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North Macedonia on the Threshold of Europe

Dimitar Bechev and Damir Marusic





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Cover: A girl stands with her bicycle near the offices of the Delegation of the European Union to the Republic of North Macedonia, covered with logos reading “EU for You” in different languages, in Skopje, North Macedonia March 24, 2020. REUTERS/Ognen Teofilovski

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Introduction

Shortly after blocking North Macedonia from starting accession talks with the European Union (EU) in October 2019, France's Emmanuel Macron sat down with *The Economist* to give an interview which is best remembered for him saying NATO was experiencing "brain death."¹ For Balkans-watchers, however, his comments on EU enlargement were, if anything, more significant.

Macron upbraided certain Europeans for assuming that enlargement was the core of Europe's foreign policy, challenging them to imagine the union of twenty-seven, already experiencing internal friction, getting by with thirty or more members. He went on to argue that beyond structural reforms within the core of the EU, the accession process itself needed a thorough rethink. "[The accession criteria] are not strategic. They're not political—too bureaucratic and not reversible," he said.² He averred that he was not shutting the door completely and that once accession was reformed, he would lift his veto. In a speech two years earlier, he stated that the Western Balkans as a whole would eventually be accepted, so he was sticking to his word.³

Keeping his word, however, would cost him little politically before the growing cohort of European voters who increasingly held jaundiced views of adding new members. The new accession process would be anything but automatic, and reversibility meant that actual enlargement could be put off almost indefinitely. The message was not lost on the region's leaders: hope of joining the club any time soon should be put on ice. Accession was far off in the distance.

For North Macedonia in particular, this was a hard pill to swallow. Since the late 1990s, it has been well ahead

of many of the countries it now finds itself alongside in Europe's anteroom. And the years in limbo had not been kind. Clientelism and corruption, a bane of all Yugoslavia's successor countries, had taken a particularly tough toll. The brave compromise made with Greece at Lake Prespa was a gamble that was initially rebuffed.

The report that follows offers a snapshot of a North Macedonia finally on the threshold of accession talks. It is an outline of the myriad challenges that face this complex little Balkan polity as it struggles to chart a path forward in Europe's shadow. It can be read as a reform agenda—a laundry list of things that need to be done in order for the country to prepare itself for final accession.

But Western leaders—and especially those in Europe—looking at North Macedonia in the context of slowdown in EU enlargement, should ask themselves how they can be more productively and strategically engaged. Because North Macedonia, like the Western Balkans in general, represents not so much a problem to be managed but an opportunity to be seized. If the region's six countries—North Macedonia, Serbia, Albania, Kosovo, Montenegro, and Bosnia and Herzegovina—build on existing momentum toward deeper mutual cooperation, new avenues of integration with the rest of Europe become conceivable.

Now is a time for creative thinking. And studying the challenges and opportunities facing Skopje will, ideally, spur just that among both Macedonian reformers and those in Europe who see the Western Balkans as an integral part of the vision of a united and free Europe.

1 Emmanuel Macron, "Emmanuel Macron in his own words (English)," *The Economist*, November 17, 2019, <https://www.economist.com/europe/2019/11/07/emmanuel-macron-in-his-own-words-english>.

2 Ibid.

3 Emmanuel Macron, "Sorbonne speech of Emmanuel Macron," *Ouest-France*, September 26, 2017, <http://international.blogs.ouest-france.fr/archive/2017/09/29/macron-sorbonne-verbatim-europe-18583.html>.

The Story Until Now

North Macedonia embarked on its EU and NATO journey in the mid-1990s. It became the first post-Yugoslav republic to sign both a membership action plan with the alliance (in 1999) and a Stabilization and Association Agreement with the EU (in 2001). The fact that the country became the target of a NATO peacekeeping operation, subsequently led by the EU, in the wake of a brief armed conflict in 2001 did not thwart its ambitions. The then Republic of Macedonia gained official candidate status with the EU in 2005 and was poised to join NATO three years later. Had it not been for the Greek veto at the Bucharest Summit in April 2008, it would have become a member alongside Croatia and

Albania. Similarly, the European Commission considered Skopje ready to start membership talks in 2009. Yet its aspirations were frustrated by the unresolved dispute with Athens over the issue of its name.⁴

What followed was a lost decade during which each side—the nationalist administrations led by Nikola Gruevski and a succession of Greek governments—dug in their heels. Though negotiations under the auspices of the United Nations (UN) went on, they produced no palpable progress for years. The deadlock was broken only by Alexis Tsipras' rise to power in Athens and Skopje's leadership shakeup in the spring of 2017. In June 2018, Prime Minister Zoran



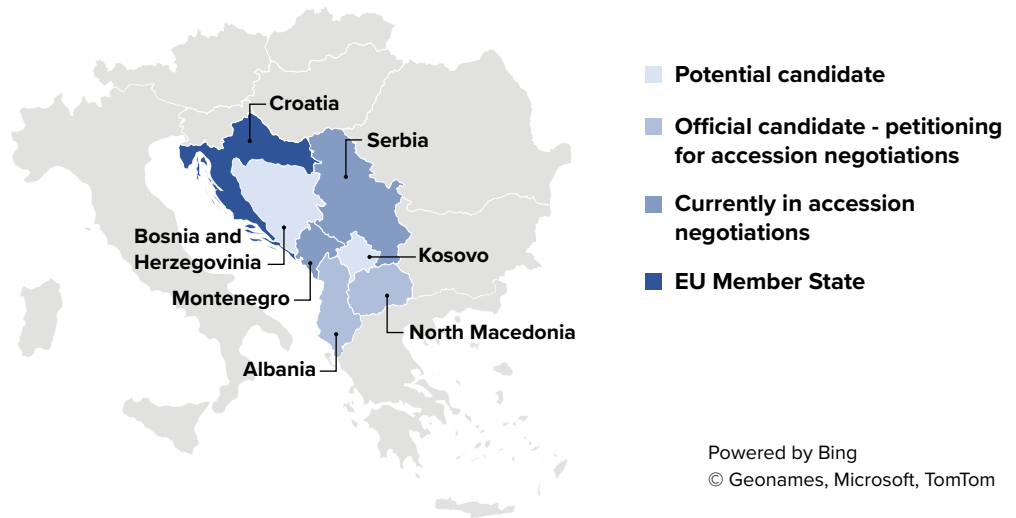
Prime Minister of Greece Alexis Tsipras and Prime Minister of North Macedonia Zoran Zaev gesture before the signing of an accord to settle a long dispute over the former Yugoslav republic's name in the village of Psarades, in Prespes, Greece, June 17, 2018. REUTERS/Alkis Konstantinidis TPX IMAGES OF THE DAY

⁴ Dimitar Bechev, *Historical Dictionary of North Macedonia*, Rowman, 2019.

