

# Rival Influences in the Western Balkans:

## Hard Facts and Limitations

It is a long and winding road to the European Union. For the countries of the Western Balkans<sup>1</sup>, which have been seeking to join for some twenty years, the length of the accession process – more than for any previous accession – has also had the perverse effect of facilitating the incursion of rival powers in the region, which is therefore paying a high price for its ‘non-accession’. Certain influences (notably Russia and China), bearing witness to the EU’s inability to welcome these countries as members, are attempting to compete with the European development model in the region, thereby hindering its integration into the EU.

Opponents of further EU enlargement are increasingly seizing upon this supposed fragility and permeability of the Western Balkans countries to third-party influences to stigmatise their applications for membership. Today

it is attracting more attention than ever from the media, academic circles and think tanks, at the risk of developing, whether intentionally or not, a fantasised and exaggerated perception of local competition between external powers.

This competition may be fuelled by the sovereign will of the States in the region, which would see it as a way of defending their own interests, or may instead be a strategy of influence by the third powers concerned. In either case, it is necessary to **identify the forces in play** and their intentions, in particular for influences competing with the European model, **and the various factors enabling their permeation**, in order to **support the Western Balkans in their integration into the European project in full compliance with EU requirements and with the strategic direction adopted by the region**<sup>2</sup>.

1 Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia.

2 This work is supported by an assignment conducted in Montenegro, North Macedonia and Serbia in April 2023. It includes data and was developed in part through meetings held with civil society and local administration stakeholders in addition to French and European delegations (list in the appendix). This paper reflects the views of the author alone and does not necessarily represent the positions of the persons interviewed.



EUROPE IN THE  
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POLICY BRIEF  
NOVEMBER 2023

#westernbalkans  
#enlargement  
#integration

Benjamin Couteau,  
Research Fellow at  
the Centre Grande  
Europe

## I • A clear strategic direction

The strategic orientation of the countries of the Western Balkans has been abundantly clear since the turn of the century. Its focus is political and economic integration within the EU, and, with the exception of Serbia, military integration within the North Atlantic Treaty Organization (NATO), of which 22 EU Member States are also members.

**This Euro-Atlantic pathway is already well underway, albeit at different paces:** with the exception of Kosovo, which did not submit its application until December 2022, all have been recognised as candidates for EU membership, and Montenegro, Serbia, Albania and North Macedonia have even begun accession negotiations. In addition, they are all members of the European Political Community (EPC) and the Council of Europe (with the exception of Kosovo, which has applied for membership), while Albania, Montenegro and North Macedonia are members of NATO. Bosnia and Herzegovina, which is a candidate for NATO membership, also hosts an EU peacekeeping mission (EUFOR Althea). Kosovo hosts the international NATO-led KFOR mission and EULEX Kosovo, the EU's largest civilian mission, the latter leading the Belgrade-Pristina Dialogue aimed at normalising relations between Serbia and Kosovo.

While Kosovo has made no secret of its desire to join NATO too, and is already taking part in joint military exercises, it suffers in each of its applications from the position of five Member States of these various organisations – Cyprus (outside NATO), Greece, Romania, Slovakia and Spain – which refuse to recognise its independence, thereby jeopardising the full integration of the entire region.

Serbia, which has been officially neutral since 2007, is the only country for which NATO membership is not on the agenda. However, it had joined the Partnership for Peace in 2006, and even deepened its relations with the North Atlantic Alliance in 2015 by adopting an Individual Partnership Action Plan, a tool designed to encourage cooperation with NATO based on the specific strategic interests of partners that do not wish to join. As a result, it regularly takes part in joint military exercises and hosts more on its territory<sup>3</sup> than any other partner – including Russia<sup>4</sup> – and, like all the countries in the region, purchases weapons from the United States.

This has not prevented it from gradually distancing itself from the EU's strategic direction – despite its status as a candidate country – with a current alignment rate of only 51% with the Common Foreign and Security Policy (CFSP), whereas it followed almost two-thirds of the EU's positions only two years ago<sup>5</sup>. It is the only country in the region not to have adopted or applied sanctions against Russia and Belarus since the invasion of Ukraine in February 2022.

Conversely, the three NATO members in the region and Kosovo voluntarily launched the *Western Balkans QUAD – 100% Alignment with EU Common Foreign Security Policy (CFSP)* initiative in 2023, in order to highlight their full alignment with the CFSP. Despite systematic obstruction from *Republika Srpska*, its very Russophile Serb-majority entity, Bosnia and Herzegovina managed to achieve 98% alignment with EU positions in 2023<sup>6</sup>.

When it comes to achieving the region's continental and transatlantic integration, the European Union can also count on a major partner: the United States. Contrary to the initial image of an EU incapable of putting

3 Igor Miroslavljević, "Through military exercise with NATO members, Serbia leans towards cooperation with the West", *European Western Balkans*, 27 April 2023.

4 Dragan Janjić, "Serbia between NATO and Russia - Reality against emotions", *Demostat*, 18 August 2017.

5 *Serbia 2023 Report*, Commission Staff Working Document, Accompanying the document *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, 2023 Communication on EU Enlargement policy*, SWD(2023) 695 final, Brussels, 8 November 2023.

6 *Bosnia and Herzegovina 2023 Report*, Commission Staff Working Document, Accompanying the document *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, 2023 Communication on EU Enlargement policy*, SWD(2023) 691 final, Brussels, 8 November 2023.

an end to the hostilities in Yugoslavia in the 1990s and then of negotiating peace, **the United States has acquired unrivalled political capital, more than economic capital, in the region**, where it is generally perceived as having put an end to the wars – to the detriment of the Serbs, some of whom still harbour a strong grudge against the world’s leading power and NATO. Although its decisive presence gradually diminished over the course of the 2000s to allow the EU to lead international initiatives on the ground, particularly in Bosnia and Herzegovina and Kosovo, the United States has always acted in support of the EU since, sometimes in trouble.

However, this became less the case when Donald Trump came to power in January 2017. While supporting the region’s political integration in the EU – the primary interest of the United States being the strengthening and enlargement of a Union capable of ensuring continental security – the pursuit of conflicting strategic objectives has in fact damaged the European prospects of the countries in the region. Two of them were lured into signing the Kosovo and Serbia Economic Normalization Agreements, known as the Washington Agreement, involving the recognition of Jerusalem as the capital of Israel by both States, in contradiction with international law and the CFSP. Despite a renewed convergence since Joe Biden took office, US policy today follows a transactional model – all the more so since Russia’s aggression against Ukraine – partly reproduced by the EU, consisting of appeasing local ethno-nationalist leaders such as Serbian President Aleksandar Vučić<sup>7</sup>, often linked to rival powers, in an attempt to ensure a semblance of regional stability.

Another facet of the discreet re-engagement observed under Donald Trump’s presidency was to counter Russian and Chinese influence in the region. The US State Department has revealed that the United States spent more than one billion dollars on neutralising Russian influence around the world

between 2017 and 2021, with more than a quarter of that going to the Western Balkans alone, excluding Albania and Kosovo<sup>8</sup>. It also launched *The Clean Network* programme in 2020, quickly joined by Albania, Kosovo and North Macedonia – as well as 26 EU Member States – with the stated aim of protecting data privacy, security and human rights online in the face of long-term threats “posed to the free world from authoritarian malign actors”<sup>9</sup>, starting with the Chinese Communist Party and Huawei. Finally, to combat hybrid and cyber threats, it supports the strengthening of local institutional capacities, with the backing of EU and/or NATO Member States, in particular Austria, the Netherlands, the United Kingdom and France.

After a long absence from politics in the Western Balkans, France is now stepping up its cooperation not only for cyber capacities but also in the fields of justice, security and defence, as a symbol of its renewed commitment to EU membership for the countries in the region<sup>10</sup>. France entered into a strategic partnership and cooperation agreement with Serbia in 2011, followed a year later by Serbia’s first-ever participation in a European Union operation, organised with France. To tackle hybrid threats and the resurgence of external operations aimed at destabilising the region, a Franco-Slovenian initiative has also resulted in the founding in Podgorica of the Western Balkans Cyber Capacity Center (WB3C), with the aim of strengthening local cyber culture and response capabilities.

**The day-to-day reality of local populations is therefore first and foremost, and almost exclusively, a European reality.** The six States in the region, while awaiting their accession to the most advanced regional integration project, are already full members of the international initiatives and organisations that make up the European and, more broadly, transatlantic family, implying shared interests and a desire to deepen our interdependent relationships.

7 Leon Hartwell & Jack Galloway, *West Appeases Serbia’s Bullying*, Center for European Policy Analysis (CEPA), 2023.

8 Saša Dragojlo, “US Spent 621 Million Dollars Tackling Russian Influence in Balkans, CEE, V4”, Balkan Investigative Reporting Network, *Balkan Insight*, 22 December 2022.

9 Website of the United States Department of State, *The Clean Network*.

10 *Closing speech by the President of the French Republic, Emmanuel Macron*, GLOBSEC 2023 Forum, Bratislava, 31 May 2023.

Bosnia and Herzegovina is also unique in that its institutional system includes a High Representative with extensive executive and legislative powers, appointed by the Steering Board of the Peace Implementation Council (charged with implementing the Dayton Peace Agreement). It is interesting to note that this Board is made up of members of the G7 and representatives of the EU, as well as Turkey (representing the Organisation of Islamic Cooperation) and Russia. A week before the launch of its full-scale invasion of Ukraine, however, the Kremlin suspended its financial contribution to the Steering Board, having already made known a few months earlier its decision to no longer participate in its meetings as long as they were chaired by the High Representative<sup>11</sup>.

These decisions are in line with Russia's usual position of rejecting the authority of the High Representative, whom it sees as defending exclusively Western positions that would inherently be anti-Serbian. Although they have little impact on the local situation that has already deteriorated considerably as a result of the secessionist actions of *Republika Srpska*<sup>12</sup> (70% of the budget of the Office of the High Representative is funded by the EU and the United States and only 1.2% by Russia<sup>13</sup>), they do provide them with substantial support and encourage the destabilisation of the country at low expense.

In contrast, **the region's Western partners can count on the presence and support of Turkey, their ally within NATO, for their initiatives on the ground** (starting with the Steering Board of the Peace Implementation Council, EUFOR Althea, KFOR, EULEX Kosovo and the Belgrade-Pristina Dialogue). For example, when Serbia and Kosovo signed the Washington Agreement, both Turkey and the EU pointed out that opening an embassy in Jerusalem did not comply with international law. Turkish President Recep Tayyip Erdoğan has also expressed his desire to resolve the "political deadlock" in Bosnia and Herzegovina, "ease the tension" between

Serbia and Kosovo and support the latter's accession to NATO<sup>14</sup>.

While China also supports the EU integration of the region, this strategic positioning actually serves no other purpose than to bolster its penetration of the single market and to strengthen the EU's international influence, with a view to the Union's autonomy vis-à-vis the United States, thereby promoting the division of world order into competing blocs. Moreover, despite this support, China remains dependent on the strategic positioning of its main partner in the region, Serbia, for the preservation of its interests, even when this positioning proves dangerous for the region's stability and EU integration.

## II • Interference from third-party influences

the EU seeks to organise the continental area through its unification, a fundamental objective of the European project, and **the countries of the Western Balkans have made EU membership their priority<sup>15</sup>. As a result, they all need to follow the same strategic, economic and political compass.**

This convergence is more necessary than ever against the backdrop of Russia's war of aggression against Ukraine. The EU is putting its own existence at risk if it tolerates a never-ending process likely to allow a zone of instability to develop at the heart of the continent, fuelled by malign influences. The violence of the power struggle in Europe and the progressive division of the world into competing blocs leave those States that have condemned Russian aggression no choice but to close ranks, all the more so when they aspire to join or are members of a Union founded on the guarantee of peace, democracy, the rule of law and fundamental rights and freedoms.

11 Website of the Office of the High Representative in Bosnia and Herzegovina, [Peace Implementation Council](#).

12 Benjamin Couteau, *Bosnia and Herzegovina under pressure*, Infographic, Paris, Jacques Delors Institute, 2022.

13 Željko Trkanjec, "Russia suspends financing of High Representative in BiH", *EURACTIV*, 20 April 2022.

14 Alice Taylor, "Erdoğan maintains diplomatic offensive, commits to easing Kosovo, Serbia tensions", *EURACTIV*, 11 January 2023.

15 *Declaration*, EU-Western Balkans Summit, C/03/163, Thessaloniki, 21 June 2003.

However, if rival powers have been able to compete with this model promoted by the European Union within the countries seeking to join it<sup>16</sup>, it is precisely because **the EU has for too long ignored the geopolitical magnitude of its enlargement policy**. It has thus contented itself with an illusory stabilisation of the region<sup>17</sup>, neither viable nor beneficial to either party, creating fertile ground for the spread of anti-European discourse and practices among a significant proportion of local populations and governments.

At the end of the 2000s, with the crisis-ridden **European Union** suffering from enlargement *fatigue*<sup>18</sup> and the **United States** diminishing its presence in order to recalibrate its foreign policy, **the regional powers historically linked to the region were quick to reinvest in it, primarily for geostrategic reasons: Russia**, which has gradually regained its power since the collapse of the USSR and is seeking to preserve its sphere of influence, and **Turkey**, heir to the Ottoman Empire, which is trying at the time to implement its “zero problems with neighbours” doctrine.

They were quickly followed in the 2010s by new players with more economic, and sometimes strategic, ambitions: **China**, which is seeking to extend its partnerships and find its way into the European market in order to establish itself as a key global economic player; the **rentier Gulf States** (particularly the United Arab Emirates [UAE]), which are trying to prepare for the post-oil era by diversifying their economies; and **Israel**, seeking international recognition and diplomatic missions in Jerusalem. More recently, **Azerbaijan** has followed suit, wishing to forge ties of trust with the countries that host the pipelines carrying its gas to the European Union, while at the same time turning them into new customers.

They have all found **Serbia** to be the ideal gateway to the region, due to its central geographical position, its unrivalled demo-

graphic, economic and political importance in the region, and its linguistic, cultural and historical proximity to all its neighbours. The country is deliberately transforming itself into an intermediary for their influence to advance its own interests. It therefore plays a key role in the security of the Western Balkans, which it likes to leverage to position itself as the guardian of the region’s stability.

It is necessary to identify among these players the powers that are competing with the European project and that are quick to exploit the political, economic and social weaknesses of the region in order to satisfy their interests, to undermine its integration and therefore to endanger the security of the continent.

### III • Competing influences

Firstly, **Russia is and will remain the main threat to the stability of the region and its EU integration as long as the war in Ukraine continues and its regime remains unchanged**. This authoritarian regime, based on the violation of international law and the undermining of Western principles and the model of liberal democracy, has the stated aim of keeping the Western Balkans within its sphere of influence, as a counterweight to the European Union and NATO at the very heart of the continent, at the expense of eroding regional security and democracy.

