia has also concluded an agreement that Huawei that will store data on behalf of public institutions in the state data centre which the company would build. Serbia entrusted the Chinese side with the equipping and digitalization of schools, as well as the development of software for artificial intelligence. Serbia got its first 5G trial base station in 2019. For a number of reasons, the public auction of 5G spectrum licences in Serbia has been postponed for the first quarter of 2021 and may well be pushed back further.

However, Serbia's digital silk road seems to be in jeopardy after President Aleksandar Vucic signed an agreement on economic normalization between Kosovo and Serbia in Washington on September 4th. According to point 9 of the Washington Agreement, "both parties will prohibit the use of 5G equipment in their mobile communication networks, which is delivered by an unverified seller. Where such equipment is already present, both parties will commit to its removal and other efforts at mediation to do so promptly." Although Huawei or other Chinese companies have not been specifically named, it is clear that this point of the agreement was intended as unofficial acceptance of the clean network US policy principles by Serbia, which aim to stop Chinese companies from installing 5G equipment globally.

Nonetheless, in the days which immediately followed the signing of the Washington deal, Serbian officials have made it very clear that Belgrade is not planning to imperil its strategic partnership with Huawei, let alone place political ties with Beijing on thin ice. Less than a week after signing the document, Vucic announced that Serbia will respect the Washington Agreement, but also that it "does not state that Serbia cannot use Chinese equipment for the 5G network, just that it cannot use the equipment for the 5G network that has not been tested. We are still far from 5G, but the word China is not written anywhere (in the document)." During a meeting with Ambassador Chen on September 11th, Vucic explained the details of the Washington Agreement and stressed that China is a reliable and cooperative partner of Serbia and Serbia will conduct cooperation with China in various fields including telecommunications. Moreover, as reported by diplomatic sources, a clause that set a five-year deadline for removing 5G equipment from untrusted vendors was removed from the agreement signed in Washington on the demand of the Serbian side. This suggests that Belgrade does not want to be bound by specific deadlines and is instead buying time to see what will happen with the deal.

As a major sign that Chinese influence in the Serbian telecommunications sector is here to stay, Huawei opened an Innovations and Development Centre in Belgrade just a week after Serbia signed the agreement in Washington which appeared to commit it to exclude the Chinese technology giant from the roll out of its 5G network. Huawei's Innovations and Development Centre was opened in the presence of Serbian Prime Minister Ana Brnabic and the Chinese Ambassador to Belgrade. Brnabic said the centre will significantly help further digitalization in Serbia and that despite the Washington agreement, the country was working on many other technologies with Huawei that are a precondition for the introduction of 5G. Brnabic insisted that cooperation with Huawei on the introduction of the 5G network in Serbia does not contravene the agreement signed in Washington, claiming that "Serbia is not interested in unreliable technologies either, on the contrary, it is in the interest of the tender for the introduction of the 5G network to be open and transparent while respecting international standards, which includes the agreement

from Washington." Li Mengqun, President of Huawei Western Balkans, told media he believes that the Serbian Government will continue to create an open and fair business environment for ICT infrastructure construction and that he expects cooperation with the Serbian government to increase.

In mid-August, the Serbian Minister of Construction, Transport and Infrastructure, Zorana Mihajlovic, met with the President of the Chinese company China Railway International Company (CRIC) Yu Guodjeng. The main topic of the meeting was the construction of the Belgrade-Budapest high-speed railway, which Mihajlovic assessed as the most important strategic project for the country: "The construction of this high-speed railway is our most important project, I expect everything to be done on time and we are happy that next year we will travel from Belgrade to Novi Sad in less than half an hour in the fall," she said, adding that all projects that Serbia and China realize together are a symbol of friendship and good relations between the two countries. Mihajlovic noted that her ministry manages projects worth around €15 billion, of which projects with China are worth €7 billion. The President of CRIC, Yu Guodjeng, expressed confidence that all works will be completed according to the agreed dynamics and international standards. Works on the reconstruction of the Hungarian section of the Budapest-Belgrade railway have also begun, since the contract on the realization of this project came into force on July 13th. The railway is expected to be completed by 2025.

