



EXTERNAL INFLUENCES IN THE WESTERN BALKANS: WHERE ARE WE AT?

ABSTRACT

Alongside the EU accession path, other third countries have managed to create the conditions to expand their spheres of influence to the Western Balkans. Ethnic fragmentation, weak economic conditions and widespread cases of corruption created fertile soil for non-EU-aligned actors to enter regional dynamics and attempt to fill regional power vacuums. Multiple strategies have been adopted. These go from the use of diplomacy to direct financial investments; from promoting cultural adherence to establishing forms of economic dependence. The main actors involved in the process are Russia, China, Turkey and the Gulf States, all using different tools and capacities to pursue their objectives. The EU complex principles of conditionality and long negotiation processes have worsened the institutional and motivational obstacles to pursuing a smooth European path. Nevertheless, the conflict in Ukraine and the most recent global development, have led the EU to overcome political and institutional minutiae to work on reaching its main regional interests: security and stability. This paper focuses on the presence of external actors in the Western Balkan region, the interests and ambitions behind their manoeuvres and the direct consequences for the European Union.



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Introduction

The Western Balkans (WB), a crossroads of peoples and a bridge between the East and the West, represent a crucial neighbouring region for the European Union. Most countries present common structural features such as developing economic conditions, heterogeneous societies and, in some cases, a conflictual past which still permeates in nowadays internal politics. There are also post-conflict or deeply divided societies, such as the case of Bosnia and Herzegovina¹ and North Macedonia, which are still governed on the basis of power-sharing and 'consociational' traits.² Grand coalitions, proportional electoral systems and equal distribution of power between communities are aimed at extending political representation along ethnic lines. However, this has resulted in favouring even stronger polarisation within the region.

Despite the profound divisions, throughout the years and especially after the Russian aggression to Ukraine, interest in the EU enlargement has grown. Nevertheless, when considering their external political alignment, the Western Balkans have not always shared a pro-Western voice. In particular, accession mechanisms based on the EU's principle of conditionality, lengthy negotiation processes, the presence of strongly contested unresolved matters (such as the recognition of Kosovo), and the lack of concrete and finalised accession paths have fed strong frustration among WB governments and civil society, hence creating room for third actors to acquire influence in the region, enter the WB's internal affairs and offer alternative opportunities to the ones created by the EU. Several third-party external actors are trying to fill the void in the region, including Russia, China, Turkey and the Gulf States. The context in the Western Balkans is therefore becoming increasingly critical, not only for its

elements of instability and territorial proximity to the EU but also as a proxy for diplomatic challenges and increased competition. For the purposes of this policy brief, each case study will be presented with references to the most recent developments.

Russia

The proximity between the Western Balkan region and Russia cannot be considered only territorial; as a matter of fact, several other factors have traditionally strengthened their ties, first of all, religious adherence. The Christian Orthodox Church is one of the most bonding elements at the societal and political levels. Many Orthodox communities live in the Western Balkans, especially in Serbia, Bosnia and Herzegovina, Montenegro but also in North Macedonia and Croatia. This religious factor is probably one of the elements that mostly favour a strong connection between Russia and the Western Balkan countries, but it is not the only one. The Slavic populations of Eastern Europe also share the legacies of 'pan-Slavism', a social movement that advanced the idea of a common Slavic cultural heritage. A shared cultural and religious heritage, and the use of Cyrillic, in particular among Serbs, Bulgarians and Macedonians, made most populations perceive themselves extremely close to Russia. According to the latest censuses, people declaring themselves as Orthodox³ are respectively 81.1% in Serbia,⁴ 46.14% in North Macedonia, 69.5% in Bulgaria,⁵ 72% in Montenegro⁶ and 82.82% in Republika Srpska⁷ (Bosnia and Herzegovina). They also make use of Cyrillic as the official language script. All these features contribute to shaping political agendas,⁸ especially among the ranks of right-wing parties, notably more connected to the aspects of traditions and conservatism. Religion is increasingly interconnected with cultural and institutional layers of societies,

contributing to a growing political consent and social cohesion around Russia



Energy remains the strongest point of accession for Russia in the Western Balkans: Serbia, North Macedonia and Bosnia and Herzegovina have been and still are fully dependent on Russian gas.