**Historically well-identified in the region, Russia has been using any means available, especially since its offensive in Ukraine has stalled**. Isolated on the continental stage, its only recourse to maintain its influence is by stirring up local tensions, in Kosovo or Bosnia and Herzegovina for example, through destabilisation operations at minimal expense. If it remains visible throughout the region, it is above all because certain local stakeholders, foremost among them Serbia and its government-linked media, pursue their own

<sup>16</sup> This model is itself being challenged within the EU by some of its Member States, notably Hungary (see for example: Lukáš Macek, *The power struggle between the European Union and Hungary*, Infographic, Paris, Jacques Delors Institute, 2022), thus weakening the credibility of its enlargement policy (see below).

<sup>17</sup> Luka Šterić, *Sortir de la « stabilocratie » : repenser l’approche française des Balkans occidentaux*, Fondation Jean Jaurès, 2022 (in French).

<sup>18</sup> Benjamin Couteau & Lukáš Macek, *Enlargement of the European Union: an unexpected revival*, Infographic, Paris, Jacques Delors Institute, 2023.

interests by amplifying the Kremlin's narrative. In the countries of the region that are members of NATO (Albania, Montenegro and North Macedonia), fully aligned with the EU's CFSP, Russian influence is naturally waning, due to a lack of an attractive model and a credible alternative to the EU.

The European Commission has described China as a cooperation and negotiating partner, an economic competitor and, above all, a “systemic rival promoting alternative models of governance”<sup>19</sup>. If the three aspects of this triptych can be applied to EU-China relations in the region, the war in Ukraine could heighten the rivalry between the two powers. Whether through a declaration of “friendship without limits” or a neutrality that has no other meaning than tacit support for the invasion, **China and Russia share a rejection of an international order based on rules and principles that they consider to be Western and designed to limit their role in the international arena.** In the Western Balkans, this rivalry takes two forms: firstly, by pursuing an aggressive economic policy based on opacity and corruption with the aim of finding its way into the single market, China is undermining the EU integration of the region; secondly, by superimposing its political influence on its economic power, it is seeking to forge alliances that will facilitate its project for an alternative world order.

**Bolstered by its phenomenal growth, China has leveraged its considerable economic and financial resources over the last decade to quietly establish itself as one of the leading players in the region, which is in need of investment.** Highlighting its prin-

ciples of “mutual benefit” and “win-win” cooperation<sup>20</sup>, it has invested massively in local infrastructure, transportation and ore extraction – a critical requirement if it is to maintain its dominant position on the world stage<sup>21</sup> – as well as in the promotion of its activities in the region, particularly during the Covid-19 pandemic. Although it does not have a comprehensive strategy for the region, China has incorporated the Western Balkans<sup>22</sup> into the two main instruments of its policy of influence in the region: the platform for Cooperation with Central and Eastern European Countries, also known as *14+1* (the number of countries participating in addition to China, formerly *16+1* then *17+1*), created in 2012, and the Belt and Road Initiative (BRI), a “new silk roads” project launched in 2013 to extend China's hold on world trade by interconnecting it with the rest of the world. While the results of these initiatives have been generally disappointing, if not negative, for the countries in the region<sup>23</sup>, China has managed to take advantage of these economic ties to curry favour with some of their ruling classes and therefore protect its interests there. Today, it is continuing to position itself bilaterally and, through a granular approach<sup>24</sup>, is attempting to extend its presence to other areas.

Turkey, although itself a candidate for EU membership, a member of NATO and an active supporter of the Euro-Atlantic integration of the Western Balkans<sup>25</sup>, can also play this disruptive role – but to a lesser extent. **Its status of close partner of the Western powers has gradually enabled Turkey to boost its image as a reliable partner of the region,** fostered by well-es-

<sup>19</sup> Joint communication to the European Parliament, the European Council and the Council, EU-China – A strategic outlook, JOIN(2019) 5 final, Strasbourg, 12 March 2019.

<sup>20</sup> Ana Krstinovska, *The place of North Macedonia in China's strategy for the Western Balkans*, Konrad-Adenauer-Stiftung, Office in Skopje, 2020.

<sup>21</sup> Elvire Fabry, “Reducing the EU's dependence on Chinese imports of rare earths and other strategic minerals”, in EU-China Working Group of the Jacques Delors Institute, *Building Europe's strategic autonomy vis-à-vis China*, Report No. 124, Paris, Jacques Delors Institute, 2021, pp. 117-122.

<sup>22</sup> With the exception of Kosovo, which it does not recognise as an independent State, partly for fear of creating a parallel with Taiwan.

<sup>23</sup> Olga V. Alexeeva & Frédéric Lasserre, “China in Central and Eastern Europe: The End of the Mirage?”, *Politique étrangère*, vol. 87, No. 4, Winter 2022.

<sup>24</sup> Vladimir Shopov, *China goes granular: Beijing's multi-level approach to the Western Balkans*, Commentary, European Council on Foreign Relations, 2020.

<sup>25</sup> Aslı Aydıntaşbaş, *Turkey, NATO, and the Ukraine war: Why Erdogan's grievances are about more than Sweden and Finland*, Commentary, European Council on Foreign Relations, 2022.

established relations with local leaders<sup>26</sup> and by new economic capacities reinforced by its geographical proximity. Since the tensions of spring 2023 in the north of Kosovo, Turkey has even stepped up its participation in KFOR<sup>27</sup> – of which it took over the command for the first time in October 2023 – by sending a battalion of 500 soldiers<sup>28</sup>.

Despite this, its political system remains notoriously haunted by Sèvres Syndrome, maintaining that Western powers are continually conspiring and acting in concert with domestic enemies with the aim of destroying the Turkish nation<sup>29</sup>. Newly re-elected Recep Tayyip Erdoğan is himself adept at anti-Western rhetoric<sup>30</sup> and verbal and military provocations, for example in the Eastern Mediterranean. He also glorifies an Ottoman past that encompassed a large part of the continent, thereby legitimising his plan for Turkey to become a regional power. In view of the Russian invasion of February 2022, **Turkey's refusal to apply sanctions against the Russian regime and the suspicions that it is circumventing Western sanctions<sup>31</sup> call into question its positioning and strategic objectives.**

Similarly, Israel, while a long-standing partner of the EU, has at times sought to undermine the EU's credibility in the eyes of the Western Balkans, particularly with the support of former US President Donald Trump, in order to gain their support in relation to Iran or for its policy of colonising Palestine<sup>32</sup>, or even their recognition of the Israeli State.

Finally, we must not lose sight of the fact that the other players identified in the region have themselves interests and even alliances which, while not directly anti-Western – often simply because they lack the political and/or economic means to do so –, bring them closer to the players discussed above. Azerbaijan and Turkey, for example, see each other as “one nation, two States”, while China is gradually making itself a key partner in the eyes of the Gulf States<sup>33</sup>, and the latter are themselves becoming essential to the health of a Turkish economy badly battered by Recep Tayyip Erdoğan's policies<sup>34</sup>.

#### IV • Tools of influence

Without calling into question free competition and their own economic development, the return or arrival of these players must be closely monitored by the European Union, to ensure that they do not derail the progress made by the Western Balkans towards EU accession. **The EU integration model, its standards and principles could suffer as a result of this regional competition, in which respect for the European strategic direction chosen by the States concerned must take precedence.**

So when rival powers pursue a “covert policy of influence”, of interference, in the countries of the Western Balkans and – in the same way as they do with EU Member States – conduct “destabilising actions aimed at discrediting” European influence and the European model and “making [these] countries' policies

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- 26** There are several reasons for this, depending on the country: a shared Ottoman past, a shared Muslim faith, its role in the regional wars of the 1990s and/or a mutually beneficial collaboration between leaders with autocratic tendencies.
- 27** The Kosovo Force, deployed in June 1999 to end the war in Kosovo, is the NATO-led international peacekeeping force in the country.
- 28** NATO, [NATO reinforcements start arriving in Kosovo](#), 5 June 2023.
- 29** Cem Çalışkan, “Who is behind the Plandemic? Analysing the different ideological conspiracy theory endorsements on Turkish Twitter”, *Southeast European and Black Sea Studies*, 2022.
- 30** Ali Küçükgöçmen, “On final day of campaign, Erdogan accuses Turkish opposition of working with Biden”, *Reuters*, 14 May 2023.
- 31** Jared Malsin, “Sanctioned Russian Cargo Ships Made More Than 100 Stops at Turkish Ports”, *The Wall Street Journal*, 29 June 2023.
- 32** *Courrier des Balkans*, “Benjamin Netanyahu en mission de lobbying anti-EU dans les Balkans”, 2 November 2018 (in French).
- 33** Mehran Haghiriian, “Si la Chine occupe désormais une place centrale dans les calculs stratégiques du Golfe, les Européens, eux, en sont presque totalement absents”, *Tribune, Le Monde*, 4 May 2023 (in French).
- 34** See for example: Orhan Coskun, “Turkey expects Gulf investments after top-level UAE visit”, *Reuters*, 22 June 2023; Firat Kozok, “Turkey in Talks to Sell Izmir Port Operating Rights to Gulf Investors”, *Bloomberg*, 5 July 2023.

structurally favourable to [their own]”<sup>35</sup>, the EU has a duty to act in defence of its future Member States.

Interference can be carried out using a variety of techniques, sometimes in a hybrid fashion, to destabilise a country in the region or the Western Balkans as a whole. In addition to well-identified diplomatic and military relations, and economic presence and even pressure (particularly in terms of energy and infrastructure), cultural and religious links tend to be over-exploited, amplified by rival rhetoric and a manipulation of information that has stepped up a gear since the launch of the Russian invasion of Ukraine.

While these powers are playing to their strengths, we must not lose sight of the fact that the countries in the region are themselves using these relationships to defend their own interests. By refusing to adopt EU sanctions, Serbia secures Russia’s continued support in the United Nations (UN) Security Council to prevent any recognition of Kosovo. By signing a letter of support for China’s repressive policies against the Uyghur population<sup>36</sup>, it is doing the same with China. Conversely, as part of this power struggle with Serbia, Kosovo will seek support from the United States, the EU and Turkey.

#### I FACTORS OF INSTABILITY FOSTERED BY INTERNAL PLAYERS

The region’s progressive integration into the European Union actually conceals an unprecedentedly slow process, due not only to insufficient reforms on the part of the countries in the region, but also to enlargement *fatigue* in the EU<sup>37</sup>.

The Union’s inability to bring the accession process to a swift conclusion has undermined its credibility in the region, with the knock-on effects of reducing the determination of local governments to carry out the reforms needed to comply with EU requirements and

fostering Eurosceptic sentiment among the populations of the candidate countries. This combination of factors, while not the primary reason for the incursion of third powers into the region, has undoubtedly favoured it.

In a bid to foster security in the region on its path to the EU, the latter has in recent years favoured a *stabilocratic* approach in its policy towards the region. This led to an appeasement of local leaders with autocratic tendencies considered to be the guarantors of regional security – starting with the Serb ones – at the expense of weakening national institutions and, more generally, the requirement of democracy and the rule of law which it itself has laid down. **With the accession process running out of steam, the EU has lost its ability to bring about a democratic transformation of the region’s candidate countries, thus fulfilling the objective of its rival powers.**

In so doing, it is compromising its geopolitical action, which has taken the form of mediation in a number of regional disputes, in particular the Belgrade-Pristina Dialogue. Aleksandar Vučić and his counterpart in *Republika Srpska*, Milorad Dodik, whose autocratic style of power is encouraged by powers competing with the EU, are thus forcing the EU’s complacency towards them by exploiting their relationship with Russia or China, presenting them as potential alternative partners should the EU accession process fail.

Russia, which is losing ground economically and strategically due to the war, is therefore counting on its local proxies to safeguard its influence in the region, in a relationship of interdependence which is essential for their survival. **A wide range of stakeholders in the region are putting themselves at the service of Russian interests that also benefit them:** Churches, sports clubs, veterans’ groups, the media (see below), but also paramilitary groups, secret services, political parties and politicians.

<sup>35</sup> French National Assembly, Committee of Inquiry into political, economic and financial interference by foreign powers – States, organisations, companies, interest groups, private individuals – aimed at influencing or corrupting French opinion leaders, decision-makers or political parties, *Compte-rendu de l’audition, à huis clos, de M. Nicolas Lerner, directeur général de la sécurité intérieure (DGSI, ministère de l’intérieur)*, 2 February 2023 (in French).

<sup>36</sup> Wouter Zweers, Vladimir Shopov, Frans-Paul van der Putten, Mirela Petkova, Maarten Lemstra, *China and the EU in the Western Balkans: A zero-sum game?*, Clingendael Report, 2020.

<sup>37</sup> Benjamin Couteau & Lukáš Macek, *Enlargement of the European Union: an unexpected revival*, *op. cit.*



Serbia and *Republika Srpska* in particular have become key links in Russia's presence in the Western Balkans. Russia's opposition to NATO's 1999 bombing campaign against Serbia and to any form of independence for Kosovo has made it one of Serbia's special partners in the defence of its interests, deemed to be threatened by Western powers, at a time when a strong majority of Serbs remain opposed to any form of independence for Kosovo<sup>38</sup>. With its status as a permanent member of the UN Security Council, Russia has also won support from Bosnian Serbs and their leader Milorad Dodik, who, while reinforcing a creeping authoritarianism, have found in Russia an ideal partner to undermine the action of the Western powers, epitomised by the High Representative.

Such action could indeed prove decisive in achieving the European and transatlantic integration of a sovereign Bosnia and Herzegovina<sup>39</sup>. Since 2021, therefore, Russia has successfully put pressure on the EU Member States and the United States to agree not to mention the High Representative in the UN resolutions renewing the mandate of EUFOR Althea, thereby consolidating its own influence in Bosnia and Herzegovina through the positions of *Republika Srpska*. *Republika Srpska* has repaid Russia particularly well in return by blocking Bosnia and Herzegovina's application to join NATO and the application of Western sanctions, and by adopting Russian-inspired laws with the clear aim of gagging the free press and civil society. Milorad Dodik, who has been under US sanctions since 2017 for obstructing the Dayton Peace Agreement, also announced that the entity's authorities will end all cooperation with the US and UK embassies in 2023<sup>40</sup>.

This is compounded by suspicions that Russia has financed his election campaigns

and has allegedly paid more than \$300 million to political parties in more than twenty countries since 2014<sup>41</sup>. Some political parties now act as mouthpieces for the Kremlin's propaganda, such as New Serb Democracy (*Nova srpska demokratija*, NOVA) and several of its partners in the Democratic Front (*Demokratski front*, which became the For the Future of Montenegro coalition and supports the government formed on 31 October 2023 despite US concerns<sup>42</sup>) in Montenegro, or the VMRO-DPMNE<sup>43</sup> and Levica in North Macedonia.

Aleksandar Vučić's Serbian Progressive Party (*Srpska napredna stranka*, SNS) has also gradually strengthened its ties with Vladimir Putin's United Russia party by signing several cooperation agreements over the last ten years. Since the SNS came to power, Serbia, through its National Assembly, became an observer State in the Parliamentary Assembly of the Collective Security Treaty Organization in 2013, a military alliance led by Russia. That same year, it signed a strategic partnership agreement with Russia – the only country in the region to have done so – and went so far as to take part in military exercises with the Russian and Belarusian armed forces – including *Slavic Brotherhood* – between 2014 and 2021, even hosting two of them.

