



## Chinese Influence in the Eastern Trio and the Western Balkans: Strategic Fragmentation in the EU's Enlargement Countries

Author

Matteo Bonomi

Contributors

Marko Todorović, Strahinja Subotić, Nona Mikhalidze, Nicoletta Pirozzi, Luca Cinciripini, Miloš Pavković, Julian Plottka, Kai Ole Vorberg, Vladislav Kulminski, Tatiana Nistorica, Vadim Pistrinciuc, Giorgi Khishtovani, Guga Tsukhishvili, Irakli Sirbiladze, Irena Rajcinovska Pandeva, Ivan Damjanovski, Nenad Markovic,



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## Executive summary

### Chinese Influence in the Eastern Trio and the Western Balkans: Strategic Fragmentation in the EU's Enlargement Countries

China's growing presence in Eastern and Southeastern Europe has become a source of strategic concern for the EU, especially as global power dynamics shift under the weight of increasing U.S.-China rivalry. Once seen primarily as an economic partner, China is now viewed by many in Europe as a systemic rival, particularly due to its trade practices, ambiguous geopolitical positions – such as its stance on Russia's invasion of Ukraine – and its model of state-led development. Against this backdrop, the report examines China's influence in nine EU (potential) candidate countries: the Eastern Trio (Georgia, Moldova, Ukraine) and the Western Balkans (Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia), assessing the scope and nature of Chinese involvement.

Drawing on the **InvigoratEU External Influence Index** – an empirically grounded tool for systematically measuring and comparing the political, economic, and societal dimensions of external influence – the report tracks the evolution of China's presence between 2013 and 2023. The findings show that China's approach is flexible, pragmatic, and highly context-specific, rather than driven by a unified regional strategy. It leverages bilateralism, exploiting institutional fragmentation and offering alternatives to the EU's liberal-democratic model through infrastructure investments, soft power, and diplomatic engagement, often in ways that align with the interests of local elites.

Serbia emerges as China's most deeply embedded partner, showing significant political alignment, high levels of economic engagement – including strategic FDI and a free trade agreement – and a growing societal footprint. In contrast, countries like Kosovo and Moldova exhibit minimal Chinese presence, largely due to non-recognition in the case of Kosovo and a sharp political and institutional reorientation toward the EU in Moldova. Georgia and Ukraine present complex cases: both show increasing political and economic influence by China, but with varying degrees of political openness and strategic caution. Among the Western Balkans, Albania and North Macedonia maintain limited but pragmatic relations with China, focusing primarily on trade and infrastructure, while Bosnia and Herzegovina and Montenegro have shown higher levels of economic engagement, often accompanied by governance and debt-related concerns.

On the economic front, Chinese engagement increased after the 2008 financial crisis and the launch of the Belt and Road Initiative in 2013. However, one of the report's main findings is that China's actual economic influence in the two regions remains limited and highly uneven. Meaningful economic presence is largely concentrated in a few countries such as Serbia (and Georgia and Ukraine to a lesser extent), while in most other countries it is marginal or symbolic. Despite high-profile announcements and investment promises, economic cooperation remains limited. This weak economic footprint undermines China's ability to leverage economic engagement into long-term strategic influence. At the same time, concerns persist regarding issues such as debt sustainability, corruption risks, and the involvement of Chinese actors in sensitive sectors, including telecommunications.

In societal terms, China's approach has been primarily top-down, driven by Confucius Institutes, educational exchanges, and symbolic partnerships rather than bottom-up societal

engagement. In terms of public perception, though, attitudes towards China are generally tepid to positive in most countries, especially where economic cooperation has been more visible. However, trust in China has significantly deteriorated in Ukraine, largely due to its perceived ambiguity regarding Russia's invasion.

Overall, Chinese influence in the region is growing but remains fragmented. It tends to concentrate in environments where governance is weak, institutions are fragile, and EU prospects are either uncertain or distant. China acts less as a direct challenger to Brussels or Washington and more as a strategic opportunist – offering investment and diplomatic support without requiring democratic reform. This approach allows Beijing to reinforce the power of domestic elites in hybrid regimes while promoting its own development model.

To effectively respond to these challenges, the report recommends that the EU adopts a more strategic, targeted, and country-specific approach. The EU should strengthen political engagement beyond enlargement rhetoric through concrete diplomatic, institutional, and financial commitments tailored to the individual needs and contexts of partner countries. Enhancing internal coherence and strategic coordination among EU member states and institutions is crucial to align policies on China-related issues and integrate them into broader enlargement strategies. Moreover, the EU should strengthen its support for transparency and resilience in partner countries by promoting anti-corruption measures, independent media, and the vibrant civil society, thereby reducing the attractiveness of opaque and conditional Chinese offers.

## Author



**Matteo Bonomi**  
Senior Fellow  
Istituto Affari Internazionali (IAI)

## Contributors

**Marko Todorović** Researcher, European Policy Centre (CEP)

**Strahinja Subotić**, Programme Manager and Senior Researcher, European Policy Centre (CEP)

**Nona Mikhaliidze**, Senior Fellow, Istituto Affari Internazionali (IAI)

**Nicoletta Pirozzi**, Head of Programme on European Union and Institutional Relations Manager, Istituto Affari Internazionali (IAI)

**Luca Cinciripini**, Researcher, Istituto Affari Internazionali (IAI)

**Miloš Pavković**, Researcher, European Policy Centre (CEP)

**Julian Plottka**, Scientific Senior Project Manager, Institut für Europäische Politik (IEP)

**Kai Ole Vorberg**, Institut für Europäische Politik (IEP)

**Vladislav Kulminski**, Executive Director, Institute for Strategic Initiatives (IPIS)

**Tatiana Nistorica**, Expert and Former State Secretary, Institute for Strategic Initiatives (IPIS)

**Vadim Pistrinciuc**, Expert and Former Deputy Prime Minister of Moldova for Reintegration, Institute for Strategic Initiatives (IPIS)

**Giorgi Khishtovani**, Research Director, PMC Research Center

**Guga Tsukhishvili**, Affiliated Researcher, PMC Research Center

**Irakli Sirbiladze**, Affiliated Researcher, PMC Research Center

**Irena Rajcinovska Pandeva**, Professor, Faculty of Law, SS. Cyril and Methodius University

**Ivan Damjanovski**, Professor, Faculty of Law, SS. Cyril and Methodius University

**Nenad Markovic**, Professor, Faculty of Law, SS. Cyril and Methodius University

## Approved by:

**Funda Tekin**, Director Institute for European Politics, Scientific Lead, InvigoratEU

**Michael Kaeding**, Professor for European Integration and European Union Politics at the Department of Political Science at the University of Duisburg-Essen, Germany, Project Coordinator, InvigoratEU

## About InvigoratEU

InvigoratEU is a Horizon Europe-funded project, coordinated by the EU-Chair at the University of Duisburg-Essen (UDE) together with the Institut für Europäische Politik (IEP) in Berlin. The project, with a duration of 3 years from January 2024 until December 2026, examines how the EU can structure its future relations with its Eastern neighbours and the countries of the Western Balkans. The consortium has received around three million euros for this endeavour.

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## 1 Introduction

As China expands its global footprint, European policymakers are viewing with mounting concern at China's growing presence in Europe, including in its Eastern and Southeastern regions. While the United States remains the world's dominant power in military, technological and economic terms,<sup>1</sup> the intensifying strategic rivalry between Washington and Beijing is reshaping the global order, moving away from the post-Cold War liberal international system towards a more multipolar and competitive landscape.<sup>2</sup> China's increasing weight in trade, investments, technology and diplomacy, is hence being felt more strongly across the European continent, raising urgent questions about strategic autonomy, economic dependency, and the coherence of the transatlantic alliance. For Europeans, this is not merely a matter of external competition, as it also directly affects their internal cohesion and long-term strategic interests.

Against this backdrop, the European perceptions of China have evolved significantly over the past decades. In the 1990s and early 2000s, China was largely seen as an economic partner, especially as European companies sought to benefit from China's rapid growth and integration into global markets. By 2006, it also had started to be viewed as a trade challenge, as concerns grew over market access, intellectual property rights, and the impact of Chinese exports on European industries.<sup>3</sup> In 2019, the EU formally designated China as a "systemic rival" in its strategic outlook,<sup>4</sup> while still acknowledging areas of cooperation and competition, signalling that a more strategic and cautious approach toward China had emerged across Europe.

Political tensions have further intensified during the COVID-19 pandemic and following Russia's large-scale invasion of Ukraine in 2022, fuelling distrust over China's lack of transparency in managing the health emergency<sup>5</sup> and its ambiguous stance on the war – characterized by rhetorical neutrality but *de facto* alignment with Moscow.<sup>6</sup> These developments, along with repeated EU complaints about human rights violations in China<sup>7</sup> and growing concerns over peace and stability in the Taiwan Strait,<sup>8</sup> have contributed to a shift in perception: China is

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<sup>1</sup> Latham / Adnan Moeini: *Unraveling China's Grand Strategy: Its Aim is to Erode U.S. Global Hegemony, Not Seek World Domination*, 26 February 2025, available at: <https://peacediplomacy.org/2025/02/26/unraveling-chinas-grand-strategy-its-aim-is-to-erode-u-s-global-hegemony-not-seek-world-domination/> (last accessed: 09.06.2025).

<sup>2</sup> Nurullah Gur / Serif Dilek: "US-China Economic Rivalry and the Reshoring of Global Supply Chains", in: *The Chinese Journal of International Politics*, Vol. 16, No. 1 (Spring 2023), p. 61-83.

<sup>3</sup> European Commission: *EU – China: Closer Partners, Growing Responsibilities*, 24 October 2006, available at: <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2006:0631:FIN:EN:PDF> (last accessed: 09.06.2025).

<sup>4</sup> European Commission: *EU-China – A Strategic Outlook*, 12 March 2019, available at: <https://commission.europa.eu/system/files/2019-03/communication-eu-china-a-strategic-outlook.pdf> (last accessed: 09.06.2025).

<sup>5</sup> Ettore Greco / Federica Marcon / Irene Paviotti: *Crisis and Geopolitical Reordering. Covid-19 from a Comparative Perspective*, in REGROUP Research Papers, No. 1, May 2023, available at: <https://www.iai.it/it/publicazioni/c09/crisis-and-geopolitical-reordering-covid-19-comparative-perspective> (last accessed: 23.06.2025).

<sup>6</sup> Yifan Ding / Alice Ekman: *China-Europe Relations, Two Years After Russia Invaded Ukraine*, 11 March 2024, available at: <https://carnegieendowment.org/posts/2024/03/china-europe-relations-two-years-after-russia-invaded-ukraine?lang=en> (last accessed: 09.06.2025).

<sup>7</sup> European External Action Service: *China – 39th Human Rights Dialogue with the European Union* took place in Chongqing, June 2024, available at: [https://www.eeas.europa.eu/eeas/china-39th-human-rights-dialogue-european-union-took-place-chongqing\\_en](https://www.eeas.europa.eu/eeas/china-39th-human-rights-dialogue-european-union-took-place-chongqing_en) (last accessed: 23.06.2025).

<sup>8</sup> Nicola Casarini: *China-Taiwan Relations and the EU: How European Soft Power Could Help Reduce Cross-Strait Tensions*, in IAI Commentaries 24|21, May 2024, available at: <https://www.iai.it/en/publicazioni/c05/china-taiwan-relations-and-eu-how-european-soft-power-could-help-reduce-cross> (last accessed: 23.06.2025).

increasingly viewed not only as an economic competitor but also as a geopolitical actor whose values and strategic priorities diverge sharply from those of Europe – hence its designation as a “systemic rival.”<sup>9</sup>

A key driver of the EU’s reorientation has been the growing securitization of economic relations, reflecting heightened concerns about unfair competition, trade dependencies, and the risks posed by Chinese technologies to intelligence and sensitive data security.<sup>10</sup> Furthermore, the chip crunch during the COVID-19 pandemic exposed significant vulnerabilities in global supply chains, particularly in critical sectors such as the semiconductor industry.<sup>11</sup> Reflecting this shift, European Commission President Ursula von der Leyen in 2023 called for “de-risking” from China, underlining the need to reduce strategic dependencies without severing ties entirely.<sup>12</sup>

Given this evolving landscape, this report analyses China’s ambitions and influence in nine countries located in Europe’s Eastern and Southeastern “peripheries”: the so-called EU Eastern Trio (Georgia, Moldova, and Ukraine) and the six Western Balkan countries (Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia). Despite their differences, these nine countries share a common strategic importance for the EU: they are all on the path toward EU membership. In response to Russia’s 2022 invasion of Ukraine, in fact, the European Council extended accession prospects to Ukraine, Moldova, and Georgia, while renewing its engagement with the Western Balkans. This revived momentum after more than a decade of enlargement fatigue since Croatia’s accession in 2013,<sup>13</sup> represents a key component of EU responses to growing instability and insecurity in the EU’s surroundings, underscoring the EU’s recognition that enlargement is not only a political process, but a security imperative.

Indeed, as potential EU members, the political and economic orientation of these countries is not only crucial for shaping the Union’s future but also for reinforcing its present structure and enhancing the resilience of its broader system of regional integration.<sup>14</sup> As EU candidates, these countries maintain close political, institutional, and economic ties with the EU through Association Agreements and the Stabilisation and Association Process, benefiting from varying degrees of access to the Single Market,<sup>15</sup> while already participating in the coordination of a

<sup>9</sup> Andreea Brinza / Una Aleksandra Bērziņa-Čerenkova / Philippe Le Corre / John Seaman / Richard Turcsányi / Stefan Vladisavljev: *EU-China Relations: De-risking or De-coupling – The Future of the EU Strategy Towards China*, 26 March 2024, available at: [https://www.europarl.europa.eu/Reg-DATA/etudes/STUD/2024/754446/EXPO\\_STU\(2024\)754446\\_EN.pdf](https://www.europarl.europa.eu/Reg-DATA/etudes/STUD/2024/754446/EXPO_STU(2024)754446_EN.pdf) (last accessed: 09.06.2025).

<sup>10</sup> Francesca Ghiretti: *Chinese Investments and the Economic Security Turn in Europe*. By Bristol University Press 2025.

<sup>11</sup> Aurelio Insisa: Italy’s De-Risking Efforts in the Semiconductor Industry, the European Chips Act and Sino-American Geo-Economic Competition, in: IAI Papers 25|05, 2025, available at: <https://www.iai.it/it/pubblicazioni/c03/italys-de-risking-efforts-semiconductor-industry> (last accessed: 23.06.2025).

<sup>12</sup> European Commission: Speech by President von der Leyen on EU-China Relations, 30 March 2023, available at: [https://ec.europa.eu/commission/presscorner/detail/en/speech\\_23\\_2063](https://ec.europa.eu/commission/presscorner/detail/en/speech_23_2063) (last accessed: 23.06.2025).

<sup>13</sup> Matteo Bonomi and Irene Rusconi: *From EU ‘Enlargement Fatigue’ to ‘Enlargement Enthusiasm’?*, Österreichische Gesellschaft für Europapolitik (ÖGfE), October 2023, available at: <https://www.oegfe.at/policy-briefs/from-eu-enlargement-fatigue-to-enlargement-enthusiasm/> (last accessed: 23.06.2025).

<sup>14</sup> Frank Schimmelfennig / Thomas Winzen: “Regional Differentiation: Beyond the EU Member States”, in: Frank Schimmelfennig / Thomas Winzen: *Ever Looser Union? Differentiated European Integration*, Oxford, 2020.

<sup>15</sup> The six Western Balkan states – except Kosovo – are official candidate countries, while Kosovo is considered a “potential candidate country” under EU terminology. These countries have participated in the EU’s Stabilization and

number of EU policies short of full membership.<sup>16</sup> A clearer understanding of China's role in these regions is thus essential for formulating a coherent European response that protects shared interests, strengthens resilience, and upholds the credibility and sustainability of the EU enlargement process.<sup>17</sup>

This policy report draws on the **InvigoratEU External Influence Index**,<sup>18</sup> an original empirical tool developed for this research to systematically measure and compare third actors' influence across political, economic, and societal dimensions. The index maps the external influence of Russia, China and Türkiye in the two regions. Three policy reports provide a detailed assessment of the respective external influence of the global actors.<sup>19</sup> By combining qualitative assessments with a structured quantification of external leverage, this report identifies key patterns and variations in Chinese engagement across the two regions. Through such a comprehensive approach, the report aims to formulate actionable policy recommendations to strengthen the EU's resilience and enhance its capacity to engage with China's evolving global strategies.

## 2 Methodological Framework

This report applies a structured and multidimensional framework to assess China's geopolitical influence in the nine EU candidate (and potential candidate) countries across the EU Eastern Trio and the Western Balkans – specifically Georgia, Moldova, and Ukraine as well as Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia. The analysis integrates both qualitative and quantitative methods to capture the complexity of external influence dynamics. At the core of this analytical approach is the *InvigoratEU External Influence Index*, an empirically grounded instrument developed within the research project “*InvigoratEU – How to reform the EU's enlargement and neighbourhood policy for a resilient Europe*” funded by the European Commission's Horizon Europe programme.<sup>20</sup> Designed to systematically measure and compare the political, economic, and societal dimensions of external influence of China, Russia and Türkiye, the Index allows for both cross-country comparisons and comparisons over time. Developed collaboratively by the European Policy Centre (CEP) and Istituto Affari Internazionali (IAI), with support from partners including the Institut für Europäische

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Association Process since 1999 – the main policy framework for stabilizing the Western Balkans and guiding them toward membership in the aftermath of the Yugoslav wars – and have each concluded individual Stabilisation and Association Agreements with the EU, including the establishment of Free Trade Areas. The countries of the Eastern Trio have signed Association Agreements with the EU, which include Deep and Comprehensive Free Trade Agreements. In 2022, they also applied for EU membership. The EU has since decided to open accession negotiations with Ukraine and Moldova, while the process with Georgia remains stalled. See European Commission: *Enlargement Policy*, available at: [https://enlargement.ec.europa.eu/enlargement-policy\\_en](https://enlargement.ec.europa.eu/enlargement-policy_en) (last accessed: 09.06.2025).

<sup>16</sup> Maria Giulia Amadio Viceré / Matteo Bonomi: External differentiation as a strategy of system maintenance: EU enlargement towards the Western Balkans, in: *West European Politics*, 48(5), 2024, pp. 1159-1185.

<sup>17</sup> Hannah Brandt / Funda Tekin / Pol Bargañés / Ramūnas Vilpišauskas / Luisa Waschke: *Growing Resilient Together: Reshaping EU-Enlargement and Neighbourhood Policy in a Geopolitical Era*, July 2024, available at: [https://invigorat.eu/wp-content/uploads/2024/07/InvigoratEU\\_deliverables\\_D3.2\\_public\\_final-ueberarbeitet.pdf](https://invigorat.eu/wp-content/uploads/2024/07/InvigoratEU_deliverables_D3.2_public_final-ueberarbeitet.pdf) (last accessed: 09.06.2025).

<sup>18</sup> The InvigoratEU External Influence Index has been developed within the InvigoratEU project to assess and compare the geopolitical influence of Russia, China, and Türkiye in EU candidate countries.

<sup>19</sup> On Russia see Marko Todorović: *Long Policy Report on Russia's Ambitions and Leverage*, May 2025, available at: [https://invigorat.eu/wp-content/uploads/2025/05/InvigoratEU\\_D6.1\\_Long-Policy-Report-on-Russias-ambitions-and-leverage\\_public.pdf](https://invigorat.eu/wp-content/uploads/2025/05/InvigoratEU_D6.1_Long-Policy-Report-on-Russias-ambitions-and-leverage_public.pdf) (last accessed: 09.06.2025); On Türkiye forthcoming.

<sup>20</sup> See *InvigoratEU: Invigorating Enlargement and Neighbourhood Policy for a Resilient Europe* project's website at <https://invigorat.eu> (last accessed: 09.06.2025).

Politik (IEP), PMC Research Center, Ss. Cyril and Methodius University (UKIM), and the Institute for Strategic Initiatives (IPIS), the Index expands upon CEP's earlier pilot project in Serbia.<sup>21</sup>

The conceptual foundations of the Index are grounded in established theoretical frameworks that examine how one country exerts influence over another. Primary references are the concepts of “linkages” and “leverage”, introduced by Levitsky and Way,<sup>22</sup> which distinguish between structural interdependencies – economic, societal, informational, and institutional connections that embed countries within international networks – and the capacity of external powers to exert pressure or induce strategic shifts. These two dimensions are interrelated: deeper linkages often enhance the potential for leverage. In parallel, the Index integrates the concept of “soft power”, as theorized by Joseph Nye,<sup>23</sup> highlighting the role of non-coercive influence through culture, values, and narratives. As also illustrated by our e report, this is particularly relevant in the case of China, which, in recent years, has invested heavily in shaping its global image and swaying foreign audiences through a broad range of tools, including cultural institute, media outreach, academic exchanges.<sup>24</sup>

To operationalize these theoretical insights, the Index adopts a pragmatic structure that draws on the simplified typology proposed by Bieber and Tzifakis,<sup>25</sup> who categorize external influence into three broad domains: political-security, economic, and societal. This tripartite model enhances analytical clarity and comparability, reflecting how external actors like China engage through a diverse but coordinated toolkit – ranging from multilateral and bilateral cooperation, investment and developmental projects to cultural outreach and scientific cooperation – to shape strategic orientations in the target states.

