



MAIN TAKEAWAY of the month

Ukraine and the Republic of Moldova received their official recommendation from the European Commission to start the EU negotiation process on November 8, with a final decision to be taken by the Member States in December. So far, Ukraine faces opposition from Hungary.

On the battlefield, no significant advancements have been made, with Russia amassing a significant number of troops around Avdiivka. Ukraine continued attacking Russia's naval capabilities near Crimea, while Russia is conducting drone strikes against the country's ports and energy capacity. Germany was the main arms supplier to Ukraine this month, with most military aid consisting of air defense capabilities, tanks, and artillery shells, along with a newly-created F-16 training center in Romania. Meanwhile, humanitarian aid consisted mainly in supporting Ukraine's energy infrastructure and general reconstruction. New initiatives are underway in the agricultural sector, despite Russian aggression in the Black Sea corridor, including an insurance program. However, humanitarian transport lines were significantly slowed down by Polish truck driver protests, causing massive blockades.

Within Russia, Vladimir Putin signed the largest defense budget in modern Russian history and as a result, next year, spending on defense and law enforcement will amount to more than 14 trillion rubles or about 39% of all federal government spending. Furthermore, the lack of frontline rotation among Russian soldiers sparked discontent among both military personnel and their relatives, who engaged in small-scale protests in Russian cities - an act of courage, considering the heavily enforced Russian internal security measures. Economically, Vladimir Putin adopted a new state budget that significantly bolsters defense spending, with labor and skilled workforce shortages being considered some of the main economic challenges, as internal reports also show an increase in military equipment production. Moscow's cooperation with Beijing continues in the energy sector, with discussions underway on the Power of Siberia pipeline, although the future of Power of Siberia 2 is uncertain. Regarding external relations, this month was marked by Putin's presence at the CSTO Summit and by his later online participation at the G20 Summit, as well as by the attempt to develop Russia's presence in Libya. Russian MPs also attempted to increase interparliamentary relations with China.

November 2023 was also marked by a series of sanction measures and proposals regarding the restriction of dual-use goods reaching Russia, or restricting the freedom of movement of Russian diplomats/spies. Furthermore, Russia's attempts to use migrants as a hybrid weapon were countered by Finland and Estonia, who imposed border restrictions. Moreover, more Russian sanction eluding tactics become known to the general public, both in the energy and the technology sector.

Moldovan local elections held this month, the PAS party received most of the votes and consolidated its position as the most relevant pro-European force in the Republic of Moldova, but it failed to win the mayorship of the capital Chisinau and suffered defeats in all of the country's 11 municipalities. This election has been the most significant test ahead of the 2024 presidential election, which could

maintain the Republic of Moldova on its European integration trajectory or retract it from that path and return it to Russia's sphere of influence. For now, the Republic of Moldova is making considerable progress in its European integration process, pledging to join the EU sanction regime against Russia. Lastly, tensions arose in the Moscow-backed Moldovan Orthodox Church, as more priests are joining the Metropolitanate backed by Bucharest.

In the Balkans, Jens Stoltenberg's visit focused on highlighting the malign foreign interference imposed by Russia in the region, especially in the case of Bosnia & Herzegovina. Turkey emerged as a top commercial partner of Russia, importing energy from Russia and exporting dual use goods to Moscow in considerable quantities. Ankara has also been postponing Sweden's NATO accession. Meanwhile, Bulgaria's attempts to tax Russian gas extensively failed, due to Moscow's ability to hide its „fingerprint”, while North Macedonia announced the training of the first batch of Ukrainian troops.

WAR in Ukraine

This month debuted with the largely [failed attacks of the Russian Army in Southern Bakhmut](#), in the Andriivka and Klishciivka directions, while also attempting to encircle Avdiivka, which would later be reinforced by a further [40.000 Russian troops](#). Meanwhile, Ukraine started operations along the Dnepr shore, [attempting first to maintain positions](#) there. The limited advancements from both sides led Ukrainian Armed Forces Commander, Valery Zaluzhnyi, to claim that [the war adopted a “positional form”](#), marked by static and attrition warfare. Meanwhile, [the Russian Army retreated all of its military units from Belarus](#), with only around a thousand Wagner troops being left in the country. Moscow continued its drone attacks on [Ukrainian critical infrastructure](#), as [Kyiv authorities expect increasing waves of attacks](#) on energy and civilian airstrikes amid the upcoming winter. Ukraine responded by striking several military targets, such as the [Zaliv shipyard](#) in Kerch, which damaged a Russian corvette, or an attack on [two landing crafts of the Serna class](#) in Crimea, which were transporting armored vehicles. Russia started [testing an intercontinental nuclear missile](#) launched by a new nuclear submarine. Furthermore, the Ukrainian president also pursued a number of military personnel changes, by replacing the [special forces](#) and the [medical forces](#) commander.

