The New Black Sea: How the War in Ukraine is Reshaping the Region

Expert Conference

November 29, 2022

Contents

Key Takeaways

- The most likely **military scenarios** for the future of Russia's war in Ukraine are: 1) a complete Russian withdrawal 2) a Ukrainian counterattack that freezes the current separation and contact line or 3) a brief "cooling off" period followed by a restart of the fighting in spring 2023. Any scenario leaves the EU in a highly unfavorable situation.

- **Turkey's** security priorities are Syria and the Kurdish question, and it considers Russia's war in Ukraine as more of a regional crisis than a global crisis.

- **Turkey**, as a NATO member balancing between Ukraine, Russia, and the West, has established itself as a mediator in the conflict. While still being allied to the West, Turkey remains deeply suspicious of the US and its policies in the Middle East, including its support for Kurdish groups.

- **Turkey's** foreign policy seeks to create a zone of influence in its neighborhood, pursued through a mixture of soft and hard power. Energy supplies and infrastructure play an important role in this regard.

- **Armenia, Azerbaijan, and Georgia** are currently seeking to deepen their ties with Western countries for a variety of reasons. A Black Sea regional identity thus offers a desirable framework, as it connects the South Caucasus to European/EU partners across the Black Sea.

- The EU's granting of a 'European perspective' to **Georgia** can be considered a success in that Georgia has managed to detach itself from the South Caucasus region and is now treated by the EU as a part of a new 'Trio' alongside Moldova and Ukraine.

- **Armenia** is seeking the general stabilization and transformation of the Nagorno-Karabakh conflict, moving away from armed fighting towards multiple negotiation processes.

- The role of the EU as a mediator in the Nagorno-Karabakh conflict is viewed positively in **Armenia**, although cooperation with Russia is still required to achieve progress. The latter remains exceedingly difficult due to the war in Ukraine.

- **Azerbaijan** identifies with the Ukrainian cause in the current war on many levels, especially with regard to sovereignty and respect for internationally-recognized borders.

- It would be an auspicious moment to sign a peace agreement between **Azerbaijan and Armenia**. However, while there is a certain degree of willingness to do so in both Baku and Yerevan, there is a lack of consensus on critical points.

- The **economic impacts of the war in Ukraine** can be compared to the economic crisis in 2008 and the beginning of the COVID-19 pandemic in 2020. The economic shock of the war at present - including inflation and skyrocketing energy and food prices - is one of its most immediate impacts on economies in the Black Sea region.

- The **economic decoupling** of Europe and most of the Black Sea region from Russia has accelerated since the beginning of Russia's full-scale invasion of Ukraine. This separation will be even more total than during the Cold War.

- The **EU** is the dominant economic partner for much of the Black Sea region, and its importance will continue to grow, alongside enhanced integration.

- **Ukraine's** 32% drop in real GDP in 2022 is a direct result of Russia's aggression. Russia's blockade of Ukraine's Black Sea ports is one of the most important reasons for its economic contraction. The EU's awarding of candidate status to Ukraine is expected to provide the basis and incentive for future reforms.

- **Moldova** faces enormous socio-economic and political challenges stemming from Russia's invasion, including a reevaluation of its energy dependency on Russia, inflation of 34% year-on-year, and greater public discontent due to the deterioration of living conditions.

Context

The war in Ukraine has led to a profound transformation of both the European security system as well as the entire global order. One of the places that has felt the impacts of the war most directly is the Black Sea region.

The Black Sea spans countries with deep historical and cultural ties that have nevertheless failed to form a fully-fledged region, in part due to the diversity of its countries. The region includes members of both the EU (Bulgaria, Romania) and NATO (Bulgaria, Romania, Turkey) as well as the post-Soviet, Western-oriented states of Moldova, Ukraine, and Georgia – all of which have had military conflicts with Russia. In addition, Armenia and Azerbaijan are deeply connected to the Black Sea region through their close economic and security relations with Russia and Turkey, respectively. Finally, Russia remains an important player in the area, although its presence in the Black Sea has decreased significantly after the collapse of the USSR – a reality that the Kremlin has been trying to alter by force in Ukraine since 2014.