Chinese influence is assessed by the index across these three dimensions. The **political-security dimension** includes indicators such as participation in bilateral and multilateral forums, interference in domestic political processes, military cooperation, and foreign policy alignment. The **economic dimension** evaluates trade flows, investment patterns, strategic ownership of assets, energy dependence and debt exposure, capturing the extent to which economic interdependence translates into geostrategic leverage. The **societal dimension** focuses on people-to-people connectivity, cultural diplomacy, media influence, and public opinion, including metrics such as visa policies, student exchanges, diaspora activity, and presence of Confucius Institutes. Each indicator is scored on a 0 to 3 scale, reflecting the depth of engagement. These scores are then aggregated and rescaled to a 0 to 10 range for easier comparison across countries and time periods, without distorting the underlying proportional values. The full list of indicators and their weightings is detailed in *Annex 1* of the study.

The research design follows a mixed-methods approach, combining desk research, structured index scoring, and semi-structured interviews. The desk research involved a comprehensive review of academic publications, policy reports, official statistics, and media sources. The

<sup>21</sup> Strahinja Subotić/Miloš Janjić: Serbia at the Crossroads between the West and the East, European Policy Centre (CEP), 2020, available at <https://cep.org.rs/en/publications/serbia-at-the-crossroads-between-the-west-and-the-east/> (last accessed: 09.06.2025).

<sup>22</sup> Steven Levitsky/Lucan A. Way: Linkage versus leverage. Rethinking the international dimension of regime change, in: *Comparative Politics*, 38 (4), 2006, pp. 379–400.

<sup>23</sup> Joseph Nye: *Soft Power. The Means to Success in World Politics*, Public Affairs 2004.

<sup>24</sup> Jean-Marc F. Blanchard / Lu Fujia: “Thinking Hard About Soft Power: A Review and Critique of the Literature on China and Soft Power” in: *Asian Perspective*, vol. 36, no. 4, 2012, pp. 565–89.

<sup>25</sup> Florian Bieber/Nikolaos Tzifakis (eds), *The Western Balkans in the World. Linkages and Relations with Non-Western Countries*, Routledge 2020.



scoring process drew on publicly available data, supplemented by expert assessments and cross-referencing with regional studies to ensure consistency and reliability. Interviews with policymakers, analysts, and scholars from the target countries enriched the analysis with contextual nuance and contemporary insights.

The temporal range of the analysis spans for a decade, with data points for the years 2013, 2018, and 2023. The selection of 2013 as the baseline year is methodologically significant, since it marks the last full year before major geopolitical shifts in Europe, such as the Russian illegal annexation of Crimea, and coincides with critical moments in EU enlargement, including the beginning of Serbia's accession negotiations, and the signing of Association Agreements with Ukraine, Moldova, and Georgia. Croatia's entry into the EU in 2013 also defined the broader context of European integration. Although the years were not selected based on developments in the influencing countries, the choice of 2013 as the starting point is particularly meaningful in the case of China, due to Xi Jinping's assumption of leadership in 2012, which marked the beginning of a new phase in China's domestic and international trajectory. The year 2018 provides a midpoint for comparative analysis, while 2023 offers the most recent comprehensive data snapshot, especially in the economic domain.

Although the index calculations focus on these three benchmark years, developments from adjacent periods are taken into account wherever relevant. This historical perspective enables the study to trace evolving patterns of influence, assess the impact of major geopolitical events, and offer a dynamic understanding of how China's presence in the region has changed over time. In doing so, the methodology provides a robust foundation for informed policy responses by EU institutions and member states concerned with external influence in the Union's immediate neighbourhood.

Finally, it is important to clarify that the study does not rely on fieldwork or primary source analysis conducted within China. This is a conscious and deliberate methodological choice. The aim is not to investigate the internal processes through which China formulates its foreign policy, but rather to understand how its geopolitical ambitions are projected outward and how they materialize in specific external contexts. By focusing on how Chinese influence is exercised and perceived in EU candidate countries, the research highlights the concrete mechanisms, intensity, and effects of this influence where it actively takes shape, on the receiving end. This approach allows for a more grounded analysis of China's external impact, beyond official narratives or policy intentions.<sup>26</sup>

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<sup>26</sup> This external, comparative, perspective is particularly relevant in the case of China, given the absence of official documents outlining Beijing's specific strategy toward the EU enlargement countries, including those in the Western Balkans. Indeed, while these countries are occasionally mentioned, they occupy a secondary, less prominent position in key policy documents such as various China's White Papers, elaborating Beijing foreign policy. For instance, they are occasionally mentioned in BRI documents as part of a broader Central and Eastern Europe framework, not as a standalone focus. See State Council Information Office of the People's Republic of China: The Belt and Road Initiative: A Key Pillar of the Global Community of Shared Future, October 2023, available at: [http://english.scio.gov.cn/whitepapers/2023-10/10/content\\_116735061.htm](http://english.scio.gov.cn/whitepapers/2023-10/10/content_116735061.htm) (last accessed: 23.06.2025).

### 3 China's Ambitions in the Eastern Trio and the Western Balkans

China's geopolitical ambitions in Europe have evolved significantly since Xi Jinping's rise to power in 2012, shifting from cautious integration into the liberal international order toward a more assertive global strategy.<sup>27</sup> Initially seeking economic expansion and regime stability without openly challenging the West, China's posture hardened in the aftermath of the 2008 Global Financial Crisis, as vulnerabilities in Western-led institutions opened new opportunities for influence.<sup>28</sup> A key component of this strategy has been the Belt and Road Initiative, launched in 2013 to strengthen trade and infrastructure links across Asia, Europe, and Africa, along with its digital extension, the Digital Silk Road,<sup>29</sup> introduced in 2015 to promote cooperation in telecommunications, e-commerce, and data systems. Both serve not only economic but also strategic purposes, expanding China's influence and technological footprint in Europe and beyond.

At a time when access to the US market became increasingly tight, Europe has since acquired renewed strategic significance for Beijing – not only as an export market for Chinese industrial overcapacity and reduce dependence on the U.S.,<sup>30</sup> but also as a space where China can promote a state-centric development model and deepen political and technological interdependencies.<sup>31</sup> In particular, China's engagement with the EU enlargement countries in the Western Balkans and Eastern Trio reflects a broader ambition to challenge Western dominance, promote multipolarity, and secure long-term strategic advantages.

From a realist perspective,<sup>32</sup> China's growing presence in these regions serves to maximise relative power and ensure strategic positioning in an evolving global order. The Belt and Road Initiative and the Digital Silk Road exemplify this logic, offering investments for infrastructural and connectivity projects, with few political conditions. In areas where governance is fragmented and EU integration remains incomplete, such as the Western Balkans and Eastern Trio, China has leveraged its economic statecraft to cement its influence in the region, avoiding direct confrontation with Washington or Brussels. Projects in transport, energy, and telecommunications are not purely commercial but reflect efforts to secure critical nodes in Eurasian connectivity and establish footholds that can serve broader geopolitical interests.<sup>33</sup>

<sup>27</sup> Irene Dong: *China as Future Leading Superpower*, 1 June 2023, available at: [https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=4598344](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4598344) (last accessed: 09.06.2025).

<sup>28</sup> Ettore Greco/ Federica Marcon / Irene Paviotti: *Crisis and Geopolitical Reordering. Covid-19 from a Comparative Perspective*, in REGROUP Research Papers, No. 1, May 2023, available at: <https://www.iai.it/it/publicazioni/c09/crisis-and-geopolitical-reordering-covid-19-comparative-perspective> (last accessed: 23.06.2025).

<sup>29</sup> Council on Foreign Relations (CFR): *China's Digital Silk Road Initiative: The Tech Arm of the Belt and Road Initiative*, 2023, available at: <https://www.cfr.org/china-digital-silk-road/> (last accessed: 23.06.2025).

<sup>30</sup> Esther Goreichy / Jacob Gunter / Grzegorz Stec: *China's Overcapacity and the EU + German China Policy under Merz + EU-China Trade*, Mercator Institute for China Studies (MERICS), 16 May 2025, available at: <https://merics.org/en/merics-briefs/chinas-overcapacity-and-eu-german-china-policy-under-merz-eu-china-trade> (last accessed: 23.06.2025).

<sup>31</sup> Andrew Latham / Arta Moeini: *Unraveling China's Grand Strategy: Its Aim is to Erode U.S. Global Hegemony, Not Seek World Domination*, 26 February 2025, available at: <https://peacediplomacy.org/2025/02/26/unraveling-chinas-grand-strategy-its-aim-is-to-erode-u-s-global-hegemony-not-seek-world-domination/> (last accessed: 09.06.2025).

<sup>32</sup> Jonathan Kirshner: "Chapter 6. Classical Realism and the Rise of China" in "An Unwritten Future: Realism and Uncertainty in World Politics", Princeton: Princeton University Press, 2022, pp. 180-213.

<sup>33</sup> Xavier Richet: *Chinese Presence in the Western Balkans: Competition, Complementarity, Cooperation*, in: *Economic Studies journal* 6, pp. 3-25.



From a constructivist perspective,<sup>34</sup> China's ideational narratives – such as state-led capitalism, political non-interference, and respect of national sovereignty – resonate with countries disillusioned with EU conditionality. By offering an alternative model of development, China appeals to post-socialist states where democratic institutions are weak, market economies have been underperforming and where the EU's governance agenda is often perceived as intrusive.<sup>35</sup> Instruments like the Digital Silk Road and the 14+1 cooperation format<sup>36</sup> foster spaces where the lines between economic, political, and technological influence blur, enabling China to project norms that subtly challenge the liberal-democratic foundations of the EU's external action.

Nevertheless, theoretical insights from both realism and constructivism converge around the view that China's overarching ambition is to expand its global influence by creating alternative poles of economic and political gravity. This ambition manifests itself through a range of interrelated sub-ambitions that structure China's behaviour across these regions:

- **Expanding geo-economic leverage through connectivity:** Through Belt and Road and Digital Silk Road linked initiatives, China offers financing for infrastructure in countries with limited public investment capacity. These projects lock in strategic relationships and deepen dependencies, especially in critical sectors such as telecommunications.
- **Exploiting institutional asymmetries and fragmentation:** By engaging bilaterally and avoiding EU-level oversight, China capitalises on the regulatory grey zones in EU neighbouring states. Its selective engagement with local elites and institutions enables influence without triggering collective resistance.
- **Promoting alternative governance norms:** China's development model gains traction in contexts where EU demands for rule of law and reform are met with fatigue or resistance. The Chinese approach, often delivered through opaque loan agreements and the involvement of state-owned enterprises, appeals precisely because it is seen as pragmatic and non-intrusive.

One of the defining features of this strategy is the increasing interconnection between economic engagement and security concerns. Particularly in enlargement countries – where institutional oversight is weaker than within the EU – Chinese investments in critical infrastructure raise alarms about strategic vulnerabilities. The blurred lines between state and private entities, coupled with legal instruments like China's 2017 National Intelligence Law,<sup>37</sup> have

<sup>34</sup> John Ikenberry: "The Rise of China and the Future of the West: Can the Liberal System Survive?" in *Foreign Affairs*, vol. 87, no. 1, 2008, pp. 23-37.

<sup>35</sup> Matteo Bonomi / Dušan Reljić: "The EU and the Western Balkans: So Near and Yet So Far. Why the Region Needs Fast-Track Socio-Economic Convergence with the EU", in *SWP Comments*, 53, 2017, available at: [https://www.swp-berlin.org/publications/products/comments/2017C53\\_rlc\\_Bonomi.pdf](https://www.swp-berlin.org/publications/products/comments/2017C53_rlc_Bonomi.pdf) (last accessed: 09.06.2025).

<sup>36</sup> The 14+1 cooperation format refers to a diplomatic and economic framework initiated by China in 2012 to strengthen ties with Central and Eastern European countries as part of the broader Belt and Road Initiative. Originally launched as 16+1, it expanded to 17+1 with Greece's inclusion in 2019. However, Lithuania withdrew in 2021, followed by Estonia and Latvia in 2022, amid rising concerns over China's influence and strained EU-China relations, reducing the group to 14+1. The remaining participating countries include: EU members – Bulgaria, Croatia, Czech Republic, Hungary, Poland, Romania, Slovakia, and Slovenia; Non-EU states – Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, and Serbia.

<sup>37</sup> Jeremy Daum: *What the National Intelligence Law Says, and Why It Doesn't Matter*, China Law Translate, 22 February 2024, available at: <https://www.chinalawtranslate.com/what-the-national-intelligence-law-says-and-why-it-doesnt-matter/> (last accessed: 23.06.2025).

heightened fears that seemingly neutral economic activities may carry implications for national and regional security.

While the EU has developed tools such as the FDI Screening Regulation,<sup>38</sup> the Foreign Subsidies Regulation,<sup>39</sup> and the Anti-Coercion Instrument<sup>40</sup> to mitigate risks linked to China's integration with the EU market, these instruments are unevenly implemented across Member States and largely confined to the EU internal market. Enlargement countries, though institutionally associated with the EU, remain outside its regulatory perimeter, creating a permissive environment for Chinese economic footprint.<sup>41</sup> This regulatory gap not only exposes the EU's external vulnerabilities but also weakens its ability to project strategic preferences beyond its borders.

At the same time, China's ability to navigate these institutional asymmetries depends crucially on the agency of local actors. In both the Eastern Trio and the Western Balkans, domestic political elites and economic stakeholders play a central role in mediating Chinese influence – either by embracing it as a tool of domestic development, using it for regime consolidation, or selectively resisting it. These dynamics underscore the limits of applying a strictly regional lens. Despite the use of frameworks like 14+1 or the corridor logic of the Belt and Road Initiative, China does not treat the Eastern Trio or the Western Balkans as cohesive blocs. Its engagement is tailored to each national context, shaped not only by structural conditions but also by how local actors respond to Chinese incentives. For these reasons, granular, country-specific analysis becomes essential.

This includes not only tracking the presence of Chinese actors and projects, but also verifying their actual impact – whether political, economic, or societal – within national systems. In this respect, our InvigoratEU External Influence Index offers a valuable framework to capture these differences and assess the depth and evolution of China's presence across Europe's eastern and south-eastern periphery.

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<sup>38</sup> European Union: Regulation (EU) 2019/452 of the European Parliament and of the Council of 19 March 2019 establishing a framework for the screening of foreign direct investments into the Union, *Official Journal of the European Union*, L 79I, 21 March 2019, available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R0452> (last accessed: 23.06.2025).

<sup>39</sup> European Union: Regulation (EU) 2022/2560 of the European Parliament and of the Council of 14 December 2022 on foreign subsidies distorting the internal market, *Official Journal of the European Union*, L 330, 23 December 2022, available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32022R2560> (last accessed: 23.06.2025).

<sup>40</sup> European Union: Regulation (EU) 2023/2675 of the European Parliament and of the Council of 22 November 2023 on the protection of the Union and its Member States from economic coercion by third countries, *Official Journal of the European Union*, L 2023/2675, 7 December 2023, available at: [https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=OJ:L\\_202302675](https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=OJ:L_202302675) (last accessed: 23.06.2025).

<sup>41</sup> Dragan Tilev: *Global Changes, European Economic Security and the New Proposal for Revision of the FDI Screening Regulation*, Institute for Democracy "Societas Civilis" – Skopje (IDSCS), May 2024, available at: <https://idscs.org.mk/wp-content/uploads/2024/05/Global-changes-European-economic-security-and-the-new-proposal-for-revision-of-the-FDI-screening-Regulation.pdf> (last accessed: 23.06.2025).

## 4 Dimensions of Chinese Influence

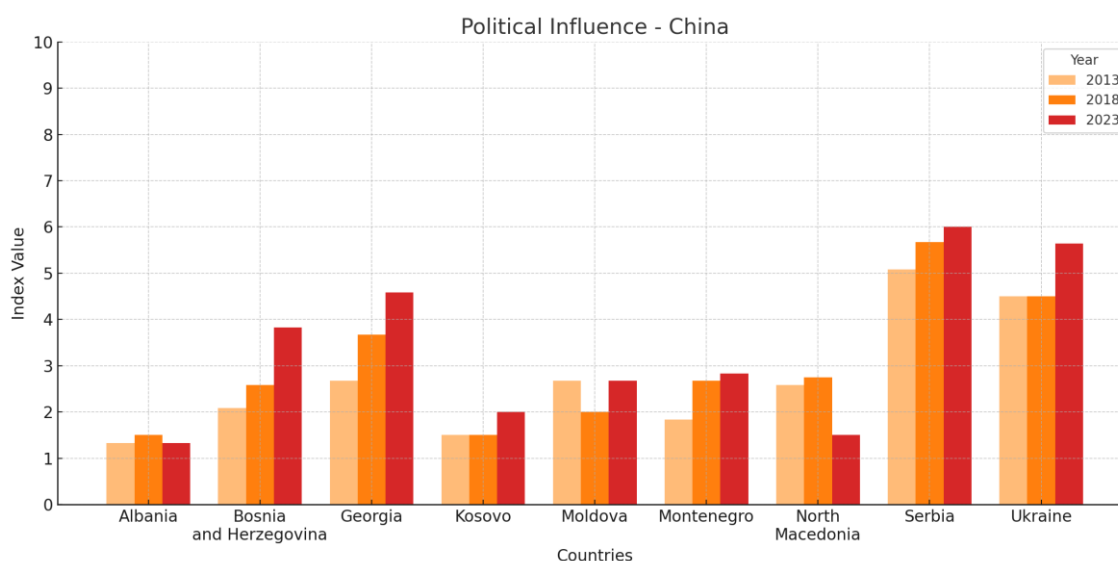
Drawing on data from the InvigoratEU External Influence Index, this section analyses the scope and nature of Chinese engagement in studied regions, highlighting that this engagement cannot be reduced to a single logic but must be understood as a flexible and evolving strategy of influence, co-constructed with local actors. The following sections explore three core dimensions of Chinese influence – political, economic, and societal – showing how China translates its strategic objectives into practice through political cooperation, economic leverage, cultural diplomacy, and soft power projection.

### Political Influence: Evolution, Patterns, and the Political Sub-Index

Over the last decade, Chinese political influence in the Eastern Trio and the Western Balkans has shown different trajectories and considerable variations across countries and sectors, ranging from deeply embedded and growing political ties to marginal or symbolic cooperation, and even non-recognition in the case of Kosovo. While China primarily uses economic means – mostly notably the Belt and Road Initiative – its political influence has also been on the rise, unevenly distributed across the four key domains captured by the index: bilateral and multilateral cooperation, internal political engagement, military relations, and foreign policy and key national interest alignment or disruption.

As shown in Figure 1, China's political influence has increased in six of the nine countries examined, though along different trajectories. Between 2013 and 2018, most countries experienced a phase of expansion, with China emerging as a notable political actor across the two regions. From 2019 to 2023, however, these trends diverged: Albania and North Macedonia saw a decline in influence following earlier growth, while China's political presence continued to deepen in Bosnia and Herzegovina, Georgia, Serbia, and Ukraine. Kosovo remained on the margins, largely due to China's non-recognition of its independence.

**Figure 1: The Political Influence Sub-Index Over Time (2013–2023)**



In terms of **multilateral and bilateral cooperation**, all countries except Kosovo have participated in the Belt and Road Initiative, having signed individual Memoranda of Understanding and various bilateral agreements with China. Beijing's engagement in the Western Balkans is comparatively more institutionalized, as these countries have joined the 14+1 cooperation format (formerly 17+1), a multilateral initiative launched in 2012 to foster economic collaboration with EU member states in Central and Eastern Europe, five Western Balkan countries, and was later expanded to include Greece. A similar pattern is evident also in China's outreach to Ukraine, Georgia, and Moldova, where all countries have been seeking Chinese capital through Belt and Road's projects, but they do not participate in China's led multilateral formats such as 14+1. This divergence reflects the region's more complex geopolitical landscape, marked by tensions with Russia and more intricate pathways toward Euro-Atlantic integration. In this context, China has adopted a more nuanced and politically cautious approach, focusing primarily on the economic dimension of its engagement.

Among all countries, Serbia stands out as China's most engaged partner in **bilateral cooperation**. Serbia was the first, among the countries analysed, to sign a Strategic Partnership Agreement with China in 2009, upgraded to a Comprehensive Strategic Partnership in 2016,<sup>42</sup> and culminating in a Free Trade Agreement in 2023.<sup>43</sup> High-level visits, numerous intergovernmental agreements, and close ties between the Chinese Communist Party (CCP) and the Serbian Progressive Party (SNS) underscore the strategic nature of this relationship. Ukraine and Georgia have also signed Strategic Partnership Agreements with China – in 2011<sup>44</sup> and 2023,<sup>45</sup> respectively. In 2013, Ukraine and China also signed a "Treaty of Friendship and Cooperation," marking a high point in a relationship governed by over 300 agreements.<sup>46</sup> However, bilateral cooperation weakened after the 2014 Euromaidan revolution, with China adopting a cautious stance.<sup>47</sup> Since then, China's ambiguous position on Russian aggressions – especially the Sino-Russian critique of NATO – has further strained diplomatic relations, but not diminished their importance. Georgia's early engagement with China focused primarily on trade and investment, but bilateral and high-level political visits have been steadily on the rise. The 2017 Free Trade Agreement spurred economic exchange.<sup>48</sup> Following Russia's 2022 full-scale invasion of Ukraine and the ensuing war of aggression, bilateral cooperation with Georgia accelerated, culminating in the 2023 declaration of a strategic partnership aimed at expanding collaboration across political, economic, and cultural domains. Bilateral relations between China and Bosnia and Herzegovina have been also on the rise, but showing a more segmented pattern: while state-level relations remain limited, China has cultivated strong ties with Republika

<sup>42</sup> Strahinja Subotić/Miloš Janjić: Serbia at the Crossroads between the West and the East, European Policy Centre (CEP), 2020, available at <https://cep.org.rs/en/publications/serbia-at-the-crossroads-between-the-west-and-the-east/> (last accessed: 09.06.2025).

<sup>43</sup> Nikola Belić: *Si Đinping u poseti Srbiji sledeće godine*, 7 November 2023, available at: <https://www.politika.rs/sr/clanak/582581/Si-Dinping-u-poseti-Srbiji-sledece-godine> (last accessed: 09.06.2025).

