

EaP Think Bridge

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OIL CRISIS: A WINDOW OF OPPORTUNITY FOR THE EASTERN PARTNERSHIP



It seems likely that the oil crisis played into the hands of import-dependent countries in the region

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EaP Think Bridge is a platform uniting expert communities in the countries of Eastern Partnership region to fill the gap in distributing analytical products for stakeholders

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Grants are available for CSOs from the Eastern Partnership and EU countries. Key areas of support are democracy and human rights, economic integration, environment and energy, contacts between people, social and labour policies.

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Crisis or Energy for the Change?

The sharp collapse in world oil prices has opened a new window of opportunities for most of the Eastern Partnership countries.

This is a chance for the “association club” countries to comply with European requirements and create the necessary energy stocks with minimal budget expenditures. In addition, the crisis has shown the importance of developing the infrastructure that connects the states of the region. The first batch of Azerbaijani oil was delivered to Belarusian refineries via Georgian and Ukrainian ports and Ukrainian oil pipelines and became a trump card in the negotiations between Minsk and Moscow.

How has the oil crisis affected Russia’s behavior in the region? And what new opportunities do the Eastern Partnership countries face? We analyzed in the current issue.

Nevertheless, the focus in the region, as well as in entire world, in April remained on combating the coronavirus pandemic and its economic and social consequences. Although countries are slowly starting to lift quarantine restrictions, the situation is far from normal. Azerbaijan has already felt a serious blow in the banking sector. In Armenia, small and medium-sized businesses received only a tiny share of promised support from the state. Belarus, contrary to the epidemic, held a national Saturday clean-up and is preparing for the May 9 parade. The capital is still closed in Georgia and curfews are in effect. In Moldova, the coronavirus has aggravated the domestic political crisis while the Constitutional Court blocked the package of anti-crisis measures adopted by the government. Meanwhile, in Ukraine, the governmental team faces staff shortages

All the main April developments in the region are analyzed in our latest digest.



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Oil Crisis: a Window of Opportunity for the Eastern Partnership

Igor Stukalenko, Center for Global Studies Strategy XXI (Kyiv, Ukraine)

Since late 2019 there has been a tendency of lower crude oil prices on the global market. However, on March 9 at London Intercontinental Exchange Brent Crude Futures – North Sea – Wave went down \$12 to \$35.45/barrel. Brent lost 25,5%. The market crashed and impacted all spheres of life undermining economic activity in the entire world. How did this situation affect the EaP region?



Where Does the Crisis Come from?

The oil market crisis is a result of many processes. The amount of crude oil present on the market was increasing, first and foremost, due to more mining in the USA. The end of 2019 saw the USA mining more crude oil in 24 hours than Saudi Arabia and Russia. The USA became global exporters of oil and gas leaving import at the minimal level. At the same time, there was a process of reducing global oil demand. Already in 2019 global oil consumption went down against 2018. This tendency was further reinforced by introducing restrictions and lowering business activity as a result of the COVID-19 pandemic. For instance, in January 2020 China's import of Russian oil dropped by 30% against the same period last year.

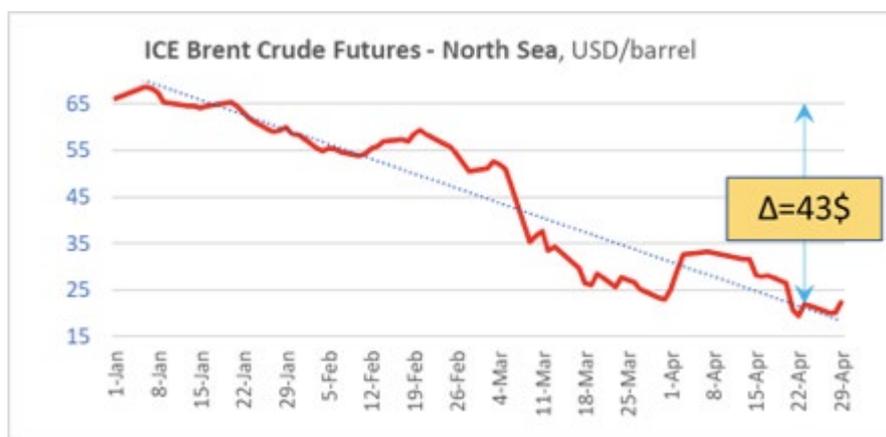


Fig. Intercontinental exchange London / 2020 / oil price dynamics. Source: ICE

However, there is a direct crisis accelerator, namely the broken negotiations on prolongation of OPEC+ agreement in March, which led to reduced limitations on crude oil mining. In April these processes deepened. New agreements on reduced mining did not save the situation. The process can be characterized by negative WTI crude oil prices at NYMEX and Urals in April. Prices went drastically down and became negative largely due to stock market speculations, weak demand and the lack of storage facilities. Yet at the same time negative prices (seller pays buyer) are indicators for the crisis depth.

Russia's Changing Behavior

It is yet difficult to make a forecast regarding the crisis aftermath and its impact on life. Much will depend on containment measures and countermeasures implemented all over the world. The IMF and its World Economic Outlook (April 2020) report that 2020 global growth will decrease minus 3% after global economic growth rate of 2.9% in 2019. Gross Domestic Product is expected to go down in most European countries, EU in general (-7.1%) and in all six EaP countries. Russia's economy will go down 5.5%, while as early as March OPEC reported 0.5%. Moreover, forecasts underline that there are risks of even deeper

economic recession.

These facts highlight the scale of such issues. In the Russian Federation that is highly dependent on hydrocarbon export, a so-called "working version" of 2020 federal budget forecast has recently been developed. It is based on supposed crude oil price of \$20/barrel. In this case federal budget deficit will make up approximately \$75 bn and it is planned to be covered by funds of the Russian Federal Wealth Fund. However, how long this money will last is yet to be discovered.

It seems that the current crisis is changing Russian behavior and encourages it to come to compromises with its neighbors. For instance, Belarus, while getting most of its crude oil and gas via its eastern border, yet again faced the issue of its main neighbor freezing crude oil supplies early this year. Experts believed then that such Russian actions mean more pressure on Minsk during deeper integration negotiations between the states. Such a break in crude oil supplies meant a threat of freezing Belarusian refinery industry, however, it also demonstrated the importance of solidarity and the need for better infrastructural contingency between EaP countries.