In the middle part of November, [Russian airstrikes continued hitting Ukraine's energy infrastructure](#), leaving thousands of citizens without electricity. Wagner troops went through a series of changes, some of them being [transferred to Skadovsk](#), Kherson region, others being [recruited for Russian MOD operations in Africa](#), despite being reported that many of them refused the offer. On the battlefield, [Russia took heavy losses in Avdiivka](#), which were compensated by an increase in airstrikes, and in [counter attacks in the Kharkiv and Donetsk](#) regions. The pressure and high casualty rate among Russian troops, combined with a lack of rotation on the frontlines, pushed many soldiers even more towards [cannabis, alcohol and amphetamine abuse](#). At the same time, Ukraine increased [drone attacks on multiple Russian regions](#), including on Moscow, which forced the authorities to install [a radar system for drone jamming at the Sheremetyevo Airport](#), in the Russian capital. Ukrainian troops [developed their operations on the Dnepr](#), establishing several bridgeheads.

In late November, Russia launched [drone waves over Kyiv](#), while Ukraine [continued attempting to gain ground on the left side of the Dnepr](#) and on the river's islands. Due to its [high death rate in Avdiivka](#), it is estimated that the Russian Army lost around 930 troops daily this month. Russia continued its [attacks on the port infrastructure in the Odessa region](#) and put the [Admiral Makarov warship](#) on active combat duty in the Black Sea. However, Ukraine retaliated by striking [a large group of Russian marines at an award ceremony](#) in the Donetsk region and by conducting [drone attacks against Crimea](#) and the Volgograd region. Regarding Ukrainian war stocks, Kyiv authorities claim that since the start of the war in Gaza, Ukraine received [30% less artillery shells](#) from the United States, an information that [Washington denied](#). In that sense, the Lithuanian foreign minister argued that [Ukraine is being forced into peace talks](#) due to the insufficient amount of military aid from its allies. Despite this, Russia is also showing certain signs of equipment exhaustion, starting to [move air defense systems from Kaliningrad to the battlefield](#) to compensate for losses in military technology on the battlefield.

As such, regarding Ukraine aid, on the military side, Germany was one of the top contributors. Berlin firstly sent a package including [12 armored carriers](#), 2 aerial surveillance raiders, drones and 20

unmanned surface vessels, among others. Later, the Germans offered [10 Leopard tanks](#) in another package, as well as recon drones and 155mm artillery shells. After that, Berlin also offered Ukraine [20 Marder armored vehicles](#) and a demining tank. The biggest package offered by the German government this month amounts to [1.3 billion euros](#), consisting mainly of IRIS-T anti-air defense units. Furthermore, German company Rheinmetall collaborated with the German state and announced [100.000 mortar shells](#) for Ukraine, while also announcing the delivery of [25 Leopard 1A5 tanks](#).

Meanwhile, the United States provided [60 Gepard anti-aircraft-gun tanks](#) and \$100 million worth of Stinger anti-aircraft missiles, one HIMARS system and Javelin anti-armor systems. While last month's House of Representatives crisis has been averted, the American legislature still struggles finding a consensus regarding aid for Ukraine. While [senior republicans](#) who preside in Foreign Relations and Defense Commissions voiced their support for continued Ukraine military aid, House Republicans opposed voting for an all-encompassing bill, including aid for Ukraine, Israel, Taiwan and the Southern US border. Instead, Republicans proposed an Israel-only package, [blocked by the Democrats](#) who support the aforementioned option. Furthermore, a worrying statistic was revealed by US officials, that [96% of the funds allocated to Ukraine](#) at the start of the war have been exhausted. In other concerning news, Ukrainian officials also announced that the European Union [will not be able to respect its commitment to send 1 million shells](#) to Ukraine by spring 2024.