Besides cultural affinity, Russia has made considerable economic investments in the region. The amount of money invested does not reach the same proportions as the Chinese investments. Still, Russian investors have managed to access key regional sectors such as infrastructure, energy and electronics. In the last few years, it has been estimated that Russian economic investments in the region involved an expenditure of \$1.27 billion in Montenegro, \$1.1 in Serbia, \$547 million in Bosnia and Herzegovina and \$30 million in North Macedonia.⁹ While it is estimated that Russian financial involvement has increased in absolute terms over the last few years,¹⁰ Russia's economic footprint on the Western Balkan economy has generally shrunk, especially after 2014 with the annexation of Crimea and in the wake of international sanctions against Moscow.¹¹ Energy remains the strongest point of accession for Russia in the Western Balkans: Serbia, North Macedonia and Bosnia and Herzegovina have been and still are fully dependent on Russian gas.¹² Other countries, such as Kosovo, Montenegro and Albania are likely to opt for Azerbaijan resources via the Trans-Adriatic Pipeline (TAP).¹³ One of the most relevant cases is that of the Republika Srpska (RS), one of two the federated entities of Bosnia and Herzegovina mostly inhabited by Serb-Orthodox citizens. In the context of a

general diplomatic and economic distancing between the West and Russia, Milorad Dodik, president of RS and exponent of Serbian conservatism in Bosnia and Herzegovina, and Aleksandar Vučić, president of Serbia, managed to strengthen their ties with Moscow.¹⁴ Despite the EU's warnings to maintain a European alignment towards the conflict in Ukraine, Serbia and Republika Srpska still remain close to Moscow's orbit. This also resulted in the wide spread of pro-Russian narratives within the country.

China

Unlike Russia, China started to exert its influence on the Western Balkans much more recently. Obviously, the foundations of Chinese influence do not lay on special historical or cultural ties. Trade exchanges and investments in infrastructures and industries remain the main tools used by China to acquire influence in the Western Balkans.¹⁵ It has been estimated¹⁶ that between 2009 and 2021, China has invested more than €32 billion in the whole region, ten of them just in Serbia. In 2020, China has even become the main investor in Montenegro and Serbia¹⁷ not only for the direct purchase of businesses and properties but also for corporate debt.¹⁸ Alongside the financial aspect, China's diplomatic strategy includes shaping a positive and benevolent image, by offering support to local communities. This



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became extremely clear during the Covid-19 crisis when China strengthened its so-called 'vaccine diplomacy',¹⁹ particularly in Serbia, Albania and North Macedonia. Between February and June 2021, China provided 4.2 million doses of Sinopharm²⁰ to Serbia, 200,000 to North Macedonia²¹ and another 200,000 to Montenegro. Chinese diplomacy²² has also expanded through the establishment of seven new Confucius Institutes²³ – four of them only in 2019,²⁴ reaching the total number of 16 centres in the whole region – a second²⁵ sinology department in Bosnia and Herzegovina,²⁶ at the University of Banja Luka, and a visa-free regime for Serbia, Bosnia and Herzegovina, and Albania.²⁷

Turkey

Historically, the Western Balkans played a crucial role in the economic development of the Ottoman Empire and as an intermediary territory between East and West. In this context, Turkey's ability to offer itself as a valuable interlocutor between the Adriatic,



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the Mediterranean and Central Europe was developed to enhance its strategic role within the international community until today. Peace and stability across the Western Balkans is a priority for the Turkish foreign policy agenda: migrations, crime, economic stagnation and regional conflicts have always

represented negative externalities for the country's national growth.²⁸ For this reason, the Turkish government decided to have a primary role in several initiatives focused on crisis prevention, such as the Southeast European Cooperative Initiative (SECI),²⁹ the Stability Pact for South-Eastern Europe and the South-East European Cooperation Process (SEECP).³⁰ In addition, Turkey represents the Organisation of Islamic Cooperation (OIC)³¹ at the Peace Implementation Council for Bosnia and Herzegovina.³² Also, Ankara has strengthened its position as a regional power through soft power tools, leveraging long-standing religious and cultural affinities in many areas.³³ The Turkish Cooperation and Coordination Agency (TIKA) has opened seven out of 55 offices only in the Western Balkans³⁴ and – through the Yunus Emre Institute, the creation of the International Burch University in Sarajevo in 2008 and the cooperation through the university-level Mevlana Exchange Programme³⁵ – it works to raise interests in the Turkish language and culture.³⁶ This has further contributed to the diffusion of TV and film productions, radio broadcasting programmes and information agencies (such as Novo Vrijeme and Macedonia Zaman). Poor regional public transportation systems have led Turkish Airlines to establish multiple routes to connect the Balkans to Turkey and many other destinations. On the financial side, Ziraat Bank and Halbank are now among the biggest banks rooted in the region. In 2022, Turkey exports to the Balkans surged by 28.7% and reached \$14 billion in the first eight months of that year.³⁷ Finally, concerning the religious aspect, if Russia manages to connect with the Orthodox world, Turkey represents the main point of reference for an estimated number of 8 million people who profess Islam and live in the Western Balkans, especially among Albanians, Bosniacs and Roma.³⁸