In addition, Serbia was the only country in the region to acquire Russian weapons before the invasion of Ukraine, sometimes even in the form of donations, and with a great deal of publicity<sup>44</sup>. The introduction of weapons into the country is a particularly useful tool for Russia, which can thereby give Serbia – with its negligible strike force – the means to exacerbate local tensions, particularly in Kosovo<sup>45</sup>, and to blow hot and cold in relation to the region's security, thus cementing

38 NI, "Poll shows Serbians divided over Kosovo", 17 August 2022.

39 Majda Ruge, *Peace of the action: The Kremlin's plans in Bosnia and Ukraine*, Commentary, European Council on Foreign Relations, 2022.

40 Azem Kurtić, "Bosnian Serb Govt 'Ends Cooperation' With UK, US Embassies", Balkan Investigative Reporting Network, *Balkan Insight*, 24 March 2023.

41 NI, "US official says Russia secretly financed DF in Montenegro and Dodik in Bosnia", 14 September 2022.

42 Website of the United States Embassy in Montenegro, *Statement by U.S. Ambassador Reinke on Government Formation in Montenegro*, 13 October 2023.

43 Stands for Internal Macedonian Revolutionary Organisation – Democratic Party for Macedonian National Unity.

44 *Courrier des Balkans*, "Défense : la Russie offre 30 chars de combat à la Serbie", 31 May 2021 (in French).

45 Lisa O'Carroll, "Arms cache found after ethnic Serb gunmen storm village in Kosovo", *The Guardian*, 25 September 2023.

its position as a key player in its stability. At the same time, it challenges the EU's own capacity for action, playing into the hands of powers seeking to undermine its credibility.

However, strategic cooperation between the two countries has waned since the invasion of Ukraine. Serbia, in line with its policy position of respect for the principle of territorial integrity of States, has consistently supported United Nations General Assembly (UNGA) resolutions condemning the Russian aggression against Ukraine. Despite its refusal to adopt sanctions and the signing in September 2022 of a Consultation Plan between foreign ministries for 2023-2024, no joint military exercises have been carried out and no Russian equipment has been acquired by Serbia since then.

**Dependent on the goodwill of its local partners, Russia's influence in the Western Balkans is therefore greatly diminished when the countries in the region pursue divergent strategic interests or as tensions ease.** This explains why it continually puts pressure on Serbia to ensure that the Belgrade-Pristina Dialogue makes as little progress as possible<sup>46</sup>. By the same token, it is not seeking under any circumstances to withdraw from the Steering Board of the Dayton Peace Implementation Council or to end EUFOR Althea: if it did, it would find itself sidelined from international initiatives in the region and would therefore lose all means of applying pressure.

In the other countries of the region, where Russia has less of a foothold, its influence is countered by a solid Euro-Atlantic anchoring, as reflected by their membership of NATO. In March 2022, Albania, Montenegro and North Macedonia, completely aligned with EU sanctions, were included by Russia on its list of unfriendly countries, which has affected their trade relations. Three months later, North Macedonia and Montenegro closed their

airspace to Russian Foreign Minister Sergei Lavrov, who was supposed to visit Serbia, and then expelled eleven and twelve Russian diplomats respectively, amid suspicions of espionage since the start of the war<sup>47</sup>.

Conversely, **Turkey is not counting on the destabilisation of the region to promote its interests, but on its stabilisation**, hence its support for initiatives promoting the region's Euro-Atlantic integration and, consequently, its local image as a reliable partner. Turkey's prevarication in July 2023 over recognition of the Srebrenica genocide is a prime example of its desire not to offend any of its partners<sup>48</sup>.

This strategy is paying off, since all the leaders in the region have good relations with Recep Tayyip Erdoğan, and he received the support of leaders in Bosnia and Herzegovina, both Serb<sup>49</sup> and Bosniak, Bosniak representatives from Montenegro and Serbia<sup>50</sup>, and even Albanian Prime Minister Edi Rama<sup>51</sup>, for the presidential election in May 2023. While the latter see it as a way of forging their international stature, Turkey naturally sees it as confirmation of its status as a regional power.

It is also seeking to consolidate this status in military terms, particularly with its NATO allies. Over the past five years, Turkey has signed military cooperation agreements with Montenegro and Albania, an agreement on military-financial cooperation with North Macedonia and a military framework agreement with Serbia. These agreements generally include the payment of financial aid by Turkey to the partner country (up to almost €30 million over two years for North Macedonia), in exchange for the purchase of weapons manufactured entirely in Turkey. In particular, Turkey is seeking to encourage the acquisition of its *Bayraktar* TB2 tactical UCAVs, which have already been delivered to Kosovo, ordered by Albania and are currently

<sup>46</sup> Jamie Dettmer, "Serbia's Vučić faces a tough choice", *POLITICO Europe*, 1 March 2023.

<sup>47</sup> Maja Živanović, Sonja Gočanin, Riin Aljas, Mark Krutov & Sergei Dobrynin, "Exclusive: Expelled Russian Diplomats With Spy Links Resurface In Serbia", *Radio Free Europe/Radio Liberty*, 13 March 2023.

<sup>48</sup> Hamdi Firat Büyük, "Turkey Does Recognise Srebrenica Killings as Genocide, Embassy Says", *Balkan Investigative Reporting Network, Balkan Insight*, 13 July 2023.

<sup>49</sup> Zoran Radosavljević, "Bosnian Serb leaders back Erdogan in Turkish election", *EURACTIV*, 11 May 2023.

<sup>50</sup> Hamdi Firat Büyük, "Bosniak Politicians Campaign for Erdogan in Turkish Elections", *Balkan Investigative Reporting Network, Balkan Insight*, 8 May 2023.

<sup>51</sup> Alice Taylor, "Albanian PM backs Erdogan in run-up to Turkish elections", *EURACTIV*, 10 May 2023.

being negotiated by Bosnia and Herzegovina.

While Turkey is keen to help keep the peace in the region, it has not lost sight of its own economic and strategic interests, and therefore did not hesitate to deliver drones to Kosovo at the height of the tensions with Serbia, prompting the latter – which had expressed an interest in purchasing Turkish drones – to denounce the delivery and put an end to its own talks<sup>52</sup>.

However, this has not been the case with Chinese equipment, which Serbia quickly favoured over both Turkish and Russian equipment in the wake of the war in Ukraine. **Given its generally weak political ties with the region, China is investing heavily and almost exclusively in its relationship with Serbia.** United by a strategic partnership since 2009, subsequently known as “comprehensive”, the two “steel friends”<sup>53</sup> are cultivating their attachment to respect for the territorial integrity of States to advance their relations, particularly in military terms.

Like Russia, China has a permanent seat on the UN Security Council, and has not hesitated to support Serbian interests, for example by abstaining from voting on a draft resolution recognising the genocide in Srebrenica, in order to pamper one of its most important European partners. In the same year, 2015, China voted against Kosovo’s entry into UNESCO. For its part, Serbia was one of the only countries in the world – and the only one outside Asia – to acquire the FK-3 anti-aircraft defence system, following several tactical drones in 2020.

**Serbia is increasing its military partnerships,** not only to modernise its capabilities but also to diversify its suppliers and support its own industry. The UAE is now Serbia’s leading buyer of equipment, while the latter has a military cooperation agreement with Israel.

Israel has recently drawn closer to other countries in the region. This has taken place on a military level, with the signature between 2019 and 2023 of no fewer than three contracts with Montenegro for the acquisition of at least €55 million worth of Israeli equipment<sup>54</sup> and in June 2023 of a memorandum of understanding with Albania on military cooperation, and on a diplomatic level, such as with Kosovo following the Washington Agreement. The only two States in the region linked to Israel by a military cooperation agreement abstained from voting on 27 October 2023 on the UNGA resolution calling for an “immediate, durable and sustained humanitarian truce”, for all parties to comply with international law and for continuous and unhindered aid into the Gaza Strip<sup>55</sup>.

**Diplomacy is also the path currently favoured by Azerbaijan to get closer to a region that has become strategic for the EU’s energy supply.** The Azerbaijani President Ilham Aliyev, who has been in power for twenty years, made his first visits to Albania and then Bosnia and Herzegovina, five months apart between 2022 and 2023. While Azerbaijan already increased its diplomatic presence in Bosnia and Herzegovina in 2021 by opening an embassy there (and vice versa), it now intends to do the same in Albania.

In Sarajevo, it also signed a Joint Declaration on Strategic Cooperation with Bosnia and Herzegovina<sup>56</sup>. It is indeed banking on its good relations with the Serb leaders in the region to consolidate its influence, as it does not recognise Kosovo – drawing a parallel with Nagorno-Karabakh. In November 2022, several bilateral agreements strengthening economic cooperation between Serbia and Azerbaijan were signed, including one establishing an Azerbaijan-Serbia Strategic Partnership Council<sup>57</sup>.

<sup>52</sup> Elis Gjevori, “Turkish Bayraktar drone sales to Kosovo spark anger in Serbia”, *Middle East Eye*, 20 July 2023.

<sup>53</sup> Website of the Ministry of Foreign Affairs of the Republic of Serbia, *Steel friendship and strategic partnership between Serbia and China*, 28 October 2021.

<sup>54</sup> *Middle East Monitor*, “Montenegro signs \$22m deal for arms from Israel’s Elbit Systems”, 16 May 2023.

<sup>55</sup> UN News, *UN General Assembly adopts Gaza resolution calling for immediate and sustained ‘humanitarian truce’*, 27 October 2023.

<sup>56</sup> Talha Öztürk, “Azerbaijan, Bosnia hail ‘new era’ in bilateral relations”, *Anadolu Agency*, 13 April 2023.

<sup>57</sup> Talha Öztürk, “Serbia, Azerbaijan sign MoU to establish Strategic Partnership Council”, *Anadolu Agency*, 23 November 2022.

## I COMPETITION HEIGHTENED BY THE REGION'S ECONOMIC POTENTIAL

**When it comes to the economy, whether with respect to energy, infrastructure, transportation or new technologies, the importance of the European Union is unrivalled:** it is by far the region's biggest trading partner, accounting for 68% of its foreign trade (8.5 times China's share and almost 23 times Russia's), as well as the biggest investor (almost 2/3 of foreign direct investment in the region comes from the EU) and the biggest provider of funds<sup>58</sup>. Despite China's powerful arrival on the scene, trade between the EU and the region is even enjoying strong growth: it has more than tripled in fifteen years, particularly with the entry into force of the Stabilisation and Association Agreements with each of the six countries. One third of the EU Member States alone account for between a third and a half of the foreign trade of each country in the region (see Chart 1).

To support the socio-economic and sustainable development of the region with a view to accession, the EU is devoting more than €14 billion of its multiannual budget to the Instrument for Pre-accession Assistance for candidate countries (including Turkey) and "potential candidates", and also launched the Western Balkans Investment Framework (WBIF) in 2009. Alongside its Member States and a number of international financial organisations, including the European Bank for Reconstruction and Development and the World Bank, it supported more than 220 projects in the region<sup>59</sup>, with funds of more than €31 billion invested to date<sup>60</sup>, including the regional counterpart of the EU's post-Covid recovery plan, the comprehensive Economic and Investment Plan.

As part of the Global Gateway strategy, the EU's alternative to China's BRI, this plan aims to mobilise up to €30 billion in public and private funds by building on EU subsidies to stimulate the region's economic recovery,

help it overcome the energy crisis, support its green and digital transitions and further connect it to the European Union. Through a number of priority areas (clean energy, digital future, human capital, etc.), the EU has supported key projects for rail, road and waterway interconnections, the development of renewable energies, health and education facilities, and the private sector. These include the reconstruction and modernisation of the port of Brčko in Bosnia and Herzegovina, the construction of the Belgrade-Niš high-speed rail link in Serbia, the modernisation of the *Peace Highway* linking Kosovo to Serbia, and the development of the first electric bus rapid transit system in Tirana, Albania.

In addition to this unrivalled support, we must mention the EU's assistance in relation to the region's response to the Covid-19 pandemic, which outstripped all others. While the initial one-month restriction on the export of protective equipment greatly weakened the EU's credibility in the eyes of local opinion – as Aleksandar Vučić illustrated when he said that European solidarity was no more than a "*fairy tale on paper*"<sup>61</sup> – it has in total provided more than €3.3 billion in support to the region for the acquisition of medical equipment and access to vaccines, but also to assist local small and medium-sized enterprises<sup>62</sup>.

<sup>58</sup> Benjamin Couteau & Lukáš Macek, *Enlargement of the European Union: an unexpected revival*, *op. cit.*

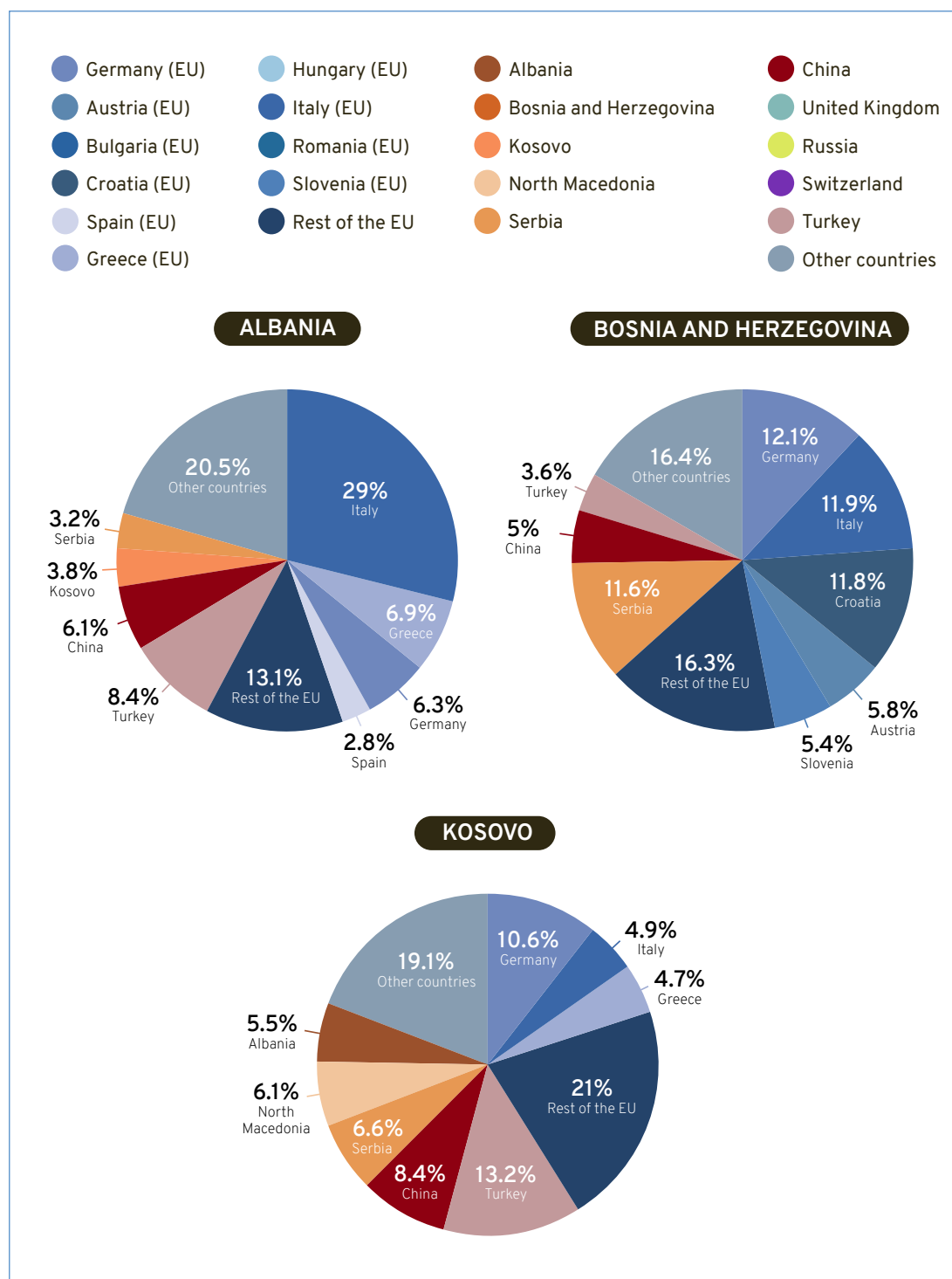
<sup>59</sup> Western Balkans Investment Framework, *Economic and Investment Plan Endorsed Flagship Investments 2020-2022*, February 2023.