Already on March 12 the first tanker with Azeri Light of 90 thousand tons arrived in Yuzhny offshore oil terminal. JSC Ukrtransnafta accepted crude oil and transported it via Odessa-Brody pipeline and one of the two trunk lines of Druzhba (Friendship) pipelines directing it to Belarusian oil refineries. Therefore, the route from oil fields in Azerbaijan via Black Sea ports (Georgian Supsa and Ukrainian Yuzhny) and pipelines Odessa-Brody-Mozyr started to function, thus allowing Azerbaijan oil Azeri supplies to Belarusian oil refineries and launching their work. This was not the first instance of Belarus pumping oil via Odessa-Brody pipeline: in 2010-2012 this route was used for pumping crude oil from Venezuela.

It is worth noting that already in several days, in late March Rosneft changed its position and agreed to restart crude oil supplies to Belarus. The reason for restarting the supplies is unknown. However, market conditions were surely favorable. Moreover, Brent crude oil futures did not exceed \$26-27/barrel in late March. As for Russian crude oil Urals, its March average price made up \$29/barrel (official statistics of RF Ministry of Finance), while physical deliveries were even cheaper. For instance, on March 30, Urals barrel dropped to \$13 in Rotterdam.

Time to Make Stocks

The impact of global oil crisis also mainstreamed other issues of energy security, in particular, the necessity to maintain minimal stocks of crude oil and petroleum products. EU association agreements as well as Energy Com-

munity membership oblige Ukraine, Georgia and Moldova gradually implement EU energy legislation regarding maintaining minimal stocks of crude oil and petroleum products (Directive 2009/119 /EU).

Each country must ensure that the total oil stocks maintained at all times within the Community for their benefit correspond, at the very least, to 90 days of average daily net imports or 61 days of average daily inland consumption (Article 3) and additionally 10% of stocks (technically inaccessible) of all types of products. There is a regulation that at least one-third of stocks should contain petroleum products. There is also a requirement to develop an action plan in case of emergency that would be reflected and approved in the special Plan.

Fulfilling minimal stock obligations is also essential taking into account energy security. In all EaP countries except Azerbaijan crude oil and petroleum products are mostly imported. Ukraine annually spends several billion dollars to solve this issue. According to State Statistics Service of Ukraine, in 2018 8.06 ml tons of petroleum products were imported to the country, equivalent to \$5.5 bn dollars. Imported petroleum products make up 73-80% of total consumption. Georgia, Moldova and Armenia do not have their own refineries and therefore import 100% of petroleum products, with most of the import coming from the Russian Federation, the aggressor state.

Oil crisis is a great opportunity to make stocks while saving money. For example, calculations aided by EU in 2018 demonstrated that Ukraine's minimal stocks should consist of 25-30% of crude oil and 70% of petroleum products (38% of motor petrol and 62% of diesel fuel). The total volume of necessary 90-day 24-hour average import is calculated in oil equivalent at the level of over 2 ml tons including 1,4 ml tons of petroleum products. Let us remember that Brent average annual crude oil price made up \$72/barrel (approximately \$514/ton). Therefore, to create stocks under current conditions will cost less, saving some hundreds of million dollars.

The importance of stock issue is further highlighted by Energy Community Secretariat. According to it, as of November 2019, legislative obligations on minimum stocks are not completely fulfilled in EaP countries. For instance, in Georgia and Moldova the general implementation indicator is only 8%, while solutions for such issues as lack of storage capacities are yet to be found. Already in 2018 a special draft bill on creating minimal stocks was introduced in Ukraine and it has to be directed to the Verkhovna Rada of Ukraine as soon as possible.

It is obvious that given the conditions of low global oil prices Ukraine and other EaP countries need to mobilize their work including amendments to legislation in order to create national stocks of crude oil and petroleum products. Lower global prices may also have a positive economic

impact. Given the conditions of lacking storage capacities Ukrainian Naftogaz is working on attracting oil suppliers and providing them with oil storage services. Such services have an estimated monthly profit of \$1-3 ml. The preparation includes developing a "customs warehouse" mode based on oil storage capacities ($V = 1,083$ ml cubic meters only in Ukrtransnafta). Such a mode provides for an opportunity not to pay VAT while importing raw stuff in order to encourage suppliers. Gas "customs warehouse" has been operating for two years already, which in 2019 allowed to provide European companies with storage services of 24 bn cubic meters of gas in Ukrainian gas storage facilities and plan additional 5-6 bn cubic meters for 2020.

EaP is a Winner. Almost

One of the Eastern Partnership goals is providing for contingency of gas, oil and other energy infrastructure. Recent crisis situations only support this idea and further prioritize this goal, while the fast track of Azerbaijani oil supplied using Georgian and Ukrainian infrastructure demonstrated obvious advantages for everyone. In general, it seems likely that the oil crisis played into the hands of import-dependent countries in the region.

Serious financial losses within EaP will be relevant in case of **Azerbaijan** that is a large oil producer, having produced 37.5 mln tons of oil and 35.7 bn cubic meters of gas in 2019. Oil and gas export of hydrocarbons is extremely important for developing domestic economy. The results of 9 months in 2019 show that oil export made up 75,76% from the entire Azerbaijani export. According to the State Customs Committee, with-

in the period of January-September 2019 Azerbaijan exported 23,3 ml tons of oil that made up some \$11,267 bn.

Armenia does not have its own oil and gas resources and is completely dependent on foreign supplies. Petroleum products are mostly imported from the Russian Federation. In 2018 330 thousand tons equal to \$278 ml at the world price of \$71.9 per barrel were imported. Therefore, there are preconditions that Armenia will spend significantly less resources in order to import petroleum products. As for gas that is now supplied by Gazprom and is a kind of monopoly, the Russian Federation does not agree to cut the prices as was voiced on April 22, on the tribune of Armenian parliament.

Belarus has a strong oil refining industry and exports significant volumes of petroleum products while importing the complete amount of crude oil needed for its refining capacities. The termination of crude oil supplies from the Russian Federation early this year resulted in boosting deeper relations with EaP partners and diversifying sources and routes of crude oil supplies. Moreover, global oil crisis facilitated negotiating a good deal with the Russian Federation and it looks like it is beneficial for Belarusian interests.

The current crisis is changing Russian behavior and encourages it to come to compromises with its neighbors

Georgia also does not have its own crude oil mining and completely depends on import. Lower crude oil prices will lead to reduced cost of petroleum products import. Yet the coronavirus pandemic has a negative impact on economic activity and transportation resulting in lower oil product consumption that went down 40% in March. Moreover, possibly aggravating economies in countries mining crude oil may have a negative impact on Georgia's export and the country's economy in general. However, low prices also mean a good opportunity to create national stocks of crude oil and petroleum products, which will increase the country's energy security and sustainability.