EU accession of the Western Balkans

On July 1, 2013, Croatia became the first country in the Western Balkans to join the European Union. Montenegro and Serbia are official candidates and began accession negotiations in 2012 and 2014, respectively. The Republic of North Macedonia and Albania are official candidates, but accession negotiations have not yet been opened as of this publication. Bosnia and Herzegovina and Kosovo are potential candidates for EU accession.

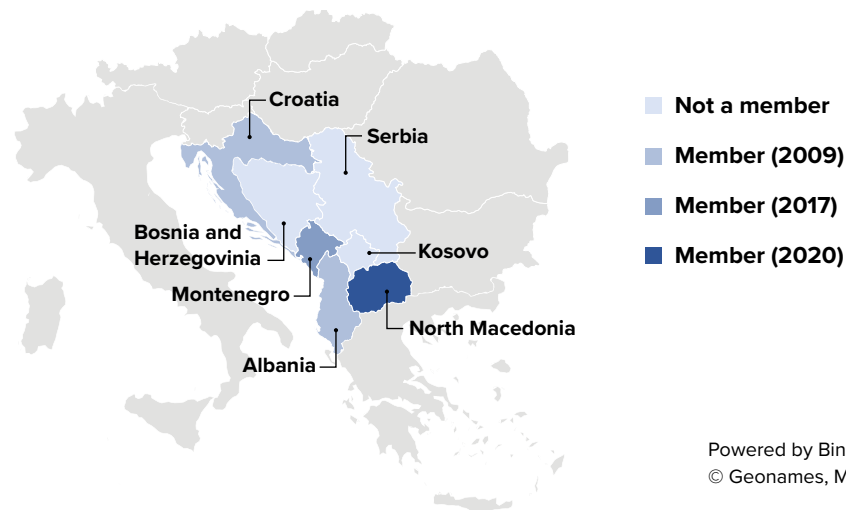
Source: European Parliament, "The Western Balkans," <https://tinyurl.com/y6l9nz92>.



NATO membership of the Western Balkans

NATO membership has been extended to Albania (2009), Croatia (2009), Montenegro (2017), and North Macedonia (2020). Bosnia and Herzegovina, Kosovo, and Serbia are not yet NATO members.

Source: NATO, "Member Countries," <https://www.nato.int/nato-welcome/index.html>.



Zaev (of the Social Democratic Union of Macedonia, or SDSM) and Tsipras signed the historic Prespa Agreement, unblocking integration into NATO and the EU on the proviso that the country changes its name to North Macedonia to accommodate Greek demands. Two years later, North Macedonia is a NATO member and Skopje remains on the cusp of launching accession negotiations with the EU.

Delayed Euro-Atlantic integration has been costly for North Macedonia. It was a frontrunner on the path to EU membership back in the early 2000s, but has since been overtaken by a number of its neighbors. Croatia is already a member of both the EU and NATO. Montenegro and Serbia have been negotiating their accession to the EU since 2012 and 2014, respectively.

As of this moment, North Macedonia must catch up, to the extent possible, with Serbia and Montenegro. Though NATO membership is already secured, accession to the EU might take more than a decade. Croatia completed its negotiations with Brussels in under six years in the fall of 2011, but that is not the speed at which Podgorica and Belgrade are moving. The European Commission and member states have been monitoring areas such as judicial reform and the fight against organized crime much more rigorously, while appetite for enlargement, which has never been particularly strong in Western Europe, has further waned. If all goes according to plan, a new round of enlargement could take place after 2027 when a new EU budget (Multiannual Financial Framework) is set to kick in. Montenegro, the present frontrunner, is in a good position

to benefit. Should North Macedonia make swift progress with reforms and alignment with the EU body of legal and regulatory standards (*acquis communautaire*), profiting from decades of integration efforts, it also has a chance to make the cut toward the end of this decade or the start of the next. But it is only a chance.

North Macedonia is fighting against the current. French President Emmanuel Macron's veto on EU talks from 2018 to 2019 reflects the mood in core European countries that internal consolidation should take precedence over expansion. The French position is that decision making within the EU needs to be overhauled to ensure internal coherence and resilience in an increasingly competitive world. Paris has also been pointing to democratic backsliding in EU member states across Central and Eastern Europe as justification for a more rigorous approach to enlargement, an argument for punitively pausing the accession process. Macron's arguments resonate with those who take a hawkish stance on the rule of law, the Netherlands and Denmark in particular. These arguments have traction in Germany too, even if Chancellor Angela Merkel favors a more forward-leaning enlargement policy as a means to assert EU influence against geopolitical rivals such as Russia and, increasingly, China. Last but not least, historical disputes with Bulgaria, an EU member state, have cropped up anew, threatening to further delay North Macedonia's accession talks.

France scored a tactical win with the adoption of a new enlargement methodology by the European Commission on

February 11, 2020, which was endorsed by the EU Council several weeks later. Under the new rules, the commission has a broader mandate to reopen already completed negotiation chapters, in effect turning back the clock. These toughened conditions provided political cover for France to finally greenlight the start of accession talks with both North Macedonia and Albania. France scored another victory in its quest to bundle the two Balkan countries together. In 2018 and 2019, there were strong voices within the EU, including from Germany, arguing in favor of decoupling. In the end, Macron prevailed. However, while France is now removing its objections to the start of membership negotiations, it is likely to exercise its veto powers liberally down the road.