<sup>60</sup> Western Balkans Investment Framework, *Economic and Investment Plan Endorsed Flagship Investments 2020-2023*, June 2023.

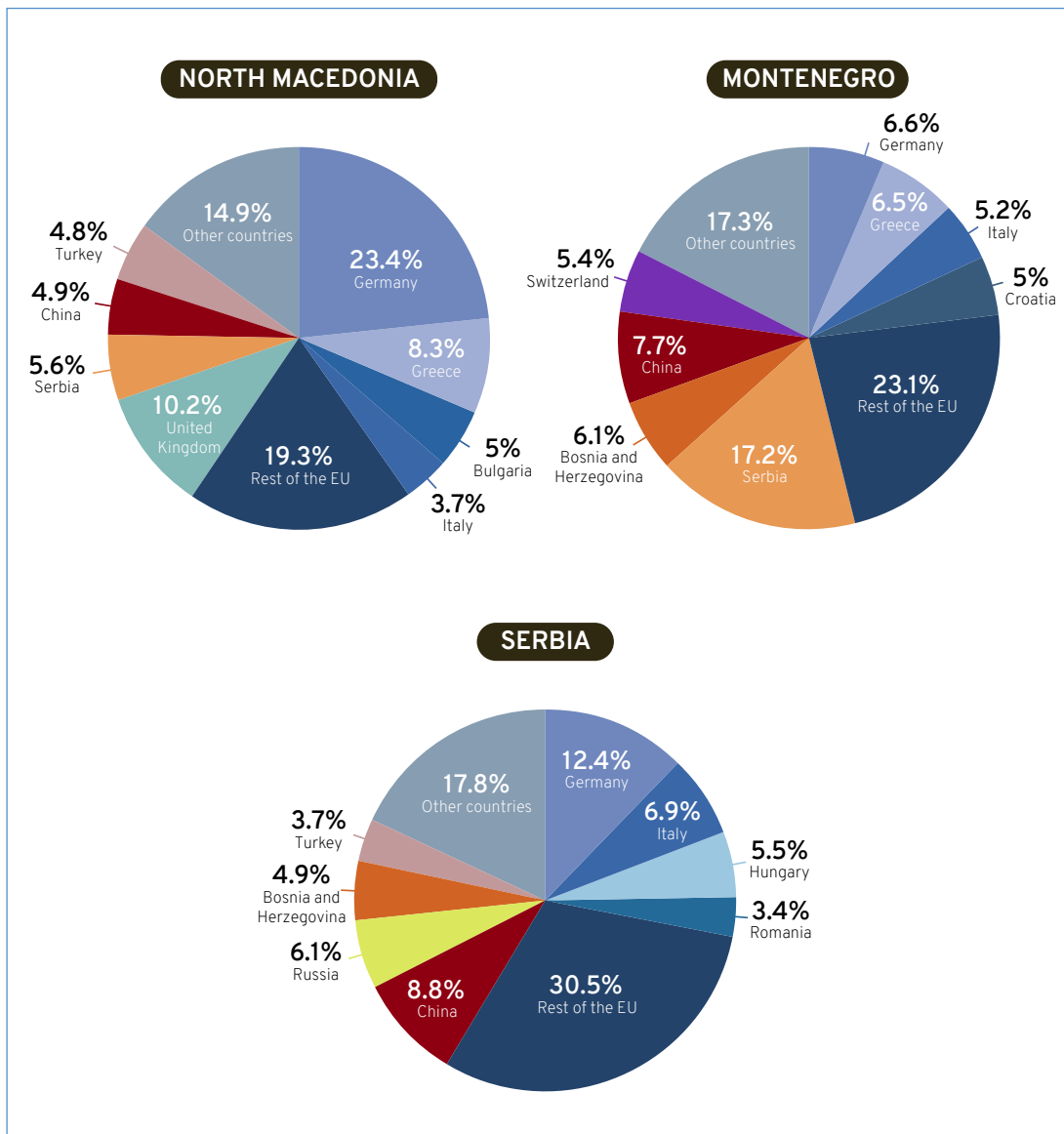
<sup>61</sup> Louis Seiller, "Entre Belgrade et Pékin, « une amitié de fer »", *Libération*, 18 June 2020 (in French).

<sup>62</sup> Council of the European Union, *Infographic - COVID-19: over €3.3 billion support for the Western Balkans*, 2021.

**CHART 1. Main export and import partners of the countries in the region in 2022<sup>63</sup>**



<sup>63</sup> Personal calculations based on: Albanian Institute of Statistics, [International Trade in Goods](#); Agency for Statistics of Bosnia and Herzegovina, [International trade in goods of BiH, January-December 2022](#), 20 January 2023; International Monetary Fund, Direction of Trade Statistics, [Exports and Imports by Areas in Countries - Kosovo, Rep. of \(2022\)](#); State Statistical Office of the Republic of North Macedonia, [External trade, January - December 2022](#), 8 February 2023; Montenegro Statistical Office, [External trade in goods of Montenegro, January - December 2022](#), 19 April 2023; Statistical Office of the Republic of Serbia, [External trade, December 2022 - By current exchange rate, EUR](#), Statistical release, Statistics of external trade, Number 23, 31 January 2023.



Member States are present in the region to varying degrees. Serbia generally attracts most of their attention, which is the case for both Germany and France, even though France’s trade with the region remains eight times lower than that of Germany<sup>64</sup>, the region’s leading trading partner. However, France is slowly re-developing its trade relations in the Western Balkans, and the French Development Agency (*Agence française de développement*, AFD), which has also joined the WBI, has granted €1 billion to the region

since 2019<sup>65</sup>, often in partnership with its German counterpart, the *Kreditanstalt für Wiederaufbau*.

Trade between France and Serbia also doubled between 2016 and 2022<sup>66</sup>, and France can be credited with the presence of over a hundred companies in Serbia and a number of major investments: the management of Belgrade’s Nikola Tesla airport by Vinci Airports, the construction of the Belgrade Metro by Alstom and Egis Rail in partnership

<sup>64</sup> Ardian Hackaj, “Boosting Economic Cooperation”, in Florent Marciacq & Romain Le Quiniou (eds.), “French Engagement in the Western Balkans: Boosting Strategic, Political, Economic and Societal Cooperation”, *Études de l’Ifri*, Ifri, 2022.

<sup>65</sup> French Development Agency, *AFD Group and the Western Balkans*, August 2023.

<sup>66</sup> French Treasury, *Relations économiques entre la France et la Serbie en 2022*, 5 July 2023 (in French).

with China<sup>67</sup> and the consultancy services provided to the City of Belgrade for the operation of this future metro by RATP Dev<sup>68</sup>. While more than 16,000 people are employed by French companies in Serbia, the Netherlands remains the leading investor, followed by China, Austria, Russia and Germany.

Serbia is the only country in which Russian and Chinese foreign direct investment (FDI) is significant (8.1% and 11.9% of FDI stocks respectively in 2022). Russian investment in Bosnia and Herzegovina has plummeted in recent years to less than 3%<sup>69</sup>. While Russian investment in Montenegro has risen spectacularly since independence, making it one of the main investors in the country, investment from China is almost non-existent, as it is in the rest of the region<sup>70</sup>. As for Turkey, while it is less present in Serbia and Montenegro, it is more present than Russia and China in all the other countries: in Bosnia and Herzegovina (3.2%), it is the 7<sup>th</sup> investor in North Macedonia (6.7%)<sup>71</sup>, the 5<sup>th</sup> investor in Albania (7.4%)<sup>72</sup>, and the 3<sup>rd</sup> investor in Kosovo (9%)<sup>73</sup> – always behind at least one EU Member State. Its trade with Serbia is growing strongly, and last year the two countries signed agreements aimed at deepening their relations<sup>74</sup>.

**Turkey's economic influence is therefore the most visible and the most diversified after that of the EU and its Member States. It is significant in terms of both trade and investment, even more so than that enjoyed by the United States, which accounts for**

between 0.4% and 2.4% of FDI stocks in Albania, Bosnia and Herzegovina and Serbia but is on a par with Turkey in Kosovo, or the UAE, which is present in Serbia (2.1%) and, more recently, in Montenegro<sup>75</sup>. Indeed, each of the six countries has signed a free trade agreement (FTA) with Turkey<sup>76</sup> and several thousand Turkish companies operate in the region, employing at least 40,000 people<sup>77</sup>. Turkey is the region's third trading partner after the EU and China, and is particularly present in the banking sector, owning the main Albanian bank, Banka Kombëtare Tregtare, which also operates in Kosovo alongside three other Turkish banks. It is the only country, along with Austria, to have at least one bank in each of the countries in the region – when there are at least four banks from EU Member States. Serbia is incidentally the only country to host a Chinese bank, Bank of China, and an Emirati bank, Mira-bank.

By its presence in the Balkans through the region of Eastern Thrace, Turkey has also invested in local infrastructure, in particular in the interconnection of road and rail networks and in the energy sector, but its bids are generally considered hardly competitive, too expensive and ill-suited to the realities of the region. When awarding contracts, arbitrary preference is given to companies that are reputed to be close to the Turkish government and have made a fortune since the Justice and Development Party (*Adalet ve Kalkınma Partisi*, AKP) came to power, including those that the opposition called

<sup>67</sup> Chambre de Commerce et d'Industrie France Serbie, *Métro de Belgrade – une collaboration de la Serbie, de la France et de la Chine*, 22 November 2021 (in French).

<sup>68</sup> RATP, *The city of Belgrade awards RATP Dev an "Early Operator Assistance" contract for the Belgrade automated metro system*, 19 January 2023.

<sup>69</sup> French Treasury, *Relations économiques entre la France et la Bosnie-Herzégovine en 2022*, 8 July 2023 (in French).

<sup>70</sup> Ana Krstinovska, "China in the Western Balkans", *Politique étrangère*, vol. 87, No. 4, Winter 2022.

<sup>71</sup> French Treasury, *Relations économiques entre la France et la Macédoine du Nord en 2022*, 10 July 2023 (in French).

<sup>72</sup> French Treasury, *Relations bilatérales France-Albanie en 2022*, 10 July 2023 (in French).

<sup>73</sup> French Treasury, *Les échanges bilatéraux France- Kosovo en 2021*, 13 June 2022 (in French).

<sup>74</sup> Website of the Ministry of Foreign Affairs of the Republic of Türkiye, *Relations between Türkiye and Serbia*.

<sup>75</sup> Milica Kovačević, *Vulnerabilities to Chinese influence in Montenegro*, Center for democratic transition / Centar za demokratsku tranziciju, 2021.

<sup>76</sup> Website of the Ministry of Trade of the Republic of Türkiye, *Free Trade Agreements*.

<sup>77</sup> Excluding Bosnia and Herzegovina and Montenegro, according to personal calculations based on: *Euronews Albania*, "Turkey's investments in Albania as our fourth largest trading partner", 17 January 2022; Website of the Ministry of Foreign Affairs of the Republic of Türkiye, *Relations between Türkiye and Kosovo*; Website of the Ministry of Foreign Affairs of the Republic of Türkiye, *Relations between Türkiye and North Macedonia*; Website of the Government of the Republic of Serbia, *Serbia open to new Turkish investments*, Belgrade, 7 September 2022.

the “gang of five” (*bešli çete*) during the last presidential campaign: Cengiz<sup>78</sup>, Kalyon, Kolin, Limak<sup>79</sup> and Makyol.

Above all, it has taken advantage of its strategic position – neighbouring the EU via Thrace, Russia via the Black Sea and Azerbaijan via the river Aras – to establish itself as an energy hub, particularly for gas and oil. It thus supplies Europe via the gas and oil pipelines that run through its territory. In particular, the Trans Adriatic Pipeline (TAP), the latest link in the Southern Gas Corridor, which has been in service for over two years, supplies Italy with Azerbaijani gas from Turkey via Albania, and should soon serve Albania, North Macedonia and Serbia. Serbia has already been connected to the *TurkStream* pipeline since 2021, enabling it to obtain supplies of Russian gas.

Russia has in fact invested in the energy sector in order to secure the relationship of dependence that half the countries in the region had with it, even though the share of gas in the energy mix of the Western Balkans is very low, the region being far less dependent on it than the EU Member States<sup>80</sup>. **Russia’s economic footprint is therefore small overall in the Western Balkans** – barely 3% of their foreign trade, on a par with the UK. Only Serbia had an FTA with Russia, which became an FTA with the Eurasian Economic Union in 2019 (see Map 1), but Russia only accounted for 6.1% of Serbia’s foreign trade in 2021, a share barely higher than that of Bosnia and Herzegovina (see Chart 1). Russia accounts for no more than 2% of the foreign trade of any other country in the region.

Russia therefore focuses on leveraging its leading role in global gas and oil supply. Although Russia accounts for only 3% of total imports of oil and oil products<sup>81</sup>, it is successfully leveraging its gas in North Macedonia, Serbia and Bosnia and Herzegovina, where it supplied between 85 and 100% of national demand at the start of the war.

However, these countries do not yet seem ready to step away from Russian fossil fuels. While within Bosnia and Herzegovina, *Republika Srpska* – where Russian investment is already 100 times greater than in the other entity, the “Bosniak-Croat” *Federacija* – is seeking to further strengthen its economic links with Russia despite the war, particularly in the energy sector<sup>82</sup>, Serbia has gone so far as to renew its gas supply contract with the Russian company Gazprom for a further three years<sup>83</sup>. Gazprom is also the majority shareholder in Serbia’s only gas storage facility and, through one of its subsidiaries, in Serbia’s only oil company.

Conversely, North Macedonia and Montenegro – although the latter, like Albania and Kosovo, does not import Russian gas – have fully embarked on the path of diversifying their energy supply since the start of the Russian invasion, based on a two-fold strategy. Naturally, as members of the Energy Community<sup>84</sup>, they, like the rest of the region, can count on the *AggregateEU* joint gas purchasing mechanism<sup>85</sup>. Above all, and again following the lead of the EU, they are now seeking to import increasing volumes of gas from Azerbaijan.

