



RESEARCH REPORT / 10

# FRIENDS OR FOES?

EXTERNAL ACTORS AND THE EU'S  
WESTERN BALKANS POLICY

Dimitar Bechev and Srdjan Cvijić

March 2026

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## EXTERNAL ACTORS AND THE EU'S WESTERN BALKANS POLICY

Dimitar Bechev and Srdjan Cvijić

Expert questionnaires administered by Vuk Vuksanović



**BCSP** Belgrade Centre  
for Security Policy

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## Summary

This publication assesses how six external actors - Russia, China, Türkiye, the United Arab Emirates (UAE), Israel, and Azerbaijan - engage with the Western Balkans (WB) and how such engagement affects the European Union (EU) enlargement process.

The analysis is anchored in: (1) Desk research on foreign influence and security dynamics in the WB; (2) 27 structured expert interviews conducted in November–December 2025 using a standard questionnaire; and (3) targeted open-source research to verify interview claims and fine-tune the empirical findings where necessary.

The main output of the research is the Threatometer: three comparable tables rating each actor across three criteria: (i) the prominence of the EU in that actor's policy vis-à-vis the WB; (ii) the degree to which the actor poses a threat to the European Project; and (iii) the degree of overlap between that actor's policy and the EU's agenda in the WB.

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## Threatometer Results at a Glance

Across the six actors, the highest combined risk profile emerges where three conditions coincide: (a) the EU is a central reference point in an actor’s regional strategy; (b) the actor has strong incentives and capabilities to exploit domestic governance opportunities and gaps; and (c) the actor’s objectives are in direct tension with the EU conditionality and rule-of-law reforms.

SCALE:

1 Very low	2 Low	3 Medium	4 High	5 Extremely high
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### Threatometer Snapshot

The table below consolidates the three criteria into a single view. Detailed justifications are provided in the actor chapters.

**Table 1:** Threatometer Snapshot

Actor	EU prominence	Threat to the European Project	Overlap with EU WB policy
Russia	5 (Extremely high)	5 (Extremely high)	1 (Very low)
China	4 (High)	4 (High)	3 (Medium)
Türkiye	3 (Medium)	3 (Medium)	4 (High)
United Arab Emirates	3 (Medium)	4 (High)	2 (Low)
Israel	2 (Low)	2 (Low)	3 (Medium)
Azerbaijan	4 (High)	2 (Low)	4 (High)

### Criterion 1: Prominence of the EU in the Actor’s Balkan Policy

How centrally the EU (as a set of institutions, single market, purveyor of norms, or geopolitical competitor) features in the actor’s engagement with the Western Balkans.

**Table 2:** Criterion 1 - Prominence of the EU in the Actor’s Balkan Policy

Actor	Score (1-5)	Qualitative mark
Russia	5	Extremely high
China	4	High
Türkiye	3	Medium
United Arab Emirates	3	Medium
Israel	2	Low
Azerbaijan	4	High

## Criterion 2: Threat the Actor Poses to EU Enlargement

How strongly the actor's engagement undermines (or could undermine) the EU enlargement's objectives, European values, and the EU's ability to act cohesively and credibly in the Western Balkans.

**Table 3:** Criterion 2 - Threat the Actor Poses to EU Enlargement

Actor	Score (1-5)	Qualitative mark
Russia	5	Extremely high
China	4	High
Türkiye	3	Medium
United Arab Emirates	4	High
Israel	2	Low
Azerbaijan	2	Low

## Criterion 3: Overlap with the EU's Policy in the Western Balkans

The extent to which the actor's objectives and instruments converge with the EU's stated priorities in the Western Balkans (promoting stability, security, prosperity, reforms, cross-border connectivity, and democratic governance).

**Table 4:** Criterion 3 - Overlap with the EU's Policy in the Western Balkans

Actor	Score (1-5)	Qualitative mark
Russia	1	Very low
China	3	Medium
Türkiye	4	High
United Arab Emirates	2	Low
Israel	3	Medium
Azerbaijan	4	High

## Key Findings

- **Russia:** Russia has a strong strategic focus on the EU's neighbourhood and deploys tools that exploit regional vulnerabilities—energy leverage, information manipulation, and alignment to nationalist narratives—making it the clearest spoiler with regard to the EU enlargement.
- **China:** China's footprint is primarily confined to the economic field, with emphasis on infrastructure development, industrial investment, and technology. It becomes politically consequential where governance gaps translate into opaque contracting, weak oversight, and watering down of labour and environmental standards. These factors can turn into slow alignment with the EU *acquis*.