Furthermore, although North Macedonia has received a formal endorsement by the council, it still has no launch date for the actual talks. Now that the country has had its early elections and Zaev has returned as prime minister, the actual kick-off looks possible for early 2021. That is more than eleven years from the moment the European Commission first published a positive *avis* in response to the Macedonian request to start accession negotiations. In other words, the already tortuous process is likely to continue to drag on for years. Skepticism in Western Europe and increasing pressure from Bulgaria do not augur well for Skopje quickly clearing the finish line. Indeed, Sofia is threatening to block the formal opening of accession talks unless Skopje does not recognize its version of what both sides refer to as "shared history."

Cleaning House

Domestically, the situation is not exactly propitious. North Macedonia went through early elections on July 15, 2020, which saw SDSM prevail over the center-right Internal Macedonian Revolutionary Organization- Democratic Party for Macedonian National Unity (VMRO-DPMNE), which opposed the Prespa Agreement, by a razor-thin margin (forty-six versus forty-four members of parliament (MPs) in the 120-strong Sобрание). In the first half of 2020, the country was led by a technical cabinet headed by SDSM's Oliver Spasovski, who replaced Zaev as prime minister on January 3, 2020. The postponement of the elections, originally tabled for April 12, 2020, due to COVID-19 put a hold on policy reforms. SDSM has finally formed a coalition government—aligning with Ali Ahmeti's Democratic Union for Integration (DUI), which triumphed amongst ethnic Albanian voters

despite allegations of corruption. Zaev's hopes to jettison the fraught partnership and coalesce with other Albanian parties were quashed. Looking forward, the government faces the daunting task of grappling with a plethora of governance challenges only made worse by the economic downturn caused by the COVID-19 pandemic.

Ethnic politics also continue to be a factor in the country. The most conspicuous example is the ethnic cleavage between the Macedonian majority and the Albanian community, alongside several smaller groups such as the Turks and Roma. Although ethnic tensions come to the fore from time to time—most recently in early 2017 when Macedonian nationalists mobilized against legislation broadening the role of the Albanian language in public institutions—they are mitigated through elite-level bargaining and power sharing



Zoran Zaev (bottom C), leader of the ruling SDSM party, poses during a group photo with newly elected ministers at the parliament in Skopje, North Macedonia August 31, 2020. REUTERS/Ognen Teofilovski

as mandated by the 2001 Ohrid Framework Agreement. Integration into Western institutions enjoys considerable support across ethnic lines and is another factor that will likely maintain a degree of inter-communal peace and stability through whatever government succeeds the current administration in the decade ahead.

Much more pressing are the challenges associated with corruption and state capture. Concerns about abuse of power and embezzlement, as revealed by leaked conversations of former Prime Minister Nikola Gruevski and other top officials, led to civic protests in the spring of 2015 and, ultimately, to the early election in December 2016 that handed power to Zaev. As part of the EU effort to defuse the crisis and ensure accountability, political parties agreed to appoint a special prosecutor tasked with investigating and bringing to justice cases of high-profile graft. Gruevski paid a price: He was found guilty of misappropriation and, in May 2018, sentenced to two years in jail.

Nevertheless, the bid to clean the government soon ran into obstacles. The special prosecutor's mandate expired in September 2018 with very few cases having led to indictments. Parliament failed to reach the requisite two-thirds majority (eighty MPs) to pass a new law on the public prosecutor to incorporate the special prosecutor's tasks relating to fighting corruption and organized crime. (They voted on the bill—a condition put forward by the EU for

opening accession talks—on February 16, 2020, before the dissolution of parliament.) To make matters worse, Katica Janeva, the magistrate who originally headed the special prosecutor's office, had herself become the subject of a bribery and extortion scandal in August 2019 involving an investigation against Orce Kamchev, a prominent tycoon. A court sentenced Janeva to seven years in prison last June. The story has cast a long shadow over the effort to tackle corruption in high places.

Zaev's incoming administration must ensure that the judiciary acts independently and with impartiality. In other words, prosecutors and judges should be able to investigate and hold accountable officials at all levels of government, as well as politically connected businesspeople, without fear. That is, of course, easier said than done. Coalition culture in North Macedonia depends on powerful parties sharing spoils, and the public sector has always been a source of patronage and rents. The judiciary, in turn, is likely to go more readily after the opposition than those who hold power. Strong EU support and encouragement for an empowered special prosecutor is essential.

It is within these political constraints that any new government will be forced to navigate a much stricter—and reversible—accession process to the EU, before member states likely slow-roll the process under all available pretexts.

The Economy

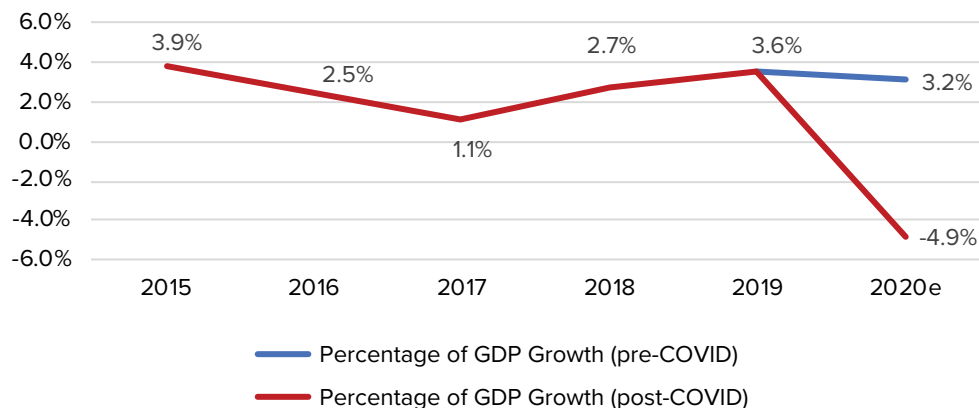
The new Zaev government has a tough job on its hands when it comes to the economy. Despite an economic rebound forecast for 2021, the incoming administration will struggle to meet the expectations of its constituents given a narrowed fiscal space in the wake of COVID-19. Like its neighbors in the Western Balkans and the rest of Europe, the country took a sizeable hit from the COVID-19 pandemic. Owing to lockdown measures and weakened external demand, gross domestic product (GDP) is expected to contract by at least 3.5 percent, or about €900 million, in 2020. At the beginning of the year, GDP was projected to grow by 3.8 percent. In the first half of 2020, exports slumped by 22.3 percent year-on-year and industrial production by 14.6 percent, according to the State Statistical Office.⁵ Sectors such as tourism, construction, and real estate are suffering too. Additionally, more than 20,000 Macedonians lost their jobs between March and July. International rating agencies like Fitch and Moody's have revised down North Macedonia's economic outlook, in turn driving up the costs of refinancing debt.⁶

The authorities have done their best to ease the pain. Beginning in March, the then caretaker administration set

aside €550 million (or 5.5 percent of GDP) for a furlough scheme and direct support to low-income households (through so-called "Buy at Home" payment cards).⁷ This was, however, done with a view to upcoming elections, with both leading parties (SDSM and VMRO-DPMNE) participating in Spasovski's technical cabinet and eager to claim credit for preserving stability.