Moldova imports petroleum products thus satisfying its own need. Therefore, lower global prices should make a positive impact on its economy. Yet natural gas is supplied by Russian Gazprom at the price (\$174/1000 cubic meters) that is significantly higher than the price at the European market and it has not been revisited yet. New agreements between Transmission System Operators of Ukraine and Moldova provide an opportunity to purchase gas in the European Union and supply it to Moldova at low prices and diversify sources and routes of gas supplies. Low oil prices mean a good time for making stocks in accordance with EU Directive requirements.

Ukraine does have oil and gas mining, however, it imports the larger part of petroleum products and therefore, should feel the positive impact of lower global oil prices. It is likely that there will be certain difficulties for mining enterprises. This period also gives a chance to create national stocks of petrol and diesel fuel and provide services of storing crude oil and gas to European companies. The situation at the European market facilitates efficient use of oil pipes, oil reservoirs and underground gas storages. The record amount of gas remains in EU UGSF and adequate pricing creates favorable conditions for providing gas storage services to European companies. Oil crisis mainstreams the necessity of restoring oil refining capacities in Ukraine.

Moreover, EaP countries aim to develop relations with other European countries. Ukraine, Moldova and Georgia are full members of the Energy Community and are deepening their relations with the European Union according to the conditions provided by Association Agreement. Implementing European energy legislation should as a result allow them to become full members of EU gas and energy markets.

It is worth reminding that the eleventh Annual Assembly of EaP Civil Society Forum in last year's declaration (December 2019) turned to EU (p. IX) calling on it to support aspirations to become full members of EU gas market that will connect member states and three EaP countries. Full membership in EU single market will allow for better coordinated plans and strategies, as well as facing energy security threats together. This also concerns challenges caused by oil crisis and the virus pandemic. Their impact should be addressed within the all-European context.

Conclusions

Global oil market crisis and the virus pandemic are serious challenges for the world, EU and all six EaP countries. Facing energy challenges should be consolidated taking into account all-European positions.

Given the conditions of low global oil prices EaP countries need to mobilize their work in order to create national stocks of crude oil and petroleum products

Involving energy infrastructure of four EaP countries as route components for Azerbaijani oil supplies to Belarus yet again highlights the importance of contingency for gas and oil infrastructure within the EU and its neighbors in order to boost energy security.

Integrating into EU energy market, boosting coordination strategies and infrastructure plans will provide for minimizing negative aftermath and getting advantages such as better security for supplying gas and other hydrocarbons.

Oil market pricing opens a window of opportunity for a faster minimal crude oil and petroleum products stocks according to the EU oil Directive.

Petroleum products import (gasoline, diesel fuel). 2018

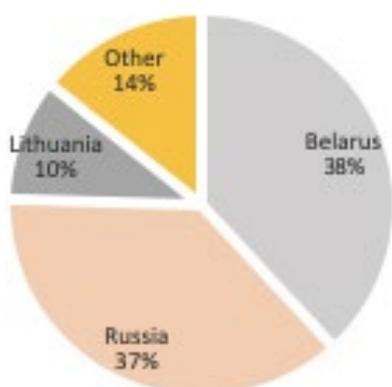


Fig. Import of petroleum products to Ukraine. Source of information: SFS.gov.ua

Armenia's Gradual Reopening

Richard Giragosian, Regional Studies Center (Yerevan, Armenia)

Struggling to manage the coronavirus pandemic, the Armenian government maintained its public health vigilance while also instituting a partial easing of restrictions imposed on the population and businesses due to the crisis. The focus shifted to dealing with the negative economic impact. Tension over gas prices mounted with Russia while the latest round of talks with Azerbaijan over the Nagorno Karabakh conflict were held via video conference.



DOMESTIC POLICY

Armenia Moves to Gradual Reopening

After a concerted effort to manage the coronavirus (COVID-19) pandemic, the Armenian government defended its decision at a cabinet meeting on April 29 to begin reopening the economy partially and gradually, and weakening the restrictive measures that were introduced on 24 March as part of a national “lockdown” of the country. The decision coincided with a record-high number of new coronavirus cases, however, as the Ministry of Health reported 134 new cases, bringing the total number of infections to 2,066 and death toll of 32 by April 28. Health Minister Arsen Torosian warned that with daily increases in cases over the past ten days, health officials are expecting to no longer be able to hospitalize or isolate all infected persons. The move to lift restrictions began on April 13 with a

partial easing of restrictions on economic activity, mobility and a gradual reopening of businesses and firms.

Oligarch-Linked Businessman Arrested

Police arrested Sedrak Arustamyan, the chief executive of the Multi Group holding company, on April 25 as part of a corruption-related criminal investigation. The arrest has political implications, as the holding company includes several firms owned by the leader of the Prosperous Armenia Party (BHK), the second-largest party in the parliament, Gagik Tsarukyan. Although Tsarukyan holds immunity as a sitting member of parliament, police did not rule out that he may be a part of the criminal investigation which led to the arrest and charging of Arustamyan with bribery and money

laundering in a case said to involve financial transactions totaling some \$20 million.

Commemoration of Armenian Genocide

Despite the national lockdown and other virus-related re-

strictions on movement, Armenia commemorated the 105th anniversary of the Armenian Genocide on April 24 with Armenians participating in a government-organized ceremony that included residents turning off lights in their homes and churches tolling their bells in memory of the victims.

ECONOMY

Problems in Economic Assistance Plans

Despite an ambitious program of economic assistance for businesses impacted by the closure imposed by the virus crisis, fewer than 500 small and medium-sized businesses were able to qualify for obtaining low-interest loans offered by the government, according to figures released on April 27. With only 1,200 of the more than 70,000 small and medium-sized enterprises (SMEs) registered in Armenia applying for the three-year subsidized commercial loans, a mere 461 applications have been approved, bringing the total amount of funds disbursed to a meager \$10.8 million.

Armenia to Receive Special IMF Funding

The International Monetary Fund (IMF) announced on April 26 that Armenia will receive some \$280 million in emergency loans aimed at easing the negative economic

The move to lift restrictions began on April 13 with a partial easing of restrictions on economic activity, mobility and a gradual reopening of businesses and firms

impact of the coronavirus outbreak. That loan package, to be released in May, includes a \$248 million “stand-by arrangement” that was allocated to Armenia back in May 2019. According to Yulia Ustyugova, IMF’s Resident Representative in Armenia, the country will also be able to use additional \$140 million in funding to Armenia. For its part, Finance Minister Atom Janjughazyan reported on April 21 that the government seeks to borrow some \$540 million in external financing to offset a major shortfall in tax revenues, to fund virus relief measures and in anticipation of a looming economic recession from the crisis.