- **Türkiye:** Türkiye is driven by both identity considerations and pragmatism reflected in its contribution to regional security. Its engagement overlaps with the EU and NATO interests in stability, yet it can also clash with Western narratives and exploit the EU's credibility deficit.
- **UAE:** UAE engagement is investment-led and often negotiated through opaque elite-to-elite channels. Where projects rely on statutory exemptions, discretionary zoning, or other shortcuts, they can amplify state capture risks and erode the EU's conditionality.
- **Israel:** Israel's engagement is comparatively narrower and often tied to bilateral diplomacy, security cooperation, and conflict management. The main EU-relevant frictions arise when WB actors adopt positions that diverge from the EU's Common Foreign and Security Policy or CFSP (for example, on the status of Jerusalem).
- **Azerbaijan:** Azerbaijan matters primarily as a supplier of natural gas. The EU–Azerbaijan cooperation on the Southern Gas Corridor aligns with the EU's diversification agenda, yet the partnership also exposes the EU to reputational and political trade-offs.

## Introduction

Since its inception in the 1990s, the EU enlargement towards Eastern Europe and subsequently the WB, has been geared towards the consolidation of democratic governance, the mitigation of regional security risks, and the anchoring of the EU's neighbourhood within a rules-based order. All these objectives have been reflective of a geopolitical vision positing the Union as an exporter of stability, market integration, and good governance towards its periphery, starting with the 10 countries that joined in 2004/2007, through the WB, all the way to neighbours such as Ukraine, Moldova and Georgia covered by the Eastern Partnership (EaP). However, from the early 2010s onwards, the EU has had to reckon with competition with other global actors, notably Russia and China, in "Wider Europe". Geopolitical contestation gained renewed prominence following Russia's full-scale invasion of Ukraine in February 2022 and the pushback Moscow faced by a coalition of Western actors where the EU emerged as a central node. The WB have been deeply affected by this dynamic. The six countries of the region - Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia - have been exposed to competing external agendas pitting the EU against its rivals and adversaries. Competition manifests itself across various fields: finance, with FDI and concessionary lending turning into a political instrument; the legacy media and social networks, an arena for narrative wars; civil society and national political systems shaped by conflicts around a variety of identity cleavages; energy, due to the weaponisation of dependency on natural gas and crude oil supplies; and, of course, security and defence, including alignment with external centres of power.

This research report does not assume that the WB are a passive target of foreign influence projection. A recurring finding in the research, grounded in the Threatometer methodology developed at a workshop convened by the Belgrade Centre for Security Policy (BCSP), is that external influence works primarily through domestic vulnerabilities and enablers: weak institutions and oversight of decision making, state capture by elites, polarised media environments, or unresolved conflicts over territory and historical memory shaping identity politics. The Threatometer therefore treats external influence and agency and host-country conditions as analytically inextricable.

In contrast to the past, the EU is acutely aware that it is no longer the only game in town and takes competition seriously. Starting from 2022, it has re-energised the enlargement process which had previously been dormant. Montenegro, Albania and Serbia are negotiating their accession, with the first two scoring progress in terms of the technical steps involved and hoping to join the EU by 2030. North Macedonia and Bosnia Herzegovina have both formally launched membership talks, but are still stuck in the preliminary phase. Kosovo applied for membership back in December 2022 and is keen to be granted candidate status. In addition, the EU has upped its economic offer to the WB, most visibly through the Growth Plan for the Western Balkans, which

conditions increased financial assistance and better market access on vigorous institutional reforms in critical areas such as the rule of law.<sup>1</sup>

Yet, European action invites counteraction. The renewed momentum towards enlarging the EU and frontloading its rules and institutional arrangements to the WB raises the stakes for foreign competitors. Moreover, the EU signalling towards the region inflates expectations and therefore increases risks. Several interviewees emphasised that when the EU's credibility weakens or when accession timelines become opaque, alternative partners can fill the void. They are in a position to extend financial support faster and with fewer formal strings attached, communicate their preferences and offers more clearly to local stakeholders in the political establishment and the general public, project identity-centred narratives and exploit fissures and traumas, as well as compromise governance structures.