The situation is bound to change now that a new government has taken office. The incoming Zaev administration will be in charge of phasing out the support measures introduced early during the pandemic and its immediate priority will be restarting growth, not implementing thoroughgoing structural reforms. With a relatively manageable debt-to-GDP ratio compared to its neighbors in the Western Balkans, North Macedonia has fiscal space to ramp up support for industry in case of slower recovery or prolonged recession. The World Bank expects a budget deficit of 4.7 percent this year, which is better than Albania (5.4 percent) and Kosovo, Montenegro, and Serbia (each 7 percent).⁸ Additional support measures are thus set to take hold in short order. North Macedonia's government has pledged to reduce charges on businesses (license fees,

**GDP Growth of North Macedonia
Pre- and Post- COVID-19**



Source: Data compiled from World Bank: <https://tinyurl.com/y4e5z9hl>; <https://tinyurl.com/yyvun28p>; <https://tinyurl.com/y2zqgk5y>

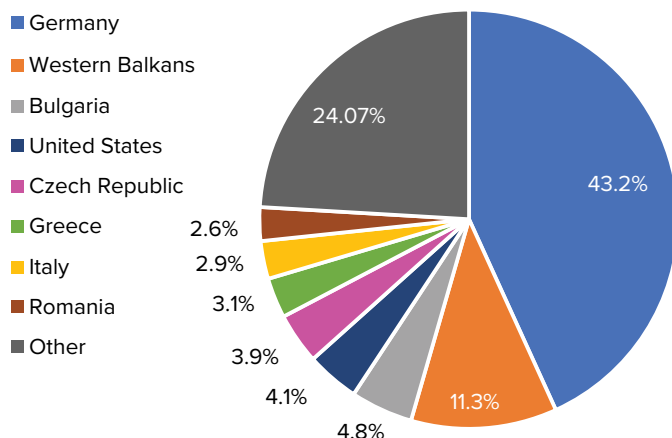
⁵ Drzaven zavod za statistika, Mesecen statisticki izvestaj, August 31, 2020, http://www.stat.gov.mk/PrikaziPublikacija_1.aspx?rbr=809.

⁶ North Macedonia posts deep GDP contraction of 12.7% in 2Q20, BNE Intellinews, 7 September 2020. <https://intellinews.com/north-macedonia-posts-deep-gdp-contraction-of-12-7-in-2q20-191360/?source=north-macedonia>

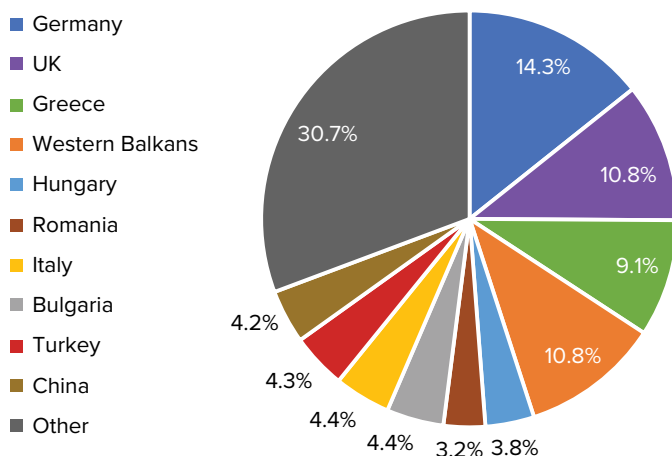
⁷ Marija Tumanovska and Andy Heil "North Macedonia Has A Card Up Its Sleeve To Kick Coronavirus Economic Malaise: Keep Shoppers 'Home,'" *RFE/RL*, July 5, 2020, <https://www.rferl.org/a/north-macedonia-has-a-card-up-its-sleeve-to-kick-covid-economic-malaise-keep-shoppers-home-/30706847.html>.

⁸ "The Economic and Social Impact of COVID-19: Western Balkans Outlook," *World Bank Western Balkans Regular Economic Report*, No.17, Spring 2020, <http://documents1.worldbank.org/curated/en/606131588087679463/pdf/The-Economic-and-Social-Impact-of-COVID-19-Western-Balkans-Outlook.pdf>.

North Macedonia's Top Export Partners (2018)



North Macedonia's Top Import Partners (2018)



certificates for compliance with health and safety regulations, and permits) by 75 percent. It also intends to slash down value added tax (VAT) for restaurants from 18 to 10 percent for the next four years.⁹ Yet, experts see such partial subsidies to the private sector as insufficient to meaningfully boost business activity and consumer confidence.

If all goes well, the Macedonian economy is expected to bounce back in 2021 by up to 5.5 percent of GDP.¹⁰ That

prospect is of course contingent on a scenario where COVID-19 is contained and there is no second wave of mass infections forcing a fresh lockdown. Another wild card is the magnitude of recession in the eurozone, which is North Macedonia's principal trading partner and source of Foreign Direct Investment (FDI). North Macedonia's deeper integration into global value chains and greater reliance on exports to the EU compared to other parts of the Western Balkans (e.g., Montenegro, Albania, and Kosovo) is, comparatively speaking, its strong suit.¹¹ Looking ahead, accession negotiations with the EU are likely to emerge as the main engine for the macroeconomic and sectoral reforms needed to make North Macedonia competitive and help it close the gap in living standards with the current EU member states.