<sup>44</sup> Embassy of Ukraine in the People's Republic of China: *Political Relations between Ukraine and China*, available at: <https://china.mfa.gov.ua/en/partnership/political-relations-between-ukraine-and-china> (last accessed: 23.06.2025).

<sup>45</sup> Ministry of Foreign Affairs of Georgia: *Foreign Policy Strategy*, 2019, available at: <https://mfa.gov.ge/en/Foreign-Policy-Strategy> (last accessed: 09.06.2025).

<sup>46</sup> Embassy of Ukraine in the People's Republic of China: *Legal Basis of Ukraine and China*, 27 October 2020, available at: <https://china.mfa.gov.ua/en/partnership/184-dogovorno-pravova-baza-mizh-ukrajinoju-ta-kitajem> (last accessed 09.04.2025).

<sup>47</sup> Andriy Goncharuk / Elina Hobova / Viktor Kiktenko / Andriy Koval / Serhiy Koshovyi: *Foreign Policy Audit: Ukraine-China*, Institute of World Policy, 2016, available at: [https://sinologist.com.ua/wp-content/uploads/2018/09/Audyt-zovnishnoi-polityky\\_Ukr\\_Kytay\\_eng\\_inet.pdf](https://sinologist.com.ua/wp-content/uploads/2018/09/Audyt-zovnishnoi-polityky_Ukr_Kytay_eng_inet.pdf) (last accessed: 23.06.2025).

<sup>48</sup> Civil Georgia: *PM Kvirikashvili: Free Trade with China Opens 'New Door' for Georgia*, 19 May 2017, available at: <https://civil.ge/archives/126410> (last accessed: 09.06.2025).

Srpska (Serb-dominated part of Bosnia and Herzegovina), including party-level cooperation with the Alliance of Independent Social Democrats party (SNSD) and selective political and economic exchanges.<sup>49</sup>

In other Western Balkan countries and Moldova, bilateral cooperation initiatives with China have stagnated or even cooled in recent years. North Macedonia, after signing Chinese-funded infrastructure deals (notably a controversial highway project), shifted decisively toward Western partners, reducing its engagement with China to a symbolic level.<sup>50</sup> Albania, despite initial enthusiasm marked by its 2017 Belt and Road Initiative cooperation agreement, scaled back its cooperation after 2018, with Prime Minister Edi Rama openly distancing the country from Chinese investment.<sup>51</sup> Montenegro experienced a surge in cooperation centred on a Chinese loan for highway construction but has recently changed course, aligning more closely with EU norms following political turnover in late 2020.<sup>52</sup> Also Moldova's cooperation with China remains limited and economically focused. While the country participates in the Belt and Road Initiative, it has not developed broader strategic or institutional ties with Beijing, and engagement is confined to a modest set of trade and investment agreements. Kosovo, lastly, is largely excluded from any bilateral or multilateral political cooperation with China, which does not recognize its independence and maintains only a Liaison Office under UNMIK accreditation.<sup>53</sup>

When it comes to **internal politics**, Chinese influence across the Eastern Trio and the Western Balkans remains generally limited and non-intrusive. There is little to no evidence of direct interference in elections, legislative processes, or domestic political affairs in Albania, Kosovo, Moldova, Montenegro, or North Macedonia, where China's role remains restrained. Beijing has not made significant efforts to embed itself within political structures, with interactions largely confined to diplomatic dialogue and occasional ceremonial exchanges with political parties. Albania, in particular, has consistently upheld political autonomy, maintaining formal relations with China without allowing substantial political influence. In Moldova, the continued emphasis on European integration has curtailed Chinese leverage, although President Maia Sandu's recent calls for a more pragmatic and balanced foreign policy – including toward China – suggest a potentially more flexible approach moving forward.<sup>54</sup>

In contrast, Serbia and, to some extent, Republika Srpska have seen a more pronounced, albeit indirect, Chinese political engagement. Here, institutionalized cooperation between local ruling parties and the CCP has taken root, marked by regular exchanges and formalized ties. This

<sup>49</sup> Goran Katić: *Komunisti iz Kine na Dodikovom 'terenu'*, 28 April 2023, available at: <https://www.slobodnavevropa.org/a/bosna-hercegovina-kina-republika-srpska-snsd-dodik-komunisticka-partija/32383867.html> (last accessed: 09.06.2025).

<sup>50</sup> Ana Krstinovska / Zlatko Simonovski / Aleksandra Davitkovska-Spasovska: *Hope for the Best, Prepare for the Worst: Is North Macedonia Vulnerable to Economic Pressure by the People's Republic of China?*, available at: [https://estima.mk/static/c2.2a1.15\\_xgfv9t3kenqscsdmit8/sl/files/rte/documents/EconomicCoertion/Hope-ForTheBest\\_EN.pdf](https://estima.mk/static/c2.2a1.15_xgfv9t3kenqscsdmit8/sl/files/rte/documents/EconomicCoertion/Hope-ForTheBest_EN.pdf) (last accessed: 09.06.2025).

<sup>51</sup> Alice Taylor-Braće: *Albanian PM: No Economic Benefits from Chinese Cooperation*, 23 February 2023, available at: <https://www.euractiv.com/section/politics/news/albanian-pm-no-economic-benefits-from-chinese-cooperation/> (last accessed: 09.06.2025).

<sup>52</sup> Jovana Bogojević: *Montenegro's Growing Distance from China*, 6 May 2022, available at: <https://chinaobservers.eu/montenegros-growing-distance-from-china/> (last accessed: 09.06.2025).

<sup>53</sup> Support4Partnership: *What is the Chinese Office Doing in Pristina?*, 17 May 2024, available at: <https://support4partnership.org/en/news/what-is-the-chinese-office-doing-in-pristina>

<sup>54</sup> Denis Cenuša: *Moldova's Foreign Policy after 2024 Presidential Elections: Staying on the EU Path, Moving Eastwards or Becoming Multi-vector?* IFRI, 2024 <https://www.ifri.org/en/editorials/moldovas-foreign-policy-after-2024-presidential-elections-staying-eu-path-moving> (last accessed: 09.06.2025).



reflects a strategic effort by Beijing to foster political alignment without overt interference in domestic governance. Similarly, in Georgia, China's political role is more nuanced. While there is no clear evidence of direct influence over domestic politics, close ties have been cultivated with the ruling Georgian Dream party. As Georgia's political trajectory drifts toward authoritarianism, the CCP's governance model has found a degree of quiet resonance. Though China refrains from explicitly promoting its political values, its silent support and growing economic presence offer an implicit alternative to Western liberal norms, potentially reinforcing local political trends.

Chinese engagement in the **military sphere** across the considered countries remains, in most cases, non-existent or modest. None of the countries have hosted a Chinese military presence, and the majority of them have had no significant military cooperation or arms trade with China – except for Serbia and, with some qualifications, Bosnia and Herzegovina and Ukraine. Serbia, in fact, has engaged in some arms deals and technological exchanges with China in recent years,<sup>55</sup> though these remain secondary to its military ties with Russia.<sup>56</sup> Bosnia and Herzegovina has received minor arms donations and conducted limited military cooperation with China during the period considered.<sup>57</sup> Ukraine, however, holds a distinct position. Prior to 2014, it was a crucial supplier of military and aerospace technology to China, providing Beijing access to post-Soviet defence capabilities that were instrumental in advancing its military and space programmes. Following Russia's annexation of Crimea and its aggression in Eastern Ukraine, cooperation with Russia collapsed, and China briefly became a key alternative market for Ukrainian defence exports.<sup>58</sup> However, with the onset of large-scale war in 2022 and China's increasing self-sufficiency, this has ended, and Beijing now functions more as a competitor than a partner in the global defence sector.<sup>59</sup>

Other countries in the two regions – most of them either NATO members (Albania, Montenegro, North Macedonia) or aspiring members – have generally avoided military entanglements with China. Kosovo, in particular, receives no military attention from Beijing; China does not participate in KFOR nor does it engage with the Kosovo Security Force. This absence of military cooperation reflects both China's broader preference for economic and diplomatic influence, and the pro-Western orientation of the Western Balkans' security frameworks. In Moldova, military engagement is virtually non-existent, consistent with both countries' preferences – Moldova's constitutional neutrality and China's non-interventionist approach. Similarly, Georgia has deliberately avoided military cooperation with China, given Beijing's sensitivity to Russian security interests in the South Caucasus. Nonetheless, Chinese investment in critical infrastructure – such as the Anaklia Deep Sea Port, through a Chinese-Singaporean consortium – could

<sup>55</sup> In 2020, Serbia bought the FK-3 air defence missile system from China, as well as six CH-92A armed drone systems. See Strahinja Subotić/Miloš Janjić: Serbia at the Crossroads between the West and the East, European Policy Centre (CEP), 2020, available at: <https://cep.org.rs/en/publications/serbia-at-the-crossroads-between-the-west-and-the-east/> (last accessed: 09.06.2025).

<sup>56</sup> See the report on Russia: Marko Todorović: *Long Policy Report on Russia's Ambitions and Leverage*, cit.

<sup>57</sup> Xinhua News Agency: *China, EU agree to strengthen cooperation amid COVID-19 outbreak*, 7 March 2020, available at: [http://www.news.cn/english/europe/2020-03/07/c\\_138851187.htm](http://www.news.cn/english/europe/2020-03/07/c_138851187.htm) (last accessed: 23.06.2025).

<sup>58</sup> Sergiy Gerasymchuk/Yurii Poita: *Ukraine-China after 2014: a new chapter in the relationship*, Friedrich-Ebert-Stiftung Kyiv, 2018, p. 7.

<sup>59</sup> Helena Legarda / Jacob Gunter: *China's Arms Industry Is Increasingly Global, but Don't Expect It to Supplant NATO's Counterparts Any Time Soon*, Mercator Institute for China Studies (MERICS), August 2024, available at: <https://merics.org/en/tracker/chinas-arms-industry-increasingly-global-dont-expect-it-supplant-natos-counterparts-any> (last accessed: 23.06.2025).

carry long-term strategic and military implications, potentially shaping Georgia's security dynamics.<sup>60</sup>

In the domain of **foreign policy and core national interests**, China's influence across the Eastern Trio and the Western Balkans varies widely, largely depending on each country's alignment with the EU, NATO, and the United States, as well as the domestic salience of unresolved national issues. Thus, Serbia has been the most receptive to Chinese support, particularly on the Kosovo issue, over which Beijing has constantly voiced its support for Serbia's sovereignty and territorial integrity.<sup>61</sup> This has translated into a consistent reluctance to align with EU statements critical of China and has fostered a narrative of diplomatic reciprocity.<sup>62</sup> Ukraine also refrains from aligning with EU positions on China, reflecting its traditional multi-vector foreign policy approach.<sup>63</sup> At the same time, China's ambiguous stance on Russia's annexation of Crimea and its subsequent *de facto* support for Russia following the full-scale invasion of Ukraine in 2022 have strained political relations, placing pressure on diplomatic ties. However, this shift has also increased the relevance of China's position and, thus, its influence on key national issues. Georgia, while officially committed to Euro-Atlantic integration, has also seen growing Chinese engagement, especially following the war in Ukraine. It has avoided endorsing EU positions critical of Beijing, opting instead for pragmatic bilateral relations. China's nuanced stance – supporting Georgia's territorial integrity while avoiding friction with Russia – has enabled it to maintain favourable relations without becoming entangled in local conflicts. Bosnia and Herzegovina presents a more ambivalent picture. Although it upholds the One-China policy and receives rhetorical support from Beijing on its territorial integrity, its institutional commitment to EU and NATO integration, particularly within the Federation, limits deeper alignment.<sup>64</sup> Nonetheless, recent trends – such as China's opposition to the appointment of High Representative Christian Schmidt and Bosnia's decreasing alignment with EU statements on China – suggest a subtle shift toward a more opportunistic and pragmatic approach.<sup>65</sup> In this context, China could increasingly act as a spoiler to the country's Euro-Atlantic orientation. In Moldova, China has maintained a consistent position, at least rhetorically, in support of the country's sovereignty and territorial integrity, especially concerning the Transnistrian conflict.<sup>66</sup> This aligns with Beijing's broader foreign policy principles of non-interference and territorial unity.

Conversely, Montenegro and North Macedonia have increasingly distanced themselves from Beijing on foreign policy issues. Montenegro's full alignment with the EU's Common Foreign and Security Policy – including its condemnation of China's human rights record – has strained

<sup>60</sup> RFE/RL's Georgian Service / Reid Standish: *Chinese-Led Consortium To Build Massive Port Project On Georgia's Black Sea Coast*, 29 May 2025, available at: <https://www.rferl.org/a/anaklia-georgia-china-port-winner/32970697.html> (last accessed: 09.06.2025).

<sup>61</sup> Strahinja Subotić/Miloš Janjić: *Serbia at the Crossroads between the West and the East*, European Policy Centre (CEP), cit.

<sup>62</sup> Calculated for the index on the basis of extensive list of HR declarations regarding China.

<sup>63</sup> Calculated for the index on the basis of extensive list of HR declarations regarding China.

<sup>64</sup> Jasmin Hasić: *The Role of China in Bosnia and Herzegovina*, Friedrich Ebert Stiftung, 31 July 2022, available at: [https://www.researchgate.net/profile/Jasmin-Hasic/publication/362388665\\_The\\_Role\\_of\\_China\\_in\\_Bosnia\\_and\\_Herzegovina/links/62f368340b37cc34478466f7/The-Role-of-China-in-Bosnia-and-Herzegovina.pdf](https://www.researchgate.net/profile/Jasmin-Hasic/publication/362388665_The_Role_of_China_in_Bosnia_and_Herzegovina/links/62f368340b37cc34478466f7/The-Role-of-China-in-Bosnia-and-Herzegovina.pdf) (last accessed: 09.06.2025).

<sup>65</sup> Radio Slobodna Evropa: *Ambasada Kine u BiH: Imenovanje visokog predstavnika nije legitimno*, 17 August 2021, available at: <https://www.slobodnaevropa.org/a/schmidt-kina-ohr-bih/31414439.html> (last accessed: 09.06.2025).

<sup>66</sup> Infotag: *The First Bilateral Political Consultations Between Moldova and China in the Last 12 Years Were Held in Beijing*, 3 December 2024, available at: <https://www.infotag.md/politics-en/320782/> (last accessed: 09.06.2025).

bilateral ties.<sup>67</sup> North Macedonia's participation in the U.S.-led Clean Network Initiative and its legal exclusion of Chinese telecom firms from the 5G market reflect a clear strategic pivot.<sup>68</sup> Albania has adopted a more ambivalent approach. While formally part of the Belt and Road Initiative and maintaining diplomatic openness, it has shown limited interest in deeper political engagement, as reflected in public statements downplaying future Chinese investment.<sup>69</sup> Kosovo stands in direct opposition to China's foreign policy due to Beijing's refusal to recognize its independence and its opposition to Kosovo's integration into NATO and the EU. Yet, precisely because of Beijing's support for Belgrade, China retains leverage over a key national issue for Kosovo.

Overall, as shown by Figure 2, China's political influence in 2023 follows a clear gradient: high in Serbia, moderate in Ukraine and Georgia, low in Bosnia and Herzegovina, Montenegro, Moldova and Kosovo, and very low in North Macedonia and Albania. Yet, if we look at the evolution since 2013, the nine countries now show a clear polarization. Four countries – Serbia, Ukraine, Georgia, and to a lesser extent, Bosnia and Herzegovina – exhibit comparatively high levels of engagement, due to sustained bilateral ties, strategic partnerships, or selective alignment on key foreign policy issues. In contrast, Albania, Kosovo, Moldova, Montenegro, and North Macedonia form a group with lower or more limited political influence, reflecting either a deliberate distancing from China, institutional constraints, or geopolitical priorities more closely aligned with the EU and NATO. This divergence reflects China's emphasis on bilateral engagement, which allows for tailored, flexible partnerships that respond to the specific political and economic context of each country. Rather than following a unified regional strategy, China's approach appears pragmatic and opportunity-driven, favouring cooperation where interests align and conditions are favourable. As a result, its influence remains uneven and contingent, shaped both by local dynamics and broader geopolitical developments.

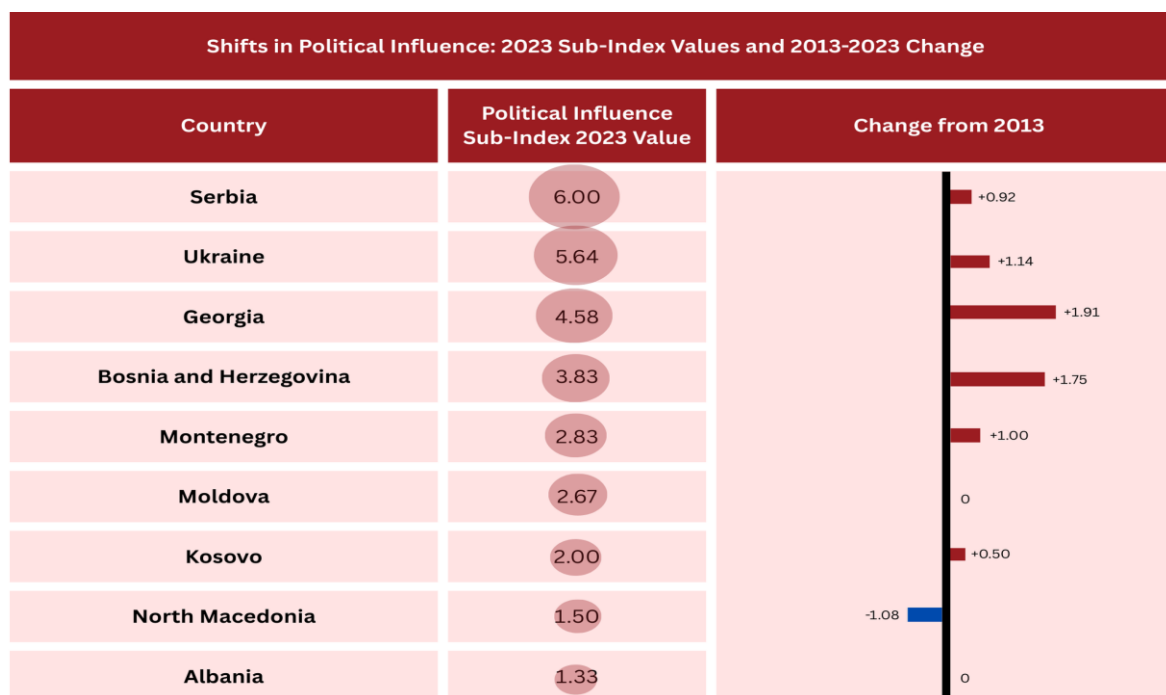
<sup>67</sup> Calculated for the index on the basis of extensive list of HR declarations regarding China.

<sup>68</sup> Krach Institute for Tech Diplomacy: *The Construction of the 5G Network Brings the Demise of the Chinese Domination in North Macedonia's Telecommunications*, 1 May 2023, available at: <https://techdiplomacy.org/news/the-construction-of-the-5g-network-brings-the-demise-of-the-chinese-domination-in-north-macedonias-telecommunications/> (last accessed: 09.06.2025).

<sup>69</sup> Alice Taylor-Braće: *Albanian PM: No Economic Benefits from Chinese Cooperation*, 23 February 2023, available at: <https://www.euractiv.com/section/politics/news/albanian-pm-no-economic-benefits-from-chinese-cooperation/> (last accessed: 09.06.2025).



Figure 2: Political Influence Sub-Index Values in 2023 Compared to 2013



## Economic Influence: Evolution, Patterns, and the Economic Sub-Index

China's global ambitions have grown steadily since the 2008 Global Financial Crisis, with a clear focus on expanding its economic influence. Central to this strategy are the Belt and Road Initiative, launched in 2013, and the Digital Silk Road, introduced in 2015, which aim to extend China's global reach through large-scale infrastructure and digital networks. Europe has emerged as a key region in this vision. While major Western economies – particularly the UK, Germany, and France – have historically attracted the bulk of Chinese investment,<sup>70</sup> infrastructure and connectivity projects have increasingly targeted Central, Eastern, and South-eastern Europe as part of a broader effort to deepen China's presence across the continent.<sup>71</sup>

This trend is particularly evident in the Eastern Trio and the Western Balkan countries, where China's economic engagement has intensified since the aftermath of the 2008 crisis. As these regions faced a sharp decline in foreign direct investment, reduced export demand, and limited access to affordable credit – largely due to their close economic ties with the EU markets, which already constituted their main economic partner for most of these countries – Beijing positioned itself as an alternative source of capital, infrastructure financing, and political engagement.<sup>72</sup> The crisis revealed deep-seated structural weaknesses, such as low competitiveness, high unemployment, and ongoing deindustrialization, creating fertile ground for China's strategic economic entry. Through trade relations, concessional loans, and high-profile

<sup>70</sup> Xavier Richet: Chinese Presence in the Western Balkans: Competition, Complementarity, Cooperation, in: *Economic Studies journal* 6, pp. 3-25.