Bosnia and Herzegovina and Serbia, with their respective Joint Declaration of Strategic Cooperation and Strategic Partnership Council (see above), have also followed suit,

78 Elvira M. Jukić, “Bosnia Takes Small Step in Motorway Construction”, Balkan Investigative Reporting Network, *Balkan Insight*, 22 May 2012.

79 *Balkan Green Energy News*, “Limak looks for new projects in Albania”, 29 September 2016.

80 Organisation for Economic Co-operation and Development (OECD), *Clean energy transition in the Western Balkans*, October 2022.

81 *Ibidem*.

82 Milorad Milojević, “Bosnie-Herzégovine : la Republika Srpska cherche toujours à attirer les investissements russes”, *Courrier des Balkans*, 13 September 2022 (in French).

83 Ivana Sekularac, “Serbia’s Vucic says he agreed a three-year gas supply contract with Putin”, *Reuters*, 29 May 2022.

84 The Energy Community is an international organisation established in 2005 to build an integrated pan-European energy market encompassing the EU, the Western Balkans, Georgia, Moldova and Ukraine.

85 Representation of the European Commission in France, *Achat commun de gaz : plus de 13,4 milliards de m<sup>3</sup> proposés à l’UE suite au premier appel d’offres conjoint*, 16 May 2023 (in French).



forging closer links with Azerbaijan in the fields of energy and infrastructure.

**Azerbaijan is therefore making its entry into the Western Balkans, in the hope of a Russian-style rise in power,** and in direct competition with Russia. While the TAP already transports its gas to Italy, and soon to Albania, North Macedonia and Serbia (see above), the future Ionian Adriatic Pipeline (IAP) should link the TAP from Albania to Croatia via Montenegro and Bosnia and Herzegovina in a few years' time.

**China has invested massively in the region, not only in the field of energy but also in the areas of infrastructure, transportation and mining, trying to outdo European partners.** The major difference with the other partners in the region, however, is that China and its companies have never really invested funds, but have preferred to grant preferential loans and buy out companies, thereby creating little wealth and employment in the region and setting up there at a lower cost to find its way into the single market.

This explains why China, unlike the EU, has never set up a real framework for the region, but has always integrated it into larger groupings (14+1, alongside some EU Member States, which it views as more significant, and BRI in particular). China's only truly regional initiative, the China-Europe Land-Sea Express Route, therefore derives from the BRI and is in reality no more than a small section designed to provide the simplest possible link between Greece and Hungary, two EU Member States separated by the Western Balkans<sup>86</sup>. Indeed, since the state-owned China Ocean Shipping Company (COSCO) took control of the Greek port of Piraeus in 2016, it has become the main entry point for Chinese products into Europe and its interconnection with the rest of the continent has become essential for China.

The financing of local projects is also facilitated by corruption at all levels in the region<sup>87</sup> and failures in the rule of law and the transparency of public contracts (see below). As a result, countries such as China and Turkey, which do not have the same standards as the EU and its Member States and are less demanding in terms of project viability and/or social and environmental impacts, are much quicker to foster an image of privileged partners, even if their contracts are less competitive and run the risk of undermining the public finances of the countries in the region. China's presence and influence in the region, while significant and in need of monitoring, are therefore primarily the result of certain governments seeking to benefit personally and electorally from Chinese money.

Serbia is a case in point. As its leading trading partner in the region, Serbia accounts for more than half of all regional trade with China – although this represents less than €5.9 billion<sup>88</sup> – and is once again the only country to have signed an FTA with China, in October 2023. It is also a hub for Chinese investment in the region: since 2009, an estimated 61 projects worth at least €18.7 billion have been financed by China in Serbia – more than half of all Chinese funds in the region<sup>89</sup>.

Almost all the contracts signed between the two countries are kept secret and are rarely subject to an award procedure, which heightens doubts about the trade-off demanded by China in exchange for such major investments and for projects whose viability is almost systematically called into question. This is particularly the case in the mining industry, where two Chinese companies control the local copper and gold sectors, in the midst of a global race for access to rare earth elements and other strategic minerals. Serbia is the only country in the region to have a Chinese mineral extraction and/or mining project, despite the fact that it receives only 3 to 5% of the profits from

<sup>86</sup> Wouter Zweers, Vladimir Shopov, Frans-Paul van der Putten, Mirela Petkova, Maarten Lemstra, *China and the EU in the Western Balkans: A zero-sum game?*, *op. cit.*

<sup>87</sup> Anđela Šemić, "EC 2021 Reports on Western Balkans: Corruption is widespread and remains an issue of concern", *European Western Balkans*, 2 December 2021.

<sup>88</sup> Personal calculations based on: Statistical Office of the Republic of Serbia, *External trade, December 2022 - By current exchange rate, EUR*, *op. cit.*

<sup>89</sup> Bojan Stojkovski, Ivana Jeremic, Samir Kajosevic, Ivana Nikolic, Ivan Angelovski, Fatjona Mejdini, Irvin Pekmez, "China in the Balkans: Controversy and Cost", Balkan Investigative Reporting Network, *Balkan Insight*, 15 December 2021.

mining projects, the lowest margins on the sale of its mining rights in the world<sup>90</sup>.

In this field, China even acts like the saviour of local industry, having bought out two companies that were otherwise doomed to disappear: the Bor mine, one of Europe's main copper deposits and long considered to be "Serbia's least profitable company"<sup>91</sup> and the Smederevo steelworks, on which 5,000 jobs depended. In both cases, the unbridled increase in production capacity led to air pollution in excess of legal limits. By tolerating the breach of its own laws by Chinese companies operating on its territory, in order to guarantee a continuous flow of investment, Serbia is tacitly relinquishing part of its sovereignty and reinforcing the feeling of impunity of these companies and its ruling class.

These breaches of environmental standards, incompatible with the requirements of the EU accession process, are the norm for Chinese projects in the region, particularly in Bosnia and Herzegovina<sup>92</sup>, but above all in Montenegro, where these threats to national sovereignty extend to public finances. A case in point is China's flagship project in the country: the motorway intended to link the port of Bar to the border with Serbia, a project long sought-after by the Montenegrin authorities to open up the north of the country, but the economic viability of which was called into question by a study commissioned by the European Investment Bank<sup>93</sup>.

Although only the first segment of 41 kilometres has been built by the China Road and Bridge Corporation (CRBC) to date, the Montenegrin government already borrowed €1 billion from the Export-Import Bank of

China (Exim Bank) in 2014 to finance this €800 million project. In addition to the serious environmental damage caused by the project – waste been deposited in the river Tara, which had already been diverted for the purposes of the route – and the fact that the two parties to the contract kept the route of the motorway completely secret<sup>94</sup>, it is above all the terms of the contract that raise questions, and in particular the possibility that China could seize the country's critical infrastructure in the event of default. This "debt trap" seems to be receding, however, after a previous Montenegrin government reduced the foreign exchange risks thanks to the support of two US banks and a French bank, and then began to repay the loan and reduce the proportion of the country's foreign debt owed to China<sup>95</sup>.

Apart from these few examples, Chinese investment in the region has remained very low overall, and below the expectations of the countries concerned. Few projects have come to fruition, many have been linked to corruption scandals<sup>96</sup>, and none have really been a major project, leading local leaders to withdraw progressively. In Albania, China has never won a single public contract, leading its Prime Minister Edi Rama to state that the country had not benefited from any economic spin-offs from the 14+1 platform<sup>97</sup>, and its level of indebtedness to China fell from almost €14 million to less than 2 million between 2010 and 2019<sup>98</sup>. With its two NATO partners in the region, North Macedonia and Montenegro, no major Chinese infrastructure projects are on the agenda.

In Serbia, however, cooperation with China extends to another Chinese spearhead: dig-

90 *L'invasion silencieuse – La Chine et sa stratégie pour les Balkans*, directed by Michael Wech (BROADVIEW TV GmbH, ZDF, 2023).

91 *Ibid.*

92 Ana Krstinovska, *The place of North Macedonia in China's strategy for the Western Balkans*, *op. cit.*

93 Vanja Čalović Marković, Vuk Maraš & Aleksandar Mašković, *Public infrastructure analysis*, MANS – Network for Affirmation of NGO Sector, 2017.

94 *Ibid.*

95 Interview with the Montenegrin Ministers of Finance, Milojko Spajić, and Economic Development, Jakov Milatović, in Jacob Hanke Vela & Suzanne Lynch, *Brussels Playbook: Orbán's nemesis - Belarus international - Don't feed the tech giants*, *POLITICO Europe*, 11 November 2021.

96 See for example: Ana Krstinovska, *Exporting Corruption? The Case of a Chinese Highway Project in North Macedonia*, China Observers in Central and Eastern Europe (CHOICE), 2019.

97 Shoichiro Taguchi & Maya Shimizu, "Albania sees 'zero' benefits from China's '17+1' but will stay: PM", *Nikkei Asia*, 22 February 2023.

98 Wouter Zweers, Vladimir Shopov, Frans-Paul van der Putten, Mirela Petkova, Maarten Lemstra, *China and the EU in the Western Balkans: A zero-sum game?*, *op. cit.*

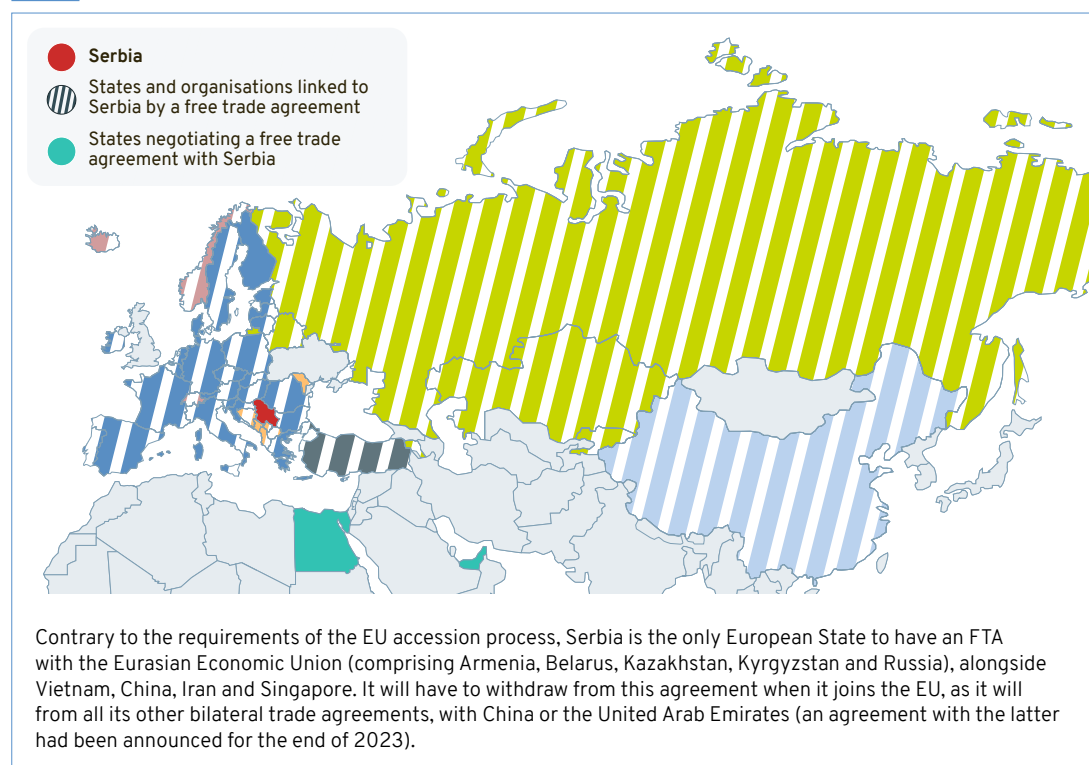
ital technologies. Under the guise of making public spaces safer, Belgrade and several major Serbian cities have been criss-crossed for around a decade by thousands of surveillance cameras supplied by the Chinese company Huawei – considered by the European Commission to be a high-risk supplier of 5G technology within the European Union<sup>99</sup>. Equipped with facial recognition software and capable of combining data in real time, these cameras are a veritable Chinese Trojan horse at the heart of Serbia’s new technology sector.

The country is also opening its doors to the United Arab Emirates in search of economic diversification, particularly since the SNS came to power in 2012. The latter was quick to exploit its relationship with them – symbolised by the personal relationship between Aleksandar Vučić and the Emir of Abu Dhabi and President of the UAE Mohamed bin

Zayed Al Nahyan<sup>100</sup> – in a bid to consolidate its power by presenting itself as the only party able to attract its capital to the country.

Following the signature of a cooperation agreement in 2013, the UAE has invested across the board: in aviation, with the acquisition that same year of a 49% stake in Air Serbia by Etihad Airways (a stake that has now fallen below 17% following the recapitalisation of the airline by the Serbian State), in banking (see above), in agriculture, or in construction (with the emblematic *Belgrade Waterfront* urban renewal project, estimated at €3.5 billion), through contracts that are consistently opaque. In addition to these investments, the Emirati government granted several billion-dollar loans at favourable rates in 2014, 2016 and 2022<sup>101</sup>. Negotiations for an FTA between the two countries were launched in September 2023.

#### MAP 1. Serbia and its free trade agreements



<sup>99</sup> European Commission, [Speech by Commissioner Breton on the cybersecurity of 5G networks](#), Brussels, 15 June 2023.

<sup>100</sup> Tena Prelec, “Our brothers’, ‘our saviours’: The importance of Chinese investment for the Serbian government’s narrative of economic rebound”, in Ioannis Armakolas, Barbora Chrzová, Petr Čermák & Anja Grabovac (eds.), [Western Balkans at the Crossroads: Ways Forward in Analyzing External Actors’ Influence](#), Edited Volume, Prague, Prague Security Studies Institute, 2021, pp. 12-22.

<sup>101</sup> Misha Savic, “Serbia Wins \$1 Billion UAE Loan Amid Headwinds Over Russia”, [Bloomberg](#), 11 September 2022.

## I AN OVER-EXPLOITED CULTURAL AND RELIGIOUS HERITAGE

The historical Slavic and Ottoman influences in the region today foster a climate conducive to the spread of a feeling of closeness to the Russian and Turkish powers, a feeling that the EU and its Member States are struggling to compete with despite the overall appeal of the European project.

### — Education, artistic creation and cultural heritage

Nevertheless, **educational and cultural exchanges between the EU and the Western Balkans have been stepped up in recent years.** The EU's flagship education and training programme, Erasmus+, enabled nearly 30,000 young people from across the region (excluding North Macedonia and Serbia, which are directly integrated into the programme) to study and work in the EU between 2015 and 2020, while more than 18,000 travelled in the opposite direction<sup>102</sup>. North Macedonia, followed by Serbia in 2019, have even become associated to it on the same footing as EU Member States, while the other four, which are already partners in the programme, should obtain this status in the future, at the latest when they join the EU. In these countries, more than a hundred projects to strengthen higher education capacity have also been carried out, with one notable feature: the EU requires these projects to be regional in scope, and therefore to include at least two of the countries in the region.