Apart from the obvious danger of the ongoing war in Ukraine, other threats to the region loom large, including the spillover of fighting to Transnistria in neighboring Moldova, human trafficking, the proliferation and illicit trade in arms, and disruptions to global food and energy supplies. In addition, the conflict between Armenia and Azerbaijan over Nagorno-Karabakh and beyond is still very much on the agenda.

Finally, Western sanctions against Russia are hitting the country's economy hard. With the EU searching for replacements for Russian energy supplies, other countries in the Black Sea region – especially Azerbaijan – are becoming increasingly important partners.

Introduction: Assessment of Military Developments in Ukraine

Ukraine represents a geopolitical focal point for Russia. According to the Kremlin, Ukraine is a vital buffer zone separating it from the West and NATO. Russia's full-scale war against Ukraine following its invasion in late February 2022 has taken place over three phases. The first phase comprised Russia's initial attempt to blindside the West, topple the government in Kyiv, and seize control of the entire country. With a new president and deep divisions in the US, a newly-elected government in Germany, and an overall weak and divided EU, the Kremlin thought it had found the perfect moment to attack Ukraine and secure its long-standing security interests. However, Russian officials significantly miscalculated the resolve and unity displayed by Ukrainians and by the West, and Moscow failed to achieve its initial aims.

The second phase of the war was shaped by Russia's recognition of its military failure and the withdrawal of its troops from the Kyiv region as well as the retaking of territory by Ukraine. Russia's primary goal remained the overthrow of the government in Kyiv, but it also sought to seize territory in Ukraine's east and south and deter the West by nuclear threats. Furthermore, Putin announced a partial mobilization in Russia, which effectively brought the war home. At the same time, the Ukrainian military began regaining territory through counterattacks, including in the regions of Kharkiv and Kherson. The third phase of the war started at the

While there are some channels of communication between Ukraine and Russia, neither side is prepared to focus on peace.

beginning of October, with Russia now aiming to buy time and freeze the current situation. This is crucial for Russia in order to reorganize its military and rebuild its army supplies while it continues to focus on attacking Ukraine's critical infrastructure, trying to reduce the overall morale of Ukrainians, and slowing Western support.

The war has been shaped along different battle lines, including the conventional front, the economy, energy supplies, grain and food supplies, cyberspace, propaganda, subversion, and more. The main question remains how long the resistance of the Ukrainian people can last, especially as the winter has arrived and the country's critical infrastructure (heating, water, and electricity systems) is being targeted daily by Russian missile strikes. On the one hand, while there have been peace talks between the two conflicting parties from the beginning of the war, no concrete basis for peace negotiations is forthcoming. Neither side is prepared to deescalate or focus on peace. There are some channels for communication and exchange, such as the exchange of prisoners of war. In addition, in August 2022, Ukraine and Russia signed a grain export deal, representing an opening for the international community to come aboard. Furthermore, the International Atomic Energy Agency is monitoring the situation at the Zaporizhzhia Nuclear Power Plant. This creates some foundations for international crisis management, which could become more important in the future of the conflict.

There are three possible military scenarios that are most likely for the future of Russia's war: 1) a complete Russian withdrawal 2) a Ukrainian counterattack that freezes the current separation and contact line or 3) a brief "cooling off" period followed by a restart of the fighting in spring 2023. Any scenario leaves the EU in a highly unfavorable situation.

Workshop 1: Turkey - The Gatekeeper of the Black Sea

In order to analyse and better understand Turkey's position and its role as the "gatekeeper" of the Black Sea, one must consider Turkey's relationship with Russia and the West. Turkey is both a very important and a very difficult partner for the West when it comes to the current geopolitical situation in Europe and the Russian aggression in Ukraine.

Balancing between Russia, Ukraine, and the West shapes current Turkish foreign politics.

Experts argued that security is the central issue of Turkish politics - it defines its domestic, economic, cultural, and international policies. This has significant historical roots. Russia's aggression in Ukraine has shifted global politics and reshaped the international security order. Turkey, as a NATO member balancing between Ukraine, Russia, and the West, has established itself as a mediator in the conflict.

Turkey's bilateral relationship with Russia developed long before Putin or Erdogan came to power. Ankara sought to deepen its ties to Moscow during the cold war period as a counterweight to its NATO membership path. This relationship has evolved over time, as evidenced by their deepening economic relationship and their joint regional conflict management in the Middle East, especially in Syria. Although they also have many different interests, the costs of breaking up the relationship between Moscow and Ankara are greater than maintaining it. In addition, Turkey and Russia share similarly negative views about the US-led world order, and both countries have similarly autocratic political systems.