Gulf states

As a crossroads between the West and the East, the Western Balkans have always been particularly sensitive to influences from all sides of Europe. Unlike the above-mentioned actors, those from the Arab world might appear to act in the region in a more discreet, restrained manner. However, this does not certainly mean that actions targeting the acquisition of influence are less effective. The countries that are more involved in WB6 are Saudi Arabia, Qatar and the United Arab Emirates. Several elements demonstrate these countries' increased interests in the Western Balkans, such as the creation and the diffusion of information platforms, like Al Jazeera Balkans, and the wide investments to favour the spread of Islam, such as the construction of mosques and the training of imams by Arab clergy.³⁹ The influence of these countries is visible even just walking in the city centres: the Sarajevo City Centre, the biggest mall in the capital of Bosnia and Herzegovina, has been built by the Saudis, while the Alta Shopping Center in Sarajevo and the maxi urban redevelopment project in Belgrade to enhance and encourage the economic development of the Sava river banks called 'Belgrade on the water' (Београд на води / Beograd na vodi) have been financed by the Emirians. In addition, it is worth mentioning the acquisition of AirSerbia by the Ethiad Group and the substantial funding of the Serbian defence sector by Saudi Arabia.⁴⁰

Where does the EU stand in all this?

In light of the conflict in Ukraine, the EU felt the urgency to accelerate the enlargement to its neighbouring countries. Croatia was the last state to access the Union in 2013 and to join the eurozone at the beginning of 2023. Since Croatia's accession, only Serbia and Montenegro have been truly progressing in



EU membership might represent a true game-changer for diverting the current unstable regional trajectory.



the negotiations as a candidate status, but finally, 2023 has been a year of big changes. As a matter of fact, the conflict in Ukraine turned EU enlargement into a political priority on the European agenda so, as of today, all WB countries have moved some steps towards integration. Albania and North Macedonia have started the negotiation process, and Bosnia and Herzegovina is expected to do so. Ukraine and Moldova have been granted the state candidate status, and Kosovo formally presented the request for EU accession. After years of vetoes and slowing downs, the EU has finally maintained a united approach and proceeded toward some more serious accession talks.

It will be during this very process that European and local policy-makers can aspire to build together stronger democratic standards in the region. After the dissolution of Yugoslavia, the Western Balkans have struggled to convert their post-conflict societies into fully working liberal democracies. Corruption still lies at all levels of societies and poor economic conditions have decelerated reconstruction processes. EU membership might represent a true game-changer for diverting the current unstable regional trajectory.⁴¹ In addition to all this, the extreme fragmentation and polarisation of societies, such as in Bosnia and Herzegovina, Kosovo and North Macedonia, have put the brakes on a linear advancement in the political sphere as well as in the development of a unified and widely accepted sentiment of national civil society. This results in lingering political narratives and discourses that solely