A €3.3 billion stimulus package earmarked by the EU for the Western Balkans could make a difference, but much hinges on the conditions attached to assistance and the capacity of the state to absorb external funds. The longer-term structural challenges remain the same as before the pandemic hit: reducing the size of the informal economy (estimated at a little over 17 percent of GDP) to bring business activity into the open and increase the state tax base; providing incentives for the formalization of informal employment; strengthening the independence and impartiality of the courts to resolve disputes and safeguard property rights; making public administration, and especially tax authorities and various state inspectorates, transparent; overhauling state-owned enterprises such as the electricity producer ELEM; and selling government stakes in privately owned businesses such as the tobacco factory in Prilep.¹²

In addition to structural reforms to improve regulation and enhance governance capacity, North Macedonia needs to design and implement a long-term strategy to upgrade human capital and productivity. That is a difficult prospect given the country's negative demographic outlook and high rate of outmigration. The official estimate is that 2.08 million people live in North Macedonia. The actual number, officials believe, could be as low as 1.5 million.¹³ A declining birth rate and mass emigration account for the shortfall. The lack of an official census since 2002 complicates matters further by hindering the government's capacity to design and implement public policies.

9 Finance Minister Fatmir Besimi quoted by the Makfax Agency, September 16, 2020, <https://makfax.com.mk/ekonomija/besimi-na-javi-direktna-poddrzka-od-vl/>.

10 "North Macedonia overview," European Bank for Reconstruction and Development, accessed October 2020, <https://www.ebrd.com/where-we-are/north-macedonia/overview.html>.

11 *The Economic and Social Impact of COVID-19, Western Balkans' Outlook*, the World Bank, April 2020, <http://documents1.worldbank.org/curated/en/606131588087679463/pdf/The-Economic-and-Social-Impact-of-COVID-19-Western-Balkans-Outlook.pdf>.

12 *North Macedonia 2019 Report*, European Commission, May 29, 2019, <https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/20190529-north-macedonia-report.pdf>.

13 Tim Judah, "Wildly Wrong: North Macedonia's Population Mystery," *Balkan Insight*, May 14, 2020, <https://balkaninsight.com/2020/05/14/wildly-wrong-north-macedonias-population-mystery/>.

It also strains inter-ethnic relations, as many believe the overall share of Albanians in the population has shrunk and this has implications for the allocation of public jobs and resources. A comprehensive strategy is essential for making the country competitive. North Macedonia's spending on education as a percentage of GDP is similar to the European average, yet it lags behind in terms of secondary and post-secondary education completion rates. Performance on indices such as the Programme for International Student Assessment (PISA) and the World Bank Human Capital Index is far from impressive. Reform of the school curricula and a more aggressive introduction of vocational training are necessary.¹⁴

North Macedonia is also not spending nearly enough on research and development—it spent 0.4 percent in 2017 as compared to 2 percent on average for the EU. The one positive story is the expansion of internet access and mobile broadband in the 2010s. Looking ahead, with NATO membership secured, defense offset agreements may help improve the situation in North Macedonia by bringing in foreign capital, a force multiplier. Macedonian defense officials see many opportunities for slotting North Macedonia in as a NATO training and servicing hub.

Inadequate infrastructure is another obstacle to growth and development. Under the VMRO-DPMNE-led governments from 2006–2017, attention and financial resources were directed to new highways, like the Miladinovci-Shtip and the Kichevo-Ohrid sections, where work started in the spring of 2014. The former was completed in 2018 while the latter, delayed because of financial irregularities, still needs work. Completion is slated for 2021. Further efforts are required, for instance, to upgrade transport connections to Kosovo (the Skopje-Blace road) and Bulgaria (Kumanovo-Deve Bair and Shtip-Delchevo). Border checkpoints are critical, too. The Markova Noga-Laimos (Rambi) crossing point, to be opened with Greece in the Great Prespa Lake area, as well as Klepalo between Berovo (North Macedonia) and Strumyani (Bulgaria), are examples of projects that can make a huge immediate difference at the local level. Improving road connections to Albania and Bulgaria, underdeveloped in comparison to the much better-established north-south axis, through highways and a railway would similarly deliver economic gains.

Beyond the economic benefits, improved cross-border infrastructure will spur regional cooperation and foster better relations among neighbors. North Macedonia needs to do more on infrastructure, and do it better. Corruption, cumbersome procurement procedures, and contractor underperformance have unfortunately often stymied projects like these.

In addition, North Macedonia needs to double down on efforts to expand energy links in its neighborhood. Priority projects include a gas interconnector with Greece and an electricity link to Albania. There is no funding secured for the former venture, while the latter is still in its initial stages of implementation. It is hard to overestimate the significance and value of those projects. Physical connection to the Greek natural gas grid¹⁵ will help diversify gas sources away from Russia (which remains the country's main supplier), lower prices, and reduce CO₂ emissions. Furthermore, getting the interconnector done will have energy implications for the entire region. Kosovo, for example, will be added to the interconnector in the future. At present, Kosovo consumes no gas and relies on low-calorie lignite coal, a major source of air pollution, instead. Getting Skopje and Pristina to interlink their energy systems would be a win-win. The same goes for the electricity connection to Albania, which will allow North Macedonia to export surpluses, as well as import in times of peak demand.

One of the stated priorities of the new Zaev cabinet is to have renewables' share of power generation reach 50 percent by 2025. That goal reflects trends in (and demands from) the EU and pressure from environmentalists inside the country, but it is unlikely to be met in practice. In addition to signing contracts for 21 megawatts (MW) from solar facilities, the government has also pledged to overhaul the thermal plant in Bitola to prolong its life for another two decades. It is also supportive of the mining industry, a big employer in the underpopulated regions in the east of the country. Skopje's commitments contrast with policies adopted by neighboring countries such as Greece, which decided to phase out coal completely by 2028, notably by closing thermal plants in its Western Macedonia region, just across the border from Bitola. Finally, the environment ministry in the new cabinet is controlled by DUI, which limits Zaev's direct influence over the sector.

¹⁴ Ibid.