In other military aid cases, the Netherlands announced that it will provide [500 million euros worth of ammunition](#) and [5 F-16 fighter jets](#), to be used for Ukrainian pilot training in the [new F-16 training hub opened in Fetesti, Romania](#). The Dutch also announced a [\\$2 billion extra military package for 2024](#). Also regarding training, UK authorities declared that they've thus far trained [30.000 Ukrainian recruits since June 2022](#). In total, Ukrainian officials announced that [over 100.000 Ukrainian soldiers in over 30 partner countries have been trained in less than 2 years](#).

France sent [200 million euro stimulus](#) for Ukraine to buy French military equipment, [Lithuania](#) sent small arms ammunition and detonation systems, while [the new Slovakian government rejected](#) a package meant to send missiles and artillery shells to Kyiv. However, prime minister Robert Fico, who during the Slovakian parliamentary election campaign said that [he won't send "one bullet" to Ukraine](#), now declares that he only referred to Slovakian Army stocks, not to private companies.

Meanwhile, Ukraine launched the mass production of kamikaze drones with a [1000 kilometer range](#) through Ukroboronpom and will allocate around [\\$4.8 billion in 2024 for the acquisition of missiles and artillery shells](#).

Referring to humanitarian aid, in preparation for the upcoming winter aerial strikes by Russia, the US will send [\\$500 million to Ukraine](#) for consolidating the country's energy infrastructure, while [Germany provided \\$328 million for Ukraine's energy grid](#). The European Commission will allocate [335 million euros for Ukraine's reconstruction](#) while [Japan is also willing to invest 160 million euros](#) for the same cause. [Norway sent around \\$90 million, dedicated to humanitarian organizations](#) operating in Ukraine. Lastly, the 50 billion euro EU-wide package currently [remains vetoed by Hungary](#), but Brussels authorities are looking for creative ways to bypass it, such as spreading the aid sum among the other Member States and preparing bilateral aid packages. Despite this, the European Bank for Reconstruction and Development will allocate [200 million euros](#) for Naftogaz's strategic reserves and [600 million for consolidating the whole Ukrainian energy security](#) framework.

When it comes to Ukraine's grain corridor, Russian planes extensively [dropped explosives on the civilian shipping lane](#) in early November, followed by extensive bombardments against the Odessa port, which also [hit a civilian vessel](#). Despite the fact that [trade resumed after the attacks](#) and that [151 vessels](#) used Ukraine's improvised corridor since August 2023, [Ukraine's grain export is a third lower](#) compared to last year. To improve grain flow, Kyiv authorities proposed the construction of a [new dry port in the Western Zakarpattia region](#) and are working with [British brokerage firms to start an insurance program](#) for grain vessels sailing from Ukrainian ports. Lastly, Kyiv is looking to expand the "Grain from Ukraine" program throughout Africa, searching for financial backing from Arab States and [holding a summit](#) in that sense.

Another issue that marked the month of November was the [Polish truck driver protests](#) that blocked the Ukrainian border in several border crossings. The protesters demand reimposing restrictions on Ukraine-registered trucks and a ban on non-EU transport companies, claiming the two are hurting their business. Although the truckers pledged not to block humanitarian and military aid, it nevertheless [slowed down their movement severely](#). Kyiv authorities declared that they will [not compromise on Ukrainian driver licenses](#) issue, which resulted in a [negotiation deadlock](#). Moreover,

[Polish farmers joined the border protests](#), along with [Slovak truckers](#), creating a fully region-wide dispute. Thus, soon enough the blockade [stretched to the Ukraine-Slovakia and Ukraine-Hungary borders as well](#). This tense situation soon turned into a humanitarian issue, with Ukrainian authorities [sending help to the stuck truckers, such as food, water and medicine](#). Thus far, [two Ukrainian truck drivers have died](#) after waiting for days at the border in harsh weather conditions. However, Polish protest organizers announced an extension of the blockade [until February 1](#).

When it comes to Ukraine's European integration, it has received a positive sign from the [European Commission](#), which recommended the start of negotiations for both Ukraine and the Republic of Moldova on November 8. The next step is getting the approval of EU Member States, however, in this foreign policy chapter, Ukraine has received more criticism than the Republic of Moldova, especially from Hungary. Hungarian Foreign Minister [Peter Szijjarto stated that Ukraine is not yet ready for EU membership](#) and that it may push the alliance to war, while also criticizing Ukraine's lack of a comprehensive press freedom and freedom of expression, as well as the lack of an electoral process. Furthermore, according to Hungarian Prime Minister Viktor Orban, [Ukraine is not ready to begin negotiations on its accession to the European Union](#), thus indicating a clear veto in an eventual vote on the issue. At the same time, he stated that the European Union "owes Hungary 3-4-5 billion euros," the transfer of which has been halted by the EU due to claims made against Budapest regarding judicial reforms and anti-corruption efforts. Despite the fact that the [EU unblocked 900 million euros for Budapest's economic recovery](#) plan, no change has been registered from Hungary's side on the Ukraine issue.