Whereas the EU is slow moving, norm-bound and procedural as well as vulnerable to internal disfunction due to divergent interests and priorities on the part of member states, the likes of Russia, China and Türkiye benefit from centralized decision-making where the personality of the leader plays an outsize role. Informal engagement at the level of leadership as well lower levels gives them an edge. The EU's competitors take advantage of transnational networks of political, business and civil society actors operating in conditions of non-transparency, poor legal oversight, clientelism and state capture on both sides. In short, the EU enlargement and its underlying conditionality mechanism remain central to WB politics at national and regional level, but they continue to face stiff competition by third parties whose outreach aligns with domestic political and economic incentives.

At the same time, the research does not assume, in a binary fashion, that all external actors at all times, and in all sectors, act at cross-purposes with the EU and seek, consciously or by implication, to thwart Brussels policy and roll back European influence. There are clearly cases where the dynamic could be positive-sum and mutually reinforcing, e.g. Türkiye providing troops to the EU and NATO-led peacekeeping missions deployed in Bosnia and Herzegovina and Kosovo respectively, or Chinese contractors delivering EU-funded infrastructure projects more efficiently and quickly than other companies or indeed deploying technology which could advance joint goals in areas as decarbonizing the energy sector in line with Europe's green agenda. Other times, engagement could be EU enlargement-neutral - e.g. promoting trade and security cooperation with more distant countries such as Israel or UAE, attracting Azerbaijani investment into tourism, or carrying out projects with Türkiye in the area of renovation of architectural heritage dating back to the Ottoman period. Though the EU is bound to remain the main political and economic partner for the six WB countries, they are open to the rest of the world and are likely to benefit from linkages with non-European countries.

In light of this, the Threatometer gauges in a rigorous fashion external engagement precisely to assess compatibility with the EU agenda, without making assumptions and falling into the methodological trap of reducing all forms of connection with non-European world to a matter of geopolitical competition. The nuanced view sets it apart from other comparable analyses of foreign malign influence in Wider Europe that have come out over the past decade or so.

Against this backdrop, the purpose of the Threatometer is not to rank actors for its own sake, but to take stock of a complex landscape and translate it into a structured public-facing tool that helps critical stakeholders - policymakers, researchers and civil society: (a) identify areas where risks are most acute; (b) recognise where overlaps of interest and therefore potential for common action exist; and (c) calibrate the EU and national policy responses to sector-specific realities.

## Methodology

The Threatometer methodology was developed through a dedicated BCSP workshop held in November 2025 and refined through iterative testing across the six selected actors. The workshop brought to the surface conceptual ambiguities (especially around “overlap”), highlighted the risk of treating the EU as monolithic, and stressed the need to differentiate by sector, looking at the economic, political, security, information/cultural fields through separate lenses.<sup>2</sup>

## Sources

**Desk research:** The analysis draws extensively on primary and secondary sources on foreign influence, security dynamics, propaganda ecosystems, and the governance implications of foreign capital and industrial projects in the WB.

**Interviews:** 27 expert interviews were conducted in November–December 2025 using a structured questionnaire. Interviewees were asked to focus on at least one WB country and assess one or more external actors across the three Threatometer criteria. Where anonymity was requested, interviewees are referenced as ‘anonymous expert’ with the interview date.

**Open-source triangulation:** Selected official EU documents (enlargement reports and policy documents), international organisations’ publications, and media reporting were used to triangulate interview claims and update empirical developments cited in the period 2022–2025.

## Threatometer Criteria

**Criterion 1 (EU prominence):** This assesses how centrally the EU features in an actor’s policy towards the WB. The EU can be present as a geopolitical competitor, a market the actor wants privileged access to, a normative pole whose rules constrain the actor, or a partner whose engagement the actor seeks to influence.

**Criterion 2 (Threat to the European Project):** This assesses the extent to which an actor’s engagement undermines EU enlargement objectives and EU values or weakens the EU’s ability to act cohesively. Threat can be direct (destabilisation, disinformation, security coercion) or indirect (state capture, corruption, erosion of regulatory alignment, polarisation).

**Criterion 3 (Overlap):** This assesses where the actor’s objectives and instruments converge with EU priorities in the Western Balkans. Overlap can exist even when motivations differ, but it is scored as higher where convergence is sustained, institutionalised, and supportive of EU *acquis* alignment.