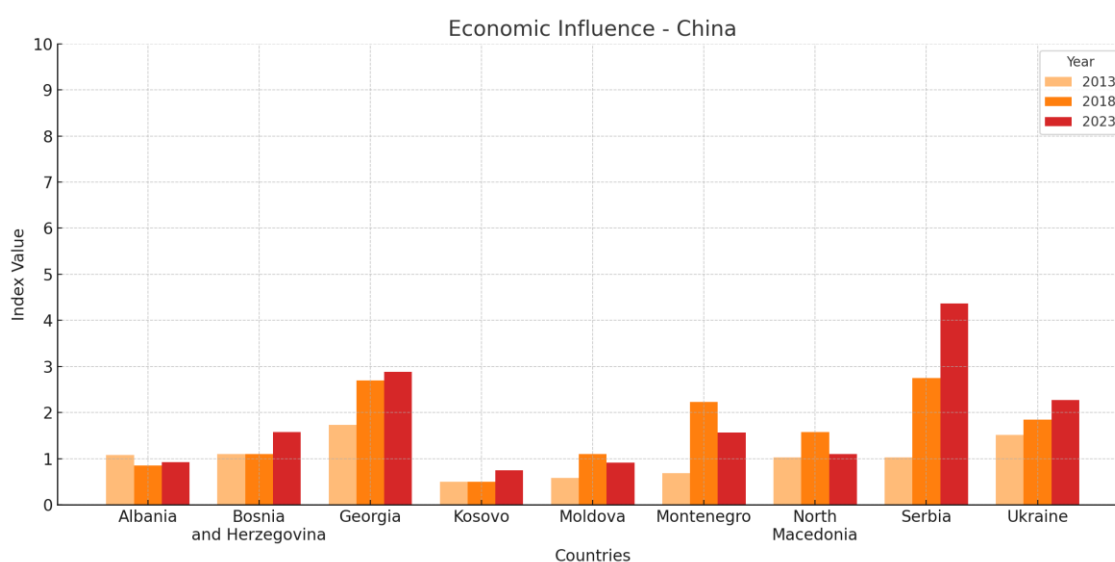
<sup>71</sup> Danijela Jačimović / Joel I. Deichmann / Kong Tianping: The Western Balkans and Geopolitics: Leveraging the European Union and China, in *Journal of Balkan and Near Eastern Studies*, 25(4), 2023, pp. 626-643.

<sup>72</sup> Matteo Bonomi / Milica Uvalic: The economic development of the Western Balkans: The importance of non-EU actors, in F. Bieber and N. Tzifakis (eds), 2019), cit. pp. 36-58.

infrastructure investments – mainly linked to the Belt and Road Initiative – China has established itself as an increasingly relevant, and at times competitive, economic partner in the EU’s immediate neighbourhood, complementing or even challenging the Union’s traditional influence.<sup>73</sup>

However, as illustrated in Figure 3, China’s tangible economic influence between 2013 and 2023 remained limited across most of the nine countries. While Chinese engagement has been highly visible and initially raised considerable expectations, the anticipated benefits often failed to materialize. The evolution of economic linkages reveals a fragmented and asymmetrical landscape. A few countries – most notably Serbia, Georgia, and Ukraine – stand out for having experienced a marked increase in Chinese economic influence, reflecting deeper and more sustained patterns of engagement over the decade. In contrast, Montenegro, North Macedonia, and Moldova experienced a rapid increase in Chinese economic presence between 2013 and 2018, followed by a significant reversal of this trend. Meanwhile, Albania, Bosnia and Herzegovina, and Kosovo exhibited only modest or relatively static patterns of engagement. Nevertheless, outcomes across the two regions were, in many cases, modest.

**Figure 3: The Economic Influence Sub-Index Over Time (2013–2023)**



As far as **trade and investment** relations are concerned, exchanges from/to China have increased across various countries in the two regions, albeit unevenly (see Tables 1 and 2). Serbia has emerged as the most deeply integrated partner, attracting substantial Chinese concessional loans and investments within Belt and Road Initiative, becoming the leading regional destination for Chinese capital – which accounted for over 30% of Serbian FDI inflows and 10% of its FDI stock in 2023. The signing of a Free Trade Agreement in 2023 further consolidated these ties, although the bilateral trade balance remains heavily skewed in China’s favour. Georgia, while adopting a more cautious approach, has also developed a solid economic partnership with Beijing. The 2018 Free Trade Agreement facilitated consistent growth in bilateral trade, with Chinese investments primarily concentrated in infrastructure, including strategically significant port development projects. Ukraine plays a central role in China’s regional trade network. Even before the Russian invasion in 2022, China had become an important

<sup>73</sup> Xavier Richet: Chinese Presence in the Western Balkans: Competition, Complementarity, Cooperation, cit.

trading partner for Ukraine. Among the countries under review, Ukraine stood out as both the top importer of Chinese goods and the leading regional exporter to China, driven mainly by agricultural products and industrial raw materials.<sup>74</sup> Despite this dynamic trade relationship, Chinese FDI in Ukraine remained relatively limited. Although Chinese firms expressed interest in strategic sectors such as aerospace and defence – as exemplified by the attempted acquisition of Motor Sich<sup>75</sup> – Ukrainian authorities adopted a cautious stance, blocking the transfer of ownership in sensitive industries.

Other countries, including Albania, North Macedonia, and Bosnia and Herzegovina, have followed a markedly different trajectory. In these countries, Chinese presence has remained modest. While imports from China have steadily increased, exports remain negligible, and Chinese investments have lacked both scale and strategic focus. Despite some visibility of Belt-and-Road-related infrastructure projects between 2015 and 2018 – particularly in the transport and energy sectors – these initiatives soon lost momentum due to growing concerns over debt sustainability, tighter regulatory scrutiny, and unmet expectations. The projects typically produced limited FDI, weak local economic spillovers, minimal technology transfer, and low job creation, while also raising alarms about long-term public debt burdens and potential political dependency.<sup>76</sup>

Moldova presents a slightly more limited profile. Chinese economic activity has extended into sectors such as renewable energy, tourism, and telecommunications, but remains narrow in scope and impact. In Kosovo, the situation is even more constrained: China's refusal to recognize Kosovo statehood effectively blocks formal economic engagement. As a result, Chinese goods reach the Kosovo market only indirectly through neighbouring states, with virtually no investment, no bilateral debt exposure, and no cooperation in strategic sectors.

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<sup>74</sup> Kateryna Oleksandrivna Kravchenko / Zheng Yu / Nataliia Viacheslavivna Dobrovolska / Iryna Anatoliivna Skryl: *Ukraine-China Strategic Partnership: Current Situation, Problems and Prospects*, in: *Visnyk of V. N. Karazin Kharkiv National University, Series "Geology. Geography. Ecology"*, Issue 53, 2020, available at: <https://periodicals.karazin.ua/geoeco/article/view/17065> (last accessed: 23.06.2025).

<sup>75</sup> Radio Free Europe/Radio Liberty (RFE/RL): *Ukrainian Court Seizes Aerospace Company Motor Sich From Chinese Investors*, 21 March 2021, available at: <https://www.rferl.org/a/ukraine-seizes-motor-sich/31161801.html> (last accessed: 09.06.2025).

<sup>76</sup> Ana Krstinovska / Ioannis Alexandris: *Chinese Direct Investment in South-East Europe: The Story Behind the Numbers*, ELIAMEP | Policy Paper 138/2023, June 2023, available at: <https://www.eliamep.gr/wp-content/uploads/2023/06/Policy-paper-138-Chinese-direct-investment-Balkans-.pdf> (last accessed: 09.06.2025).

**Table 1: Imports and exports of goods from and to China, as share of total, by country (2013, 2018, 2023)**

	2013		2018		2023	
Country	Imports (% of total imports of goods)	Exports (% of total exports of goods)	Imports (% of total imports of goods)	Exports (% of total exports of goods)	Imports (% of total imports of goods)	Exports (% of total exports of goods)
Albania	6,8	4,6	8,4	1,8	10,7	2,3
Bosnia and Herzegovina	6	0,1	6,9	0,3	9,5	0,2
Georgia	7,6	1,2	8,9	5,9	8,5	5,1
Kosovo	7,3	0,4	7,9	0,4	10	0,1
Moldova	8,7	0,3	10,4	0,7	11,7	0,2
Montenegro	8,1	1	10	3,5	11,2	0,4
North Macedonia	5,7	2,5	5,8	1	9	1,2
Serbia	8,6	0,1	9,2	0,5	13,3	4,2
Ukraine	10,3	4,3	13,3	4,6	16,4	6,7

Source: Wiiw Annual Database <http://wiiw.ac.at/annual-database.html> and National Statistics Office of Georgia: <https://www.geostat.ge/en/modules/categories/637/>

**Table 2: Chinese FDI Inflows and Inward Stock, as share of total, by country (2013, 2018, 2023)**

	2013		2018		2023	
Country	FDI inflows (% of total annual FDI inflows)	FDI inward stock (% of total FDI inward stock)	FDI inflows (% of total annual FDI inflows)	FDI inward stock (% of total FDI inward stock)	FDI inflows (% of total annual FDI inflows)	FDI inward stock (% of total FDI inward stock)
Albania	0,4	0	-0,1	0,1	0,1	0
Bosnia and Herzegovina	-	-	0	0,1	4,7	0,5
Georgia	2	7,6	3,2	8,9	2,8	8,5
Kosovo	-0,1	0	0	0	0	0
Moldova	-	0,1	-	0	-	0
Montenegro	0	0	0	1,1	0	0,9
North Macedonia	0	0	3,7	2,5	-6,9	1,3
Serbia	0	0,1	17,2	4,1	30,4	11,3
Ukraine	-	0	0	0,1	-0,1	0,1

Source: Wiiw FDI Database <http://wiiw.ac.at/fdi-database.html> and National Statistics Office of Georgia <https://www.geostat.ge/en/modules/categories/191/foreign-direct-investments>

Alongside growing trade and investment, China's engagement in the Eastern Trio and the Western Balkans has increasingly raised concerns over **strategic dependencies**, both in geo-economic terms and more traditionally security-related issues. In Serbia, Chinese engagement has significantly increased the country's economic and strategic exposure to Beijing, through concessional loans and strategic investments<sup>77</sup> in major infrastructure projects, such as the construction of roads and energy facilities, supported acquisitions like the Smederevo steel plant and the Kostolac B power station,<sup>78</sup> investments in Serbia's mining sector, notably in copper,<sup>79</sup> and the opening of industrial parks.<sup>80</sup> At the same time, the deployment of Huawei's surveillance technologies and smart-city infrastructure in Belgrade has sparked concern over data sovereignty and the influence of Chinese technology in critical public sector systems.<sup>81</sup> These developments illustrate how economic cooperation can carry direct security implications. Montenegro offers another telling example. A €670 million loan from China's Export-Import Bank to fund the Bar-Boljare highway project significantly raised the country's debt-to-GDP ratio,<sup>82</sup> triggering concerns about fiscal sustainability and sovereignty. The lack of transparency in the deal, including clauses assigning jurisdiction to Chinese courts, deepened anxieties about accountability and political leverage.<sup>83</sup> In North Macedonia, a highway project awarded to Sinohydro became entangled in corruption scandals,<sup>84</sup> underscoring how Chinese-funded infrastructure initiatives can intersect with local governance vulnerabilities.<sup>85</sup>

Elsewhere, reactions have varied. Georgia's recent awarding of the Anaklia Deep Sea Port project to a Chinese-Singaporean consortium has been interpreted as part of a broader trend in which port and transport infrastructure become strategic assets amid geopolitical flux. Meanwhile, Ukraine blocked the sale of the aerospace firm Motor Sich to a Chinese buyer over national security concerns, highlighting Beijing's growing interest in dual-use and high-tech

<sup>77</sup> Ana Krstinovska / Ioannis Alexandris: *Chinese Direct Investment in South-East Europe: The Story Behind the Numbers*, Hellenic Foundation for European and Foreign Policy (ELIAMEP), Policy Paper #138/2023, June 2023, available at: <https://www.eliamep.gr/wp-content/uploads/2023/06/Policy-paper-138-Chinese-direct-investment-Balkans-.pdf> (last accessed: 23.06.2025).

<sup>78</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, August 2020, available at: <https://www.clingendael.org/pub/2020/china-and-the-eu-in-the-western-balkans/> (last accessed: 09.06.2025).

<sup>79</sup> Katarina Baletić: *Chinese Mining Giant Expands in Serbia Despite Pollution Fears*, Balkan Insight, 11 April 2024, available at: <https://balkaninsight.com/2024/04/11/chinese-mining-giant-expands-in-serbia-despite-pollution-fears/> (last accessed: 23.06.2025).

<sup>80</sup> Valentina Bajic: *Chinese Firms to Invest 400 Million Euro in Belgrade Industrial Park – Minister*, 13 September 2024, available at: <https://seenews.com/news/chinese-firms-to-invest-400-mln-euro-in-belgrade-industrial-park-minister-1263396> (last accessed: 09.06.2025).

<sup>81</sup> Maja Bjeloš / Vuk Vuksanović: *Geopolitics is Local – Ramifications of Chinese Projects for Human Security in Serbia*, Belgrade Centre for Security Policy, available at: <https://bezbednost.org/en/publication/geopolitics-is-local-ramifications-of-chinese-projects-for-human-security-in-serbia/> (last accessed: 09.06.2025).

<sup>82</sup> Government of Montenegro: *China's Exim Bank Approves Loan Worth EUR 687 Million for Highway's Construction*, 18 September 2014, available at: <https://www.gov.me/en/article/141755--china-s-exim-bank-approves-loan-worth-eur-687-million-for-highway-s-construction> (last accessed: 09.06.2025).

<sup>83</sup> Bojan Stojkovski / Ivana Jeremic / Samir Kajosevic / Ivana Nikolic / Ivan Angelovski / Fatjona Mejdini / Irvin Pekmez: *China in the Balkans: Controversy and Cost*, Balkan Insight, 15 December 2021, available at: <https://far-rightmap.balkaninsight.com/2021/12/15/china-in-the-balkans-controversy-and-cost/> (last accessed: 09.06.2025) and Digidem Soyaltin-Colella: *The EU Accession Process, Chinese Finance and Rising Corruption in Western Balkan Stabilitocracies: Serbia and Montenegro*, *Europe-Asia Studies*, 75:8, 1311-1335, 2023.

<sup>84</sup> Ana Krstinovska: *Exporting Corruption? The Case of a Chinese Highway Project in North Macedonia*, China Observers, 6 November 2019, available at: <https://chinaobservers.eu/exporting-corruption-the-case-of-a-chinese-highway-project-in-north-macedonia/> (last accessed: 09.06.2025).

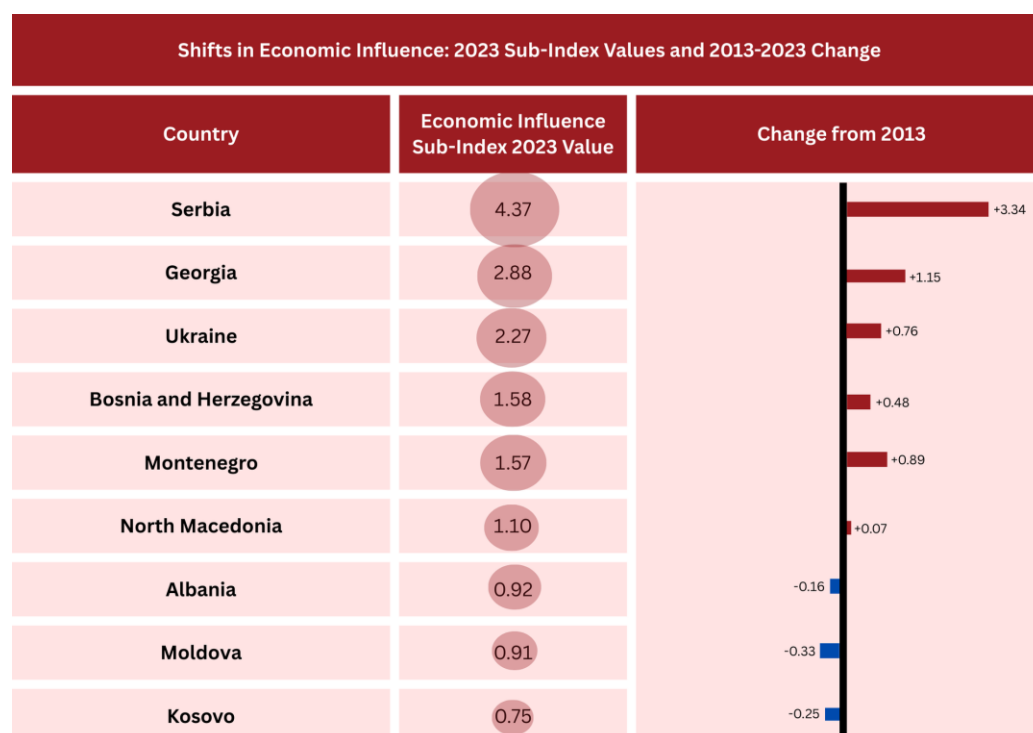
<sup>85</sup> Ana Krstinovska: *China's Aid in the Western Balkans: Supporting Development, Undermining Good Governance*, China Observers, February 2022, available at: <https://chinaobservers.eu/chinas-aid-in-the-western-balkans-supporting-development-undermining-good-governance/> (last accessed: 09.06.2025).

sectors. In response to such pressures, some governments have begun to shift course: North Macedonia joined the U.S.-led Clean Network Initiative and excluded Chinese firms from its 5G rollout, aligning with Western standards in key sectors.<sup>86</sup>

These cases reflect broader trends. Beyond debt exposure and the acquisition of key assets, the geo-economic risks associated with China's presence in the Eastern Trio and the Western Balkans include unfair competition from subsidized firms, the erosion of local competitiveness, forced technology transfers, opaque procurement practices, and declining institutional transparency. Traditional security concerns are increasingly intertwined with these dynamics, particularly as China becomes more involved in critical infrastructure sectors such as energy, telecommunications, and transport, where dual-use technologies and sensitive data are at stake. Overall, while Chinese engagement has opened up economic opportunities in the region, it increasingly intersects with challenges of governance, sovereignty, and strategic autonomy, forcing countries to weigh immediate development gains against long-term national interests.

Taken together, the Eastern Trio and the Western Balkans' cases reflect a patchwork of Chinese influence in the region, ranging from deep strategic entrenchment in Serbia to minimal engagement in Kosovo, as illustrated in Figure 4. The rest of the region falls between these extremes, showing varying degrees of trade asymmetry, sector-specific investment, and cautious or opportunistic partnerships. This differentiation is shaped not only by China's tactical approach but also by the institutional capacity, foreign policy orientation, and development strategy of each partner country.

**Figure 4: Economic Influence Sub-Index Values in 2023 Compared to 2013**



<sup>86</sup> Bojan Georgievski: *Caught in the Middle: North Macedonia's Journey to "Clean 5G"*, ESTIMA, May 2022, available at: [https://estima.mk/static/c2.2a1.15\\_xgv9t3kenqscsdmit8/sl/files/rte/documents/Values\\_China\\_outputs/Brief\\_Caught%20in%20the%20middle\\_EN.pdf](https://estima.mk/static/c2.2a1.15_xgv9t3kenqscsdmit8/sl/files/rte/documents/Values_China_outputs/Brief_Caught%20in%20the%20middle_EN.pdf) (last accessed: 09.06.2025).

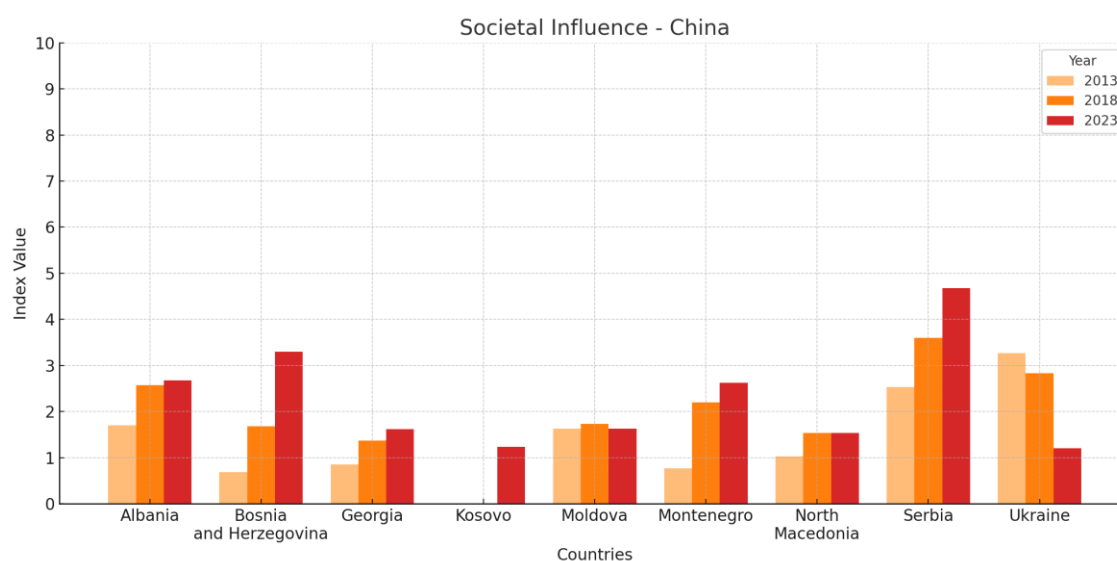


## Societal Influence: Evolution, Patterns and the Societal Sub-Index

Over the past decade, China's societal presence in the Eastern Trio and the Western Balkans has increased, as shown in Figure 5. While societal influence – pursued through cultural initiatives, educational programs, media cooperation, and interpersonal exchanges – is a relatively non-traditional domain of Chinese influence in these regions, it is gaining strategic relevance, driven by a generally favourable perception of China among these countries' populations. The data show an upward trend in almost all countries, with the notable exception of Ukraine, where societal influence has declined significantly in recent years, mainly as a side-effect of the perceived Chinese support for Russia.

Serbia clearly leads, with high and sustained levels of societal engagement, driven by strong political ties and an open media environment for Chinese narratives. Kosovo remains at the tail end, reflecting minimal Chinese presence and limited formal cooperation. Crucially, for most countries, trends in societal influence do not strictly mirror shifts in economic or political relations. This indicates that China's soft power in the region operates according to its own logic, influenced by factors such as public perception, institutional openness, and local political alignment, rather than being merely a derivative of economic or political dynamics.