Although the emergency borrowing will trigger a sizable increase in foreign debt, the move is seen as a necessary response to the deepening economic impact of the public health crisis and from the shutdown of the economy, which the Armenian Ministry of Finance expects to result in at least 2-percent decline in GDP.

FOREIGN POLICY

Armenian Official Refutes Russian Criticism over Gas Supplies

Deputy Prime Minister Mher Grigoryan strongly dismissed Russian criticism over gas price negotiations on April 23, arguing that not only was the Armenian government justified in seeking a reduced price for its imports of natural gas from Russia but stressing that Russia’s offer of “subsidized gas” at a discounted price was never as “generous” as Gazprom contends. Grigoryan further explained that even EU gas consumers were paying less for Russian gas imports than Armenia due to a global collapse in oil prices and a pronounced decline in energy demand.

The discrepancy, which applies to Russian gas exports to both Armenia and Belarus, is a result of gas contracts set at fixed prices. For Armenia, the wholesale price for imported Russian gas increased from \$150 to \$165 per thousand cubic meters after Gazprom raised prices in January 2019. The pressure is likely to only increase as Armenia’s Gazprom-owned gas distribution network is now seeking a further 11% increase in gas prices. Russian officials have also defended the bid for higher prices, also complaining of ongoing criminal investigations of reported corruption and tax evasion by major Russian companies and the operation

of the Armenian national railway network managed by the Russia Railways (RZD).

Armenian and Azerbaijani Foreign Ministers Hold Videoconference

Reflecting the limitation from the global virus pandemic, the Armenian and Azerbaijani foreign ministers held a video conference on April 21 in the latest round of talks over the Nagorno Karabakh conflict. According to the official statement issued after the conversation, the Foreign Minister Zohrab Mnatsakanyan and his Azerbaijani counterpart Elmar Mammadyarov “expressed the hope that the resolve seen in the global pandemic response will bring a creative and constructive impetus to the peace process”. The official French, Russian and U.S. mediators, the OCSE Minsk Group co-chairs, also participated in the video session and reiterated calls for all parties to “strictly” observe the ceasefire in the conflict zone and “avoid provocative actions in the current environment”. The discussion was the latest round of talks since the late January Geneva two-day meeting of the two ministers. In that meeting, which was defined as “intensive discussions”, the officials focused on “possible next steps to prepare the populations for peace” and regarding principles and elements forming the basis of a future settlement.

Azerbaijan: Supreme Court Discharged Two Opposition Members

Zohrab Ismayil, Public Association for Assistance to Free Economy (PAAFE)

Public threats of the president I. Aliyev addressed to the opposition did not wither on the vine. The Popular Front Party reported about arrests of its 12 activists. The economic crisis, which results from the pandemic and oil prices drop, already hit the banking sector. Meanwhile, the international negotiations moved into the telephone mode.



Ilgar Mammadov (left) and Rasul Jafarov (right).
Photo by Fargan Novruzov

DOMESTIC POLICY

12 Opposition Members Arrested

The opposition is still under pressure. On 13 April 2020, the leader of the opposition Popular Front Party (APFP) Ali Karimli stated he was under pressure personally. According to Karimli, in the evening, when he was to give an online interview, his access to the Internet was blocked.

He said that his mobile and landline phones, as well as his wife's mobile communications, were blocked. A few days later, Ali Akhmedov, the deputy chairman of the ruling New Azerbaijan party, wrote on Facebook that there are "two viruses" in Azerbaijan: COVID-19 and the "political virus".

The APFP claims that president's Ilham Aliyev's public

calls against the opposition on March 19 and April 14 led to the arrest of twelve party activists.

On the other hand, on 23 April 2020, the Plenum of the Supreme Court of Azerbaijan reviewed cases of the leader of the opposition Republican Alternative Party (ReAl) Ilgar Mammadov and human rights activist Rasul Jafarov, overturned the convictions and awarded both with compensation for non-pecuniary damage for being imprisoned.

The opposition politician Ilgar Mammadov spent five years and six months in prison, and he will be paid a compensation of AZN 234 thousand (€127 thousand). Ilgar Mammadov was sentenced to seven years in prison on charges of organizing protests in the Ismayilli district. His

The Plenum of the Supreme Court of Azerbaijan reviewed cases of the leader of the opposition Republican Alternative Party (ReAl) Ilgar Mammadov and human rights activist Rasul Jafarov, and overturned the convictions

case is unique because it was his complaint after which for the first time the European Court of Human Rights (ECHR) found a violation of the rights of the applicant from Azerbaijan under Article 18 of the European Convention, noting the political motives for the persecution. On these charges, the Committee of Ministers of the Council of

Europe caused proceedings for assessing non-compliance by the member state. The Grand Chamber of the ECHR ruled that Azerbaijan did not fulfil its obligations to the Council of Europe.

Human rights activist Rasul Jafarov spent a year and eight months in prison and was awarded a compensation of AZN 57.4 thousand (€31 thousand).

ECONOMY

Banking Sector under Attack

A temporary tax regime will be introduced in Azerbaijan due to a significant change in economic conditions as a result of the spread of the coronavirus pandemic. The Tax Code is proposed to be amended with such changes. The proposals envision the taxpayers' exemption from paying full land and property taxes for the whole of 2020 in areas directly affected by anti-coronavirus quarantine.

Tax holidays and benefits will be provided in such spheres as domestic transportation of passengers by cars, operation of hotels and similar facilities, tourism and travel agencies' activities, transportation and delivery of goods on orders, catering, culture, sports, and educational services.

The crisis caused by the coronavirus and oil prices drop have already shown themselves in the banking sec-

tor. On April 30, the Baku Court of Appeal declared two banks of Azerbaijan, Atabank and Amrahbank, bankrupt and launched the bankruptcy procedure. The results of the process of returning funds to depositors will be known within a month. However, what will happen to the funds of legal entities is unknown yet. More than 1,500 employees of these banks will become unemployed. Dozens of Amrahbank employees protested the same day the bank went bankrupt. They demanded wages for the last month. It should be noted that in March, the President Ilham Aliyev assured the citizens that during the quarantine period companies would not leave employees without work.

At the moment, another bank of Azerbaijan, AGBank, has also found itself in a difficult situation. Approximately 30 thousand of its customers cannot withdraw their funds. And more than 1,400 bank employees turned to the country's leadership for assistance.

FOREIGN POLICY

An Unexpected Loan for Ukraine?