RUSSIA - internal and external dynamics

During the month of November, the pressure on Russian authorities was growing, as relatives of the mobilized continued to voice their grievances in public. The most significant event in this regard took place for the first time in Moscow, where [around 30 relatives of mobilized soldiers](#) held up placards in [Moscow's Teatralnaya Square](#), near the Kremlin walls, calling for the rotation of soldiers. Their demonstration took place during a Communist rally dedicated to the 106th anniversary of the October Revolution and lasted no more than a few minutes, with police later intervening and questioning them. Also in Novosibirsk, although a rally was not allowed, [some 30 family members of those mobilized took part in a "closed meeting" with local officials](#), after which participants [published a list of the issues most often faced by military personnel](#). The list includes not being granted leave, lack of rotation and lack of supplies. Also among the causes of grievances are "declining morale due to an unlimited period of mobilization" and problems with receiving medical care.

The local authorities [did not authorize any rallies in the 30 cities and regions](#) where relatives of the mobilized persons gathered, and in the cities of Moscow, St. Petersburg, Krasnoyarsk, Novosibirsk and Chelyabinsk applications for permits to hold their own public rally were rejected on the grounds that measures to prevent the spread of the Coronavirus infection are in place.

These types of protests are causing concern to the Kremlin, especially in the run-up to the presidential election. [Regional officials have therefore been instructed to prioritize this issue](#), and among the recommended actions to be taken in this regard are [trying to persuade relatives of those mobilized not to protest publicly](#), including by [promising financial benefits](#).

Fires and attempts to burn down military enlistment offices continued to be recorded in multiple cities and regions, including Moscow, Sankt Petersburg, in [Kolomna](#), in [Perm](#), [Shakhunya](#) (Nizhny Novgorod), [Zhigulyovsk](#) (Samara), [Ufa](#), [Novosibirsk](#), [Sovetsk](#) (Kaliningrad), [Podolsk](#). There were also acts of sabotage on Russian railways, which took place [in Tyumen](#), [Ulyanovsk](#), [the Sverdlovsk region](#), [in the Ryazan region near Dyagilevo station](#), in [Dzerjinsk](#), in [Tyumen](#), in [Domodedovo](#) and [Novosibirsk](#).

Regarding the economic situation, the most militarized budget in modern Russian history has been adopted in the final reading by the [State Duma](#) and the [Federation Council](#), and later by the [Russian President](#). As a result, next year, spending on defense and law enforcement will amount to more than 14 trillion rubles or about [39% of all federal government spending](#).

In order to have enough financial resources for the budget and for an increased military spending, [budget revenues would have to grow by 22%](#) more than in 2023 [which raises concerns](#), given that [the trend is not optimistic regarding the rise in the price of Russian oil](#).

Also in the context of rising defense spending, President of the National Bank of Russia, Elvira Nabiullina, said that by the end of 2023, [inflation will be at 7-7.5%](#) and will start to fall in spring, and

that a return to the 4% target is expected by the end of next year. As price growth and ruble devaluation slow down, the regulator will start to reduce the key interest rate, which was recently raised to 15%, but it is expected to [stabilize only in 2026 at a "neutral" level of 6-7%](#). Furthermore, according to the central bank chief, [labor and skilled workforce shortages](#) are the main problem for the Russian economy, with some institutions resorting to migrant and even ex-convict labor.

With the reset of the Russian military industry in the context of the war in Ukraine, Rostec head Sergei Chemezov said that the [production of tanks during 2023 has increased sevenfold and that of armored vehicles by 4.5 times](#). At the same time, according to a former design engineer at a company producing engines and components for Russian strategic missiles, [the Russian defense industry is a "colossus with feet of clay"](#), plagued by pervasive corruption, brutal control exercised by Intelligence Services and, contrary to government claims, unable to provide truly modern weaponry.