Figure 5: The Societal Influence Sub-Index Over Time (2013–2023)



When considering the **diaspora and mobility**, it is evident that the size and visibility of Chinese communities remain limited in all nine countries examined. Ukraine once had a notable Chinese population, estimated at around 30,000 in 2017<sup>87</sup>, but the number has sharply declined since the outbreak of the full-scale war with Russia in 2022.<sup>88</sup> Elsewhere, the figures are negligible. Georgia, Moldova, Montenegro, Albania, and Bosnia and Herzegovina each host an insignificant share of the Chinese population despite increasing numbers of work permits and

<sup>87</sup> Nataliya Trach: *No Chinatown in Ukraine, Home to 30,000 Chinese*, Kyiv Post, 11 May 2017, available at: <https://www.kyivpost.com/post/7527> (last accessed: 23.06.2025).

<sup>88</sup> The World of Chinese: *Who are the Chinese Diaspora in Ukraine?*, 4 March 2022, available at: <https://www.theworldofchinese.com/2022/03/who-are-the-chinese-diaspora-in-ukraine/> (last accessed 09.04.2025).

business registrations over the past decade. In Serbia and North Macedonia, the situation is similar; the Chinese community is small and lacks significant social integration. This low level of diaspora presence limits natural people-to-people interaction, implying that much of China's societal outreach must be initiated through formal channels rather than evolving organically.

In terms of **visa regimes and tourism**, some countries have liberalized entry policies for Chinese citizens in the hope of increasing mobility and tourism. Serbia, for instance, removed visa requirements for Chinese nationals in 2016, resulting in a noticeable, though still limited, uptick in tourist visits and educational exchanges.<sup>89</sup> Albania, Montenegro, Georgia, and Bosnia and Herzegovina have adopted similar measures, though with more modest outcomes. For example, only around 13,000 Chinese tourists visited Albania in 2023,<sup>90</sup> while Montenegro saw a high of over 74,000 in 2019<sup>91</sup> before numbers plummeted due to the COVID-19 pandemic and global travel disruptions.<sup>92</sup> Bosnia and Herzegovina experienced a drop from 58,000 Chinese tourists in 2018<sup>93</sup> to about 30,000 in 2023.<sup>94</sup> Despite these efforts, the proportion of Chinese visitors remains small relative to regional or European travellers, and the economic and cultural impact of such tourism has been limited.

China has invested most heavily in **education and student exchanges**, with the establishment of Confucius Institutes and bilateral cooperation between universities serving as the main instruments. Confucius Institutes are now present in all countries but Kosovo. These institutions aim to promote Chinese language learning and cultural appreciation. In North Macedonia, the institute at the University of Skopje has seen a tenfold increase in enrolment since its opening in 2013, suggesting a growing but still niche interest in Chinese studies.<sup>95</sup> Montenegro has developed a Chinese Studies program and has facilitated scholarships enabling nearly 100 students to pursue degrees in China since 2015.<sup>96</sup> In Serbia, Confucius Institutes work closely with schools and universities.<sup>97</sup> In Albania, Chinese language courses and scholarships have

<sup>89</sup> Milivoje Pantović: *Serbia Eyes Benefits of Scrapping Visas with China*, Balkan Insight, 18 October 2016, available at: <https://balkaninsight.com/2016/10/18/serbia-s-high-hopes-from-the-abolition-of-visas-with-china-10-17-2016/> (last accessed: 23.06.2025).

<sup>90</sup> Ministry of Tourism of Albania: *Buletini i Turizmit – Dhjetor 2023*, Maj 2023, available at: <https://turizmi.gov.al/wp-content/uploads/2023/05/BULETINI-I-TURIZMIT-DHJETOR-2023.pdf> (last accessed: 23.06.2025).

<sup>91</sup> Radio Televizija Crne Gore (RTCG): *Crna Gora povoljna destinacija za kineske turiste*, 21 June 2025, available at: <https://rtcg.me/vijesti/turizam/378007/crna-gora-povoljna-destinacija-za-kineske-turiste.html> (last accessed: 23.06.2025).

<sup>92</sup> Milika Mirković: *Montenegro and China Relations*, in: *Montenegro External Relations Briefing*, China-CEE Institute, 22 March 2024, available at: <https://china-cee.eu/2024/03/22/montenegro-external-relations-briefing-montenegro-and-china-relations/> (last accessed: 23.06.2025).

<sup>93</sup> Agency for Statistics of Bosnia and Herzegovina (BHAS): *Tourism Statistics – Cumulative Data, January–December 2018*, published 7 February 2019, available at: [https://bhas.gov.ba/data/Publikacije/Saopštenja/2019/TUR\\_02\\_2018\\_12\\_0\\_EN.pdf](https://bhas.gov.ba/data/Publikacije/Saopštenja/2019/TUR_02_2018_12_0_EN.pdf) (last accessed: 23.06.2025).

<sup>94</sup> Agency for Statistics of Bosnia and Herzegovina (BHAS): *Tourism Statistics – Cumulative Data, January–December 2023*, published 7 February 2024, available at: [https://bhas.gov.ba/data/Publikacije/Saopštenja/2024/TUR\\_02\\_2023\\_12\\_1\\_EN.pdf](https://bhas.gov.ba/data/Publikacije/Saopštenja/2024/TUR_02_2023_12_1_EN.pdf) (last accessed: 23.06.2025).

<sup>95</sup> Bojan Blaževski: *Behind the Scenes: Chinese Influence in North Macedonia*, Meta.mk, 9 March 2023, available at: <https://meta.mk/en/behind-the-scenes-chinese-influence-in-north-macedonia/> (last accessed: 23.06.2025).

<sup>96</sup> Embassy of the People's Republic of China in Montenegro: *Ambassador Liu Jin Meets with Montenegrin Minister of Economic Development Dragica Sekulić*, 4 September 2020, available at: [http://me.china-embassy.gov.cn/mon/sghd\\_1/202009/t20200904\\_2845250.htm](http://me.china-embassy.gov.cn/mon/sghd_1/202009/t20200904_2845250.htm) (last accessed: 23.06.2025).

<sup>97</sup> Confucius Institute at the University of Novi Sad: *Scholarships*, available at: <https://konfucije.ff.uns.ac.rs/stipendije/> (last accessed: 23.06.2025).



gained visibility, especially since 2017.<sup>98</sup> In Georgia, academic and cultural exchanges began to increase since 2018, largely through Confucius Institutes and Chinese scholarships,<sup>99</sup> but these developments have yet to translate into a broader societal impact or a notable shift in public attitudes toward China.

Bilateral academic projects have also expanded, particularly in technical and scientific fields. North Macedonian universities report more formal partnerships with Chinese institutions than with those from other countries, reflecting Beijing's targeted investment in educational diplomacy. Nevertheless, student flows remain modest, and the influence of these exchanges on national academic ecosystems is limited compared to those with Western partners. While Chinese education is becoming more accessible, it does not yet exert substantial cultural or intellectual influence in the region.

Efforts to deepen ties through **local partnerships and city twinning** have produced few tangible results. Most cooperation between Chinese and local municipalities remains symbolic, often limited to ceremonial "China Days" or one-off visits. The number of twinning cities between Serbia and China has been on constant rise.<sup>100</sup> Montenegro has hosted cultural days in selected towns, but without follow-up or broader community engagement.<sup>101</sup> In North Macedonia, Skopje served briefly as a regional hub for China's 14+1 platform, organizing a High-Level Think Tanks Symposium in 2018.<sup>102</sup> However, this momentum faded quickly, particularly as Skopje shifted its foreign policy orientation toward EU and NATO integration. In general, cooperation at the local level has lacked strategic depth and long-term vision.

The **cultural and informational sphere** is one of China's more visible but also more contested areas of societal engagement. Cultural events, language courses, and traditional performances form part of the standard diplomatic toolkit. In 2019, Albania hosts partnerships with public broadcasters.<sup>103</sup> Similar cultural footprints exist in Serbia and Moldova, with some countries also signing media cooperation agreements with Chinese state outlets. For example, Albania and Serbia both signed memoranda to facilitate the sharing of news content and journalistic collaboration.<sup>104</sup> Despite these efforts, Chinese media content remains peripheral. In

<sup>98</sup> Bledar Feta: *Chinese Influence in Albania*, Center for European Policy Analysis (CEPA), 2022, available at: <https://cepa.org/comprehensive-reports/chinese-influence-in-albania/> (last accessed: 23.06.2025).

<sup>99</sup> Nastasia Arabuli: *Studying in China – Opportunity or Trap?* In Radio Fee Europe, July 25, 2024, available at: <https://www.radiotavisupleba.ge/a/33051016.html> (last accessed: 23.06.2025).

<sup>100</sup> Danas editorial team: *Gde sve gradovi iz Srbije imaju braću: Prvi pobratim stranac bio je Kursk – prijateljstva koja traju i duže od veka*, Danas, 17 March 2024, available at: <https://www.danas.rs/vesti/drustvo/gde-sve-gradovi-iz-srbije-imaju-bracu-prvi-pobratim-stranac-bio-je-kursk-prijateljstva-koja-traju-i-duze-od-veka/> (last accessed: 23.06.2025).

<sup>101</sup> Embassy of the People's Republic of China in Montenegro: *Ambassador Liu Jin Meets with Montenegrin Minister of Public Administration Marash Dukaj*, 10 February 2023, available at: [https://me.china-embassy.gov.cn/mon/sghd\\_1/202302/t20230210\\_11023791.htm](https://me.china-embassy.gov.cn/mon/sghd_1/202302/t20230210_11023791.htm) (last accessed: 23.06.2025).

<sup>102</sup> Anastas Vangeli: *A Macedonian Perspective on the Fifth High-Level Think Tank Symposium of China and the Central-East European Countries Held in Skopje, 30–31 October 2018*, in: *Macedonia External Relations Briefing*, China-CEE Institute, November 2018, available at: <https://china-cee.eu/2018/11/19/macedonia-external-relations-briefing-a-macedonian-perspective-on-the-fifth-high-level-think-tank-symposium-of-china-and-the-central-east-european-countries-held-in-skopje-30-31-october-2018/> (last accessed: 23.06.2025).

<sup>103</sup> State Council Information Office (SCIO) of the People's Republic of China: *Albania, China Sign Agreement on Broadcasting of Television Programs*, 22 October 2019, available at: [http://english.scio.gov.cn/m/scionews/2019-10/22/content\\_75326426.htm](http://english.scio.gov.cn/m/scionews/2019-10/22/content_75326426.htm) (last accessed: 23.06.2025).

<sup>104</sup> Support4Partnership: *Chinese Media in the Western Balkans: How the Soft Power System Works from Serbia to Albania*, 2023, available at: <https://support4partnership.org/en/news/chinese-media-in-the-western-balkans-how-the-soft-power-system-works-from-serbia-to-albania> (last accessed: 23.06.2025).

the case of Ukraine, for instance, Chinese outlets like CGTN and Xinhua largely echo Russian narratives and are not considered credible by the general public.<sup>105</sup> In other countries, such as Kosovo and Georgia, Chinese cultural content does not reach broad audiences and is often confined to elite or academic circles.

China's societal outreach **lacks strong links to religious or civil society engagement**. This is particularly evident in religiously diverse or conservative countries like Kosovo and Albania, where attempts to engage through cultural diplomacy are constrained by deep-rooted social norms and historical distrust. There are no notable religious or spiritual connections between China and the region, and this dimension of soft power remains virtually untapped.

Finally, **public perceptions and opinion** about China vary significantly by country and are highly susceptible to geopolitical developments. The majority of countries received COVID-19 vaccines and other medical equipment from China early on, and this was reflected in public opinion.<sup>106</sup> This stood in stark contrast to the European Commission's initial decision to prohibit the export of medical products outside the single market – a decision that was very shortly reversed by making an exception for enlargement countries.<sup>107</sup> In Serbia, the government has constructed a consistently positive narrative about China, especially during the COVID-19 pandemic, when Chinese President Vučić has repeatedly referred to China as Serbia's most reliable partner, fostering widespread public goodwill.<sup>108</sup> In contrast, Ukrainian perceptions of China have deteriorated sharply since 2022, with the majority now viewing China negatively due to its perceived alignment with Russia and lack of clear support for Ukrainian sovereignty.<sup>109</sup> In Moldova<sup>110</sup> and Montenegro,<sup>111</sup> opinions are mixed but generally neutral or cautiously positive, often correlating with views on Chinese investment and educational opportunities. Albanian society is split; while some appreciate China's developmental model and scholarships, others remain sceptical about its political system.<sup>112</sup> In Kosovo, public attitudes have shifted from predominantly negative to more neutral or mildly positive, despite China's refusal

<sup>105</sup> Maria Repnikova: *China's Propaganda on the War in Ukraine*, China Leadership Monitor, Issue 72, June 2022, available at: <https://www.prcleader.org/post/china-s-propaganda-on-the-war-in-ukraine> (last accessed: 23.06.2025).

<sup>106</sup> Michael Leigh: *Vaccine Diplomacy: Soft Power Lessons from China and Russia?*, Bruegel, 27 April 2021, available at: <https://www.bruegel.org/blog-post/vaccine-diplomacy-soft-power-lessons-china-and-russia> (last accessed: 23.06.2025).

<sup>107</sup> European Western Balkans: *Export of Medical Equipment Not Banned by EU – Member States Decide on Authorisation*, 17 March 2020, available at: <https://europeanwesternbalkans.com/2020/03/17/export-of-medical-equipment-not-banned-by-eu-member-states-decide-on-authorisation/> (last accessed: 23.06.2025).

<sup>108</sup> Sofija Popović: *"Steel Friendship" Between Serbia and China Criticised by European Commentators*, European Western Balkans, 30 March 2020, available at: <https://europeanwesternbalkans.com/2020/03/30/steel-friendship-between-serbia-and-china-criticised-by-european-commentators/> (last accessed: 23.06.2025).

<sup>109</sup> The Odessa Journal: *Survey: The Majority of Ukrainians Have a Positive Attitude Towards Georgia*, 4 March 2024, available at: <https://odessa-journal.com/survey-the-majority-of-ukrainians-have-a-positive-attitude-towards-georgia> (last accessed: 23.06.2025).

<sup>110</sup> International Republican Institute (IRI): *National Survey of Moldova*, April 2024, available at: <https://www.iri.org/wp-content/uploads/2024/04/NationalSurveyMoldova2024.pdf> (last accessed: 23.06.2025).

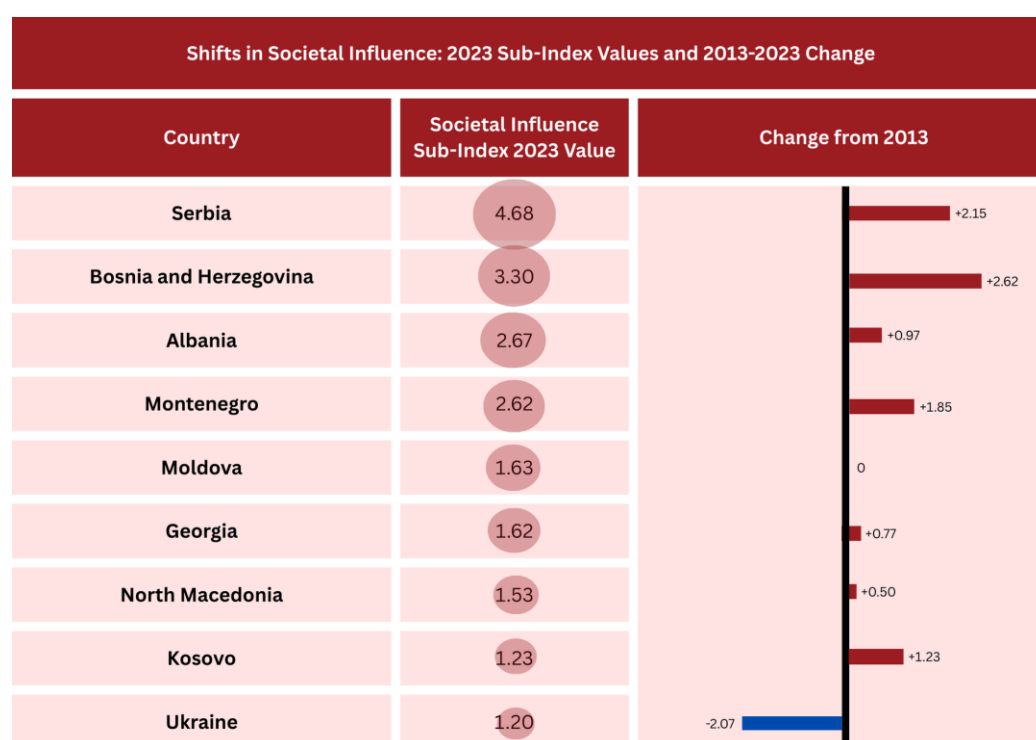
<sup>111</sup> International Republican Institute (IRI): *2022 Western Balkans Regional Survey*, January–February 2022, available at: <https://www.iri.org/resources/2022-western-balkans-regional-survey-january-february-2022/> (last accessed: 23.06.2025).

<sup>112</sup> Arjan Dyrnishi: *Final Barometer 2021 – Albania: Public Perceptions Towards Bilateral Relations, Cross-Border Cooperation and Identity Issues*, Center for the Study of Democracy and Governance (CSDG), March 2022, available at: [https://csdgalbania.org/wp-content/uploads/2022/04/Final\\_Barometer-2021-Albania-3-ENG.pdf](https://csdgalbania.org/wp-content/uploads/2022/04/Final_Barometer-2021-Albania-3-ENG.pdf) (last accessed: 23.06.2025).

to recognize Kosovo's independence.<sup>113</sup> Overall, across all countries, China is perceived more as a distant economic partner than as a culturally close or ideologically appealing power.

In sum, as illustrated in Figure 6, China's societal influence in the Eastern Trio and the Western Balkans has expanded in all countries but Ukraine and Moldova over the past decade. However, the shifts have been modest in most countries, and China's societal presence remains fragmented and state-centric. While educational programs, visa liberalization, and cultural initiatives have built new channels of interaction, their long-term impact is limited by weak grassroots engagement, cultural distance, and geopolitical ambiguity. The effectiveness of China's soft power strategy will ultimately depend not only on Beijing's continued investments but also on the willingness of local societies to engage, adapt, and reciprocate.

**Figure 6: Societal Influence Sub-Index Values in 2023 Compared to 2013**



## Overall InvigoratEU External Influence Index: General Trends of Chinese Influence

Chinese influence across the Eastern Trio and the Western Balkans has increased consistently across all domains-political, economic, and societal-throughout the observed period. As visualised in Figure 7, the aggregated index values per dimension reveal a general upward trend, even though influence levels have remained low to very low overall. Growth was particularly pronounced between 2013 and 2018, with most dimensions registering sharper increases. By contrast, the 2018-2023 period saw a noticeable deceleration, with gains slowing across the board.

<sup>113</sup> European Council on Foreign Relations (ECFR): *Kosovo - China's Spot of Absence*, 2023, available at: <https://ecfr.eu/special/china-balkans/kosovo/> (last accessed: 23.06.2025).

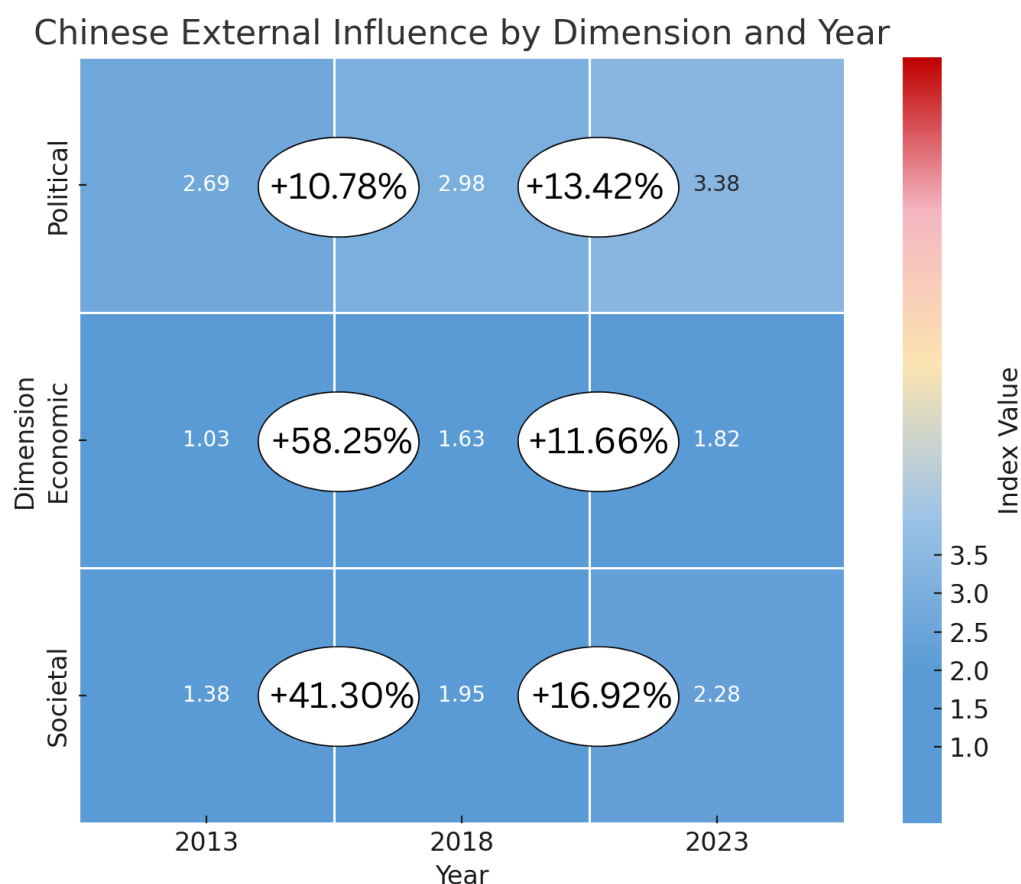
While **political influence** represents the highest index values among the three dimensions (3.38), it still falls within the “low influence” category on average –possibly reflecting China’s emergence as a stable global actor whose political presence is increasingly acknowledged, though not dominant. The political index exhibited the most linear growth, rising by 10.78 percent in the first period (2013–2018) and by 13.42 percent in the second (2018 – 2023).