In late summer, environmental protests against pollution caused by Chinese companies have spread in several local communities across Serbia. Citizens of Bor gathered in September at the most massive protest to date to protest the excessive air pollution in this city. Dissatisfied citizens claim that the problems with pollution have intensified since the end of 2018 when the Chinese company Zijin became the majority owner of the RTB Bor copper mine. Just days before the protest, the City Administration of Bor filed charges against Zijin for several days of excessive pollution with sulphur dioxide and other substances harmful to the health of the population. Almost simultaneously, only two days before the announced protest, the management of Zijin decided to immediately stop the operation of its smelter and

begin maintenance work, which, according to the maintenance plan, was planned for November. Finally, according to a lawsuit filed earlier by the Ministry of Environmental Protection, in July the Commercial Court in Zajecar handed down a first-instance verdict according to which the company Zijin Bor Copper is responsible for excessive pollution in Bor in November 2019 and January 2020. However, the verdict is primarily symbolic, as the fine is only €3,500 since the court took into account mitigating circumstances: "the company has many employees, it has not been convicted so far, it is socially responsible and seeks to take measures to reduce pollution," as stated in the verdict.

In Zrenjanin, a local civic association organized a protest in late August, demanding the construction permits for Chinese company Linglong, which is currently building a tire factory in the city, be revoked. A process of assessing the impact of the future plant on the local environment is now under way. In early September, members of local activist groups and environmental organizations who have objections to the environmental study failed to enter the public hearing because the police blocked the entrance. Local authorities in Zrenjanin limited the number of people who could enter the public hearing on the tire factory by invoking regulations regarding gathering during the coronavirus pandemic, thus preventing up to a hundred citizens and activists from attending the event. As a symbolic response to the organizers of the protests, the local Assembly of the City of Zrenjanin has decided to name the local road through the work zone in that city Linglong Avenue.

A similar environmental protest was organized in the city of Smederevo, where several hundred people have gathered demanding that the government react to air pollution from the local steel plant. Organizers claim the steel plant, owned by Chinese company HBIS, also known as Hesteel, is breaking the environmental protection laws. The inhabitants of Smederevo are worried about the hazardous dust coming from the steel factory and its transportation activities, which prompted demonstrators to urge the authorities to act against air and land pollution. Locals accuse the company of failing to introduce measures to avoid air pollution and other damaging effects. The local civil society movement organized a rally to oppose what

they claimed was a decision to allow Hesteel to use the Smederevo port for 25 years for free, with the option to extend the license for another 25 years afterward. The Minister of Construction, Transport and Infrastructure, Zorana Mihajlovic, has rejected these allegations, stating how it is "very irresponsible that opposition politicians call for the obstruction of the Port of Smederevo, where more than 150 people work, on top of more than 4,000 Smederevo citizens employed by HBIS."

7.2 Political Influence

Serbia continues to be a pioneer among European countries when it comes to military cooperation with China. In early August, Serbia purchased a new generation of radar-guided medium-range surface-to-air missiles from China. The Chinese FC-3 system was obtained as part of the equipment modernization of the territorial air defence of Serbia and it is the first known purchase of the FC-3 system in Europe. Chinese CH-92A drones purchased earlier have already arrived and were presented to the public on July 4th at the Batajnica Airport in Belgrade. The procurement of FC-3 has been presented in pro-Government media as a direct result of the meetings between the two Presidents, Xi Jinping and Aleksandar Vucic. Vucic stated that Serbia had agreed to cooperate with Chinese experts on the joint development of technology so that Serbian experts would be able to develop unmanned aerial vehicles of a similar class on their own.