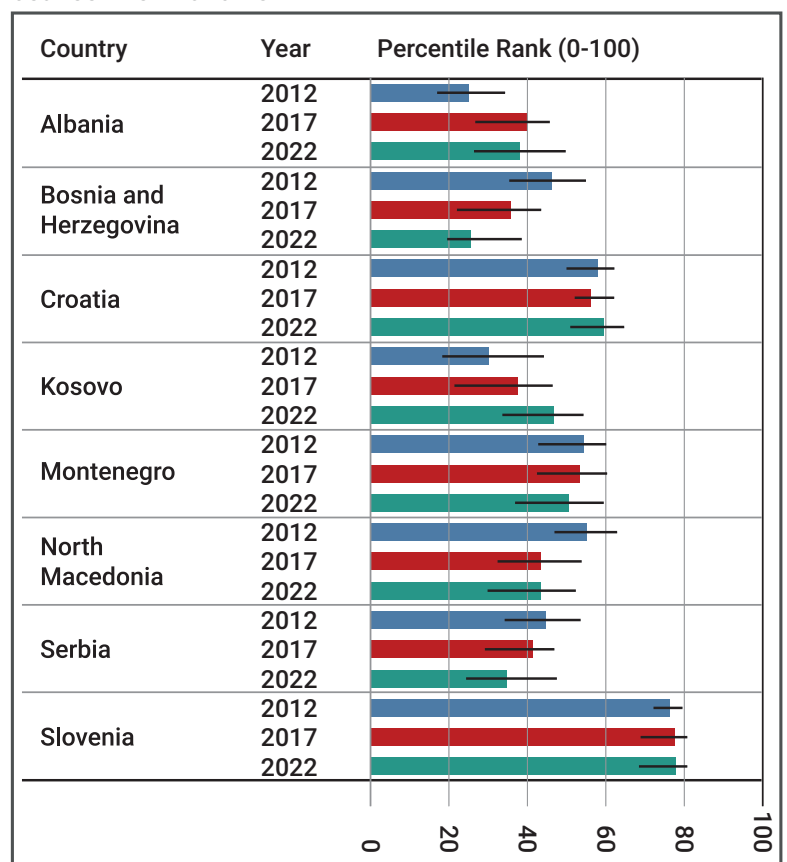
compels along ethnic lines, thus perpetuating already existing conditions of division. In these divisive contexts, the European Union has demonstrated throughout the years to be able to work on the socio-political empowerment of the region together with national leaders. However, the strict conditionality principles for EU accession have often raised crucial questions about the actual costs and benefits of the whole process. The difficulty in implementing EU requirements, further fueled by internal disagreements, has progressively eroded citizens' motivation towards the European cause. This directly affected pro-EU consensus across the region. It has been the most recent international developments that have finally shown everybody that the EU can overcome legislative minutiae in order to pursue higher goals. Among these, the Union's internal security.

Conclusions

In recent years, various external actors have gained influence throughout the Western Balkans. Ethnic fragmentation, post-conflict patterns, divided societies and poor economic conditions have offered optimal conditions for third countries to gain access to the regional internal dynamics. Through financial investments, the creation of infrastructure and cultural enhancement, countries such as Russia, China, Turkey, Saudi Arabia and the United Arab Emirates have increasingly set foot at a historic crossroad area crucially important for the EU. After years of hesitation, the EU has finally decided to speed up all the ongoing membership requests, such as Bosnia and Herzegovina and Kosovo's, which, for a very long time, have been the most critical cases. One of the main

reasons behind these changes of course was the need to countering local power vacuums and setting the ground for the Union's security strategies. As a matter of fact, there are real risks correlated to the deterioration of both international and regional contexts, which would result in negative externalities even for the EU. By leaving increasingly enlarging mesh nets within local political systems, there would be plenty of margins to operate in such a geo-strategically close region for the European Union. What has become clear for analysts is that external autocratic regimes have been developing three main objectives in the region: accessing European markets, both inland and sea freight forwarding; finding low-cost labour; and generating investment dependences. As a matter of fact, the expansion toward the Western Balkan region does not represent only

Figure 1: Data on Control of Corruption in the Western Balkans between 2012 and 2022



Source: World Bank.

a territorial ambition or a mere spawning of socio-political instability. Still, instead it results being deeply connected to economic reasons. It is estimated that in the light of the conflict in Ukraine and the rise of international sanctions against Russia, illicit financial flows (especially originated by Russian economic systems but also the Chinese and Emirian ones) have reached 6% of the region's GDP and this is bound to create a further negative impact on the development of regional economic and democratic systems.⁴² This is being brought about by money laundering through the purchase of real estate and business assets, creating corporate structures that support transfers of funds, using complex ownership structures to avoid identification and using false trade information to facilitate sensitive goods shipments.⁴³ External influences seem to have found fertile soil and are easily rooted in certain contexts such as Bosnia and Herzegovina, Serbia and North Macedonia. Internal ethnic divisions, high rates of corruption and less diversified economies open the paths for external countries to exert internal influence. Given the most recent deteriorations of the international context, the concept of ontological security jointly with the most recent decisive moves advanced by the EU might result more efficient than ever. Public support for EU approaches and policies happens to vary across the region. However, it has experienced a slight improvement over the last couple of years. Crucial moments in the international context were the Covid-19 pandemic and the war in Ukraine. Both crises deeply altered original international balances, and this led the countries to focus more on issues such as national security, alliance systems and reliable interdependence frameworks. According to the most recent statistics, Albania is among the most enthusiastic about EU membership, while the least remains Serbia.⁴⁴ This trend can