¹⁵ During his visit to Athens, Zaev expressed interest in North Macedonia joining the partnership behind the planned liquefied natural gas (LNG) terminal at Alexandroupolis in northern Greece. Bulgartransgaz already holds 20 percent in the venture, with Romgaz (Romania) expected to take a stake as well. See: "North Macedonia eyes participation in Alexandroupoli LNG terminal," *Kathimerini*, September 16, 2020, <https://www.ekathimerini.com/257015/article/ekathimerini/news/north-macedonia-eyes-participation-in-alexandroupoli-lng-terminal>.

A Tough Neighborhood

Relations with its neighbors are crucial for North Macedonia, as it occupies a central location within Southeast Europe. Typically, Macedonian nationalists berate Greece, Bulgaria, Albania, Kosovo, and, to a lesser degree, Serbia, as the sources of all evil for the country. Athens blocked Skopje's integration into the West and imposed the Prespa Agreement, they argue. Bulgaria denies the existence of both a separate Macedonian nation and language. Albania and/or Kosovo are suspected of having designs on adjacent Albanian-majority areas of North Macedonia. Even Serbia, to which many Macedonians feel attachment through their shared Yugoslav legacy, is faulted for its refusal to recognize the Macedonian Orthodox Church.

These fears and resentments, which rear their head every so often, are overblown. In reality, neighbors are a source of opportunity, not menace. Greece is a prime example. Since the late 1990s, it has become a leading investor and trading partner for the then Republic of Macedonia. After

the signing of the Prespa Agreement, Greece transformed from a naysayer to a principal advocate for its neighbor's entry into NATO and the EU. Bulgaria, the host of an EU-Western Balkans summit back in the spring of 2018, has similarly supported North Macedonia's integration. Bulgarian Prime Minister Boyko Borissov, who cultivated ties to Zaev back in 2015 when SDSM was still in opposition, also deserves partial credit for the Prespa Agreement. Albania is a fellow NATO member and EU accession hopeful. Most Kosovars, who have extensive family, business, and cultural connections to the Albanian community in North Macedonia, applauded their neighbor's Western path. Though pursuing a multivector foreign policy, Serbia too stands to benefit from stability and economic prosperity next door, underwritten by the EU and NATO. In sum, North Macedonia could profit from deep links to the countries surrounding it.

At the same time, there are clear obstacles. Lately, Bulgaria has ramped up pressure on North Macedonia with respect



North Macedonia's Prime Minister Zoran Zaev and his Bulgarian counterpart Boyko Borissov attend a welcome ceremony in Skopje, North Macedonia August 1, 2019. REUTERS/Ognen Teofilovski

to historical disputes between the two. Sofia insists the EU use the formula “constitutional language of North Macedonia”—applied in bilateral relations with Skopje since 1999. Another obstacle centers on the joint commission on historical matters established under the friendship and good-neighborliness treaty signed in August 2017. Bulgaria conditions its support for setting a date for the launch of North Macedonia’s accession talks with progress on settling disputes over past events and historical figures—e.g., about Goce Delchev, a turn-of-the-century revolutionary leader celebrated as a national hero in both countries. Sofia has also recently upped the ante, demanding a blanket recognition by North Macedonia that its identity and language have Bulgarian foundations. Sofia blocked the opening of membership talks on November 17. The decision has been deferred to late 2020 but may well linger on beyond that. These kinds of hardline tactics puzzle other EU members, but there is little evidence that any are prepared to push back against Bulgaria.

The Zagreb Summit declaration adopted by the EU and Western Balkan leaders in May of this year highlights “implementing bilateral agreements in good faith and with tangible results, including the Prespa Agreement with Greece and

the Treaty on Good Neighbourly Relations with Bulgaria” as a priority. That is a clear win for Sofia, yet arm twisting has inevitably led to backlash in Skopje. There is a risk that the war of words could get out of hand. However, Borissov, whose cabinet includes far right populists, has also made conciliatory moves toward Skopje. With the outbreak of COVID-19, Bulgaria helped repatriate Macedonian citizens from Western Europe and further afield. Ideally, Sofia and Skopje should use this positive momentum as a foundation for diplomatic compromise, putting historical discussions on a parallel track rather than turning them into the focus of state-to-state relations. On November 10, Prime Ministers Zaev and Borissov co-chaired a meeting in Sofia of the so-called Berlin Process, an initiative by the EU to speed up the Western Balkans’ integration. With German Chancellor Angela Merkel joining via video conferencing link, it was an opportunity to articulate a joint vision of economic development for the region as well as discuss bilateral issues. It is therefore important to keep dialogue going between North Macedonia, on one side, and Bulgaria as well as Greece, on the other, to ensure the EU membership talks proceed smoothly once they start. Mediation by Germany, and possibly other member states, is therefore key to overcome current tensions between Sofia and Skopje.



Prime Minister of Serbia Ana Brnabić, President of North Macedonia Stevo Pendarovski, and President of Turkey Recep Tayyip Erdoğan attend the South East European Cooperation Process (SEECP) summit in Sarajevo, Bosnia and Herzegovina, July 9, 2019. REUTERS/Dado Ruvic

North Macedonia enjoys traditionally good ties with Turkey, which has been supportive of its NATO membership and EU ambitions. Turkey has a foothold in the economy and strong ties to the local Muslim population. It provides development assistance through its Turkish Cooperation and Coordination Agency (TIKA) and recently dispatched medical supplies to Skopje for fighting COVID-19.¹⁶ While Turkish policy is not coordinated with that of the EU or the United States, it is not seeking to limit Western influence. This is appreciated by Macedonian leaders on both sides of the political divide. Former President Gjorge Ivanov attended Erdoğan's inauguration in July 2018, and during Foreign Minister Mevlüt Çavuşoğlu's visit to Skopje in July 2019, then Foreign Minister Nikola Dimitrov thanked Turkey for its ratification of the NATO accession. In the spring of 2020, North Macedonia thanked Turkey again, this time for its support during the COVID-19 emergency. At the same time, there are divisive issues, such as Ankara's demand that Skopje clamp down more resolutely on Gulenist networks in the country.¹⁷

China has similarly made inroads in North Macedonia, as in other parts of the Western Balkans. The Chinese state-owned Roads and Bridges Corporation is building two stretches of highway under a 2013 loan agreement—Miladinovci-Shtip opened in July 2019, but Kichevo-Ohrid has been delayed because of irregularities. However, North Macedonia received an additional loan from China's Exim Bank and work is on the way. Despite those ventures, Beijing is unlikely to assume a larger diplomatic role, let alone position itself as a rival to the West. That means, all things being equal, future governments in Skopje will continue to seek engagement with China.