Reactions coming from the EU and the US to the information that Serbia has acquired a new contingent of military equipment from China have been very adverse. EU spokesman Peter Stano told Voice of America that the European Commission expects Serbia to act following the obligations it has undertaken as a country that has marked EU integration as a strategic priority, and that "for Serbia to progress on the path of integration into the European Union, it is necessary to gradually harmonize with its foreign and security policy based on the negotiating framework." The former commanding general of the US army in Europe Ben Hodges has said in an interview

with Radio Free Europe that "Serbia has the sovereign right to buy weapons from China or wherever it wants, but the Serbian government should open its eyes wide and must decide how to avoid replacing one dependence, on the Kremlin, with another dependence - on the Communist Party of China".

Another story which caught the public eye both in the country and abroad was the information published by Reuters that Serbia will be among the countries where the testing of the Chinese vaccine against the coronavirus will take place. The China National Biotech Group (CNBG) and the company Sinovac Biotech Ltd. announced that additional countries, including Serbia as well, have agreed to participate in the third phase of clinical trials of their coronavirus vaccines which should provide Chinese companies with more data from abroad necessary for final approvals of a potential vaccine, as a decreasing number of new infections in China makes this country an unsatisfactory place for testing. Nevertheless, Serbian Health Minister Zlatibor Loncar has dismissed this information, claiming that the conditions for the Chinese vaccine to be tested in Serbia have not been met, but also adding that the ministry will inform the citizens when the vaccine "reaches a certain stage and requires to be tested in Serbia." At the end of September, however, Loncar said that Serbia did not participate in the clinical trial of the Chinese vaccine because the necessary documentation was not submitted on time.

7.3 Outlook and Factors to Watch

The biggest future infrastructure project announced over the last months which will involve both the Chinese construction company and the loan by the Chinese bank is the Fruskogorski corridor. The works on the 47.7 kilometres long corridor from Novi Sad to Ruma will start next year and will be worth €606 million. The key construction object of the Novi Sad - Ruma road will be the 3.5 kilometres long two-pipe tunnel through the Fruska Gora mountain, which will be the longest tunnel in Serbia. The commercial contract for the construction of the Fruskogorski Corridor

with the Chinese company CRBC was adopted by the Government, and the Ministry of Construction and Infrastructure notes that Serbia received confirmation from the Chinese Exim Bank that the loan, which will partly finance the project, was approved, while the rest of the funds will be covered from the state budget.

Politically, the biggest question remains what will be the Chinese response to the Washington Agreement on economic normalization between Kosovo and Serbia, and how Serbia will balance US expectations to deliver what has been promised with Chinese expectation that Huawei will continue with the implementation of major projects in Serbia. The current administration in Washington firmly believes that one of the major upsides of the deal made is the fact that it pushes Serbia away from Chinese influence. In the words of US special envoy for Serbia and Kosovo peace negotiations Richard Grenell, "instead of Serbia looking to China and Russia, they will turn to America and Western businesses in Europe to start expanding their business sector." The office of the US Financial Corporation for International Development (DFC) has been set up in Belgrade to implement this agenda. Adam Bohler, executive director of the DFC, said the agency was very committed to the economic development of the Western Balkans and strengthening the sovereignty of countries in the region, unlike China, whose approach is a kind of neo-colonialism. "The Chinese are not investing in the region out of good will and mercy, but for influence. Our job is to invest in those countries to strengthen their sovereignty."

This foreign policy about turn will likely affect the field of telecommunications, where Huawei is currently some way ahead in solidifying its position as the major vendor of 5G technology in Serbia. Beijing, on the other hand, believes that the rhetoric of Serbian officials in the wake of the Washington deal, as well as the opening of the Innovations and Development Centre in Belgrade, demonstrates that regardless of the US intentions with the deal, Huawei is in Serbia to stay. This can further be read in the statement made by the Chinese Ambassador to Serbia Chen Bo that "cooperation in the field of high technologies and innovations is becoming a new springboard for cooperation between the two countries." At a reception marking China's statehood day on September 30th, Vucic said the two countries would

manage to preserve fraternal and friendly relations and that Serbia, regardless of the pressures it faces, would not jeopardize its friendship with China. "In Washington, where it is probably the most difficult place in the world to say something positive about China, I said that we have very good relations with China. That speaks to the strength of our friendship."

About

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