On the cultural front, the EU has opened up its *Creative Europe* programme, dedicated to the creative arts and audiovisual sectors, to all the countries in the region, and is funding the “*Culture and Creativity for the Western Balkans*” project to the tune of €8 million until 2026, led by UNESCO, the British Council and the Italian Agency for Development Cooperation (AICS). It is expected to involve more than 800 cultural and creative industries and more than 9,000 professionals in the sector.

Several Member States lead or are involved in the projects covered by this programme, in collaboration with the countries of the region. On an individual level, some are focusing on linguistic cooperation. The number of speakers of English, a language that cannot be ignored on a global scale, German, the language of the EU's largest economy, and Italian, the language of the region's second-largest trading partner, is growing strongly. **France**, despite its role in the First World War and in the peacemaking and peacekeeping operations of the 1990s – 114 French servicemen and women lost their lives there<sup>103</sup> - **has not managed to maintain a strong emotional link.** While French was the first foreign language taught during the Yugoslav period, it has now been largely overtaken by English and German and is competing with Italian, but still has more learners than Russian or Chinese.

Other countries, however, do not have this problem. The Ottoman Empire's domination of almost the entire region for five centuries left a large Turkish community in the region, particularly in North Macedonia and Kosovo. Kosovo is also the only country outside the island of Cyprus and Turkey where Turkish is a joint official language. **Turkey therefore exerts a passive influence in the region, even beyond its minority,** and enjoys, at best, a good image, if not relative indifference.

This presence has become all the more visible since Turkish TV series – the majority of which feature either a similar lifestyle and culture or a shared Ottoman past – are now being exported on a massive scale and punctuate the daily lives of local populations<sup>104</sup>, leading to a certain but limited interest in Turkey and learning of the Turkish language.

Since the AKP came to power, a proactive policy of maintaining and extending Turkish soft power worldwide has therefore been launched to strengthen these two aspects, for which the Balkans, particularly the Western Balkans, have served

<sup>102</sup> European Commission, *EU-Western Balkan cooperation through Erasmus+*, January 2021.

<sup>103</sup> Website of the Ministry of the Armed Forces of the French Republic, *Chemins de Mémoire. France in the Balkans*.

<sup>104</sup> Nicole Ely, “*Much-loved Soaps Polish Turkey's Image in Balkans*”, Comment, Balkan Investigative Reporting Network, *Balkan Insight*, 18 June 2019.

as a laboratory. Through its Cooperation and Coordination Agency (TİKA, to use the Turkish acronym), which extended its action to the region under the influence of the AKP, Turkey has since acted to preserve what Turkish diplomacy calls their “common historical heritage”<sup>105</sup>, and to assist the countries in their development. In practice, according to 2018 figures<sup>106</sup>, almost €11 million a year is spent on the countries of the region, mainly on renovating Ottoman buildings, particularly mosques, and on building social housing<sup>107</sup> – barely 5% of what the French AFD grants annually (see above). The Directorate General of Foundations (*Vakıflar Genel Müdürlüğü*), a government institution, also participates, to a lesser extent, in this effort to preserve Ottoman heritage in the region.

By mobilising its Yunus Emre Institutes, Turkey is also seeking to increase interest in its language and culture, particularly in cooperation with local schools. Bosnia and Herzegovina and Kosovo are the only countries in the world to host no fewer than three of these institutes, while Albania has two and the other three countries in the region one each (see Map 2), but with no convincing results to date – outside the *Federacija*. The extension of its *Türkiye Scholarships* programme (*Türkiye Bursları*) to the whole world in order to attract international students to Turkey has met with a little more success in the region, and particularly with the local Turkish communities.

Turkey is also investing more widely in non-formal education, some of it religious, initially through the extensive network of 40 so-called Gülenist schools (two-thirds of which were in Albania and Bosnia and Herzegovina), named after preacher Fethullah Gülen – originally close to Recep Tayyip Erdoğan but since accused of orchestrating

the coup d'état of 15 July 2016. Well-established and influential in the region, these schools have become the target of the Turkish government, which in 2016 set up the Maarif Foundation to replace them while putting pressure on local authorities to close Gülenist schools. While this new network appears to be developing rapidly and thus fulfilling the first objective – it is already present in all the countries in the region with the exception of Montenegro – Turkey has failed to convince any government to close Gülenist schools, with the notable exception of Tirana.

Turkey's message in the region is therefore unclear, and its global activism barely conceals its limited influence. It is much the same for China and Russia, which have even weaker resources and focus almost exclusively on the Serb populations.

Only Serbia has signed an agreement with the Chinese equivalent of the TİKA, the China International Development Cooperation Agency, though this has not come to much<sup>108</sup>. China has also opened two Confucius Institutes in each country in the region with a significant Serb population (Serbia, Montenegro and Bosnia and Herzegovina – it is interesting to note that the largest institute in this country is in Banja Luka, in *Republika Srpska*, and not in Sarajevo), and only one in the others, Kosovo naturally not hosting one (see Map 2). This is the main platform for cultural cooperation between the region and China, while several EU Member States<sup>109</sup> and the United States<sup>110</sup> have denounced the threats posed by these Institutes to academic freedom and freedom of expression in the host countries, and have taken the initiative of closing down some of the Confucius Institutes established in their territories. A number of partnerships between Chinese and local universities have also been

<sup>105</sup> Website of the Ministry of Foreign Affairs of the Republic of Türkiye, [Relations with the Balkan Region](#).

<sup>106</sup> Personal calculations from: Aslı Aydıntaşbaş, *From myth to reality: How to understand Turkey's role in the Western Balkans*, Policy Brief, European Council on Foreign Relations, 2019.

<sup>107</sup> Tolga Bilener, “Les Balkans : une priorité de la puissance émergente turque”, *Diplomatie*, n°117, September-October 2022, pp. 64-65 (in French).

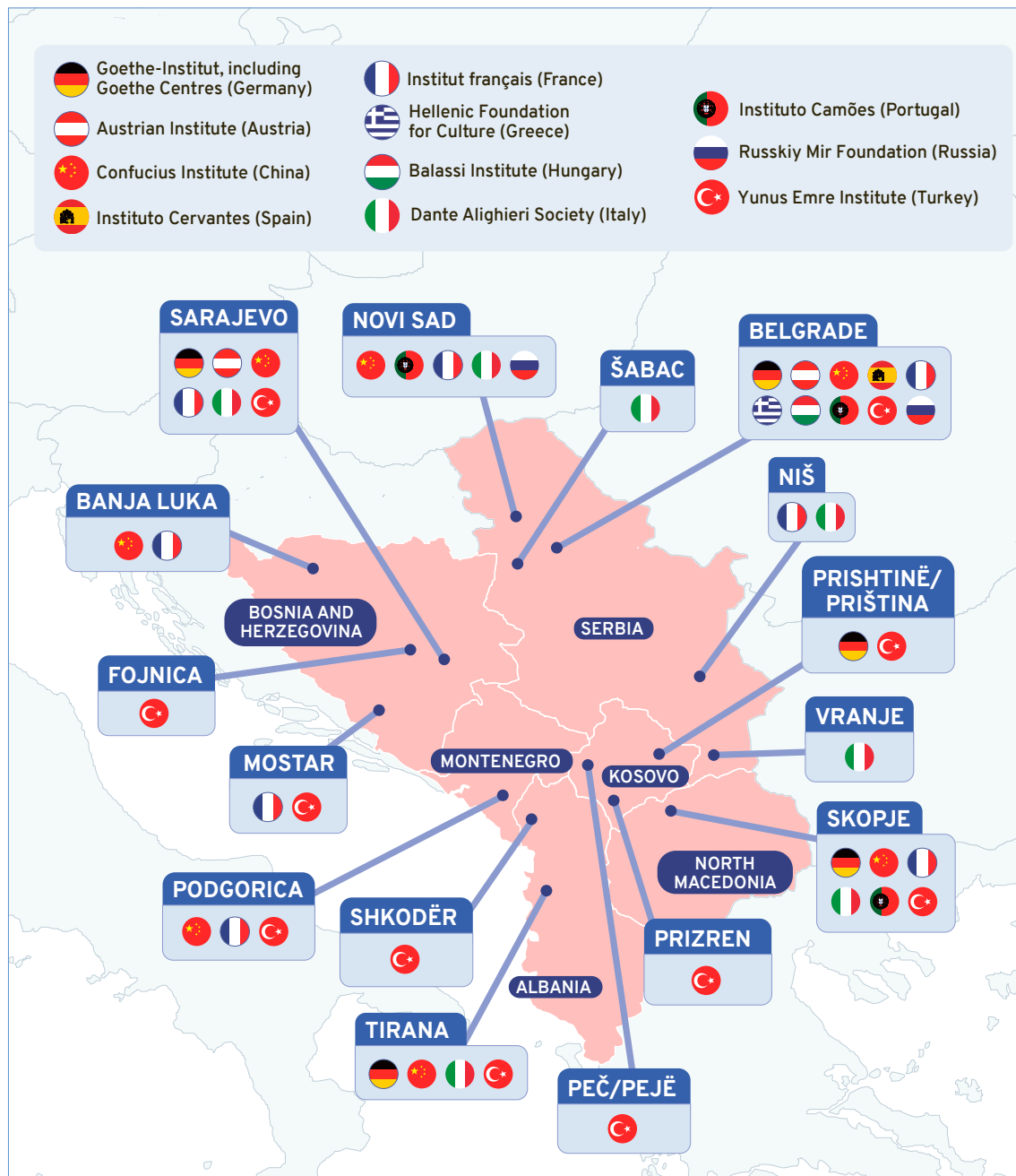
<sup>108</sup> Ana Krstinovska, “China in the Western Balkans”, *op. cit.*

<sup>109</sup> See for example: Pekka Vántinen, “Finland shuts down Confucius Institute amid censorship, espionage accusations”, *EURACTIV*, 21 June 2022; *Deutsche Welle*, “Germany to restrict influence of China's Confucius Institute”, 29 June 2023.

<sup>110</sup> Naima Green-Riley, “The State Department labeled China's Confucius programs a bad influence on U.S. students. What's the story?”, Analysis, *The Washington Post*, 25 August 2020.

set up in the region, including exchanges of professors, free Mandarin courses and scholarships<sup>111</sup>.

**MAP 2. Distribution of foreign public institutions for the promotion of languages and cultures in the Western Balkans**



<sup>111</sup> See for example: Tijana Cvjetičanin, *Chinese Influence in Bosnia and Herzegovina*, CEPA, 2022; Bledar Feta, *Chinese Influence in Albania*, CEPA, 2022; Milica Kovačević, *Chinese Influence in Montenegro*, CEPA, 2022; Ana Krstinovska, *Chinese Influence in North Macedonia*, CEPA, 2022.

For its part, **Russia, with its vast popular support among Slavic populations, maintains a noisy influence there at little expense**, in particular by mobilising the proponents of Russian President Vladimir Putin’s virilist ideology. Sports clubs and veterans’ groups are used to promote Moscow’s political agenda in exchange for its support<sup>112</sup>. The Ruskiy Mir Foundation, which aims to disseminate Russian language and culture, is virtually absent from the region, with only two of its centres in Serbia (see Map 2).

Russia does, however, have a major advantage with regard to the region that a country like China cannot, of course, claim: religion. This is a particularly important factor in the regional context, given that around 60% of the region’s inhabitants claim to be religious – twice the continental average<sup>113</sup> – and religious institutions are among the most trusted institutions alongside (if not ahead of) the army and police<sup>114</sup>.

#### – Religion

**United by the same confession, local Orthodox institutions have therefore become the primary multipliers of Kremlin propaganda** in countries where they have a majority or significant proportion of worshippers (Serbia [85%<sup>115</sup>], Montenegro [72%<sup>116</sup>], North Macedonia [46.1%<sup>117</sup>] and Bosnia and Herzegovina’s *Republika Srpska* entity [31% of the country’s total population<sup>118</sup>]). While they traditionally share and extend to the region the Russian cultural war against the basic principles of the European project,

with the protection of the rights of women and of LGBTQ+ people at the forefront, their discourse has gradually moved away from purely religious issues to support Vladimir Putin’s policies more generally, and in particular the invasion of Ukraine – described by Patriarch Kirill of Moscow as a “metaphysical battle” against the “forces of evil”<sup>119</sup> embodied by pride marches – with the support of a great deal of Russian funding, often bestowed by oligarchs<sup>120</sup>. Their influence on public opinion is strengthened not only by the high proportion of Orthodox Christians in the region, but also by their proximity to far-right nationalist circles<sup>121</sup>, as the national churches have been intimately involved in nation-building, putting pressure on governments and their stance on the war in Ukraine.

The crude dissemination of the Russian regime’s propaganda by the Serbian Orthodox Church in particular, which has a strong hold over Orthodox Christians in the region, has encouraged the emergence of small radical groups attracting mainly young people and encouraging their members to enlist, notably with the Russian forces in Ukraine. Whilst the national authorities had in recent years focused their law enforcement and intelligence operations on the radicalisation of Muslim populations and preventing their departure for Iraq and Syria, it now seems that the number of fighters from the Western Balkans who have left for Ukraine is approaching those who have joined the ranks of the Islamic State or other jihadist terrorist groups. While the latter are thought to number around a thousand<sup>122</sup>, it

<sup>112</sup> James McBride, *Russia’s Influence in the Balkans*, Backgrounder, Council on Foreign Relations, 2022.

<sup>113</sup> Dimitar Bechev & Ahmet Erdi Öztürk, *Competing over Islam: Turkey, Saudi Arabia, and Iran in the Balkans*, Middle East Institute, 2022.

<sup>114</sup> International Republican Institute, *2022 Western Balkans Regional Survey | January-February 2022*, 2022.

<sup>115</sup> Website of the US Department of State, Office of international religious freedom, *2022 Report on International Religious Freedom: Serbia*.

<sup>116</sup> Website of the US Department of State, Office of international religious freedom, *2022 Report on International Religious Freedom: Montenegro*.

<sup>117</sup> Website of the US Department of State, Office of international religious freedom, *2022 Report on International Religious Freedom: North Macedonia*.

<sup>118</sup> Website of the US Department of State, Office of international religious freedom, *2022 Report on International Religious Freedom: Bosnia and Herzegovina*.

<sup>119</sup> Jean-Benoît Poulle, “Le sacrifice comme arme de guerre”, Archives et Discours, *Le Grand Continent*, 28 September 2022 (in French).

<sup>120</sup> Thibault Spirlet, “How US Evangelicals and the Russian Orthodox Church have helped fuel anti-LGBTQ+ agenda in Europe”, *Euronews*, 24 July 2023.

<sup>121</sup> Alasdair Sandford, “EuroPride: Nationalists join church protest in Belgrade against Europe’s largest LGBT event”, *Euronews*, 29 August 2022.

<sup>122</sup> Jelena Beslin & Marija Ignjatijević, *Balkan foreign fighters: from Syria to Ukraine*, Brief Issue, European Union Institute for Security Studies, 2017.

was estimated in 2017 that around 300 Serb individuals living in the north of Kosovo had travelled to the Ukrainian separatist-held territories, supported financially by a Russian organisation<sup>123</sup>, alongside other fighters from Serbia, Bosnia and Herzegovina and Montenegro – although it is more difficult to estimate the number. Some fifty Serbs are currently being prosecuted or have been convicted for fighting alongside the Russian army, while new arrivals of Serbian fighters have reportedly been observed since the invasion of 24 February 2022, some of them responding to calls from the Russian paramilitary Wagner Group despite the ban for Serbian citizens, reiterated by the country's government, to engage in conflict abroad<sup>124</sup>.