Turkey remains deeply suspicious of the US and its policies in the Middle East, including its support for Kurdish groups and its different understanding and approach to terrorism. This has pushed Ankara closer to Moscow as a counterbalance and is one of the most important reasons for the two countries' continued relationship. Fear of isolation in the region also pushes Turkey to seek alliances. At the same time, Turkey's approach to Russia is also shaped by deterrence, dialogue, and balancing (in Syria, Libya, and Ukraine).

Turkey's security priorities can be categorized along three main levels: 1) Syria and the Kurdish question in the region, 2) maritime disputes with Greece in the Aegean Sea, and 3) the Black Sea region. Given these security priorities, Russia's war against Ukraine is perceived by Turkey as more of a regional crisis than a global crisis. However, it neither supports nor recognizes Russian territorial expansion in Ukraine. Turkey closed its airspace to Russian military activities (mainly because of Syria) and does not allow Russian naval vessels to use the strategically important Bosporus and Dardanelles straits, which connect the Black Sea to the rest of the world. This puts Russia in a precarious strategic situation and limits its naval capabilities in the Black Sea. For Turkey, stability in the Black Sea region and control of the straits remain critical priorities. Since the cold war period, Turkey has also limited the usage of the straits by the US Navy, which effectively reduces the US presence in the Black Sea and assures the balance of naval power between Turkey and Russia.

Turkey's foreign policy seeks to create a zone of influence in its neighbourhood, pursued mainly through the use of soft power but also through hard power, as seen in Syria. Energy supplies and infrastructure also play an important role in this regard. They represent a key tool for Turkey to establish itself as a centre-point of the region as it becomes an energy hub. By establishing good relations and negotiating deals with countries like Russia, Azerbaijan, Kazakhstan, Iran, and Iraq, Turkey can secure energy supplies and resell them to EU countries, taking on a greater regional and global significance.

At the same time, Turkey remains an important partner and a key candidate for the EU, as stated in the recent October 2022 report by the EU Commission. Furthermore, Turkey's ability to achieve its interests in the region depends on its economic strength, which has declined in recent years. Turkish relations with the EU have also weakened in past years because of Turkey's pursuit of strategic autonomy. Broadly speaking, on an institutional level, Turkey belongs to the West: it is a member of the European Council, an EU candidate country, and a NATO member. On the other hand, some Turkish priorities are in opposition to those of its Western allies, while Turkey's role as the gatekeeper to the Black Sea is being challenged by the increasing usage of ports like Alexandroupolis in Greece to transfer goods and weapons to Ukraine, Central and Eastern Europe, and other countries in the Black Sea region. Furthermore, Turkey's role as a regional energy hub is being threatened by the new oil discoveries in the Aegean and Mediterranean. This has put Turkey in a delicate position, leading to the establishment of the "Century of the New Turkey" concept – a doctrine for the next 100 years that is a reaction to internal and external challenges. This represents a deliberate policy to implement, secure, and maintain Turkish interests in the region and beyond, outside of the influence of Russia or the West. As a result, Turkey is distancing itself ever more from the policies of the West.

Despite the general anti-Western turn in Turkey, there are still several potential areas for closer cooperation between Ankara and Brussels. In addition, recent polls in Turkey indicate public support for the EU, and periods of economic growth in Turkey have often been correlated with improved relations with the EU. Areas for enhanced collaboration between the two include:

upgrading the customs union; increasing engagement in the agricultural sector; advocating for the de-escalation of tensions in Turkey's neighbourhood; promoting peaceful coexistence in the eastern Mediterranean Sea, especially by engaging in more cooperation and dialogue with Greece; endorsing Turkish involvement within PESCO; updating the migration statements of 2015/2016; and promoting EU values (rule of law, human rights, media freedom) in Turkey.

Workshop 2: The South Caucasus and the Greater Black Sea Region

Armenia, Azerbaijan, and Georgia form a trio of small states that are surrounded by a larger trio consisting of Russia, Iran, and Turkey. These big powers are all former empires that at some point in history controlled parts or all of the South Caucasus. Thus, the South Caucasus can be considered as belonging to various geographic regions: the Black Sea, the Middle East, or Eastern Europe.