**Economic influence** saw the sharpest acceleration between 2013 and 2018 (+58.25%), followed by a markedly slower increase from 2018 to 2023 (+11.66%). Despite the high visibility of Chinese economic initiatives and the intense debate they have generated, the absolute values remain within the “very low” category. This suggests that, at an aggregate level, the outcomes have not fully matched the ambitious rhetoric or expectations.

**Societal influence**, while also accelerating in the earlier period (+41.3%) and slowing thereafter (+16.92%), has shown a gradual but meaningful rise. Notably, it made a categorical leap from “very low” to “low” influence, indicating some progress in China’s soft power projection, even if its overall societal impact remains limited.

**Figure 7: Aggregated Chinese Influence Index by Dimension and Year (2013–2023)**

*The heatmap displays arithmetic means of country-level index scores across political, economic, and societal dimensions, offering a composite view of regional trends over time.*



However, when looking at Figures 8 and 9, which present the evolution of Chinese influence across the Eastern Trio and the Western Balkans between 2013 and 2023 and in the year 2023 alone, it becomes evident that aggregate data offer limited explanatory value. This is primarily due to the considerable variation across countries, the absence of a coherent regional strategy, and China's growing reliance on bilateral relationships to advance its strategic interests. As these figures show, Chinese influence in the region is highly uneven—both in magnitude and in trajectory—highlighting the importance of country-specific dynamics.

- **Serbia** clearly stands out as an outlier. Chinese influence there had already reached moderate levels by 2018 and has continued to rise since. Over the past decade, Serbia has become China's most strategically relevant partner among the nine countries. What began as a relationship grounded in political support – especially with regard to Serbia's position on Kosovo – has evolved into a multidimensional partnership. Political influence, already high, has further strengthened. Economically, China's position in Serbia started from a very low base in 2013, but its presence has grown rapidly, reaching moderate levels by 2023. The social dimension has also become increasingly relevant, with a marked rise in Chinese cultural and educational initiatives, greater media presence, and a significantly more positive public perception. These trends are reflected in Serbia's position at the top of the ranking, with a score of 5.02.
- **Ukraine** registers a lower overall influence score – 3.04 in 2023 – but holds the second-highest position. Interestingly, the total score remained constant over time, yet this masks divergent trends across the three dimensions. Political influence was already moderate in 2013 and remained stable until 2018, before rising further as China's stance on the Russian invasion became a matter of strategic interest for Ukraine (despite alienating political linkages). Economic influence has followed a steady upward trajectory, largely driven by trade in agricultural products and raw materials, sectors of strategic importance to both countries. However, the social dimension tells a very different story: whereas public perceptions of China were relatively positive in 2013, by 2023 they had turned strongly negative, reflecting growing scepticism and disapproval among the population.
- **Georgia** follows closely behind, with a 2023 score of 3.03. Unlike Ukraine, Georgia's influence score reflects a clear upward trajectory across all dimensions. Political influence has grown most significantly, driven by domestic political developments, followed by economic and, to a lesser extent, social engagement. China sees Georgia as a strategic platform for expanding its presence in the South Caucasus, gaining access to critical infrastructure and enhancing trade connectivity with the EU. At the same time, building ties with Georgia is part of a broader strategy aimed to balance other geopolitical actors in the region, including the West and Russia.
- Further down the ranking, **Bosnia and Herzegovina** shows lower levels of Chinese influence, scoring 2.90 in 2023. Here, political and social influence have grown steadily, but the economic dimension has remained weak, often falling short of political rhetoric and public expectations. China's engagement has focused on maintaining political goodwill, particularly with the Republika Srpska leadership, and investing selectively in infrastructure. Nonetheless, the country's complex governance structure and pro-European orientation continue to limit the depth of Chinese involvement.
- **Montenegro** represents the last country within the "low influence" category, with a score of 2.34. Chinese influence grew rapidly between 2013 and 2018—especially in the political and social realms—but has since experienced a slight decline. While political and societal ties have remained on a slow but steady rise, economic influence

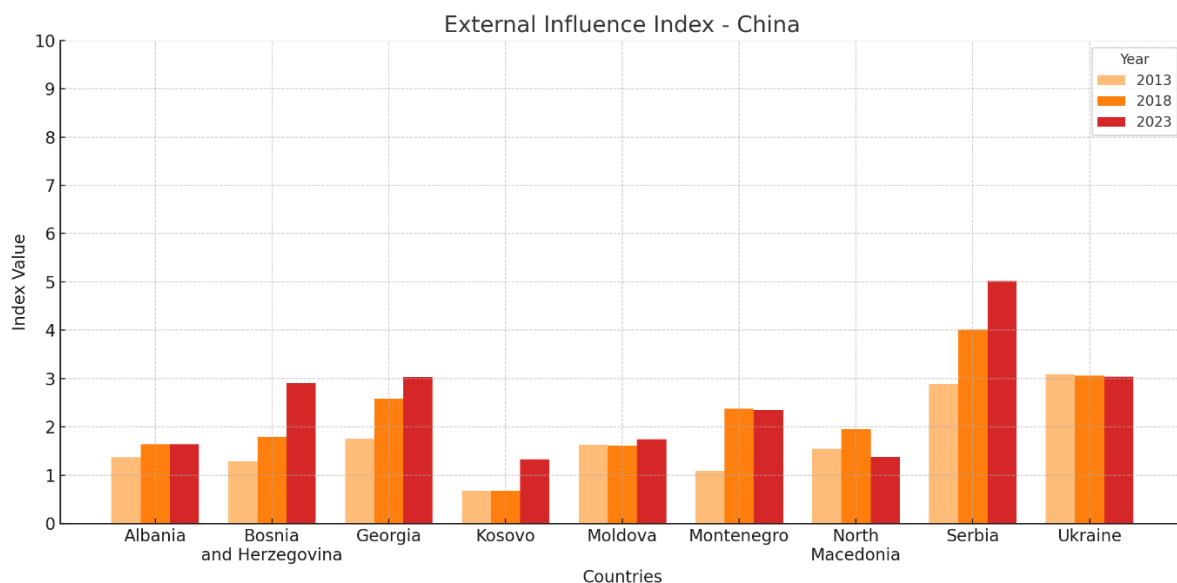


peaked in 2018 and has decreased in the following years, likely reflecting growing concerns over debt sustainability and stalled infrastructure projects.

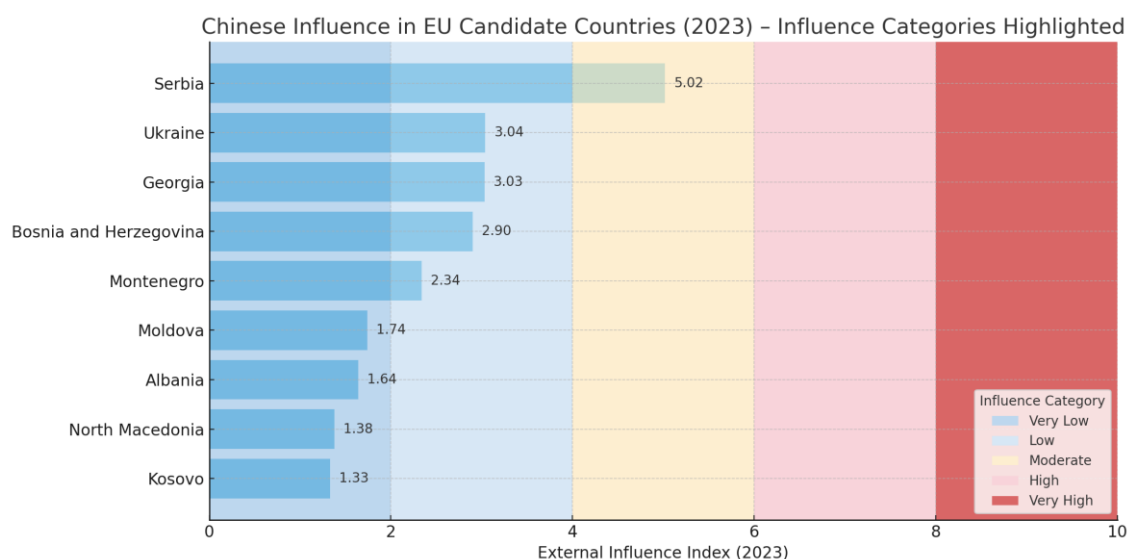
- The remaining countries – **Moldova, Albania, North Macedonia, and Kosovo** – are characterized by very low levels of Chinese influence. Moldova, with a score of 1.74, experienced a cooling of relations after 2018, particularly in the economic and political domains. Albania (1.64) and North Macedonia (1.38) show similar trajectories. All three countries saw an initial period of modest engagement with China, followed by stagnation or decline after 2018. In these cases, China has neither gained meaningful economic leverage nor developed strong cultural or social ties. Kosovo ranks last, with a score of just 1.33. China does not recognize Kosovo’s independence and engages with the territory almost exclusively through its support for Serbia’s position. As a result, there are virtually no direct political, economic, or social interactions between China and Kosovo.

Taken together, the figures illustrate not only the fragmented nature of China’s influence across these nine countries, but also the importance of understanding the local context. China’s approach is clearly pragmatic and bilateral, targeting specific countries based on their strategic value rather than promoting a uniform regional presence. This has led to a highly asymmetrical distribution of influence, where only a few of countries – most notably Serbia, and to certain extent Georgia – have seen the emergence of a truly multidimensional relationship with China.

**Figure 8: Shifts in China’s InvigoratEU External Influence Index Across the Region (2013–2023)**



**Figure 9: Country-Level 2023 Scores of Chinese Influence in EU Candidates, Colour-Coded by Influence Intensity**



## 5 Key Findings

This report examines how China’s influence in the Eastern Trio and the Western Balkans is expanding, illustrating how it remains extremely uneven, transactional, and shaped by local political, economic, and societal dynamics. Drawing from the InvigoratEU External Influence Index and qualitative research across nine countries, the following key insights emerge:

- China’s influence is growing – but remains fragmented and asymmetrical**  
 Over the past decade, China has sought to expand its global role through economic, political and societal influence, particularly under the Belt and Road Initiative and the Digital Silk Road. However, China’s influence in the two regions is far from uniform. Among the nine countries studied, only Serbia exhibits consistently high levels of influence across all dimensions. Others – including Ukraine and Georgia – display selective engagement, while countries like Kosovo, North Macedonia, Albania, and Moldova the influence remains marginal. China treats countries not as blocs, but as individualized bilateral partners, shaping a flexible and asymmetric influence spectrum based on political receptiveness, institutional capacity, and local demand.
- Economic ambitions are clear – but influence remains surprisingly limited and politicized**  
 Despite China’s global narrative of economic partnerships, its economic influence in the two regions is weaker than expected – though highly visible. Infrastructure and connectivity initiatives – such as the highway project in Montenegro – have positioned China as an alternative funder, offering capital without requiring governance reform. Yet overall, economic ties remain concentrated and uneven. While Serbia and Georgia stand out for their high levels of bilateral cooperation, other countries have seen stagnation or a decline in Chinese economic presence, often due to institutional weaknesses, external constraints, or shifting domestic preferences. This confirms that

Chinese influence is neither linear nor automatic, but shaped by a mix of domestic agency and geopolitical conditions.

**3. Serbia as an economic outlier: From infrastructure loans to strategic FDI**

Serbia represents the clearest example of China's adaptive and increasingly diversified economic strategy in the region. While the country initially attracted Belt-and-Road-style investments in infrastructure and energy, often underpinned by concessional finance, China has more recently expanded into FDI, including in manufacturing, mining, and industrial parks. This evolution is particularly striking in light of the decline of greenfield investments by Chinese firms in Western Europe.<sup>114</sup> The 2023 Free Trade Agreement and ongoing large-scale projects suggest that Serbia has become a preferred platform for China's longer-term ambitions in Southeastern Europe, combining economic scale with political receptiveness and strategic location.

**4. Political influence relies on elite alignment and symbolic reciprocity**

China avoids overt interference in domestic politics, but actively cultivates elite ties and symbolic legitimacy. In Serbia, this includes party-to-party relations and support of Beijing on the Kosovo issue. In Georgia and Ukraine, political cooperation is more functional and constrained, reflecting strategic hedging rather than alignment. In Republika Srpska (Bosnia and Herzegovina), China engages subnational elites to bypass the central government. Elsewhere – like in Albania, North Macedonia, Moldova and Kosovo – political ties are weak or cooling. Beijing's bilateralism allows for tailored engagement and has proven to be attractive to leaders in hybrid or fragile democracies, who leverage China's no-strings-attached approach to consolidate domestic authority without liberal oversight.

**5. Societal influence is modest but widespread and pragmatic**

China's societal outreach is largely instrumental and state-led, centred on Confucius Institutes, scholarships, cultural diplomacy, and pro-China narratives in local media. While Serbia leads in societal penetration, most countries have shown consistent levels of engagement through university partnerships and exchanges. Ukraine has seen a steep decline in societal ties since 2022 due to the war and China's perceived pro-Russia stance. Kosovo remains virtually disengaged. Despite limited depth, China's normative discourse resonates in post-socialist societies that still grapple with the socio-economic consequences of transitions and Western conditionality.

**6. China blurs the line between economic and security influence**

China follows a state-centric model that integrates infrastructure, trade, digital technologies, and security interests. Surveillance partnerships in Serbia, Huawei-related concerns in North Macedonia, and interest in port access and logistics hubs across the region exemplify how economic tools serve strategic goals. Chinese state-owned enterprises dominate large-scale projects, often lacking transparency or competitive procurement. Concerns over the transfer of dual-use technologies, access to critical

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<sup>114</sup> Agatha Kratz / Max J. Zenglein / Alexander Brown / Gregor Sebastian / Armand Meyer: *Dwindling Investments Become More Concentrated – Chinese FDI in Europe: 2023 Update*, MERICS & Rhodium Group, 6 June 2024, available at: <https://merics.org/en/report/dwindling-investments-become-more-concentrated-chinese-fdi-europe-2023-update> (last accessed: 23.06.2025).



infrastructure, and cyber and intelligence risks are growing across Europe. These fears are heightened by China's ambiguous positions on the war in Ukraine and global security alignments.

7. **China acts as a strategic opportunist – not as a coherent challenger to the West**  
China does not seek to displace Western actors outright, nor does it offer a clear ideological alternative. Rather, it adapts to institutional gaps, exploits elite interests, and leverages its development-without-democracy offer. In places like Serbia, Republika Srpska, and Georgia, this enables local actors to co-produce influence, using Chinese capital and technology to reinforce power structures. Far from being passive recipients, domestic elites actively shape the terms of engagement, especially where EU enlargement fatigue, hybrid regimes, or contested geopolitical orientations prevail. The region thus serves as a laboratory for China's state-centric model, showing how external influence can be embedded gradually without central coordination, yet still support long-term strategic positioning.

## 6 Recommendations

As China's presence in Eastern and Southeastern Europe becomes more visible, the European Union must respond with a coherent and forward-looking strategy. While Chinese engagement in the region remains uneven and often opportunistic, it has already exposed a number of vulnerabilities – especially in terms of governance, economic dependence, and institutional resilience. In this context, the EU must rethink how it engages with candidate countries, not only to address external influence but to support long-term democratic and economic consolidation.

A key starting point is to move beyond broad regional categories and engage instead with countries based on their specific contexts. China has been adept at adapting its approach to local conditions – for instance, cultivating close political ties with Serbia while maintaining only minimal involvement in Moldova or Kosovo. The EU should take note and adopt a similarly tailored strategy, building flexible, country-specific policies that reflect local needs, risks, and opportunities. This will require moving past generic regional initiatives and investing instead into in-depth expertise and partnerships that reflect the diversity of the countries in the two regions.

At the same time, the EU must recognise that institutional fragility is the most fertile ground for external authoritarian influence. Therefore, strengthening governance, the rule of law, and institutional transparency should become central priorities in EU enlargement policy. Rather than viewing these as merely normative aspirations, they must be treated as strategic, security, imperatives. This includes reinforcing oversight in public procurement, supporting independent media and civil society, and conditioning EU support on tangible governance reforms.

Moreover, the EU should extend the logic of its internal regulatory protection to pre-accession countries. Currently, tools such as the FDI Screening Mechanism or the Foreign Subsidies Regulation apply only within EU borders, leaving neighbouring countries vulnerable to unregulated foreign influence. The Union should work to close this gap by offering legal and technical assistance to help these countries screen foreign investments, regulate subsidies, and enhance

economic sovereignty. Doing so would significantly reduce exposure of these countries to opaque deals and politically driven partnerships.

However, regulatory tools alone are not enough. The EU must also respond to one of the core reasons why China remains attractive in the region: its ability to deliver fast, visible investment, particularly in infrastructure. Even when such investments come with long-term risks, they often address real needs. The EU must ensure that its own funding instruments are not only more generous, but also more accessible, efficient, and responsive. This includes simplifying procedures, speeding up implementation, and communicating the benefits of EU-backed projects more clearly to local populations.

Finally, while China's societal and cultural influence in the region is still limited, it is growing through Confucius Institutes, media collaboration, and scholarship programs. The EU must not overlook this soft power dimension. It should invest more in public diplomacy, support independent journalism, and fund local civil society initiatives that build trust and shared values. Equally important is crafting narratives that resonate with everyday concerns, addressing socio-economic gaps, rather than relying solely on abstract references to European norms or geopolitical threats.

Ultimately, the challenge posed by China's presence in Eastern and Southeastern Europe is not merely a matter of power politics, but one of institutional strength, public trust, and strategic vision. While opening accession paths is an important first step, it is not sufficient. The crucial test for the EU will be its ability to transform this perspective into concrete and credible accessions – starting with Montenegro and possibly Albania in the coming years. Only by doing so can the EU reinforce its legitimacy, respond to the aspirations of its neighbours, and build a more democratic and resilient European future.

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## Annex I *InvigoratEU External Influence Index: Detailed Breakdown*

**Table 3: InvigoratEU External Influence Index**

Element of analysis	Indicator	Sources of evidence	Indicator scale (0-3)	Weighting the indicator
<b>POLITICAL-SECURITY DIMENSION</b>				
<b>Bilateral and multilateral platforms (overall 25%)</b>				
<b>Level of bilateral partnership</b>	Depth and breadth of formal cooperation	Number and importance of signed agreements, presence of joint initiatives	0 – No close partnership 1 – Partnership in development 2 – Limited partnership, e.g., agreements in particular areas 3 – Deep, long-term strategic partnerships across multiple sectors	15%
<b>Participation in Russia/China/Turkey-led multilateral political initiatives</b>	Extent of participation in multilateral initiatives	Membership or observer status, participation in key summits, decision-making roles	0 – No participation 1 – Observer status or ad hoc participation 2 – Membership but limited participation 3 – Membership and significant contributions	5%
<b>Bilateral high-level visits</b>	Frequency and level of state visits	Number and level of visits (head of states and governments, ministers)	0 – No visits recorded 1 – Occasional high official and ministries visits 2 – Regular high official visits and ministries visits 3 – Frequent high official and ministerial and visits and by head of states and/or governments	5%
<b>Internal politics (overall 25%)</b>				



<b>Relations with political parties</b>	Political influence through party channels	Support, funding, or ideological alignment with external actors of key political parties	0 – No significant relations among parliamentary parties (PP) 1 – Ideological alignment and cooperation with opposition parties 2 – Ideological alignment and cooperation with junior parties in government coalition 3 – Ideological alignment and cooperation with major parties in government coalition	5%
<b>Parliamentarian cooperation</b>	Engagement in inter-parliamentary networks	Joint parliamentary sessions, parliamentary delegation visits, formal cooperation platforms	0 – No cooperation established 1 – Limited cooperation through delegations or informal networks 2 – Formalised cooperation 3 – Institutionalised cooperation with regular exchanges	5%
<b>Election interference</b>	Evidence of meddling in the election process	Instances of cyberattacks, disinformation or foreign funding	0 – No interference recorded 1 – Minor interference in information channels (e.g., disinformation campaigns) 2 – Isolated, uncoordinated interference attempts 3 – Coordinated and significant interference with election outcomes at risk	10%
<b>Legislative interference</b>	Influence on domestic law-making process	Lobbying, pressure to pass or reject laws, foreign-sponsored policies	0 – No interference recorded 1 – Minimal lobbying or indirect influence 2 – Occasional influence on particular laws 3 – Direct involvement in shaping key national legislation	5%
<b>Military sphere (overall 25%)</b>				

<b>Military cooperation</b>	Depth and frequency of military collaboration	Joint exercises	0 – No cooperation 1 – Military drills in discussions 2 – Bilateral military drills 3 – Bilateral and multilateral military drills	5%
<b>Military presence</b>	Degree of permanent/temporary foreign military presence	Troops, foreign bases, joint defence installations	0 – No active presence 1 – Military presence discussed but not implemented 2 – Short-term or semi-permanent deployments or symbolic presence 3 – Permanent bases or significant foreign military infrastructure	15%
<b>Arms trade</b>	Volume and strategic value of equipment trades	Volume of arms traded, defence contracts	0 – No notable cooperation 1 – Discussions on arms trade 2 – Notable arms trade 3 – Significant and sustained arms trade with strategic value	5%
<b>Foreign policy (overall 25%)</b>				
<b>CFSP alignment in relation to Russia/China/Turkey</b>	Degree of alignment with CFSP on Russia/China/Turkey issues	Alignment with High Representative's declarations	0 – Full alignment with CFSP 1 – >0; <20% of non-alignment 2 – >20%; <60% of non-alignment 3 – >60% of non-alignment	10%

<p><b>Involvement in the pursuit of key national interests (e.g. EU/NATO membership, territorial integrity, etc.) – contestation or support</b></p>	<p>Degree of contestation of key national policies or the degree of support for key national policies<sup>115</sup></p>	<p>Public critics, hostile diplomatic actions, coercive economic measures, support for secessionist movements, etc. (in case of contestation)</p> <p>or</p> <p>Public endorsements, diplomatic assistance in multilateral forums, non-recognition of seceding entities etc. (in case of support)</p>	<p>0 – No involvement or neutral stance 1 – Low-level involvement through rhetoric 2 – Moderate involvement, characterised by consistent contestation or support 3 – Significant involvement, where external actors actively and strategically support or contest key national interests</p>	<p>15%</p>
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<sup>115</sup> This indicator evaluates the extent of interest that foreign actors have in the key national interests of individual states. A foreign actor's influence is likely to be less intensive if it shows less interest in a state's key national interests. However, when a foreign actor actively opposes a state's national interests, its influence tends to increase due to deeper engagement. Conversely, there are instances where foreign actors actively support specific key national interests, thereby gaining leverage and fostering closer ties with those states, which also leads to significant influence. For example, Russia's influence in Moldova is considerable as it

ECONOMIC DIMENSION				
Trade and investment relations (overall 67%)				
The official level of economic/trade partnership	Strength of formal economic/trade agreements	Signed trade agreements, economic treaties, customs unions, trade promotion frameworks	0 – No formal economic partnership or negotiations ongoing 1 – Trade agreements in particular sectors 2 – Free trade agreements 3 – Deep and comprehensive free trade agreements (second generation free trade agreement)	5%
Foreign Direct Investments	FDI inflows	Annual FDI inflows as a percentage of total FDI inflows	0 – No FDI >1% of total FDI 1 – FDI 1-5% of total FDI 2 – FDI 5-20% of total FDI 3 – FDI >20% of total FDI	7%
	FDI Stock	FDI stock as a percentage of total FDI stock	0 – No FDI >1% of total FDI 1 – FDI 1-5% of total FDI 2 – FDI 5-20% of total FDI 3 – FDI >20% of total FDI	15%
Trade Intensity (goods and services trade)	Exports	Share of exported goods and services as a percentage of total exports	0 – Trade <5% of total 1 – Trade 5-10% of total 2 – Trade 10-20% of total 3 – Trade >20% of total	25%
	Imports	Share of imported goods and services as a percentage of total imports	0 – Trade <5% of total 1 – Trade 5-10% of total 2 – Trade 10-20% of total 3 – Trade >20% of total	15%
Strategic economic dependence (overall 33%)				

supports secessionist movements, thereby opposing the country's aspirations for territorial integrity and sovereignty. In contrast, in Serbia, Russia's influence remains strong due to its substantial backing on Serbia's position on the Kosovo issue, making it an appealing partner.