Meanwhile, Russia's finance minister said Russia's [budget deficit in 2023 would be around 1% of GDP](#). China's exports to Russia [also rose 17% in October from a year earlier to \\$8.69 billion](#), according to Chinese customs data, while imports to China from Russia rose 9% last month to \$11.11 billion. Regarding energy collaboration, Gazprom announced that it [set a new record](#) of gas supplies to China over the Power of Siberia gas pipeline. Despite this, reports that [China is utilizing its superior bargaining power in regards to the Power of Siberia 2 pipeline](#), slowing down production until Beijing receives a better discount, showcasing the true dynamics of this partnership.

During this month, [Russian Defense Minister Sergei Shoigu](#) and Vladimir Putin met in Moscow with China's Vice Chairman of the Central Military Commission, Zhang Youxia. They highlighted [growing military cooperation](#) through joint training on various types of terrains. Zhang stressed their aim to enhance practical military collaboration, while Putin emphasized [technology-focused cooperation](#), including space and modern weapons.

After that, [Russian MPs, led by State Duma Chairman Vyacheslav Volodin, visited China](#) for three days, focusing on enhancing interparliamentary cooperation across multiple areas. Talks covered economy, security, trade, education, and science. [Volodin also met with Chinese President Xi Jinping](#), emphasizing a peak in bilateral relations, while Xi advocated for [closer ties between the State Duma and the National People's Congress](#) (China).

[Russian President Vladimir Putin visited Kazakhstan](#) amid rumored tensions. Recent [Western-leaning trips by Kazakhstan's President Kassym-Jomart Tokayev](#) raised speculation. However, during talks between Tokayev and Putin, both leaders [highlighted strong ties](#). This visit resulted in [a joint plan for 2024-2026](#) focusing on emphasizing transport infrastructure development for energy resources and deepening collaboration in defense, military, space, and the Baikonur complex. Additionally, agreements were reached on constructing thermal power plants in Kazakhstan.

Vladimir Putin made further declarations through an online speech at the G20 summit after a two-year absence, using the platform [to criticize Ukraine for withdrawing and banning peace negotiations](#). Moreover, Putin attributed global economic issues to major powers' policies, [distancing Russia's efforts in Ukraine from the economic situation](#). He highlighted Russia's commitment to food exports and [announced free grain deliveries to African nations](#). On the same day, [Putin met with Tajik President Emomali Rahmon](#), highlighting strong Moscow-Dushanbe ties, trade relations, and plans to enhance defense cooperation, such as [Russia's supply of S-300 systems to Tajikistan](#).

Following reports of talks on a Russian base in Libya, a [new Russian MOD-led unit for Africa will handle military, infrastructure, and humanitarian tasks](#). Furthermore, Alexander Mikheyev, the head of Rosoboronexport, mentioned [ongoing discussions with Indian firms regarding jointly producing air weaponry](#) for the Indian Air Force. He highlighted previous successful collaborations between Russia and Indian enterprises, including the supply of Su-30MKI aircraft and other various military equipment.

Sanctions against Russia: Proposals and Evasion

This month's focus has been on the different suggestions from Ukraine's partners to impose additional sanctions and constraints on Russia, as well as the still-existing loopholes in the sanctions framework that Russia can exploit.

In the first instance, the EU's proposed 12th sanctions package [could include measures such as prohibitions on the sale of car components and other dual-use commodities](#) used by Russia in the development of weapons against Ukraine. Other recommendations include the long-awaited embargo on Russian diamonds, as well as moves to enhance the \$60-per-barrel price cap on Russian oil exported by sea, which Moscow has generally avoided. Likewise, the EU Commission [has informed Member States that the UAE has agreed to limit](#) the re-export of sensitive goods used for military

purposes in Ukraine to Russia. However, when it comes to imposing restrictive measures and regulations on European importers of dual-use goods, [a consensus has not been reached yet](#), as some EU countries worry about the effect this might have on the companies' competitiveness.

In the US, who has been active in targeting Russia's loopholes, the [Department of Justice reported that four people had been arrested in New York in connection with two different plots](#) to "illegally export controlled dual-use technologies to Russia". Similarly, the US State Department announced in a press release that [the US is sanctioning more than 200 foreign and Russian individuals and entities for their role](#) in supporting Russia's military and economy, while [the US Treasury Department added 130 new targets to the US sanctions list](#) for their role in assisting Russia in obtaining military technology and equipment, and [sent notices to ship management companies requesting information on 100 vessels it suspects](#) of violating Western sanctions on Russian oil.