**The religious approach has proved to be the one favoured by powers spanning the Arabian Peninsula to Iran to break into the region, which includes the four European countries with the highest proportion of Muslims, after Azerbaijan and Turkey: Kosovo (95.6%<sup>125</sup>), Albania (57%<sup>126</sup>), Bosnia and Herzegovina (51%<sup>127</sup>) and North Macedonia (32.2%<sup>128</sup>).**

While Turkey, particularly since the AKP came to power, naturally uses Islam as a soft power tool, its influence primarily derives from the actions carried out by the TİKA, which are generally aimed at renovating and building mosques and Koranic schools in the region. Nevertheless, it is interesting to note that the Presidency of Religious Affairs (*Diyanet İşleri Başkanlığı*, or simply *Diyanet*), a rising institution within the Turkish regime, tends to operate increasingly outside Turkey, and particularly in the Balkans, to improve the country's image among local Muslim pop-

ulations, beyond Turkish communities. The *Diyanet* has opened a branch in North Macedonia and Albania, and is entirely funding the construction in Tirana of the largest mosque in the Balkans outside Turkey, to the tune of €40 million<sup>129</sup>.

In Bosnia and Herzegovina, and above all in *Federacija*, Turkey, Saudi Arabia and Iran are all funding most of the renovations and (re)construction of religious buildings, which often bear the architectural stamp of the country that financed them. However, the arrival of these last two players in the region, and particularly in Bosnia and Herzegovina, is more the result of a combination of circumstances than a genuine strategy of influence. It dates back to the Bosnian War, between 1992 and 1995, when several Muslim countries came to the aid of the Bosniak community, which is predominantly Muslim. Subsequently, at a time when a large number of places of worship had been destroyed and, at the same time, population movements had altered the distribution of Muslims across the Bosnian territory, giving rise to the need for new places of worship, the support of the wealthiest of these countries, distinguished from Bosnia and Herzegovina's Western partners by their experience in this field, became long-lasting.

Saudi Arabia, which was already assisting the Bosniak community to the tune of several hundred million euros, Iran and Turkey won its trust by supplying arms, volunteers and advisers for its intelligence services throughout the war<sup>130</sup>. **While Iran gradually withdrew due to a lack of means, Saudi Arabia continued to use its financial resources to establish a more lasting pres-**

123 Lulzim Peci & Agon Demjaha, *Regional Perspectives on Radicalisation and Violent Extremism in the Balkans*, CONNEKT Regional Report, European Institute of the Mediterranean, 2021.

124 Zoran Glavonjić and Sonja Gočanin, "Guerre en Ukraine : des volontaires serbes rejoignent toujours les rangs russes", *Courrier des Balkans*, 18 January 2023 (in French).

125 Website of the US Department of State, Office of international religious freedom, *2022 Report on International Religious Freedom: Kosovo*.

126 Website of the US Department of State, Office of international religious freedom, *2022 Report on International Religious Freedom: Albania*.

127 Website of the US Department of State, Office of international religious freedom, *2022 Report on International Religious Freedom: Bosnia and Herzegovina*.

128 Website of the US Department of State, Office of international religious freedom, *2022 Report on International Religious Freedom: North Macedonia*.

129 Gentiola Madhi, "Our Brother Erdogan" – From Official to Personal Relations of Political Leaders of Albania and Kosovo with the Turkish President", in Ioannis Armakolas, Barbora Chrzová, Petr Čermák & Anja Grabovac (eds.), *Western Balkans at the Crossroads: Ways Forward in Analyzing External Actors' Influence*, op. cit., pp. 153-167.

130 Dimitar Bechev & Ahmet Erdi Öztürk, *Competing over Islam: Turkey, Saudi Arabia, and Iran in the Balkans*, op. cit.



ence in the local landscape, albeit without making any tangible political gains. By targeting all the Bosniak communities in the region, including those in Sandžak, a historic region of the Ottoman Empire now divided between Serbia and Montenegro, it has attempted to spread its more rigorist vision of Islam, without any real success. Apart from a cultural centre offering free Arabic courses in Sarajevo<sup>131</sup>, there are few other achievements to be credited to Saudi Arabia, whose influence remains, once again, limited.

Beyond places of worship, the religious soft power promoted by certain countries has not taken root in a region where the practice of Islam has its own codes. Despite the hate speech widely magnified by all the religious authorities, the region is making progress, albeit timidly, in terms of gender equality and the rights of LGBTQ+ people. For example, thanks to a protective legislative framework allowing civil unions for same-sex couples, Montenegro ranks 12<sup>th</sup> in Europe for the protection of LGBTQ+ rights, and all the countries in the region are ahead of seven EU Member States<sup>132</sup>. In Serbia, the Belgrade Europride in 2022 and the Pride March in 2023 broke attendance records<sup>133</sup>.

The powers that wish to maintain these rival narratives in the region nevertheless have a final tool at their disposal, which is undoubtedly crucial because it can exaggerate the visibility of otherwise trivial facts: information.

## I RIVAL NARRATIVES AMPLIFIED BY MANIPULATED INFORMATION

The powers that wish to assert their interests in the Western Balkans find new information and communication technologies an ideal vehicle. The promotion and instrumentalisation of their rhetoric, “aimed at promoting their narrative and discrediting [the] model, [the] values and [the] strength”<sup>134</sup> of the EU, have become the primary tools of their influence in the Western Balkans, as they are unable to surpass the EU in practice.

**Disinformation and information manipulation, designed to exert a lasting influence on local people’s perception of reality, allow them to fuel anger and tension that could destabilise the region.** With this in mind, control of the media itself has become essential to ensure that rival narratives are controlled and disseminated. The media outlets are all the more influential given that the region’s citizens suffer from poor media and information literacy<sup>135</sup>, and are therefore more susceptible to disinformation, and that media freedom, freedom of expression and pluralism are still largely hampered, particularly in Albania, Serbia and *Republika Srpska*<sup>136</sup> (see Graph 1).

<sup>131</sup> Hans von der Brelie, “Foreign influence taking over Bosnia and Herzegovina?”, *Euronews*, 26 April 2018.

<sup>132</sup> ILGA-Europe, *Rainbow Europe Map and Index 2023*.

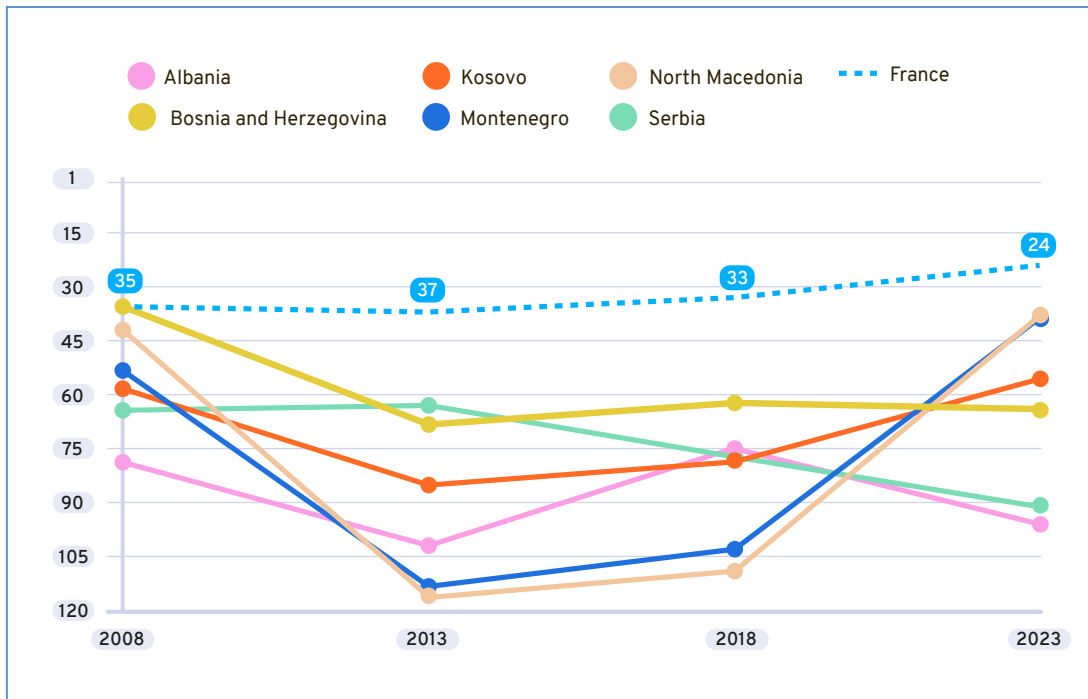
<sup>133</sup> Belgrade Pride, *Largest Belgrade Pride ever successfully held, next one scheduled for September 7, 2024*, Belgrade, 11 September 2023.

<sup>134</sup> French National Assembly, Committee of Inquiry into political, economic and financial interference by foreign powers – States, organisations, companies, interest groups, private individuals – aimed at influencing or corrupting French opinion leaders, decision-makers or political parties, *Compte-rendu de l’audition, à huis clos*, de M. Nicolas Lerner, directeur général de la sécurité intérieure (DGSI, ministère de l’intérieur), *op. cit.*

<sup>135</sup> Open Society Institute – Sofia, *Finland Tops the New Media Literacy Index 2023, Countries Close to the War in Ukraine Remain Among the Most Vulnerable to Disinformation*, 2023.

<sup>136</sup> Reporters Without Borders, “Europe - Central Asia / Press freedom in Europe overshadowed by the war in Ukraine”, *World Press Freedom Index 2023*, 3 May 2023.

**GRAPH 1.** Ranking of the Western Balkan countries in the Reporters Without Borders World Press Freedom Index, 2008-2023<sup>137</sup>



Russia has mastered the art of manipulating information to win the favour of public opinion in the Western Balkans and thus influence the direction of their governments. Not only does it benefit from strong opinion multipliers (see above), led by the Serbian media, but it also has a noisy media presence. In Serbia, where the State is the only player in the media landscape to own television channels, radio stations and print and online press titles all at the same time, and where public television channels together with pro-government private television channels accounted for almost two-thirds of viewers in 2018, Aleksandar Vučić therefore has a free hand to steer public opinion in the direction he wants<sup>138</sup>.

Pursuing its strategy of exploiting its relations with Russia to consolidate its pro-Russian voter base and put pressure on the EU, using disinformation and sensationalism<sup>139</sup>, the

Serbian media are full of praise for Russia and Vladimir Putin, who regularly tops the list of the most popular foreign leaders in Serbia<sup>140</sup>. Conversely, they constantly demonise the EU and the United States, portraying them as enemies of Serbian interests. A year after Russia launched its invasion of Ukraine, a majority of Serbs felt that the invasion was justified, while almost three quarters were opposed to the imposition of sanctions. Russia remained the country’s most reliable partner for more than 42% of Serbs, while 25.8% mentioned the EU and less than 3% the United States<sup>141</sup>.

Not content with these powerful opinion leaders, Russia has also taken advantage of the situation to invest in the local audiovisual landscape and social networks since its annexation of Crimea and the start of the war in Donbass, supported by a large number of bots capable of disseminating its messages

<sup>137</sup> Reporters Without Borders: *World Press Freedom Index 2008*; *World Press Freedom Index 2013*; *World Press Freedom Index 2018*; *World Press Freedom Index 2023*.

<sup>138</sup> Dragana Bajić & Wouter Zweers, *Declining media freedom and biased reporting on foreign actors in Serbia. Prospects for an enhanced EU approach*, Clingendael/European Policy Centre-CEP, Clingendael Report, 2020.

<sup>139</sup> *Ibid.*

<sup>140</sup> Jamie Dettmer, “Serbia’s Vučić faces a tough choice”, *op. cit.*

<sup>141</sup> Westminster Foundation for Democracy, *Opinion poll report: socio-political views of Serbian citizens in 2023*, Serbia, 2023.

on a large scale<sup>142</sup>. Taking advantage of Serbia's central position in the region and its cultural, media and political influence with its neighbours (Bosnia and Herzegovina, Montenegro and North Macedonia in particular), the Russian government-funded news agency *Sputnik* set up a Serbian version in February 2015, in order to spread the Kremlin's propaganda throughout the Western Balkans. Its compatriot *RT* (formerly *Russia Today*) followed suit in November 2022 by launching its website in Serbia, even though both media outlets had had their broadcasting activities suspended in the EU as of March 2022, as they were considered to be "under the permanent direct or indirect control of the authorities of the Russian Federation and [...] essential and instrumental in bringing forward and supporting the military aggression against Ukraine, and for the destabilisation of its neighbouring countries"<sup>143</sup>.

This is true not only in Bosnia and Herzegovina – at least in *Republika Srpska*<sup>144</sup> – but also among ethnic Macedonians in North Macedonia, where Russia, although almost absent, is spreading its anti-Western narrative through its Serbian proxies and its own media. Given their relative linguistic proximity, the Serbian media outlets easily penetrate the Macedonian sphere, as do Bulgarian media outlets, which are also open to Russian propaganda. In addition, there are online news sites that disseminate this narrative, such as *infomax.mk* – initially associated with the VMRO-DPMNE before breaking away, finding the party to be insufficiently critical of Western powers –, *markukule.mk* or *antropol.mk* – which is close to Levica. While 51% of the country's population consider that the invasion of Ukraine "is a reaction to NATO provocations that Moscow could not ignore", 61% of ethnic Macedonians share

this view, compared with just 28% of ethnic Albanians<sup>145</sup>.

This last example also shows that each country in the region cannot be treated as a monolith, and, despite the media hype in Serbia in particular, it is also important to bear in mind that public opinion there is very divided. Although the pro-Russian and pro-Putin far-right may be vocal and highly structured – thanks in part to the support of the Kremlin –, it is ultimately not very unifying, and the level of support for Russia's aggression against Ukraine is more or less equivalent to that for Ukraine's sovereignty.

**Although not quite as vocal, Turkey is also making its voice heard in the region through the meticulous communication of its two international propaganda arms.** The Turkish government press agency, *Anadolu Ajansı*, described by the Secretariat-General of the French Interministerial Committee for the Prevention of Crime and Radicalisation as a propaganda organ<sup>146</sup>, and the government-owned Turkish Radio and Television Corporation (*Türkiye Radyo Televizyon Kurumu*, TRT), have gradually established themselves in the Western Balkans in recent years and now publish in all the main languages of the region.

With the main objectives of promoting Turkey's image, the actions of its government and its world view, and denouncing the Islamophobia allegedly institutionalised within Western societies, in 2022 TRT even launched a digital platform for the region, TRT Balkans, based in Skopje and Sarajevo<sup>147</sup>. In the same year, an official trip by Recep Tayyip Erdoğan to Tirana led to the signature of a cooperation agreement between Anadolu Agency and the Albanian Telegraphic Agency (*Agjencia Telegrafike*

142 Željka Vucinić, "Out of Control: Bots and Trolls Multiply in Montenegro", Balkan Investigative Reporting Network, *Balkan Insight*, 5 December 2022.