On 23 April 2020, the Foreign Ministers of Azerbaijan and Ukraine Elmar Mammadyarov and Dmitry Kuleba held a telephone conversation. The ministers discussed the results of the official visit of the President of Ukraine Vladimir Zelensky to Azerbaijan (on December 16-17, 2019). They expressed their confidence that the agreements reached during this visit will contribute to deepening co-

operation between the two states, in particular, in the economic sphere, as well as in the GUAM framework.

It should be noted that on the eve of this discussion, the President Zelensky's speech on a \$300 million loan agreement from Azerbaijan became a surprise for the local politicians and experts. Up to this point, the Azerbaijani society had no information about this agreement and its terms.

Coronavirus in Belarus: Controversial Decisions and European Solidarity

Vadim Mojeiko, Belarusian Institute for Strategic Studies (BISS) (Minsk, Belarus)

The authorities' policy regarding the epidemic is inconsistent, the economy has to rely on emergency loans.



Saturday clean-up event in Belarus among coronavirus pandemic

DOMESTIC POLICY

Contradictory Antiviral Measures

Despite the skepticism demonstrated earlier, the Belarusian authorities are forced to take additional measures to respond to the coronavirus epidemic. There are several reasons for this, including the electorate dissatisfaction with the previous authorities' policies and the increase in coronavirus spread.

Within April 2-28, according to the official statistics,

the number of cases increased by 40 times (from 300 to 12,208 people), the death toll grew by 20 times (from 4 to 79). At the same time, the authorities' actions remain contradictory and inconsistent.

In the media policy, the authorities are more open: they regularly update on coronavirus statistics, via the official Ministry of Health Telegram channel as well. Meanwhile, statistics remain rather limited, and during a meeting with

some security officials, Alexander Lukashenko [claimed](#) the need for tighter control of independent media by security forces and the Ministry of Information.

The president [signed](#) a decree on financial incentives for some categories of doctors (ranging from €340 to €1,500 monthly), and certain measures were taken to support the business. However, according to some experts, these measures are [insufficient](#) and do not solve most of

While the Brest's authorities cancel mass events, the street parade, and the mass gathering on May 9, in Minsk parade rehearsals continue.

the entrepreneurs' problems. While the Brest's authorities [cancel](#) mass events, the street parade, and the mass gathering on May 9, in Minsk parade rehearsals continue. On April 25 a republic-wide Saturday clean-up was held with about 2.3 million people involved. The Belarusian Congress Of Democratic Trade Unions [called](#) for a "mass boycott of the Saturday clean-up". The International Labor Organization also [addressed Belarusian authorities](#) to cancel the event.

ECONOMY

Relying on Emergency Loans

With the [perfect storm](#) in the Belarusian economy, the coronavirus forces the authorities to make new budget spendings. Under these conditions, they only rely on loans and financial assistance for emergency coronavirus response.

On April 23, the Council of Ministers [approved](#) a draft agreement with the World Bank on a €90 million loan for Belarus for 11 years "to fund the emergency response to the epidemiological situation".

On April 16, the First Deputy Prime Minister of the Republic of Belarus Dmitry Krutoy and the Vice President of the European Bank for Reconstruction and Development (EBRD) Alain Pilloux held a video conference. Following the talks, they announced that Minsk requested EBRD loans of [up to \\$1 billion](#) to support companies from the most affected sectors of the economy. The European Union will allocate [\\$250 thousand](#) for a project designated to help local business in Belarus to respond more effectively to changes in economic conditions caused by COVID-19.

FOREIGN POLICY

Disputes with Russia and European Solidarity

In April, Belarus clashed with Russia on the economic issues not always with changing success. Thus, in April, country managed to get the required [volume](#) of Russian oil supplies, and a sharp drop in its world prices allows Belarus to [buy](#) oil from Russian companies with some reserves.

A [compromise](#) was also reached on a Russian loan for the construction of a Belarusian nuclear power plant. The start of the payments is most probably extended by a year, though Belarus was hoping for some better conditions. At

the same time, negotiations on gas tariffs reduction [was no success](#).

On April 23, the Lithuanian President Gitanas Nausėda and Alexander Lukashenko had their first telephone conversation, initiated by the Lithuanian side. Besides the discussion of the fuel and energy issues, the presidents also touched upon the COVID-19 pandemic. Nausėda [offered](#) to support Belarus with humanitarian aid. Also on April 24, Belarus received a batch of humanitarian aid for the epidemic response [from Poland](#). Potentially this strengthens European soft power in Belarus.

Georgia Gradually Comes out of Quarantine

Lasha Tugushi, the Liberal Academy Tbilisi (Georgia)

Georgia removes quarantine restrictions step by step but getting back to normal life is still a long way to go.



Despite quarantine and curfew, the Georgian Church refused to close Easter service for parishioners.

DOMESTIC POLICY

Easter Passion

A “face mask policy” introduced by the Georgian government is still successfully countering the COVID-19 threat, with 593 people infected and 9 people dead. This is the lowest rate in the region. Although some restrictions were already lifted by the end of April, the country is still under rather strict quarantine. From 9 p.m. to 6 a.m. citizens have a curfew time; public transport still does not work. The education institutions proceed working online. However, after May 5, some companies will come back to work. Besides, the ban on passenger cars movement was lifted. The restriction on entry and exit was lifted for two large cities Batumi and Kutaisi. Tbilisi, though it is still under quarantine, seems to open soon too.

The political statements are slowly changing the temperature regime. The direct fear of COVID-19 is replaced

by a fear of a social character. Political discourse spills into the space of social policy, employment, compensation and economy, as well as food security, local markets further advancement by domestic production promoting, protectionism in economy, etc. One can often hear the nationalist rhetoric of the 1990s, and only time will tell on its potential to grow into real politics.

A rather serious tension, caused by the church demand to celebrate Easter in the presence of parishioners during a curfew time, became a kind of manifestation of the struggle for traditional values. One by one, the members of the government publicly, at an official briefing, announced that they did not intend to go to church on the religious holiday. They all said they would watch the liturgy on TV. The government had obvious expectations for the Patriarch to refuse to sing the mass in the parishio-

ners' presence. However, the church met them only partially and called on the parishioners, who are not healthy, not to come to the temple. The rest of the compromise was to keep mainly large temples open. Parishioners were advised to keep a social distance, use face masks, come to acting churches before the curfew time, and stay there until 6 a.m.

In recent times, various issues are on the polemic agen-

Although some restrictions were already lifted by the end of April, the country is still under rather strict quarantine.

da with the church both on external and internal fronts, and it has moved into a more acute phase. The government is facing an obvious challenge: on the one hand, started by the liberal opposition, and on the other hand, connected with radical conservatism growth.