<b>Strategic assets ownership and presence of foreign firms</b>	Ownership of key sectors/assets by foreign actors, as well as presence of foreign-owned or partnered firms	Control of strategic sectors (e.g., energy, telecom, transport, banking) by foreign firms/governments	0 – No foreign ownership or minimal ownership of minor assets 1 – Relative majority ownership in one sector 2 – Relative majority ownership in several sectors 3 – Absolute majority ownership in at least one sector	11%
<b>Energy dependence</b>	Share of energy imports from foreign actors	Percentage of total energy imports coming from one external actor	0 – Energy imports <5% 1 – 5-20% energy imported 2 – 20-35% of energy imported 3 – >35% of energy imported from a single actor	15%
<b>Official foreign debt</b>	Foreign debt to external actors	Foreign debt to a specific country as a percentage of total debt	0 – No foreign debt 1 – Foreign debt <5% of total 2 – Foreign debt <15% of total 3 – Foreign debt >15% total	7%
<b>SOCIETAL DIMENSION</b>				
<b>Mobility and connectivity (overall 27%)</b>				
<b>Diaspora</b>	Size and influence of the diaspora community	Size of the diaspora population and their level of influence in local politics, economy and culture	0 – No significant diaspora 1 – Small diaspora with minimal influence 2 – Moderate diaspora with some influence 3 – Large diaspora with significant influence	6%

<b>Visa requirement</b>	Ease of travel between countries	Visa requirements for citizens, presence of visa-free agreements or relaxed visa policies	0 – No visa-free access 1 – Visa required with some facilitation 2 – Visa-free access for a shorter stay (up to 30 days) 3 – Visa-free access for a longer stay (more than 30 days)	3%
<b>Tourism</b>	Volume and impact of tourism coming from China, Turkey or Russia	Number of tourists from the external actor and their economic impact	0 – Negligible tourism interactions 1 – Low tourism interaction (1-5% of total tourism) 2 – Moderate tourism interaction (5-10% of total tourism) 3 – High volume of tourism (>10% of total tourism)	3%
<b>Education/student exchanges</b>	Scale and impact on educational exchanges	Number of exchange programmes, students participating and institutional partnerships as share of total	0 – No notable exchanges 1 – Minimal exchanges or programs 2 – Moderate exchanges with some impact 3 – Extensive exchanges with significant impact	10%



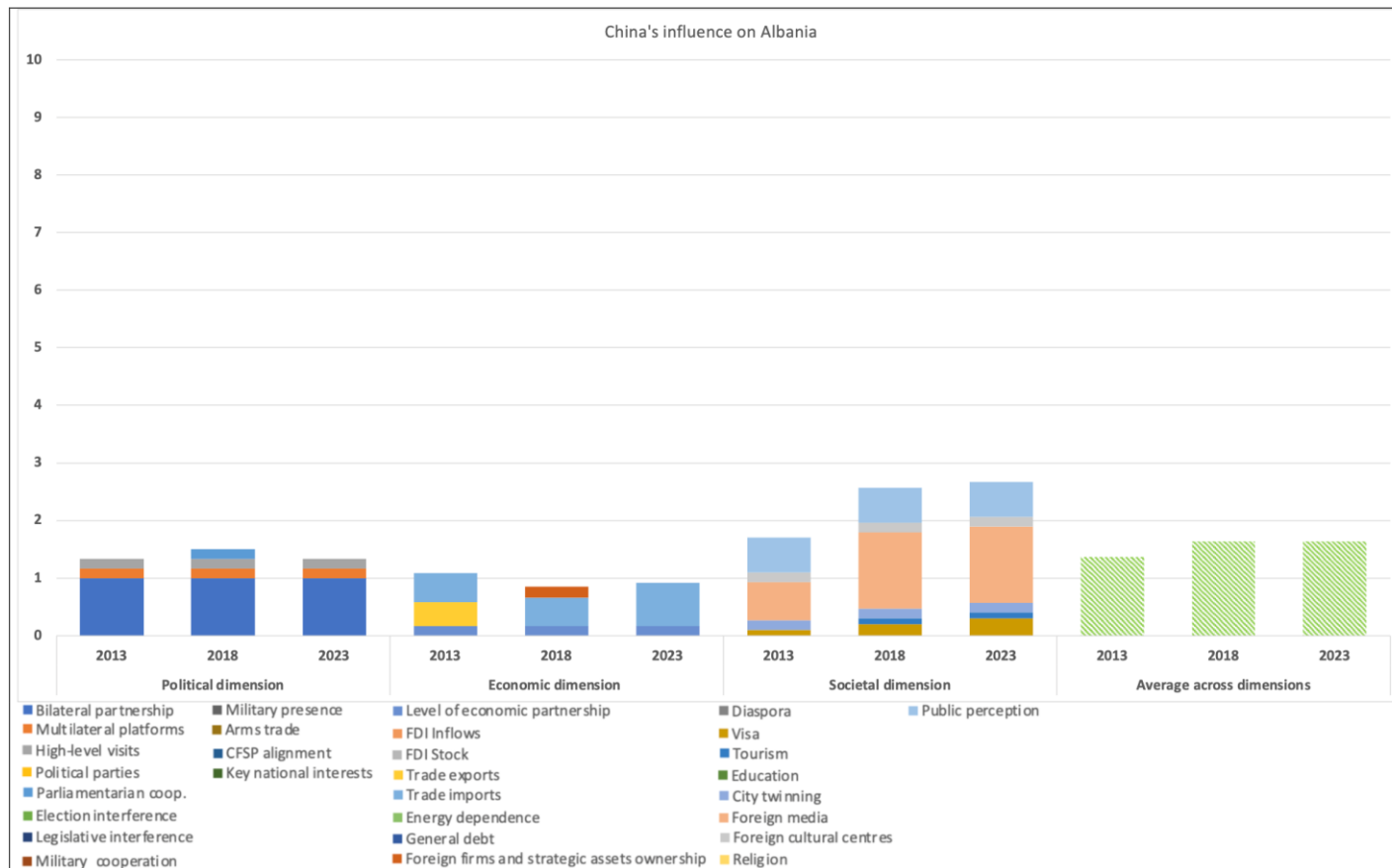
<b>Local/provincial government partnership, city twinning</b>	Number and effectiveness of local/provincial partnerships	Number of twinning agreements and their effectiveness	0 – No partnerships or twinning 1 – Few, ineffective partnerships 2 – Moderate number with some effectiveness 3 – Significant partnerships with proven effectiveness	5%
<b>Cultural and informational sphere (overall 55%)</b>				
<b>Foreign media presence and influence</b>	Extent and nature of foreign media presence	Number of foreign media outlets, their reach, and influence on public opinion	0 – No notable foreign media presence 1 – Minimal presence with limited reach 2 – Moderate presence with some influence 3 – Extensive presence with a noticeable influence on shaping public opinion	20%
<b>The presence of foreign cultural centres</b>	Impact of foreign cultural institutions	Number of cultural centres and their role in promoting foreign culture and language	0 – No foreign cultural centres 1 – Existing but with limited impact 2 – Existing with moderate impact 3 – Existing with substantial impact	5%

<b>Religious bonds and cooperation</b>	Level of religious ties and co-operation	Depth of religious collaborations and partnerships	0 – No religious ties 1 – Different religion but some ties with local minorities 2 – Majority religion, moderate church relations 3 – Majority religion, well-developed church relations	30%
<b>Public perceptions (overall 18%)</b>				
<b>Perception/Public Opinion (on cooperation benefits, on donation intensity, on global influence, on leader popularity, donor perception)</b>	Public opinion on selected aspects	Opinion on cooperation benefits, donation intensity, global influence, leader popularity, and donor perception	0 – Mostly negative opinion 1 – Mostly neutral or mixed opinions 2 – A generally positive opinion with some criticism 3 – Mostly positive opinion with broad support	18%

## Annex II *InvigoratEU External Influence Index* per Candidate Country

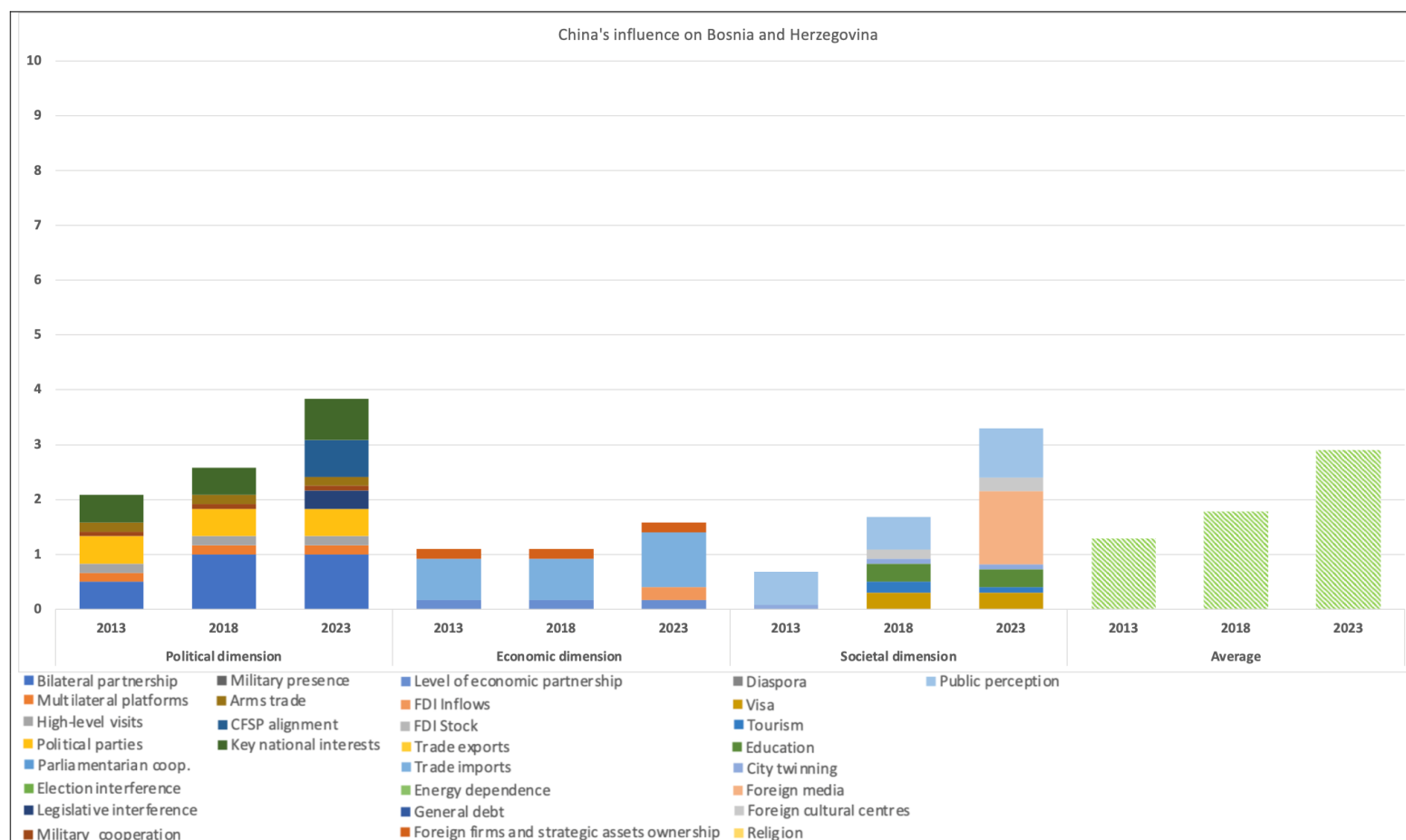
### Annex II.1 Albania

Figure 10: China's Influence in Albania (2013–2023)



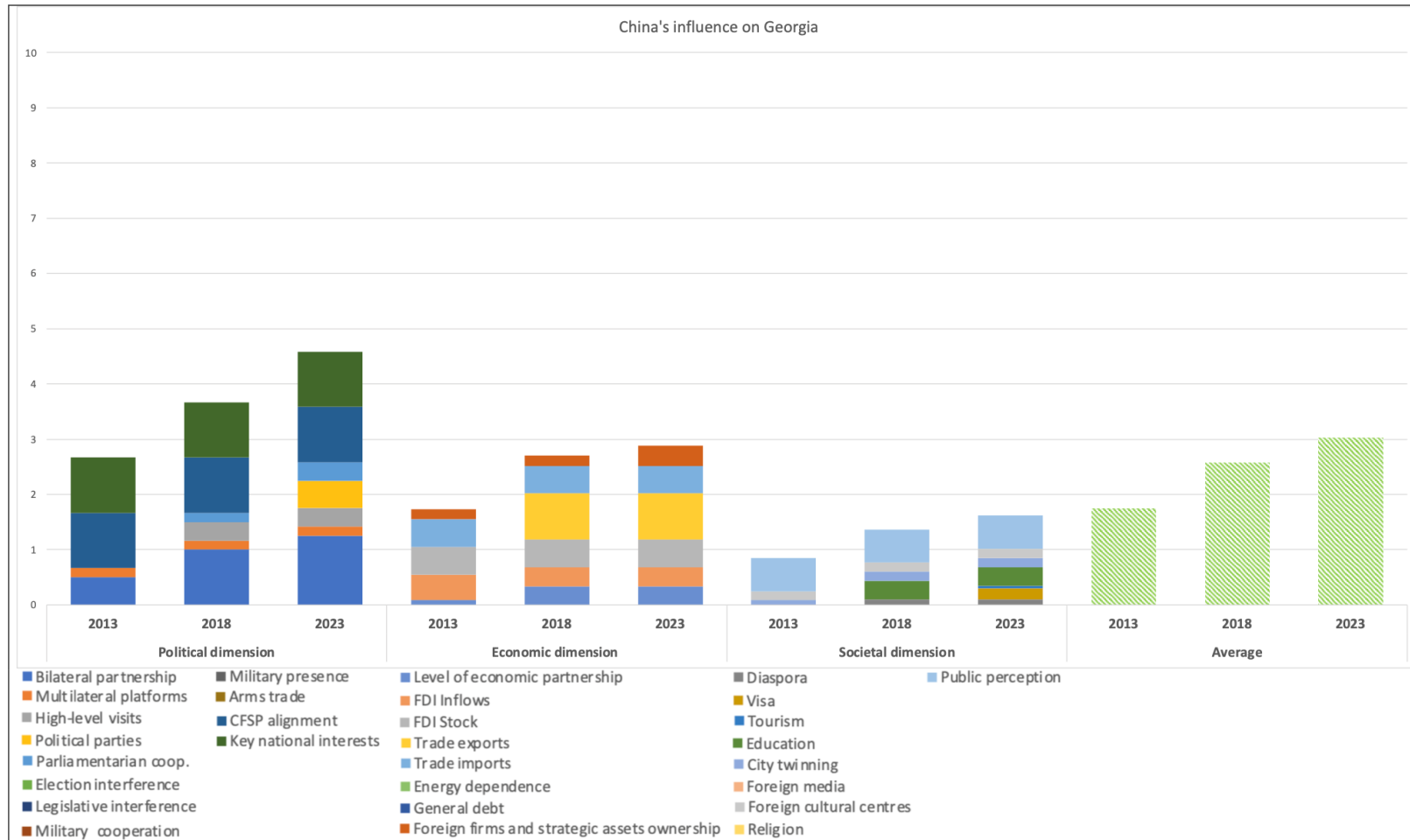
## Annex II.2 Bosnia and Herzegovina

Figure 11: China's Influence in Bosnia and Herzegovina (2013–2023)



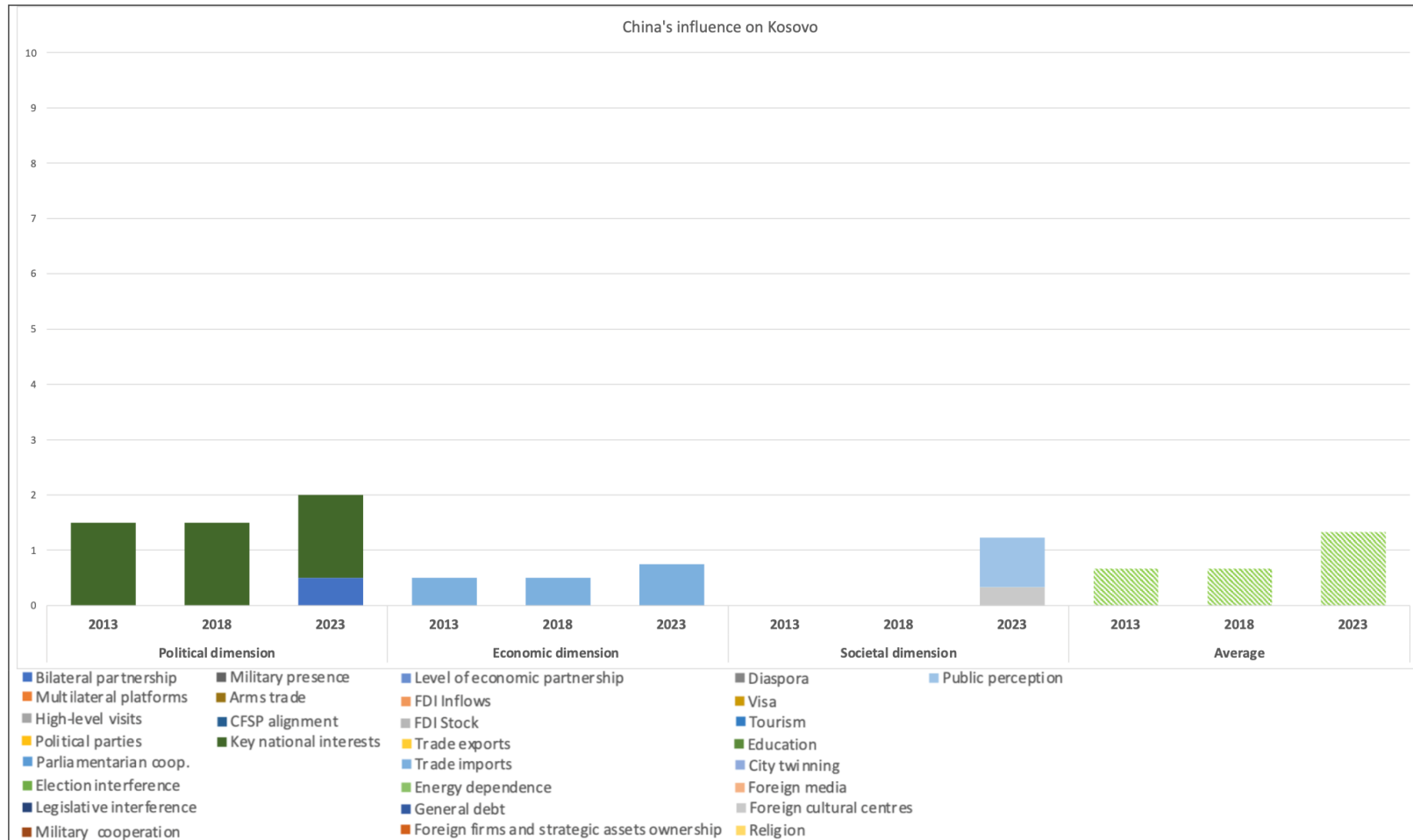
## Annex II.3 Georgia

Figure 12: China's Influence in Georgia (2013–2023)