> *A Black Sea regional identity offers a framework to connect the South Caucasus to Europe/EU.*

Regardless, all three countries are currently seeking to deepen their ties with Western countries for a variety of reasons. Thus, a Black Sea regional identity offers a desirable framework, as it connects the South Caucasus to European/EU partners across the Black Sea.

Georgia

In the eyes of the Georgian political elite, the South Caucasus, while constituting a geographic and historical region, has failed to materialize as a political project after the collapse of the Soviet Union (unlike the Baltic region, for example). This is mainly due to the unresolved conflict between Armenia and Azerbaijan over Nagorno-Karabakh. Georgia has determined that a resolution to the conflict is not in sight and thus it is not worth investing in region-building. In addition, the foreign policy orientations of the three neighbors differ starkly, with Georgia maintaining a pro-Western orientation, Armenia aligning itself militarily and economically with Russia (CSTO and EAEU), and Azerbaijan taking a non-aligned position in order to export its lucrative oil and gas reserves.

Georgia in particular has sought to emphasize its European identity through its ties across the Black Sea. After the invasion of Ukraine, Georgia's long-term goals of joining the EU and NATO have remained steady. In a crucial summit in Brussels in June 2022, the 27 leaders of the EU decided to grant Ukraine and Moldova the status of EU candidate countries. For Georgia, however, EU leaders recognized its "European perspective," a prelude to formal candidacy. Nevertheless, this can be considered a success in that Georgia has managed to detach itself from the South Caucasus region and is now treated by the EU as a part of this new 'Trio.' It will be hard for Georgia to meet in full the twelve conditions that the EU set out as a precondition to attain candidate status. However, if it fulfils the majority of these preconditions (especially regarding the rule of law), the EU might still decide positively.

The invasion of Ukraine has been particularly significant for Georgia, as it experienced a war with Russia in 2008 that was neglected by the West and treated as an isolated case. Even if the Georgian government doesn't officially support Ukraine, it has opened schools for Ukrainian refugees and sent humanitarian aid to Ukraine. The Georgian battalion that is fighting on

Ukraine's side is the largest international battalion. Meanwhile, the large influx of Russian citizens fleeing their country is seen as both an economic opportunity and a risk. Whatever the outcome of the war in Ukraine, it will drastically change the security environment in the Black Sea region. According to one assessment, there remains a risk that Russia will attack Georgia once again, even if Ukraine wins.

Armenia:

Armenia considers its identification with the Black Sea region as a means of Europeanisation. Georgia serves as a critical link for Armenia to Europe, as the Georgian ports of Batumi and Poti are the primary conduits for European imports into Armenia. Public discourse in the country suggests that Armenia mentally identifies with Europe, but geographically it is located between Turkey, Azerbaijan, Georgia, and Iran. Armenia's links to the Black Sea are in part a balancing strategy to avoid falling entirely within Russia's sphere of influence – or becoming a second Belarus.

> *Armenia mentally identifies with Europe, but geographically it is located between Iran, Turkey, Georgia, and Azerbaijan.*

Armenia has not made a clear statement about the war in Ukraine, nor has it joined the Western sanctions regime. This is understandable given that, since the second Nagorno-Karabakh war of 2020, the safety of the ethnic Armenian population in the contested region has been ensured by Russian peacekeepers. Russia's invasion of Ukraine in February 2022 distracted and weakened Moscow's influence in the South Caucasus. Azerbaijan took advantage of this new reality and attacked Armenia in September. Armenia is seeking the general stabilization and transformation of the conflict, moving away from armed fighting towards multiple negotiation processes led by Russia, the EU, the US, and Turkey. It is also trying to initiate negotiations with Turkey on the normalization of their relations (it is, however, unlikely prior to the general elections in Turkey in 2023). Yerevan is also trying to resume talks with Baku within the OSCE Minsk group.

Another reason for Armenia to be cautious with regards to the war is due to the large Armenian communities living in Ukraine (hundreds of thousands) and Russia (over a million). Generally, Armenia desires an end to the war, as the Armenian policy for survival in the post-Soviet space has focused on maintaining relations with the West and Russia and avoiding making clear choices. But in the current situation with the war in Ukraine, this policy is becoming untenable.