It is not difficult to predict that the elections, scheduled for this fall, will take place in the context of this ideological confrontation.

ECONOMY

Slowly Lifting Restrictions

According to the National Statistics Office, in April 2020, compared with the previous month, the inflation rate in Georgia was 0.9%, and the annual inflation rate reached 6.9%. As for core inflation, in April 2020 this indicator amounted to 4.6%, compared to the same period in the previous year, while the annual core inflation rate (excluding tobacco) was 4.1%.

Against this background, the 6-stage government plan proposed to the country's population is intriguing. According to the Georgian Prime Minister Giorgi Gakharia, the first stage began on April 27, and the interval between the next stages is set for two weeks. Besides, the implementation of the plan will take into account the epidemiological situation in the country.

The first phase of restrictions lifting began on April 27.

In compliance with the established procedure, they allow the following activities: passenger cars are back on the country's roads, as well as taxi services, wholesale and retail e-commerce, delivery service of any product, and open type grocery markets resume their work too. At the same time, on April 27 and 28, only for two days, citizens were allowed to move between the closed cities to return to their place of residence or work.

At the second stage, the government intends to remove restrictions on construction, construction activities supervision, production of building materials, full-fledged functioning of car washes and car services; repair of computers, personal and household goods; recreational areas functioning.

Gradually, step by step, the rest of the business will open. Coming through stages may be accelerated, and some activities will be "open" faster.

FOREIGN POLICY

MFA Returns the Georgians Back Home

The process of Georgian citizens returning to their homeland goes on. According to the latest data for April, the Georgian diplomatic missions assisted 18,646 citizens. Besides, 9,486 citizens returned to their homeland by air, land and sea, supported by the Georgian government and due to the Coordinating Council planned activities. However, these are not all who would like to return, and the real number of people interested in going back to Georgia is much higher. The Ministry of Foreign Affairs constantly announces special flights. Most of the returnees are those who lost their jobs, and sometimes even homes.

At the same time, the opposition assaulted the government for its slow and ineffective actions in this direction. The most biting criticism comes from the Mikheil Saakash-

vili's team, whose leader is faced with a new political reality in Ukraine and may get a position in the Ukrainian government. The Georgian government was definitely dissatisfied with such actions of its strategic partner, Ukraine, which did not take into account that Saakashvili was convicted by the Georgian justice. The opposition was angry with the Georgian authorities for their allegedly thoughtless actions and, as one of the opposition members said, "having hysterics" instead of staying out of its close partner's way.

Meanwhile, the Russian occupation forces continue to border on the occupied territories of Georgia, abducting people, as if the coronavirus became a dope for them. However, the fact that the virus, including coronavirus, is the causative agent of the occupational appetite for the Empire, is daily proved not only in Georgia but also thousands of kilometres from here.

Moldova: Economic Recession Seems Inevitable

Victor Chirila, Foreign Policy Association of Moldova (Chisinau, Moldova)

In April, the main priority of the Moldovan authorities and society has been the fight against the spread of the COVID-19 pandemic in order to limit its economic and social implications.



The Democrats are back to the government of Moldova

DOMESTIC POLICY

Fighting the COVID-19 Pandemic and its Implications

As of April 30, the number of the confirmed COVID-19 cases increased to 3771, out of which 431 are in Transnistrian separatist region, 960 are medical staff, with the num-

ber of fatalities reaching 109. According to the Moldovan Prime-minister Ion Chicu, the number of infection cases is declining. However, this assessment is not widely shared and is criticized by the opposition parties. Moreover, it contradicts the latest updates of the Ministry of Health. Nevertheless, Prime-minister Ion Chicu has announced

that if the epidemiological conditions do not worsen, the extension of the state of emergency might be unnecessary after May 15, and more relaxed measures could be implemented starting next week. According to him, the government has dealt quite well with the pandemic so far, considering the pessimistic scenario of the World Health Organization (WHO), which had predicted that Moldova will reach 30 000 COVID-19 infection cases by the month of May. In the meantime, Moldovan authorities have requested WHO to send a technical mission to the Transnistrian separatist region. Constitutional authorities do not have access to the region for evaluating the extent of the COVID-19 impact and cannot guarantee the compliance with human rights, particularly the right of the citizens living there for the medical services of Moldova.

COVID-19 pandemic has exacerbated domestic political struggles. On April 1, the Moldovan Government approved, through the constitutional procedure of assuming its responsibility before the Parliament, a package of economic and fiscal measures. It amounts to 816 000 000 MDL (42 million euro) designated to support the citizens and the activities of economic enterprises. The procedure of assuming the responsibility failed because the governmental coalition, comprised of the Democratic and Socialists' parties, did not attend the parliamentary plenary meeting to approve the anti-crisis package presented by the Moldovan Prime-minister. In this way, they wanted to

The Constitutional Court declared the entire anti-crisis package proposed by the government unconstitutional

avoid scrutiny of the package by the opposition parties and wrongly assumed that it will eventually be considered legally approved.

The opposition parties strongly criticized the proposed anti-crisis package and requested the Constitutional Court to check the constitutionality of several measures that, according to them, had nothing to do with the public health sector and the improvement of the economic situation in the context of the COVID-19 pandemic. On the contrary, those measures created undue economic and fiscal advantages to the duty-free shops, sellers of tobacco products and enterprises exploiting natural resources, all these groups of interests being particularly close to the governmental coalition. On April 9, the Constitutional Court suspended the decision of the Government to assume responsibility. Overstepping his constitutional rights, President Igor Dodon called Vladimir Iurcan, the Chairman of the Constitutional Court, a former member of the Socialists Party, in order to ask him to explain the decision taken by the Court. This action has sparked a strong public outcry of condemnation. Eventually, on April 23, the judges of the Constitutional Court dismissed the former Chairman and elected a new one. On April 13, the Constitutional Court declared the entire anti-crisis package proposed by the government unconstitutional, essentially because the Government failed to assume its responsibility before the Parliament as prescribed by the Constitution.

ECONOMY

Moldova Is Heading Towards Economic Recession

COVID-19 has gravely deteriorated Moldova's economic outlook. According to Moldovan Prime-minister Ion Chicu, since March 17 the budget incomes have decreased by half and the pensions and wages are paid primarily from the financial resources collected by the Customs Service during the first two months of the year, as well as from the financial assistance offered recently by the International Monetary Fund (IMF). In concrete terms, this means that in just one month the state budget incomes have reduced by 7 billion MDL (over 365 million euro). At the same time, the state budget expenditures have increased by 2,2 billion MDL (over 110 million euro) and the budget deficit has doubled to 19 billion MDL (approximately 1 billion euro). Consequently, it is expected that GDP is going to shrink by at least 3% this year.