## Annex II.4 Kosovo

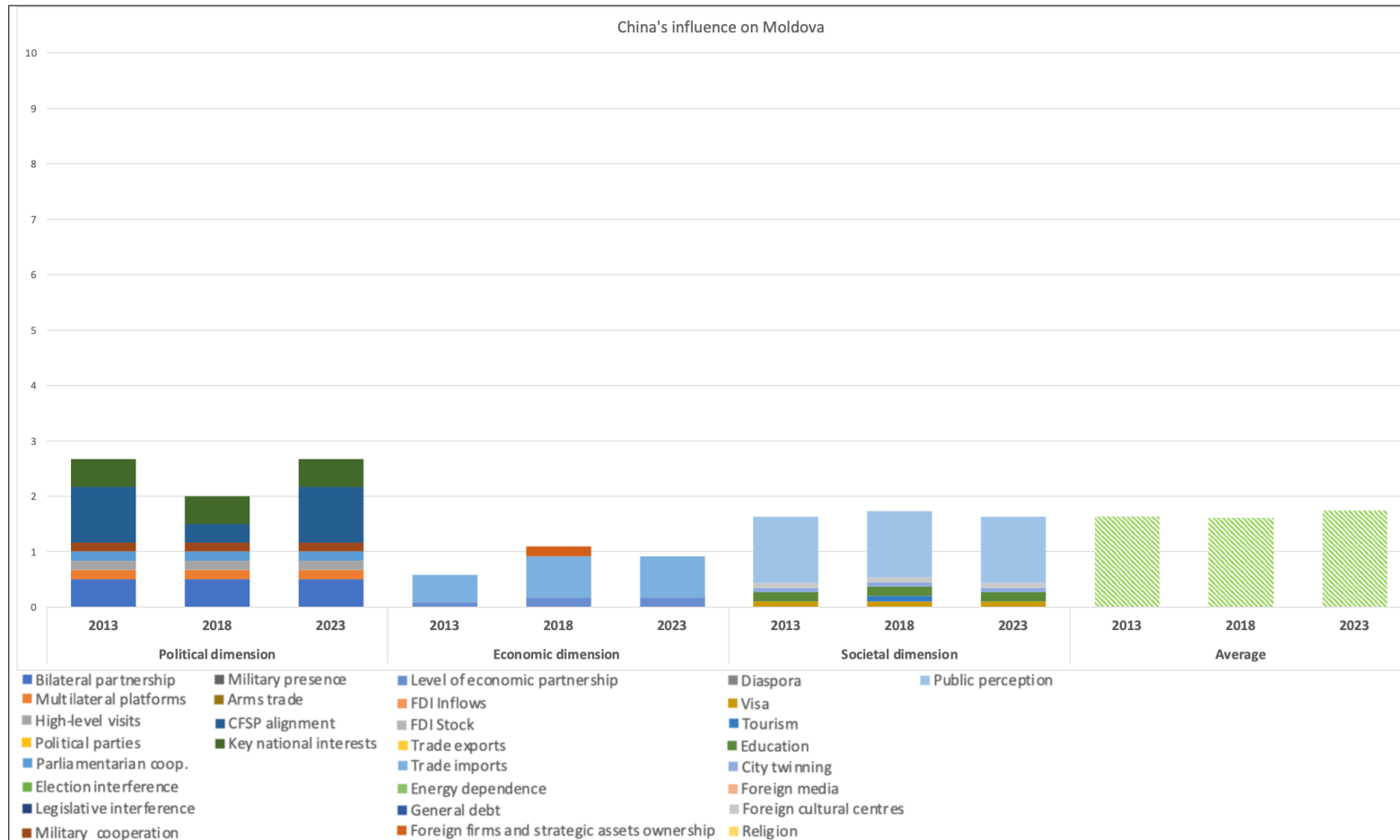
Figure 13: China's Influence in Kosovo (2013–2023)





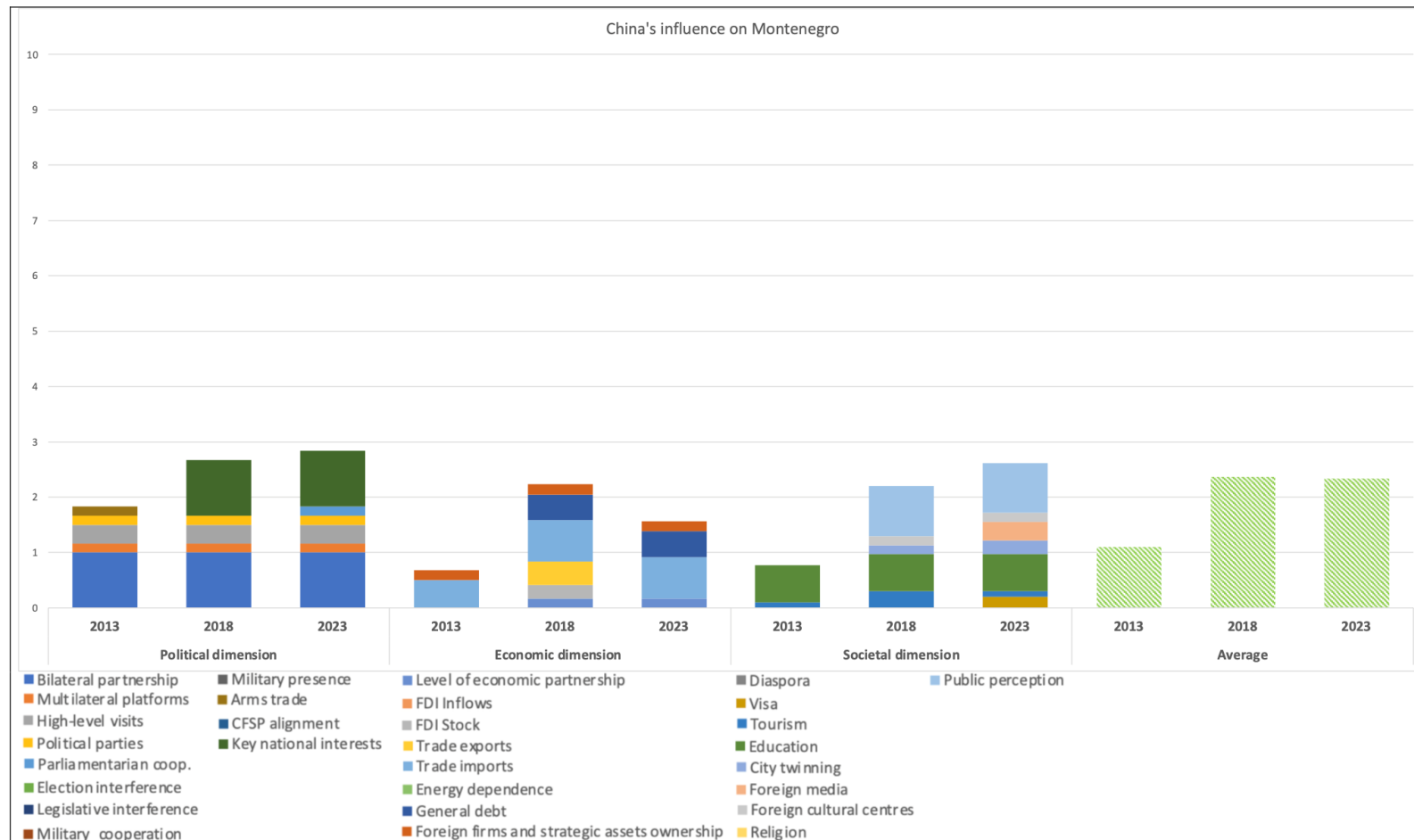
## Annex II.5 Moldova

Figure 14: China's Influence in Moldova (2013–2023)



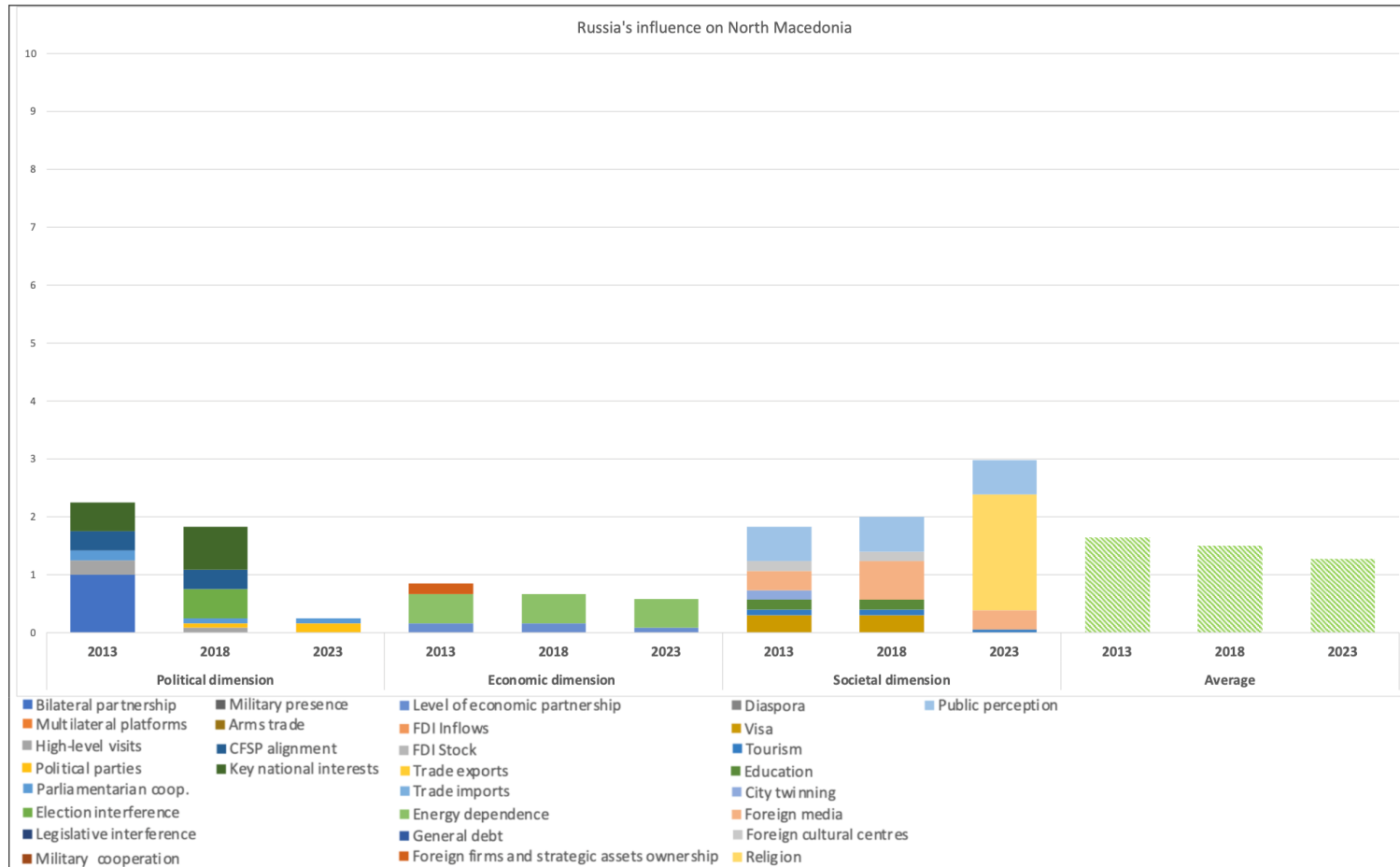
## Annex II.6 Montenegro

Figure 15: China's Influence in Montenegro (2013–2023)



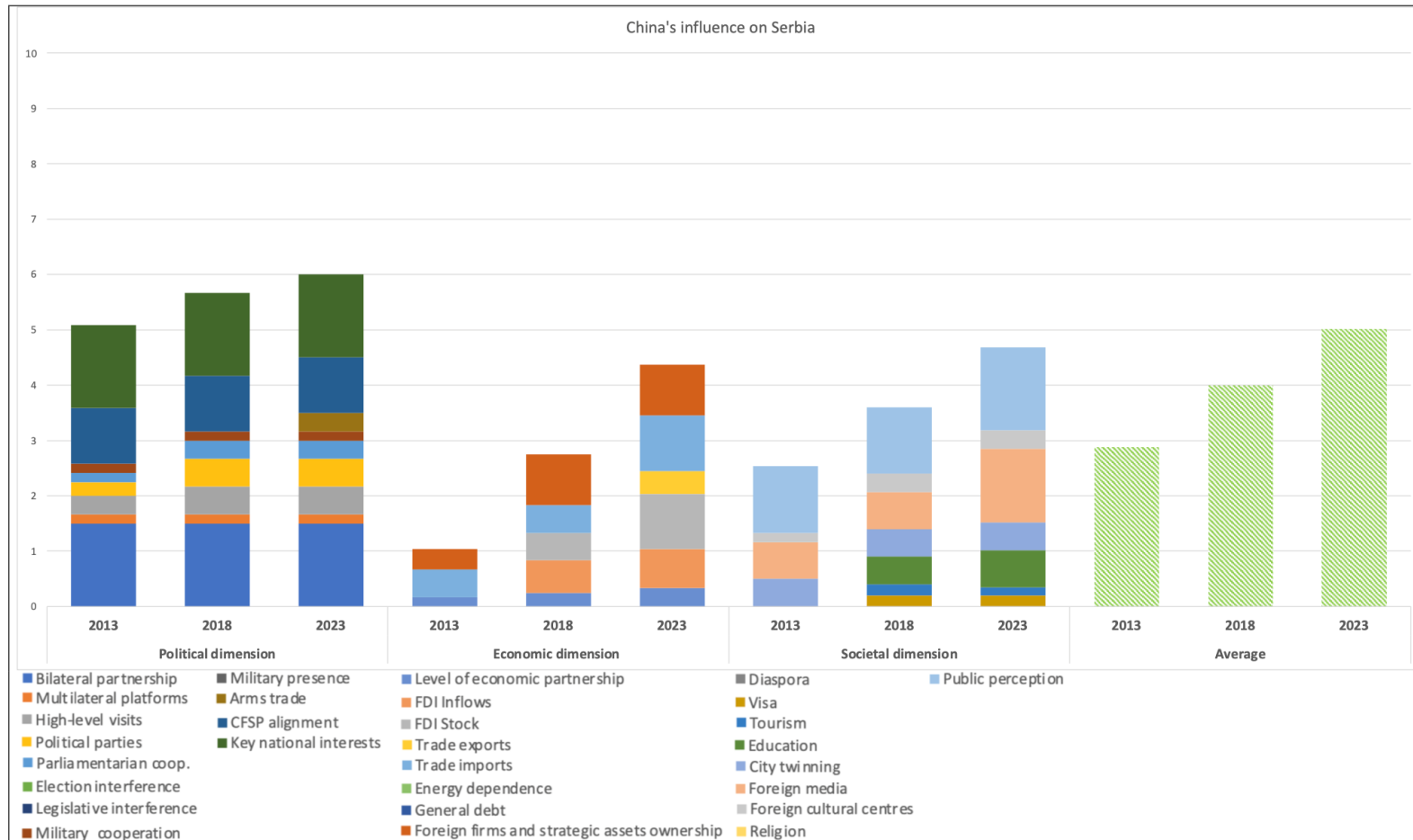
## Annex II.7 North Macedonia

Figure 16: Russia's Influence in North Macedonia (2013–2023)



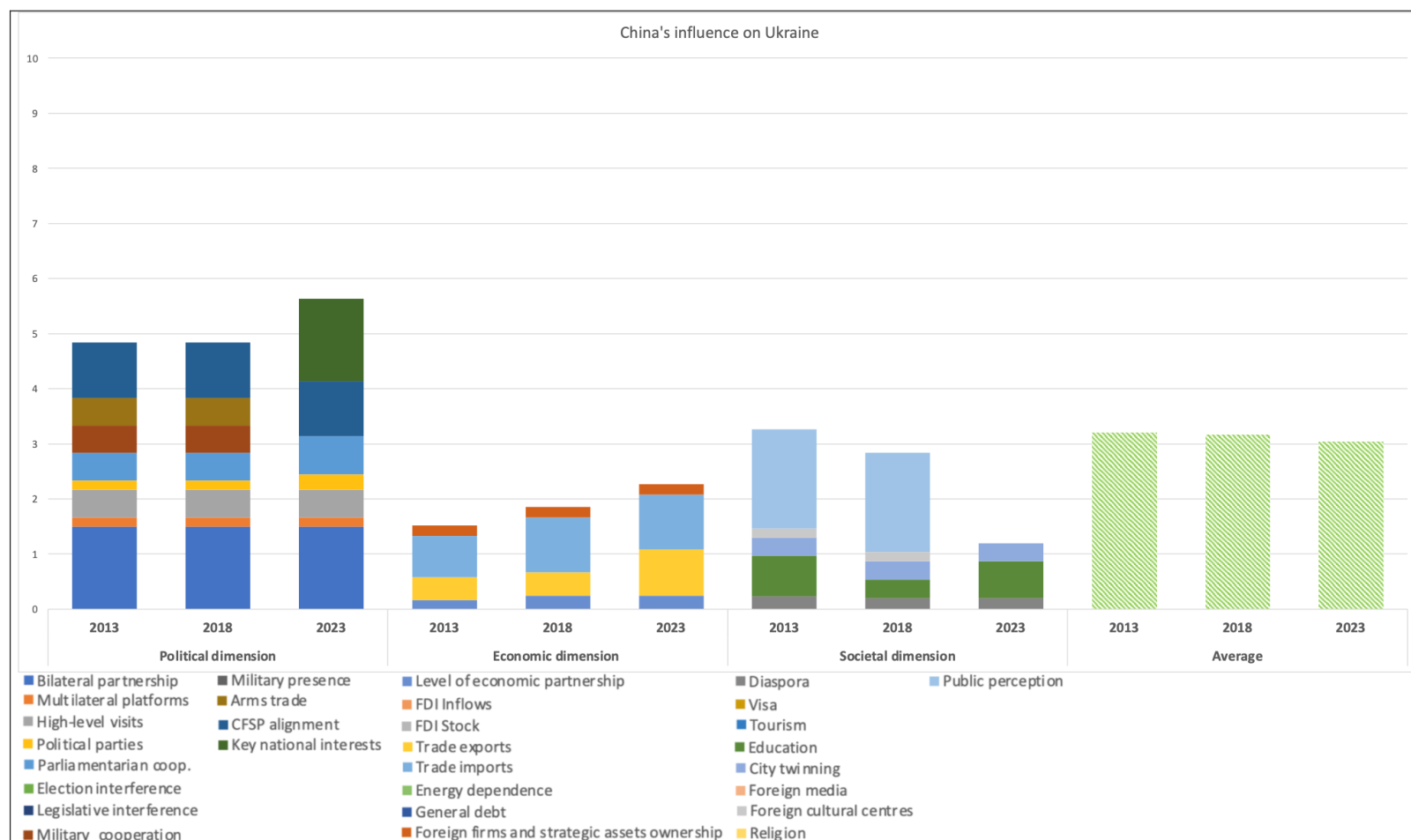
## Annex II.8 Serbia

Figure 17: China's Influence in Serbia (2013–2023)



## Annex II.9 Ukraine

Figure 18: China's Influence in Ukraine (2013–2023)



## About InvigoratEU

InvigoratEU is a Horizon Europe-funded project, coordinated by the EU-Chair at the University of Duisburg-Essen (UDE) together with the Institut für Europäische Politik (IEP) in Berlin. The project, with a duration of 3 years from January 2024 until December 2026, examines how the EU can structure its future relations with its Eastern neighbours and the countries of the Western Balkans. The consortium has received around three million euros for this endeavour.

### How can the EU invigorate its enlargement and neighbourhood policy to enhance Europe's resilience?

Our first goal is to investigate how to reform the EU's enlargement strategy in a new geopolitical phase, HOW TO RESPOND to other actors' geopolitical ambitions in the Eastern Neighbourhood and Western Balkans, and HOW TO REBUILD the EU's foreign policy arsenal in view of a new era of military threats (triple "R" approach) combining the modernisation and geopolitical logics of EU enlargement, leading to new data – e.g. a public opinion survey in Ukraine, a set of scenarios, an external influence index (Russia, China, Turkey), and a social policy compliance and cohesion scoreboard.



Our second goal is to elaborate an evidence-based, forward-looking vision for the EU's political agenda and institutional frameworks for co-designing a multidimensional toolbox (i.e. two tailor-made toolkits), together with InvigoratEU's Expert Hub, Civil Society (CS) Network, Youth Labs, Workshops for Young Professionals and Policy Debates in a gaming set up, which will result in context-sensitive and actionable policy recommendations for European and national political stakeholders and (young) European citizens in particular.

Our third goal is to deploy a CDE (communication, dissemination and exploitation) strategy aiming at recommendations from Day 1 to maximize our scientific, policy and societal impact in invigorating the EU's enlargement and neighbourhood policies to enhance Europe's resilience. Ultimately, InvigoratEU is a deliberately large consortium respecting the diversity of Europe and political perspectives; 7 out of 18 are from Georgia, Moldova, Ukraine, and the western Balkans (North Macedonia, Montenegro, Serbia), complemented by our Civil Society Network of 9 representatives from all Western Balkan countries, Georgia, Moldova and Ukraine.

InvigoratEU is funded by the European Union.

*Disclaimer: Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.*