In the Netherlands, [a Dutch court convicted a Russian national to 18 months in prison](#) and fined his firm €200,000 for violating trade sanctions against Russia, while [the UK sanctioned 29 individuals and entities](#) involved in Russia's gold and oil industries. In terms of frozen assets, [the Czech government has decided to freeze real estate assets](#) in the Czech Republic managed by Russia's federal foreign asset management agency, while [the constitutional committee of the Estonian parliament supported the government's bill](#) to use frozen Russian assets to finance Ukraine.

Furthermore, several states have taken steps to counter Russia's use of migrants as a weapon in order to exert pressure on Western states' borders: [Finnish authorities initially closed all but one border checkpoints with Russia](#), then on November 29, Helsinki closed its [entire border with Russia for 2 weeks](#). Furthermore, [Estonian authorities have approved the "partial or complete" closure of border checkpoints](#) with Russia. The Norwegian Minister of Justice, Emily Enger Mehl, [has also announced the consideration of similar border-blocking steps](#). Western sanctions have also targeted fuel exports, prompting Finnish Environment and Climate Minister Kai Mykkanen [to announce intentions to prohibit imports of Russian liquefied natural gas \(LNG\)](#), with Denmark [to inspect and possibly block Russian oil tankers](#) sailing in its waters.

Since EU countries continue to provide visas to Moscow's agents, some disguised as diplomats, granting them entry to the Schengen area, Czechia wants Russian diplomats to be given visas and residence permits allowing [travel only within the host country, but not to the rest of the Schengen area](#). It also wants the EU to accept only biometric passports, which are harder to forge or associate with fake identities.

Despite this multitude of proposed measures, Moscow is still very much able to exploit flaws in the sanction regime. [Russian enterprises managed to purchase firearms and ammunition from Europe and the United States](#), from numerous Western manufacturers, including Smith & Wesson, Barrett Firearms, Glock and Steyr Arms, and others. Moreover, Russia was able to acquire [airplane and helicopter parts produced by Ukrainian companies](#). In addition, [127 British companies have admitted breaching UK sanctions](#) against Russia, according to a recently-released document that contains information only covering cases until May 2023. Yet, Cyprus is by far the most popular location for Russian oligarchs seeking to avoid sanctions. In that sense, the international inquiry "Cyprus Confidential" focuses on [the role of Cypriot financial intermediaries in assisting Russian oligarchs and Putin's friends in protecting assets and avoiding](#) Western sanctions. The probe is based on more than 3.6 million leaked documents. As a result, [Cyprus's President announced that he had personally requested](#) that an unnamed "third country" send a team of financial crime experts to assist Cypriot authorities.

According to Western officials and Russian export data, [the US-imposed price cap on Russia's oil sales is almost entirely evaded](#), leading governments to look for methods to intensify one of the primary economic sanctions against Moscow. For that reason, the US Treasury Department [has sanctioned three ship owners located in the UAE](#), accusing them of selling Russian crude at a price higher than the \$60 per barrel cap agreed by the G7 and Australia.

In another instance following a study of shipping and trade records, it was revealed that oil products originating in Russia [continued to arrive at the Motor Oil Hellas plant in the Aegean Sea](#), Greece. They took a different path, hundreds of kilometers distant, through an oil storage facility in Turkey, a journey that obscured Russia's fingerprint. Even more concerning is the fact that the oil would go into a US Pentagon supply chain.

On November 5, the first round of local elections was held in the Republic of Moldova, a particularly significant event for understanding the political landscape in the country and observing the evolution of pro-European and pro-Russian forces. President Maia Sandu's party, Action and Solidarity Party (PAS), won the most votes in 19 of the country's 32 districts, which underlines the maintenance of an important pro-European trend among the Moldovan electorate and the consolidation of PAS as the most important pro-European party in the country. By contrast, [PAS failed to win the Chisinau capital's mayorship against Ion Ceban](#) who obtained a total of 50.62% of the votes. According to the Chisinau authorities, the campaign for the November 5 elections took place under a cloud of strong interference in the electoral process by the Russian Federation. Director of the Intelligence and Security Service (SIS) Alexandru Musteață revealed that the [Russian Federation allocated over 1 billion Moldovan lei](#) to destabilize Moldova, although it is possible that the sums are much higher. Consequently, The Organization for Security and Cooperation in Europe (OSCE) preliminarily reported campaign distortions due to an influx of illicit and foreign funds, with monetary incentives influencing voter choice. These funds were also used to support the "Chance" Party, after the "Shor" Party was outlawed by the Moldovan Constitutional Court. Both were founded with the aid of Ilan Shor, a pro-Russian oligarch in exile. In the second round of local elections, held on November 19, 2023, PAS remained a consistent electoral choice, having obtained [291 mayors out of 898](#). In total, the ruling party obtained the highest number of votes in 19 districts of the country and secured 357 district councilors and over 3000 local councilors. However, PAS [suffered defeats in all 11 municipalities](#), an unsatisfactory result for a party that is the only consolidated pro-European option.