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turn in favour of EU actions, but still, it has to be considered with caution. On the one hand, stakeholders should take further steps to refine the long-term accession processes that can be perceived with frustration by local populations, thus an unsuccessful integration plan; on the other hand, candidate states that present misleading behaviours (especially in terms of foreign policy) should be better monitored and regulated. Time-consuming frameworks and pro-Russian alignments represent risks for the EU's influence in the region as these aspects could lay the foundations for a general distancing of the Western Balkans. In fact, actors such as Russia, Turkey and China have managed to offer great economic support to all those countries in exchange for less demanding conditions. This paved the way for key sectors, which are still very strategic also for the EU.

States living in post-conflict systems, like Bosnia and Herzegovina, and post-communist systems, such as Albania, face many layers of institutional work for building reconstruction and democratic transition. This makes negotiation processes even more complicated. EU enlargement represents a big geostrategic objective as it involves much more than mere economic support. However, easy resources from other countries still look more appealing for unstable countries to overcome daily national shortcomings. On the one hand, for

the EU, the Balkans plays a strategic role in securing stability outside its borders; on the other hand, general interests in the region involve many other aspects: gaining influence within Eastern Europe and accession to the Mediterranean Sea for Russia; a viable way for establishing new markets and strengthening the Belt and Road Initiative for China; and finally, for Turkey, strengthening its position within the international arena as an alternative power bridging between the European and the Middle Eastern landscapes. The overcrowding of external interests in the region results in significant consequences: in particular, the undermining of the labile regional stability it managed to develop throughout the years, and the deepening of internal divisions. As a matter of fact, non-uniform investments (which often favour certain parts of the society instead of others, such is the case for Muslim or Orthodox populations), the lack of strong national identities and the persistence of pre-existence of internal imbalances would worsen the economic, social and political development of Balkan countries, most of them still struggling to become full democratic regimes. Repercussions on EU levels are multiple as well. Accession processes would continue to experience slowdowns as political misalignments persist. First of all, it would affect the question of trust bidirectionally: the EU cannot risk exposing itself to an internal lack of consensus by accepting within its system controversial members that do not totally adhere to European visions and might also represent a liability for the Union and have high political costs; at the same time, Western Balkan countries could limit expectations over unreachable accession standards and divert their efforts towards easier paths. Consequently, third actors can really benefit from this disorienting context by finding fertile ground to gain influence in numerous sectors. Access to both Central

European and Mediterranean markets seems to be the main common driver of all external actors while, regarding EU perspectives, the Western Balkans also represent a crucial area for security-related rationale: control over migration flows from Central Asia and the Middle East, oversight of EU external borders, protection on EU financial investments in the region and conflict prevention remain the core strategies of the European Neighbourhood Policy. For all these reasons, the positioning of the Western Balkans within the international community represents one of the most current crucial issues that must be addressed to avoid worsening within an already deteriorating international context. European policymakers should keep in mind that preserving internal strength and common political visions remains essential.

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LABOUR MIGRATION IN THE WESTERN BALKANS

CONSEQUENCES FOR THE REGION'S DEMOCRATIC LIFE

ABSTRACT

Labour migration is a phenomenon that is rooted in the structural problems of Western Balkans societies, such as the high rate of youth unemployment, a poorly performing labour market and inadequate welfare systems.

The phenomenon has severe repercussions not only on the quality of internal services, such as healthcare and highly qualified jobs, but also on the democratic stability of the countries analysed.

This policy brief provides an overview of the causes and consequences of labour migration from the Western Balkans, concluding with recommendations for the regional national governments and for the European institutions on how to jointly address the problem.

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BOSNIA-HERZEGOVINA

HOW TO BUILD A VIABLE ROAD TO EU MEMBERSHIP

ABSTRACT

Since its beginning with the Stabilisation and Association Agreement in 2002, Bosnia-Herzegovina's EU path has been marred by the country's unwillingness to gather the necessary political consensus to adopt the reforms needed to improve its functionality, its rule of law and its democratic standard. This feature has proved itself true throughout BiH's EU journey. The limits of conditionality have been overcome by Brussels' and the member states' several decisions to lower the bar and allow Sarajevo to go further. The 2022 decision by the Commission and the Council to grant BiH the candidate status stems from almost purely geopolitical considerations, rather than from the effort of Bosnian institutions to reform. The same will most likely be true when, in March 2024, the Commission might recommend the Council for the opening of accession negotiations.