In this context, the Moldovan Government has operated the budget rectifications that were approved by the Parliament on April 23. On the same day, the governmental coalition also approved the anti-crisis economic package as

proposed previously by the government. According to those rectifications, the increased budget deficit is planned to be covered from external resources, particularly, IMF credit of \$235 million that was already disbursed to the Moldovan National Bank, and the Russian credit agreement of €200 million that was signed on April 17 and approved in the Parliament by the governmental coalition on April 23. The opposition parties voiced strong criticism for the document with regard to some of its very sensitive provisions, which, in their view, could considerably increase Moldova's financial debts towards Russia and open the way to corruption and shadowy dealings with Russian companies.

Concurrently, the World Bank has approved a \$52,5 million credit to Moldova and the EU has announced that it will offer additional €100 million as macro-economic assistance to help the country cope with the negative economic consequences of the COVID-19 pandemic. Despite all this financial assistance, there is an increased sentiment that Moldova is heading not only towards an economic recession, but also towards a humanitarian crisis. This bad omen is especially strengthened by the poor agricultural harvest predictions.

The End of the “Balanced Foreign Policy”

COVID-19 pandemic has exposed the true essence of the “balanced foreign policy” promoted by the current Moldovan authorities. Igor Dodon, the President of Moldova, and his Prime-minister Ion Chicu have repeatedly unjustifiably blamed the EU for not providing sufficient and timely assistance to Moldova to cope with COVID-19, at the same time, praising excessively the help provided by authoritarian states like Russia, China and Turkey. Willingly or not, they amplified and spread the anti-EU disinformation propaganda promoted actively in the region by Russia and China.

This unpleasant ingratitude and biased behavior have surprised Brussels and other European capitals. Moreover, the negotiation and signing of the credit agreement with Russia in very obscure conditions have prompted the US Ambassador in Moldova Dereck J. Hogan to emphasize during a meeting with President Igor Dodon that any assistance should be consistent with the protection of Moldovan sovereignty. There are legitimate concerns that the credit agreement signed with Russia is designated to help Igor Dodon to win his reelection as President of Moldova and could be another trap set-up by Moscow in order to increase Moldova’s financial, economic and political

dependence on Russia.

For instance, the article 7.2 of the agreement stipulates that Moldova may also have to pay consolidated debts on the loans to Moldovan private companies granted by Russian banks, which are guaranteed by the Russian State. In the past, a similar provision has enabled Gazprom to gain the majority stake in MoldovaGaz Company. Some members of the opposition parties do not exclude that this time around Russia could use the article 7.2 to force Moldovan Government to pay the gas debts accumulated by the Transnistrian separatist region that amount to over \$7 billion and are considered by Moscow as official debts of Moldova. In the meantime, the agreement has been challenged in the Constitutional Court that decided to suspend the ratification procedure of the credit agreement approved by the Parliament until it will check its constitutionality at the request of the opposition parties. The decision has unnerved Moldovan President Igor Dodon who has threatened that if the Constitutional Court declares the credit agreement with Russia unconstitutional, Moldovan Government will fail to pay pensions and wages to public officers. In reality, the Russian credit is to be used for infrastructural projects, such as renovation and building of roads, which could be showcased during the future reelection campaign of Igor Dodon.

Corona Crisis in Ukraine: Long-term Consequences are Inevitable

Sergiy Gerasymchuk, Foreign Policy Council “Ukrainian Prism” (Kyiv, Ukraine)

Coronavirus and the economic crisis accompanying it are increasingly affecting Ukrainian politics and economics. Amid the lack of resources, the struggle between political groups is escalating. The confrontation between the billionaires Rinat Akhmetov and Ihor Kolomoysky is growing. The financial assistance of the West becomes critically necessary. At the same time, while Washington and Brussels jointly support Kyiv in security and political issues, they set conditions in the economic sphere. Reforms and transparency should guarantee that macroeconomic assistance will not go into the pockets of the Ukrainian oligarchs.



Due to the pandemic, the Minister of Foreign Affairs of Ukraine, Dmytro Kuleba, conducts international negotiations via videoconference.

DOMESTIC POLICY

Staff Shortages in the Presidential Team

In the last month, no cardinal and sharp fluctuations in domestic politics occurred. The parliament proceeded to work in committees and periodically in the session hall,

adopting laws necessary for the country. The government, newly minted in March, continues its efforts to combat the dangerous illness and an impending financial crisis. The Presidential Office and the Head of the State V. Zelensky himself still play first fiddle in medical procurement issues, regularly “reporting” about it to the Ukrainian society in

the guarantor's video messages.

In mid-April, the Verkhovna Rada amended the main financial document of the country. [With 249 deputies support](#), they created a UAH 64.7 billion (almost \$2.4 billion) fund for combating coronavirus. Moreover, in late April, the Cabinet of Ministers [extended quarantine restrictions](#) till May 11.

Several posts in the Ukrainian government remain vacant. And this is despite the “force majeure” circumstances and the need to develop the most effective policy to prepare for the upcoming economic crisis and make a plan for overcoming it. In mid-April, [the Cabinet of Ministers at its ad-hoc meeting](#) appointed Olga Buslavets to be the acting Minister of Energy and Environmental Protection of Ukraine. The government took such a step only because it would be impossible to find votes for this candidate in the Verkhovna Rada, and without the parliamentarians' support, the only option was to appoint her as an acting minister. O. Buslavets's previous work in the structures affiliated with the Ukrainian oligarch and billionaire R. Akhmetov was one of the reasons why she could not get the votes in the parliament. Besides, an acting minister was well in with the current head of the government, Denys Shmygal. The latter's track record also

Ukraine must pass an “anti-Kolomoisky” law and launch the land market to get the financial assistance from IMF

includes enterprises associated with the Ukrainian billionaire. And much more likely there is nowhere to look for a more or less compromise candidate as the pro-government team's bench is short.

It is worth noting that at one of its ad-hoc meetings, the parliament adopted a law on legislative spam, that is important without any exaggeration and in many respects could be named revolutionary. [It](#)

[was supported](#) by 242 deputies. And already in late April, [the President signed the law](#). This document introduces a limit on the number of amendments that can be submitted by deputies in between the first and the second readings, simplifies some voting procedures, and helps to avoid delays in the passage of the laws. The people's deputies were forced to adopt it by receiving more than 16 thousand amendments (a kind of anti-record) for the “banking law” or, as it is also called, the “anti-Kolomoisky” law, critical for getting the next tranche of international financial assistance. Reviewing these amendments could take several months though the law on banking and financial support are urgent for Ukraine.