Also in November, significant developments unfolded regarding the Republic of Moldova's accession to the European Union. The European Commission recommended initiating accession negotiations with the Republic of Moldova, as a [progress report in early November confirmed](#). However, it still needs to finalize judicial reforms and implement additional anti-corruption measures. The Commission's suggestion could lead EU leaders to support commencing accession negotiations at the December 12 European Council summit, contingent upon unanimous agreement among the 27 member states. Furthermore, to increase the pace of the adherence process, the Chisinau authorities created a special [Office for European Integration](#) within the Foreign Ministry, tasked with harmonizing Moldovan and EU legislation and with promoting the benefits of EU integration. Moreover, in solidarity with Ukraine, but also as a step towards integration, [Moldovan MPs voted to join the EU's sanctions against Russia](#), a move that was heavily criticized by Moscow. Moreover, [the Moldovan President and European Council President Charles Michel traveled to Kyiv](#) to discuss with President Zelensky the future steps towards EU membership.

President Maia Sandu outlined a [two-step approach for Moldova's successful accession](#) to the EU. The Transnistrian Russian occupation issue should run parallel to the accession process to prevent the Kremlin from wielding a veto over the Republic of Moldova's European integration. However, Sandu emphasized that through an improvement in aspects such as living standards, pensions, salaries, and overall quality of life improvement in localities on the right bank of the Dniester (the area controlled by Moldovan authorities), residents of the separatist regions in the left bank will likely express interest in following a similar path towards European integration. Thus, the two-step approach consists of firstly integrating the right bank and then the left bank.

Tensions arose inside the Moldovan Orthodox Church, subordinated to the Moscow patriarchate. The founder and Pro-Rector of the Orthodox Theological Academy of the Republic of Moldova, [Protopope Vetcislav Cazacu, departed from the Metropolitanate of Moldova](#), which operates under the Moscow Patriarchate, to join the Metropolitanate of Bessarabia under the Romanian Patriarchate. Since the beginning of the Russian invasion of Ukraine, [more than 60 priests have moved from the Metropolitanate of Moldova to that of Bessarabia](#). Furthermore, a significant number of priests and parishioners from the Chisinau Diocese have [petitioned the Church](#) aligned with Moscow to commence the process of transitioning the Moldovan Metropolitanate to the Romanian Patriarchate. This appeal was motivated by concerns regarding the challenging circumstances facing the Orthodox Church of the Republic of Moldova, including Russia's contentious actions in Ukraine. However, on November 16, [the request was declined](#), affirming the retention of the current status quo within the

Orthodox Church of Moldova. Nevertheless, these shifts in the Moldovan ecclesiastical landscape are an intriguing development.

The Balkans

NATO [Secretary General Jens Stoltenberg emphasized during a tour to Western Balkan states that NATO supports Bosnia's territorial integrity](#) and is concerned about "malign foreign interference", notably Russia's, in the fragile Balkan region. Similarly, the EU Commission stated that [Bosnia can begin negotiations if it meets the criteria and urged the region's other five states](#) to deal with justice, rule of law, corruption, and freedom of expression as soon as possible. These developments follow European Commission President Ursula von der Leyen's visit to Belgrade and Pristina last month, during which [she promised financial assistance, but reminded Serbia and Kosovo](#) that they must take meaningful steps to normalize relations.

In the meantime, [North Macedonia's leaders have warned that they may cancel the deal with China's Sinohydro Corporation to build the Kicevo-Ohrid motorway, while Serbia has praised a gas deal with Azerbaijan that will help the country achieve](#) its "strategic goal of diversifying supplies and strengthening its position as a transit country for gas supplies to Central Europe".