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THE EUROPEAN POLITICAL COMMUNITY: INFORMALITY AS A KEY TO SUCCESS

ABSTRACT

The EPC has been established to create 'strategic intimacy' among European countries, at a time when Russian aggression against Ukraine demanded a show of unity and geopolitical resolve. Its lack of standing structures, institutions, budget and even final declarations should be taken as added value and not as a liability. Indeed, the EPC should not be considered as a loose replica of the EU or as a waiting room for EU aspiring members. Any comparison with the EU fails to capture the real added value of the EPC – an informal format allows European leaders to freely discuss open issues at 'multilateral' level on the sidelines of the event, without the pressure of political consensus. While European leaders should resist the calls to institutionalise the EPC, they should also be aware of the risk of increasing fatigue, if this format fails to deliver tangible results in the long run. In order for the EPC not to become just a big political opportunity for the whole European continent, organising best countries (which rotate on a six-month basis on the EU/non-EU country principle) should spend their political capital to keep the EPC a valid geopolitical institution with its distinctive features.

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IS A NEW PATH TO ENLARGEMENT POSSIBLE?

A LOOK AT THE PROPOSALS FOR STAGED ACCESSION

ABSTRACT

This policy brief analyses the most relevant proposals – developed both within the European institutions and by independent research centres – on the staged accession methodology for the EU enlargement process toward the Western Balkans.

It also includes a summary of the discussion held at the network meeting of Friends of the Western Balkans in June 2023, putting together the different positions emerged, the uncertainties declared, and the new proposals developed during the discussion. Finally, the policy brief highlights the strengths and weaknesses of the proposal, indicating which aspects can be improved.

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EMBRACING THE WESTERN BALKAN COUNTRIES' EU ACCESSION AT PRESENT

A VITAL QUESTION MARK FOR THE EU

ABSTRACT

This paper highlights the challenges and geopolitical shifts impacting the European Union (EU) enlargement process for the Western Balkan (WB6) region. Concerns over democratic institutions and reluctance of some EU member countries have significantly slowed down the enlargement process. To overcome obstacles, the EU has been pushing in the region both the reforms needed but also the idea of reaching regional integration as a way to enhance welfare, growth, and stability. However, these strategies have not yet yielded the desired results.

The outbreak of Covid-19, geopolitical tensions, and an increasingly confrontational global environment might well compel the EU to reassess its regional engagement and provide a credible enlargement path for the WB6. Yet, reforms are not only needed in the WB6, but also in the EU to make its decision-making process more efficient. Notwithstanding current obstacles, the shifting global order and the influence of external actors in the region make the WB6 inclusion within the EU of vital importance for the European security and stability at large.

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MONTENEGRO'S POLITICAL TRANSITION

FROM DJUKANOVIĆ TO WHERE?

ABSTRACT

Since 2020, Montenegro has been marred by strong political turbulence, whose main driver has been the gradual loss of power by longtime former President Milo Đukanović and his party, the Democratic Party of Socialists (DPS), which have been in power since the country introduced multipartism in 1991. Đukanović's hold on power guaranteed Montenegro's hold on Western values and Euro-Atlantic institutions, building on a strong Montenegrin national identity and decoupling from Serbia. At the same time, Montenegro became a classic case of 'stabilocracy', with a strong degree of state capture, corruption and political control of media and judiciary. Years of political tensions, due mostly to the attempts by DPS to marginalise the Serb minority in the country and to the strongly felt grievances against the perceived authoritarian rule by Đukanović, resulted in the ousting of DPS from power following the parliamentary elections in 2020, when a loose coalition of pro-Serb and civic forces – whose only common denominator was the removal of the ruling party from power – managed to form a short-lived government. Notwithstanding the ensuing instability, and the persistence of the divide between pro-Serb forces and the advocates of a strong Montenegrin identity, the presidential elections in March-April 2023 saw the final demise of Đukanović with the election of Jakov Milatović as president. His recent visit to Europe Now! Movement managed to combine pro-Serb feelings with calls for economic development, with a populist twist. Parliamentary elections in June of the same year resulted in Europe Now! gaining the most votes, although not enough to form a government alone, with DPS managing to keep a fair share of support. As Montenegro embarks on the difficult process of forming a coalition government, its commitment to Euro-Atlantic values might be put to the test.

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External influences in the Western Balkans. Where are we at?