ECONOMY

The IMF and EU are Ready to Help, on Their Terms

The impending economic crisis has already made some adjustments to the state budget of Ukraine. President Zelensky [approved relevant amendments](#) which became a response to changes in the forecasts. If earlier the economic growth was expected at the level of 3.7%, now -3.9% is predicted. Inflation is expected to reach 8.7%, and unemployment will hit 9.4%. The agricultural industry, which was often able to mitigate some economic difficulties in Ukraine, this year could also fail. [According to the relevant ministry forecasts](#), due to the drought the yield of grain and leguminous crops will be 60 million tons (after 98 mil-

lion tons in 2019).

Under such conditions, substantial government deficit could be financed at a level of 7.5% of the country's GDP [only with the IMF support](#). It seems that [the IMF understands the situation](#) but firmly insists that Ukraine must pass an “anti-Kolomoisky” law and launch the land market to get the financial assistance.

The situation with the macroeconomic assistance from the EU is taking the same turn. They [allocated €1.2 billion to Ukraine](#) for overcoming corona crisis aftermaths but plan to provide funds in two installments, first €600 million upfront, and another €600 million after reforms in the public financial management, anti-corruption, taxation, and business conditions.

FOREIGN POLICY

Virtual Negotiations and Continued Political Support from the West

The foreign relations format, like many other spheres of life, underwent several changes due to the COVID-19 pandemic. Telephone and video conferencing in secure mode gained their popularity. Ukraine was no exception. In the last month, dozens of such virtual “meetings” took place.

In early April, the NATO foreign ministers agreed on a new support package for Ukraine and other countries. [In](#)

[particular](#), they talked about support for countering cyber threats, as well as exchanging radar data in the Black Sea region. The United States also expressed its support in this matter, the Permanent Representative of the United States to the NATO Kay Bailey Hutchison [reported](#).

In early April, the Pentagon Head M. Esper held a telephone conversation with his counterpart, the Minister of Defense of Ukraine A. Taran. [The negotiations aimed](#) to strengthen the strategic partnership between the United States and Ukraine. The European Union does not stand

aside as well and continues to support the territorial integrity of Ukraine in the international arena, which was declared in a statement by the European External Action Service. [Among other things](#), the EU condemned the decree of the Russian President Putin, which is prohibiting the Ukrainians from owning land in the Crimea.

The Ministry of Foreign Affairs of Ukraine continues to strengthen bilateral contacts in the Asian direction. So, on April 1, the Minister of Foreign Affairs of Ukraine D. Ku-

leba had a telephone conversation with a State Councilor and the Minister of Foreign Affairs of the People's Republic of China Wang Yi. The Ukrainian side expressed deep appreciation to the Government of the People's Republic of China for the humanitarian assistance provided to fight with COVID-19 and invited the Chinese minister to pay a visit to Ukraine. Wang Yi accepted the invitation from the Ukrainian side and, in his turn, [invited the head of the Ukrainian MFA](#) to visit China.

Monitoring COVID-19 Response in Eastern Partnership



EaP CSF is at the forefront of monitoring the situation with the development of COVID-19 in all six EaP countries. With our [online interactive tool](#), we provide daily updates on the current numbers of officially registered cases, death rates, the number of tests carried out per million of population. For the moment, Belarus is leading on the number of cases as well as by the number of conducted tests. Azerbaijan is approaching Belarus on a number of tests made. Georgia has the smallest number of deaths and cases out of the six. Ukraine has conducted the smallest amounts of tests relative to the population, Armenia following Ukraine as the second with the smallest amounts of tests.

As part of our response to the pandemic, we have also analysed the most notable civil society initiatives, which have raised in a short time large funds and acquired broad support in their respective countries. Scroll through our [page](#) to view some most notable initiatives.

Upside down – the world after pandemic

“Upside down – the world after pandemic” podcast is prepared for you by the Eastern Partnership Civil Society Forum. It is part of our wider informative campaign #PrepareEaP4Health, which we have started in light of the outbreak of the pandemic. We collect data on the number of official cases in all six Eastern Partnership countries, analyse the measures taken by the governments, and raise civil society concerns. With this podcast, we would like to talk with civil society experts on the situation on the ground. We managed to release 3 episodes by now and talked about how civil society ensured the freedom of speech in [Moldova](#). From [Azerbaijan](#), we heard about civil society concerns about how some quarantine measures were implemented in the country, violating human rights and civil liberties. We also learned how civil society and businesses mobilized in [Belarus](#) to help doctors to cope with increased numbers of COVID-19 patients. Stay tuned for our updates.



EaP Think Bridge

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NGO Promotion of Intercultural Cooperation (PIC) is a non-governmental, non-profit organization aiming to promote international cooperation and intercultural dialogue. The goal of PIC is to raise awareness in different groups (youth, students, business, journalists, state and local authorities, academics, etc.) on the issues of international, intercultural relations, global and local socio-political problems.

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Foreign Policy Council "Ukrainian Prism" (Ukraine) is a network-based nongovernmental analytical center, the goal of which is to participate in providing democratic ground for developing and implementation of foreign and security policies by government authorities of Ukraine, implementation of international and nation-wide projects and programs, directed at improvement of foreign policy analysis and expertise, enhancement of expert community participation in a decision-making process in the spheres of foreign policy, international relations, public diplomacy.

www.prismua.org



Belarusian Institute for Strategic Studies (BISS) is an independent think-tank, founded in 2007 by a group of leading scientists and civil activists. BISS's mission is to provide a holistic picture of socio-political processes in Belarus based on empiric studies.

<https://belinstitute.com/>



The Regional Studies Center (Armenia) is an independent think tank based in Armenia. The RSC conducts a wide range of strategic analysis and objective research, implements a number of educational and policy-related projects, and develops policy initiatives aimed at bolstering political and economic reform and conflict resolution in the broader South Caucasus region.

www.regional-studies.org



The foundation Liberal Academy Tbilisi (Georgia) is a nongovernmental, nonprofit organization, committed to promoting core democratic values, supporting peace-building and European and Euro-Atlantic integration and with that fostering the democratic development of Georgia and the whole Southern Caucasus region.

www.ei-lat.ge



Foreign Policy Association (Moldova) is Moldova's leading foreign policy think-tank, committed to supporting Moldova's Europeanization, integration into the European Union and a viable settlement of the Transnistrian conflict.

www.ape.md