Overall, with the Greek veto out of the way, North Macedonia faces a relatively benign international and regional environment. External powers could no doubt meddle in domestic politics, the economy, or society, but the principal challenges before the country are domestically rooted.

16 Zoran Nechev and Ivan Nikolovski, "North Macedonia: A fertile ground for external influences" in *The Western Balkans in the World: Linkages and Relations with Non-Western Countries*, ed. Nikolaos Tzifakis and Florian Bieber, (Routledge, 2019); and Gonul Tol and Dimitar Bechev, "Can Corona Diplomacy Cure Turkey's Foreign Policy Isolation?," Middle East Institute, April 29, 2020, <https://www.mei.edu/publications/can-corona-diplomacy-cure-turkeys-foreign-policy-isolation>.

17 In July 2019, Turkish Foreign Minister Mevlüt Çavuşoğlu urged Skopje to do more, praising North Macedonia as a "natural ally" and stressing Turkey's support for them joining NATO. See: Talha Ozturk, "Turkish Top Diplomat: North Macedonia is 'natural ally,'" *Anadolu Agency*, July 16, 2019, <https://www.aa.com.tr/en/politics/turkish-top-diplomat-north-macedonia-is-natural-ally/1533435>.

NATO: A Bright Spot

Though its neighborhood is anything but stable and settled, North Macedonia's desire for NATO membership is not predominantly rooted in perceptions of threat coming from its immediate neighbors. North Macedonia has a long history with NATO stretching back to the 1990s. Formal membership in the alliance was long overdue, given that much of the preparatory work was completed in the 2000s. For North Macedonia, NATO membership carries a particular significance because with it comes a guarantee of the country's hard-won statehood. The post-Yugoslav republic does not face an external challenge to its survival or territorial integrity, but its neighbors are either themselves part of NATO or, in the case of Kosovo, lean heavily towards the West. Serbia, balancing itself between Russia, China, and the West, does not threaten North Macedonia's existence either, though it does hold some influence over its internal affairs.

Since the opposition protests of 2015, there have been concerns about non-Western powers meddling in North

Macedonia's internal affairs. Many analysts have pointed out Russia's efforts to co-opt Macedonian nationalism in order to undermine the pro-Western Zaev government and block the country's NATO accession. Yet this endeavor, waged through various means including disinformation and financial support to radical opponents of the Prespa Agreement, has led nowhere. North Macedonia is part of the alliance and even a future cabinet dominated by VMRO-DPMNE won't alter this fact. Russian influence operations directed against the West, conducted in part through Serbia, will find some purchase in society but are unlikely to sway broader policy choices.

Instead, NATO underwrites the country's *internal* stability. Membership acts as a common, uniting force and strengthens political bonds—and potentially mutual trust—between the Macedonian and Albanian communities. In 2008, when Skopje was denied membership in the alliance over the name issue, support for membership was shared by an incredible 90 percent of the populace. It still stands at 76



Members of the honor guard raise the NATO flag in front of the parliament of North Macedonia to mark the ratification of accession to the NATO in Skopje, North Macedonia, February 11, 2020. REUTERS/Ognen Teofilovski

percent according to a poll conducted by the International Republican Institute in February of this year.¹⁸ The figure lies in stark contrast to public opinion in Montenegro, which entered NATO back in 2017, where society remains deeply divided over the country's participation in the transatlantic alliance.

At the same time, North Macedonia is a contributor, rather than a free rider, to the alliance. The Krivolak training area is one of Europe's best—an asset for both the US military and its allies. The NATO-led Kosovo Force (KFOR) troops regularly train there, and 2019 saw Krivolak hosting the largest multinational exercises to date between the Macedonian and US militaries. The Macedonian military has taken part in NATO- and US-led missions abroad such as the International Security Assistance Force (ISAF) mission and “Resolute Support” in Afghanistan and “Operation Iraqi Freedom.” It has contributed to EU and NATO peacekeeping efforts in the Western Balkans, too—coordinating elements of KFOR and sending personnel to the European Union Force (EUFOR) mission in Bosnia and Herzegovina. As it was clearing its last hurdles to admittance, North Macedonia also committed to reaching NATO's symbolic 2 percent of GDP spending threshold by 2024, and put together a comprehensive plan for modernizing its armed forces and adapting them to fill niches available to it within the alliance. Its efforts at reforming its intelligence services, the abuse of which sparked the 2015 crisis that led to Gruevski's fall, have been judged a success. Parliamentary oversight has been strengthened, and agencies in charge of operations have been completely rebuilt in line with NATO standards.

Despite the good forward momentum, COVID-19 comes at a tough time. Getting to NATO-mandated spending goals seemed attainable, but success may now be questionable given nasty budget realities and political exigencies after a close and bitterly-fought election. In light of the previously discussed economic slump, the fragmented coalition government, facing strong opposition from VMRO-DPMNE, could be tempted to turn its focus away from its commitments to modernizing its military and focus on other areas of policy. Nevertheless, some of the priorities identified in North Macedonia's *Strategic Defense Review 2018*—including rationalizing and reducing its force structure by the elimination of redundancies in both its armed forces and Ministry of Defense—would free up funds for necessary modernizations without necessarily negatively impacting the country's overall budget.

Despite the exogenous setbacks presented by COVID-19, North Macedonia remains a NATO success story. Its pursuit of NATO membership spurred necessary reforms and the enduring popularity of NATO itself among the broader population, for reasons outlined above, remains a sound political lever for ensuring further progress in myriad areas. Indeed, the fact that the Prespa Agreement, contentious though it was, managed to pass and has endured is a testament to how much weight NATO membership still carries in the country. North Macedonia's admittance should even provide its leadership with the justification to pursue further reforms. Success has validated all previous choices, and ought to legitimate further strides towards full Euro-Atlantic integration, however long the road.