## Scoring Rubric and Anchors

Each criterion is scored on a five-point scale (1 Very low to 5 Extremely high). To reduce score inflation and enhance comparability, the following anchors were applied:

**Table 5:** Scoring and Anchors

Score	Anchor description
1 Very low	The EU is largely absent from the actor’s policy logic; the actor’s footprint is marginal; overlap or threat effects are negligible.
2 Low	The EU appears occasionally or indirectly; the actor has a limited footprint; threat/overlap effects are narrow or episodic.
3 Medium	The EU is a relevant reference point; the actor’s footprint is visible across at least one key sector; threat/overlap effects are meaningful but constrained.
4 High	The EU is a major reference point; the actor’s footprint is broad or deeply embedded; threat/overlap effects are structurally important for accession dynamics.
5 Extremely high	The EU is a central target or competitor in the actor’s strategy; the actor’s footprint is systemic; threat effects are severe and multi-sectoral (or overlap is exceptionally strong, institutionalised, and durable).

Scores in this publication reflect the balance of evidence available across 2022–2025, recognising the workshop’s caveat that evidence asymmetry and short-term events can skew assessments.

## Conceptual Lenses and Evidence Integration

The research report combines two evidence streams - structured expert interviews and selected external literature - on an equal evidentiary footing. Claims are treated as strongest where they converge across at least two streams and where the mechanism of influence can be specified (e.g., procurement exemptions, media amplification, or energy lock-in).

Conceptually, the report draws on established work on soft power and sharper forms of authoritarian influence. Research has found that soft power operates through attraction and perceived legitimacy and emanates from a given state's society, institutions and culture rather than its government, much less from the executive branch. By contrast, sharp power practised by Russia and China operates in a top-down manner with either the state or its proxies playing a defining role and the outright manipulation of information and the institutions of the target country as the central *modus operandi*. Oftentimes, the overarching goal is not to convince the public of the merits of the actor relaying the message, but rather to discredit and undermine a third party, i.e. the EU or, to use a phrase Russian commentators and officials are partial to, "the collective West". Typically, sharp power works in tandem with enablers in the target country. In the Western Balkans, external influence constraining the EU interacts with and is reinforced by domestic governance vulnerabilities, including state capture and arrangements and practices geared towards the entry of opaque capital flows sometimes described as corrosive capital.<sup>3</sup>

The analytical question is not whether a third actor is present in the region, but how its objectives and, especially, instruments affect the EU enlargement process: whether they reinforce reforms and the alignment to the *acquis*, exploit gaps between formal adherence and informal governance practices, or actively obstruct the EU's conditionality.

## Russia

**Table 6:** Russia

Actor	EU prominence	Threat	Overlap
3. Russia	5 (Extremely high)	5 (Extremely high)	1 (Very low)

## Strategic Profile and Instruments

Across the interview corpus, Russia is described as the actor with the clearest anti-EU posture in the Western Balkans. As in its immediate neighbourhood spanning Eastern Europe and the Southern Caucasus, Moscow seeks to block or slow down the EU enlargement, keep territorial conflicts unresolved and security fears rife, and assert influence through the supply of energy and by penetrating the information sphere.

Previous BCSP's research on Russian soft or, rather, sharp power in Serbia stresses that Russia's appeal is not rooted primarily in "attractiveness" in the classical sense.<sup>4</sup> Rather, it is a function of the widely shared perception of Russia as an alternative to the West. Vast segments of the Serbian public begrudge the latter, feeling that it has "betrayed" or "never fully accepted" them. By contrast, Russia stands out as a fellow Slavic and Eastern Orthodox-majority nation which has suffered at the hands of the West and is now fighting for a more just order which will be more accommodating of Serbia as well.

*"Russia's soft power in Serbia is based on the fact that the majority sees Russia as an alternative to the West."<sup>5</sup>*

This soft-power environment has concrete policy consequences.

## Russia as a Direct Actor in Domestic Repression: The "Colour Revolution" Framework

Beyond indirect influence, Russia has been growingly engaged with authorities with regard to anti-democratic repression of the opposition. This role is most clearly visible through the adoption of the Russian rhetoric of "colour revolutions" as a global threat and, accordingly, of protecting regime stability against perceived Western encroachment as a desirable objective. The narrative developed within Russian state institutions, starting from the mid-2000s in response to the upheavals in Georgia and Ukraine, reframes civic mobilisation as externally orchestrated regime-change operations. Reinforced with the Arab Spring and the downfall of former President Viktor Yanukovich as a result of Ukraine's Revolution of Dignity and the so-called Second Maidan (2013-2014), this doctrine has become the central element of Moscow's national security thinking and has been actively exported to political allies, including Serbia.<sup>6</sup>

In Serbia in particular, the Russian "colour revolution" narrative has been systematically adopted by the ruling Serbian Progressive Party (SNS) and embedded into state discourse since 2012. Civic protests, ranging from environmental movements and anti-violence demonstrations to student-led mobilisations, have been routinely framed as foreign-engineered plots aimed at overthrowing the constitutional order. This framing mirrors Russian state rhetoric almost verbatim and functions as a legitimising device for repression, delegitimisation of dissent, and the criminalisation of civil society.<sup>7</sup>

President Aleksandar Vucic and other senior Serbian officials have been raising the spectre of colour revolution for years. First, in relation to the protests following the 2023 local elections and, even more importantly, as a way to push back against the mass rallies and blockades that have spread through Serbia since the tragic incident at the Novi Sad railway station in November 2024.