Many Balkan states safeguard their economic relations with Moscow and, as such, slow down the Euro-Atlantic integration process in the region. For example, [Serbian companies exported \\$71.1 million in dual-use goods to Russia](#) that have been sanctioned by the West due to their use in Russian weaponry, while [Turkey's imports of Russian Urals oil are set to reach a record high this month](#), above October's 1.4 million tons. Moreover, Turkish exports of dual-use goods (including microchips) to Russia soared, [rising to \\$158 million worth of products in the first nine months of 2023](#).

A vote on Sweden's NATO membership application [has also been postponed by the Turkish parliament's foreign affairs committee](#), a trend that has been occurring for months now. However, simultaneously, [Turkey, Romania, and Bulgaria are nearing an agreement on the formation of a joint team](#) to remove mines floating in their respective Black Sea zones.

In Bulgaria, [a weapons arms magnate who survived Kremlin assassination attempts has warned of a sabotage campaign waged by Moscow](#) for years to cut off vital military shipments to Ukraine, by planning explosions and fires at his weapons facilities.

On the other hand, according to Finance Minister Asen Vasilev, despite efforts to reduce Russia's energy weapon through higher taxes, [the Bulgarian government has chosen to exclude an estimated 1.2 billion euros in revenue from the new tax on Russian gas](#) transfers from the 2024 state budget, since the ruling majority doubts the money can be generated, due to Russia's capacity to hide the source of its resources.

In terms of protests and internal challenges, [Albania's parliament switched to online sessions earlier this month after physical fights between opposition and majority MPs](#) disrupted a parliamentary session. In Greece, Athens [was rocked by violent clashes between far-right and anti-fascist groups](#) as ultra-rightists commemorated the deaths of two members of the now-banned and dissolved neo-Nazi Golden Dawn party.

Despite these regional tensions, [North Macedonia](#) showcased the means through which it can contribute to Ukraine's war effort as a NATO member, reporting that they finalized the training of the first batch of Ukrainian soldiers, without offering specific data.

In the meantime



Ahead of a crucial [December 14-15 EU Summit](#), both for Ukraine and the Republic of Moldova, on November 28, EU Council President Charles Michel traveled to Hungary for talks with Prime Minister Viktor Orban, in a bid to calm relations. While Chisinau seems not to be threatened as of yet by any veto regarding the start of membership negotiations, Kyiv has been receiving severe pushback from Hungary, especially from Prime Minister Viktor Orban. As such, two important aspects for Ukraine will be determined at the summit: whether Budapest will unblock a crucial \$50 billion European aid package for Ukraine and whether it will cease its veto over Kyiv's EU membership bid. However, Orban could be emboldened by the recent election victories of Robert Fico in Slovakia and Geert

Wilders in the Netherlands, both like-minded leaders who have voiced skepticism of EU support for Ukraine.



U.S. Speaker Mike Johnson expressed confidence and optimism in [Congress' ability to secure additional funding for both Israel and Ukraine](#). The Speaker has consistently maintained the stance that funding for Israel and Ukraine should be kept separate. "Ukraine is another priority. [...] And we understand the necessity of assisting there. What we've said is that if there is to be additional assistance to Ukraine — which most members of Congress believe is important — we have to also work on changing our own border policy," Johnson said.



Vladimir Putin has signed a law [suspending the indexation of salaries for government employees](#). According to the law, indexation of government salaries will be suspended for all of 2024. The Russian authorities expect that this will save 36 billion rubles (around \$403 million). Later, the Russian Government decided to [suspend the indexation of salaries of the military, security forces and officials as well](#). Despite this, the State Duma adopted a law to increase the pay of military personnel, police officers and the Federal Penitentiary Service, firefighters, bailiffs and customs officers. From October 1, 2024, the [financial support of military personnel will be increased by 4.5%](#), a similar increase being registered [in the case of military pensions](#).



The Bulgarian Ministry of Foreign Affairs announced that it [has granted permission for the plane of the Russian Minister of Foreign Affairs, Sergey Lavrov, to cross its airspace](#) on the way to the capital of North Macedonia, Skopje, where he will participate in a meeting of the Council of Ministers of the Organization for Security and Co-operation in Europe (OSCE), scheduled to take place between November 29 and December 1. The European Union had previously imposed a general flight ban on Russian planes on February 27, 2022. Bulgaria's decision, announced late on November 27, was made at the request of North Macedonia, which currently holds the rotating presidency of the OSCE. Additionally, the Baltic States announced in a joint statement that they will not participate in the OSCE meeting, along with Ukraine.