The role of the EU as a mediator in the Nagorno-Karabakh conflict is viewed positively. The EU Monitoring Capacity in Armenia deployed there in October for the duration of two months may lead to the launch of several negotiation processes. The EU is doing the most it can, trying to bring all parties together to settle the conflict through diplomatic means. However, this is not enough. Both the EU and Russia must cooperate, but this is exceedingly difficult in the current circumstances. A joint monitoring mission might be useful, but it is also unlikely to deliver much progress.

Azerbaijan

Azerbaijan was considered to be part of the Black Sea region by the West throughout the 1990s and 2000s. It figured as such in practically all Western initiatives during that period, such as the NATO strategy for the Black Sea region of 2004. In security terms, Azerbaijan was one of the initiators of GUAM – an organization that brought together Georgia, Ukraine, Azerbaijan, and Moldova. Another link between Azerbaijan and the Black Sea is energy production and

transportation, although this might be of greater interest to the West than to Azerbaijanis themselves.

The post-Soviet development of Azerbaijan has been characterized by two main factors. First, it has evolved into a petrostate, with major democratic deficiencies. The other factor is the secessionist conflict over Nagorno-Karabakh, which has brought in significant Russian involvement. Although Azerbaijan has sought to restore its sovereignty over the territory, the conflict has long remained frozen, until the outbreak of the war in 2020. This, in turn, has led to a greater regionalization of the conflict. The process within the OSCE has completely failed, with the EU only playing a subordinate role.

> *Azerbaijan identifies with the Ukrainian cause in the current war on many levels, especially with regard to sovereignty and respect for internationally-recognized borders.*

Azerbaijan identifies with the Ukrainian cause in the current war on many levels, especially with regard to sovereignty and respect for internationally-recognized borders. After Russia's invasion, Azerbaijan sent humanitarian aid to Ukraine, and public rallies in support of Ukraine were allowed in the country – a telling sign given how few political rallies are generally permitted. Over three hundred thousand people of Azerbaijani origin live in Ukraine, many of whom are also fighting on the Ukrainian side.

A potential political role for the EU in the resolution of the Nagorno-Karabakh conflict is not much discussed at the present time. However, additional Russian involvement is not desirable either. For thirty years, the absence of Russian troops was considered to be one of the pillars of Azerbaijan's sovereignty. Baku compromised on the stationing of Russian peacekeepers in 2020 only because this deal allowed Azerbaijan to restore some of its lost territories. It would be an auspicious moment to sign a peace agreement with Armenia. However, while there is a certain degree of willingness to do so in both Baku and Yerevan, there is a lack of consensus on critical points.

Workshop 3: Black Sea Economics: Impacts of the War in Ukraine

The Black Sea region is characterized by great economic diversity. The economic systems of its constituent countries vary widely, bolstered by their political diversity. For instance, economic policies are more liberal in Romania and Turkey and more conservative in Russia and Bulgaria. This contributes to the different experiences of the war in Ukraine throughout the region. The impacts of the war can be compared to the economic crisis in 2008 and the beginning of the COVID-19 pandemic in 2020.

The economic shock of the war at present, including inflation and skyrocketing energy and food prices, is one of its most immediate impacts on regional economies. Its effects on economic activity and wages have been highly noticeable. This has led to an overall loss of trust in political and economic systems. High energy costs and dependance on Russian energy supplies will not disappear immediately and are expected to have long-lasting economic effects. Countries with important industrial sectors face structurally higher energy prices. The war has also caused trade disruptions across the region. Moldova in particular has been impacted by such disruptions, in addition to its high dependency on Russian gas. Current predictions indicate

that Russia, Ukraine, and Moldova will suffer most, whereas Romania and Turkey are projected to experience growth. It is expected that the Moldovan economy will be one of the worst-performing in the future, the Russian economy will suffer a decline of only 3-4% (accompanied by a partial deindustrialization), and the Ukrainian economy might begin to recover next year, depending on the outcome of the war. Help from the EU is expected to absorb the shock in Bulgaria and Romania.

The overall ability of countries to respond to economic shocks on the policy side is very limited. There has been a significant change in the global monetary regime because of inflation, with interest rates much higher than in recent years. The period of cheap and free money is over, and the subsequent impact on private borrowing and government capabilities is enormous. Interest rates in Moldova and Ukraine are the highest in Central and Eastern Europe, and the consequence of this is observable in the real economy, especially in credit borrowing. Fiscal policy cannot be expected to help these countries.