143 Council of the European Union, *EU imposes sanctions on state-owned outlets RT/Russia Today and Sputnik's broadcasting in the EU*, Press release, 2 March 2022.

144 Interview with Tanja Topić, "Ce que la guerre en Ukraine a changé • En Bosnie-Herzégovine, les tentations séparatistes freinées", *Courrier des Balkans*, 15 June 2022 (in French).

145 Anamarija Velinovska, *Europe in crisis. The impact on the public opinion in North Macedonia*, Public opinion analysis No.02/2023, Konrad Adenauer Foundation in the Republic of North Macedonia/Institute for Democracy "Societas Civilis" – Skopje, 2023.

146 *Bianet*, "France to Turkey's state-run news agency: A propaganda body spreading fake news", 28 April 2021.

147 *TRT World*, "Türkiye's public broadcaster TRT launches Balkans edition", 15 June 2022.

*Shqiptare*), the country's government news agency<sup>148</sup>.

Unlike Russia and Turkey, **China is cultivating a more discreet image in the region**, and while it is expanding its media presence there, it still relies heavily on the image of an economic and technological power that is sensitive to the region's development (and Serbian interests) that has been portrayed by the local media for the decade or so.

China thus enjoys a generally good image in the Western Balkans, promoted primarily by its own media outlets (led by *China Radio International*) but particularly amplified by Serbian pro-government media outlets – which often include articles directly from the Chinese media<sup>149</sup>. In 2022, 84% of citizens in Serbia, 79% of citizens in Montenegro, 60% in North Macedonia and 52% in Bosnia and Herzegovina had a positive image of China – in Bosnia and Herzegovina, however, while 79% of Serbs shared this view, only 40% of Bosniaks and 42% of Croats did<sup>150</sup>.

The Covid-19 pandemic also marked a major turning point in the media coverage of China in Serbia, its main partner, bringing its image into competition with that of the EU for the first time. There were two main reasons for this: effective Chinese vaccine and mask diplomacy, and opportunism on the part of the Serbian authorities, who were once again seeking to use the relationship between the two countries to put pressure on the EU. After a year of the pandemic and media hype extolling the close relations enjoyed between China and Serbia and smearing the EU's lack of solidarity, almost 70% of the surveyed citizens of Serbia believed that China had provided the most important humanitarian and financial support to Serbia in dealing with the pandemic, while less than 10% cited the EU<sup>151</sup>.

Faced with the initial shortage of medical supplies, and then of vaccines, the EU's inward-looking reflex brutally shattered the rhetoric of European solidarity, described by Aleksandar Vučić as a “*fairy tale on paper*” (see above). Despite massive support for the region from the start of the pandemic and, moreover, for its entire health system for decades, this went unnoticed due to a lack of communication.

**When it comes to promoting its model, principles and geopolitical credibility, and to fighting against disinformation, the EU is sorely lacking in strategic communication.** Unable to communicate effectively, it relegates its action to the discretion of restricted circles of insiders, obscured and discredited by the well-honed communication strategies of rival powers which often know how to interact better with the region.

Its economic and strategic presence alone, while incomparable, is not enough to counterbalance the consequences of the length of the accession process and the feeling of contempt it has engendered in the Western Balkans, stemming not only from strategic errors on the part of the EU but also from the unpredictable demands of certain Member States, that local media outlets are quick to exploit.

It struggles to give visibility to its funding, which is dependent on the governments that receive it, and to justify the accompanying conditions – particularly environmental and social conditions – when countries such as China do not demand them, thus losing ground with public opinion in the face of rival powers seeking to impose their model. Today, although a large majority of the region's citizens remain firmly convinced of the need for their country to join the EU, more than half of Serbs would reject such membership<sup>152</sup> while only 49% of Macedonians see it as a good

<sup>148</sup> Mümin Altaş & Ferdi Türkten, “Turkey, Albania sign 7 pacts to strengthen bilateral ties”, *Anadolu Agency*, 17 January 2022.

<sup>149</sup> Stefan Vladisavljev, “Big Brother: Serbia's Media Are Creating Nation of China Lovers”, Opinion, Balkan Investigative Reporting Network, *Balkan Insight*, 26 March 2021.

<sup>150</sup> Irvin Pekmez, “Republika Srpska – China's foothold in Bosnia”, in Plamen Tonchev & Mirela Petkova (eds.), *Secret Charm. China's hidden influence in Southeast Europe*, Policy Paper, Friedrich-Naumann-Stiftung für die Freiheit, 2022, pp. 12-14.

<sup>151</sup> Emina Muminović, “Serbian media on the assistance in the pandemic: China the savior, EU left Serbia stranded”, *European Western Balkans*, 8 April 2021.

<sup>152</sup> Jamie Dettmer, “Serbia's Vučić faces a tough choice”, *op. cit.*

thing, compared with 69% a year earlier<sup>153</sup>.

In the case of North Macedonia, for example, the constitutional amendment previously demanded by Greece to change its name and the one currently discussed under Bulgarian influence are obstacles that must be overcome in addition to the criteria for EU membership, to the detriment of the process of profound transformation of the country that should be the primary objective of membership, and in the face of an isolated public opinion that feels its identity is under threat.

The EU suffers precisely from the individual positions of some of its Member States, which blur the European narrative by pursuing their own, sometimes contradictory, national interests. While Austria, Italy and Slovenia are long-standing supporters of the region's integration into the EU, other Member States have sought to use this process to pursue their own interests, which run counter to those of the EU.

First and foremost are the five countries that refuse to recognise Kosovo's independence, as they do not wish to legitimise the pro-autonomy or pro-independence aspirations of part of their population. Among them, Greece can also put pressure on its neighbours to obtain concessions from them (North Macedonia, Albania<sup>154</sup>), just as it can join its European partners in defending their rapid accession to the EU<sup>155</sup>.

The same applies to other neighbours. In 2020, the Bulgarian Prime Minister at the time, Boyko Borisov, faced with major anti-corruption demonstrations, vetoed the Macedonian candidacy in order to divert media attention. Croatia, for its part, regularly intervenes in support of the Croats of Bosnia and Herzegovina, even if it means hijacking the latter's accession process to

promote the political representation of its ethno-nationalist leaders.

However, **the greatest source of the EU's incoherent narrative is now in Hungary.** Isolated by his illiberal and pro-Russian positions within the Union, Prime Minister Viktor Orbán is looking for allies among future EU members, on whom he may have to rely if his isolation becomes permanent. He is therefore personally helping to strengthen the positions of local leaders who are sensitive to Russian propaganda, while at the same time weakening the credibility of the EU's democratic model.

Following the conviction of Nikola Gruevski, former President of the Macedonian Government, by his country's courts, he found refuge in Hungary, where he was granted refugee status within a week<sup>156</sup>. He shares with Viktor Orbán his opposition to the Prespa Agreement, which paved the way to NATO and the EU for North Macedonia.

Although Hungary has recognised Kosovo since its declaration of independence, it has now sided with Serbia, voting against its membership of the Council of Europe and announcing that it intends to do the same with its application to join the EU<sup>157</sup>. Hungary and Serbia have since announced, at the first meeting of their Strategic Cooperation Council, that they will set up a joint company for natural gas trading, mostly from Russia<sup>158</sup>.

In Bosnia and Herzegovina, Viktor Orbán is doing his utmost to defend and even strengthen the grip of his protégé, Milorad Dodik. He is keeping *Republika Srpska's* economy afloat with loans, and opposes any imposition of EU sanctions against it<sup>159</sup>. In January 2024, Hungary will take the lead of EUFOR Althea for the first time and increase its participation, at a time when its ally is

<sup>153</sup> Srdjan Stojanov, "Половина граѓани не веруваат во ЕУ, другата половина е веќе таму", *Radio Free Europe/Radio Liberty*, 9 February 2023.

<sup>154</sup> Alice Taylor, "Athens threatens Albania's EU path again over elections arrest", *EURACTIV*, 15 May 2023.

<sup>155</sup> Chiara Swaton, "Austria unveils 'Friends of the Western Balkans' group, wants speedy EU accession", *EURACTIV*, 22 June 2023.

<sup>156</sup> Ludovic Lepeltier-Kutasi, "Nikola Gruevski a obtenu le statut de réfugié en Hongrie", *Le Courrier d'Europe centrale*, 20 November 2018 (in French).

<sup>157</sup> Alice Taylor, "Serbia says Hungary will vote against Kosovo EU, CoE membership", *EURACTIV*, 12 January 2023.

<sup>158</sup> Milica Stojanović, "Serbia and Hungary Set Up Joint Natural Gas Company", *Balkan Investigative Reporting Network, Balkan Insight*, 20 June 2023.

<sup>159</sup> *Balkan Insight*, "Hungary Announces Millions More in Grants for Bosnia's Republika Srpska", *Balkan Investigative Reporting Network*, 26 May 2023.

posing the most serious threats to the unity of Bosnia and Herzegovina.

This image of division, to which the EU is unable to respond with a single message defended collegially by its Member States, is widely exploited by the local media, further undermining the appeal of the European project. Unlike the United States, where Congress funds *Radio Free Europe/Radio Liberty*, or the United Kingdom, where the *British Broadcasting Corporation* (BBC) launched a Serbian version in 2018, the EU has no local media presence, which means it has no capacity to respond to the disinformation spread by its rivals.

Furthermore, as media freedom is not a priority in the accession process, the European funds allocated to it are relatively low. This deprives the region of the opportunity to develop independent media outlets, free from any form of political influence. At most, the EU is investing in media and information literacy through various projects, conferences and social media campaigns, but with little funding and no clearly defined strategy.

## • Conclusion

No external influence is predominant in the Western Balkans today. Despite the attention the subject is attracting – and rightly so –, global powers are not confronting each other more there, nor more successfully or violently, than in other regions of the world, such as the Caucasus or the Sahel, or even within the EU. If they are present and visible in the region, it stems above all from the sovereign choice of the States that make it up: by strategic orientation, by defence or balancing of their interests, or by political affinities.

However, the European Union – by definition, since all of those States are seeking to join it – has a clear head start. The region's political integration with the EU may be slow, but the EU and the Western Balkans have never been so strategically aligned or so economically close. The more Euro-Atlantic integration progresses, the more rival influences recede: this is unmistakable in Albania, Kosovo, North Macedonia and Montenegro.

Nevertheless, the European message is not getting through as easily in Serbia and Bosnia and Herzegovina, where the local ethno-nationalist leaders are using their links with Russia and China – two authoritarian regimes that reject an international order they consider to be contrary to their interests – to obtain concessions from the EU and the United States. Quick to seize on this, the two continental states are using and abusing it to disseminate their rival rhetoric and maintain or even gain influence.

This represents a serious enough threat to continental security for the EU to act to defend its interests, which are directly linked to the fate of the Western Balkans. Whether it claims to be geopolitical or not, it has no choice but to recognise that its key economic role calls for strategic and political investment, backed up by appropriate communication. It is only by assuming its status as a power and our shared belonging to the European project that it will recover the visibility and credibility needed to successfully transform the region, which has always been the traditional role of the enlargement process.

Instead of mechanically seeking to counter the powers that exert influence in the region, the latter being neither on their list of priorities nor as sensitive to external influences as has sometimes been portrayed, it will be necessary to build bridges with the powers that support the EU integration of the region and that have the economic, political and/or media capital to do so. Similarly, the EU must now prepare itself for the arrival of powers that are beginning to set their sights on the region, with India in the lead.

Finally, this strategic and political investment will inevitably require a credible and sincere enlargement policy that is genuinely based on the merits of each candidate country, with the fundamental aim of achieving a democratic transformation of these countries. The path of gradual accession, which makes it possible to move away from the binary logic between candidate country and Member State, and which seems to be the one taken up by the EU institutions since the European Council meeting on 23 June 2022, could be the key to regaining the visibility of the

enlargement process among the citizens of the region<sup>160</sup>.

On this path, in addition to external influences, the EU must not lose sight of the many challenges facing the Western Balkans, to which a response must also be found, from demographic decline<sup>161</sup> to the unfinished processes of remembrance and reconciliation, in order to ensure their full integration into the European Union and thus move forward together towards its deepening.

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**160** Lukáš Macek, *Advocating gradual accession to the European Union*, Policy paper, Paris, Jacques Delors Institute, 2023.

**161** Isabelle Marchais, *Depopulation in the Western Balkans*, Policy Brief, Paris, Jacques Delors Institute, 2023.

## • Appendix – Interviews

### I MISSION TO NORTH MACEDONIA, MONTENEGRO & SERBIA – 3-13 APRIL 2023

**H.E. BAUMGARTNER Cyrille**, Ambassador Extraordinary and Plenipotentiary of the French Republic to the Republic of North Macedonia

**BURAZER Nikola**, Programme Director, Centre for Contemporary Politics

**CVIJIĆ Srđan**, President of the International Advisory Committee, Belgrade Centre for Security Policy (BCSP)

**ĐUROVIĆ Gordana**, President, Montenegrin Pan-European Union

**HERCIGONJA Srđan**, Senior Researcher, BCSP

**KACARSKA Simonida**, Director, European Policy Institute

**KOLOZOVA Katerina**, Director, Institute in Social Sciences and Humanities–Skopje

**LORENZ Dirk**, Head of the Political Section, Delegation of the European Union to Serbia

**MILOSAVLJEVIĆ Miodrag**, Program Director, Open Society Foundation Serbia

**PITIĆ Goran**, Professor, Metropolitan University – FEFA

**PRESSET Paul-Henri**, Head of the Information, Communication and Media Section, Delegation of the European Union to Serbia

**SERRI Riccardo**, Deputy Head, Delegation of the European Union to Montenegro

**SHIPINKAROVSKI Petar**, Member of the Cabinet of the State Secretary of the Ministry of Foreign Affairs of North Macedonia

**SOŠIĆ Marko**, Policy Analyst, Institut Alternativa

**SUBOTIĆ Strahinja**, Programme Manager and Senior Researcher, European Policy Centre/Centar za evropske politike

**ŠTERIĆ Luka**, Researcher, BCSP

**TADIĆ MIJOVIĆ Milka**, President, Center for Investigative Journalism of Montenegro

**TOSEVSKI Filip**, State Secretary of the Ministry of Foreign Affairs of North Macedonia

**UHRÈS Johann**, First Counsellor, Embassy of France in Montenegro

**ULJAREVIĆ Daliborka**, Executive Director, Centre for Civic Education

**VLADISAVLJEV Stefan**, Program Coordinator, Foundation BFPE for a Responsible Society

**VUČKOVIĆ Nataša**, Secretary General, Center for Democracy Foundation

**VUKSANOVIĆ Vuk**, Senior Researcher, BCSP

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18 rue de Londres 75009 Paris, France • [www.delorsinstitute.eu](http://www.delorsinstitute.eu)

T +33 (0)1 44 58 97 97 • [info@delorsinstitute.eu](mailto:info@delorsinstitute.eu)



This project is funded by the European Commission's Citizens, Equality, Rights and Values Programme (CERV) under project number 101104850 – IJD 2024.