18 Public Opinion Poll, Residents of North Macedonia, International Republican Institute, January 30 – February 10, 2020, https://www.iri.org/sites/default/files/iri_n_macedonia_february_2020_poll_presentation.pdf.

The Path Forward: Two Tracks in Parallel

Having secured NATO membership, North Macedonia is pressing ahead with its bid to join the EU. If all goes well with the accession talks, it could hope to join the EU soon after Montenegro, the current frontrunner. As noted earlier, however, this does not mean that full accession is possible any time soon. A decade is a best-case scenario, not even considering serious roadblocks to further enlargement possibly arising within the EU itself.

However, while the EU perspective is a key condition for positive change in public institutions and the economy, it is not by itself sufficient. Accession talks help accelerate progress and lock in achievements, but they are no substitute for political will on the part of the main domestic players. And given the closely fought recent elections, strong political will may be in short supply in the immediate future. In fairness, there are multiple roadblocks and veto actors that inhibit necessary reform. The story of the special prosecutor offers a cautionary tale of the difficulties in upholding the rule of law and accountability. Additionally, coalition building is tricky and involves tradeoffs, mainly between stability and the fight against corruption and state capture. The Albanian pillar of the political system is easily as problematic as the Macedonian when it comes to high-level graft and clientelism. EU-driven reform is not guaranteed an easy ride in the years ahead, no matter who happens to be hold power in Skopje.

Another set of risks ahead is related to the EU's own evolution. Internal consolidation coupled with a deepening integration within the eurozone is bringing about a differentiated and multi-speed Europe. Thanks to its extensive economic and institutional links to the EU, North Macedonia is arguably already in the outer tier. Negotiations and ultimately accession, if and once it happens, would bring it into the next concentric circle, but not the inner sanctum. Being on the loose periphery generates both opportunities and costs. For one, there would be much less pressure towards convergence with "core Europe." This means that many of North Macedonia's governance challenges will remain in place, even if mitigated, for the foreseeable future. The country will not break radically ahead of the rest of the Western Balkan pack unless there is a strong push from inside.

This brings up the question of integration at the regional level. In 2019, North Macedonia, Albania, and Serbia proposed a scheme for the free movement of goods, services, people, and capital within the Western Balkans. "Mini-Schengen," as the initiative was initially known, remained

vague on detail and, thanks to the green light for the start of EU accession negotiations, has been edged out of the limelight. Still, North Macedonia, which does a considerable amount of trade with both other ex-Yugoslav republics and EU neighbors such as Greece and Bulgaria, can only benefit from deepening regional economic and infrastructure links. Whether this comes about as the result of a branded, flashy initiative (which itself can generate local suspicion and pushback) or as the result of piecemeal projects, such as the energy and infrastructure initiatives described above, it is clear that regional integration will have to run in parallel with European integration.

How exactly this plays out is the key policy challenge facing policy makers in both European capitals and Washington. For concerned outsiders, properly understanding the challenges facing North Macedonia, which have been extensively outlined in this report, is the first step to gauging how best to determine the path forward. While it is clear that the heavy lifting and political will need to come from Skopje, it is not enough for leaders in advanced Western economies to simply list all the outstanding tasks and wait for results.

In his aforementioned 2017 speech at the Sorbonne, French President Emmanuel Macron, the European leader who last year took the initiative to temporarily halt North Macedonia's accession in order to insist on a thoroughgoing reform of the accession protocol, indicated that the countries of the Western Balkans would be the last to accede to full EU membership. It was a message directed at both other European countries and Brussels bureaucrats who viewed accession as an inevitable open-ended process, but the message to the region was equally unmistakable: the door *will* remain open to you if you make the required reforms, but on our timetable. The new protocols are much more stringent, and the reversibility provisions are sure to be used in the coming years as governments backslide or stall in their reform efforts. The final goal, however, is that these countries eventually join.

Given that this is the case, and having succeeded in reframing accession, it is now imperative that forward-thinking Europeans develop plans for creatively building new relationships in the region. The existing, increasingly moribund Berlin Process, always meant to be a facilitating instrument for the kinds of large-bore integration projects that the EU is willing to fund, needs to become more targeted, strategic, and instrumental in the shadow of the reformed accession process. The focus needs to shift toward making the most of what could be quite a long period spent in Europe's antechamber.



Men wave EU and Macedonian flags in front of the Government building of North Macedonia in Skopje October 14, 2009. The European Union's executive arm said on Wednesday that Croatia could wrap up EU entry talks next year and recommended that the bloc start membership negotiations with Macedonia. REUTERS/Ognen Teofilovski

More targeted, pragmatic questions need to be asked. What does the EU want to get out of a better-developed Western Balkans, beyond stability? If some degree of “re-shoring” of supply chains is in the cards as competition with China heats up, what parts could conceivably be located in the Western Balkans, and what specific reforms need to be prioritized for that to happen? And how can existing economic and trade relationships with neighboring member states like Greece and Bulgaria be amplified as an accelerant for larger integration efforts? For example, Macedonian citizens can already travel with only ID cards to Serbia, Albania, Kosovo, and Montenegro. Skopje is also already part of regional bodies such as the Central European Free Trade Agreement (CEFTA) and the Sarajevo-based Regional Cooperation Council (RCC). How can these existing institutional frameworks and agreements be concretely leveraged to create attractive partners and a cohesive market for European investments in the coming years?

The challenges facing North Macedonia mirror those facing the region. Western Balkan leaders, including the government in Skopje, have taken the initiative, harnessing the momentum behind earlier Mini-Schengen proposals to organize a virtual summit this past July, hosted by the Atlantic Council. That meeting yielded an agreement committing the countries to put together an action plan for implementing the EU's four freedoms—the movement of goods, services, capital, and people—through both legislative efforts and infrastructure development strategies. This plan was presented to their EU partners at the Berlin Process summit in Sofia on November 10, alongside a list of shovel-ready projects for foreign investment.

Policy makers across the West should not only welcome these developments but also embrace them fully, and work out how to effectively complement them. Will they? There is no getting North Macedonia right without getting the whole region right.

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