The economic decoupling of Europe and most of the Black Sea region from Russia, which started in 2014, has accelerated since the beginning of Russia's full-scale invasion of Ukraine. This separation will be even more total than during the Cold War. Furthermore, the EU is the dominant partner for much of the Black Sea region, and its importance will only continue to grow, alongside enhanced integration. The relocation of some industries form western EU states to Poland, Romania, and Turkey could deliver substantial benefits for the Black Sea region. NATO membership would also bring enhanced security to the region, and this stability would likely attract additional foreign investment. Nevertheless, it will be up to the region itself to decide where its alliances lie. Going forward, the greatest challenge the countries of the region will face is a shrinking population.

> *The economic decoupling of Europe and the most of the Black Sea region from Russia will be even more total than during the Cold War.*

Impacts of the war on Ukraine

As expected, the impacts of the war on Ukraine are most significant within the country itself. The country's infrastructure has been severely damaged, and its water supplies, communication services, and electricity and heating systems are targeted daily by Russian missile strikes. Ukraine's 32% drop in real GDP in 2022 is a direct result of the Russian aggression. The blockade of the Black Sea ports is one of the most important reasons for Ukraine's economic contraction. On the one hand, the grain deal that was brokered by the UN and Turkey has helped Ukraine slightly recover its grain exports and economic growth. On the other hand, it works very slowly, and the prices are extremely low.

> *The current economic underperformance of Ukraine is shaped by labor loss, an inability to access capital, and significant damage to infrastructure.*

When it comes to other exports, Ukraine used to be a significant exporter of metals and other raw materials. This was mainly organized via ships from Black Sea ports like Mariupol and Odesa, which is no longer possible. Nevertheless, Ukraine has not experienced a high rate of inflation. Its main imports are oil and other goods and services. Exports of goods to the EU have increased by 30%.

Defense expenses have risen to 30% of GDP since the war started. The overall deficit of electricity supplies is about 30%, which has enormous impacts on the country's heating systems, as electricity is needed to pump the heating water. The damaged infrastructure leads to shortages in everyday life. Gas reserves currently hold 14bn cubic meters, which may still be enough for this winter. By comparison, prewar reserves held 19bn cubic meters.

Business activity and economic performance in Ukraine are slowly recovering. However, the country has seen significant setbacks since October 2022 with the increase in Russian missile strikes. Still, the expectation is that business activity and economic performance will continue to recover over the next two years. The EU's awarding of candidate status to Ukraine is expected to provide the basis and incentive for future reforms. Going forward, the process is expected to change the economic structure of the country, increase interconnections with EU infrastructure, modernize technologies, and help Ukraine implement the much-needed green transition.

Impacts of the war on Moldova

Moldova is highly dependent on Russian energy supplies. It has been affected both directly and indirectly by the war in neighboring Ukraine. Moldova can be considered to be both a target and a collateral victim. The country has been impacted by the weaponization of Russian gas, as Russia has reduced gas volumes up to 50%. The loss of electricity imports from the Transnistria region has also had a significant impact on the country's energy sector, resulting in higher energy prices. The pro-Western government has received multiple threats by Russian energy company Gazprom to pay off its long-standing debts of about $700 million for past gas supplies. This increases the risk of Russia canceling the energy agreement with Gazprom, which leaves Moldova's energy sector deeply vulnerable. Furthermore, Moldova has experienced several blackouts as a result of Russian missile attacks on critical infrastructure in Ukraine. Overall, the country faces enormous socio-economic and political challenges stemming from Russia's invasion, including inflation of 34% year-on-year and greater public discontent due to the deterioration of living conditions.

> *Moldova can be considered to be both a target and a collateral victim of the war.*

Public panel: The New Black Sea: How the War in Ukraine is Reshaping the Region

Video recording of the public panel is available at: https://youtu.be/kZ2I2exGxQY

The conference was held on November 29, 2022. The workshops took place under the Chatham House Rule. They were attended by a variety of stakeholders from academia and think tanks. Different views and arguments expressed at the conference do not necessarily reflect the views of the organizing institutions. The panel discussion was open to the public. Its recording, along with other conference materials, can be accessed at www.iipvienna.com/newblacksea

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