## Information Influence and Propaganda Ecosystems

Russia's information strategy has adapted to regulatory and platform constraints instituted in reaction to the full-scale invasion of Ukraine. BCSP's study of pro-Russian Telegram channels<sup>8</sup> notes that once major Russian outlets were blocked in Europe, propagandists increased investment in Telegram channels to sustain reach and bypass restrictions. Such platforms have been pushing a variety of content, from the messaging of radical Serbian nationalist groups with regard to the Kosovo dispute but also frictions with other WB neighbours, to the glorification of Russia's "Special Military Operation" (*Spetsial'naiia voennaia operatsiia*) in Ukraine, to attacks against "wokeness" and associated social mores in decadent Western societies infected by liberal values.

At the EU level, the post-2022 sanctions regime includes measures to suspend broadcasting and distribution arrangements for RT and Sputnik across all member states, illustrating how information policy has become a security instrument.<sup>9</sup>

*"The main Russian propaganda channels ... were blocked in Europe, so propagandists began to invest in the development of Telegram channels."<sup>10</sup>*

In contrast to the EU, Serbia did not prohibit pro-Russian channels, with Sputnik maintaining its local chapter and RT actually opening a new portal broadcasting and publishing content in Serbian/Croatian/Bosnian. In the case of Sputnik, newscast is freely available for distribution through local radio stations across Serbia<sup>11</sup> but potentially accessible in neighbouring countries such as Bosnia-Herzegovina (the Republic of Srpska, the Serb-majority entity within the state), Montenegro, North Macedonia and in Serb communities in Kosovo. Thus, Russian messaging is not limited to Serbia but to the entire post-Yugoslav space. The Russian and Russia-friendly media ecosystem matters for the wider region because narratives circulate transnationally through nearly all Serbian and Serbian-(Croatian/Bosnian) language media, local influencers, and cross-border networks.

## Russian–Serbian Security Cooperation and the Repression of Protests

Serbian authorities took on the "colour revolution" discourse to deepen formal security cooperation with Russia. In 2021, Serbia and Russia established a Joint Working Group for Combating "Colour Revolutions", initiated by Russia's Security Council Secretary Nikolai Patrushev, considered to be the point man for the Balkans in Moscow<sup>12</sup>, and then Serbian Interior Minister Aleksandar Vulin. This marked a shift from narrative alignment to practical cooperation, embedding Russian security outlook into Serbian policing and internal security doctrines and practices.

Moscow and Belgrade expanded cooperation through joint military and police exercises with Russian and Belarusian forces. Such exercises are nothing new.

They date back more than a decade ago and are rooted in a 2013 Russian-Serbian agreement. Apart from joint drills, the agreement also entailed the transfer of surplus MiG-29 fighter jets and T72 tanks along with bringing Serbia in as an observer into the Moscow-led Collective Security Treaty Organisation (CSTO).<sup>13</sup> In recent years, the focus has moved from defence (countering external challenges to Serbia) to internal order or regime security, as evidenced by the increased talk about “colour revolutions”. Some more recent exercises conducted by Serbia and Russia have explicitly simulated responses to mass demonstrations. Although formal military drills were suspended after Russia’s invasion of Ukraine, Serbian authorities continued domestic riot-control training based on such doctrines. The “Manufactured Threat” publication documents repeated acknowledgements by Serbian officials that Russian intelligence services provided assistance during protest waves, signalling a level of involvement that goes far beyond diplomatic and propagandistic support.<sup>14</sup> A particular concern has been the alleged use of illegal sonic weapon to disperse demonstrators in March 2025.

Independent investigative reporting further substantiates claims of direct Russian involvement. Recent investigations reveal that Russian intelligence-linked cyber units conducted surveillance and digital intrusions targeting Serbian civil society organisations, independent media, and protest networks. These operations included unauthorised access to internal communications and data interception, aligning with patterns attributed to Russian state intelligence services rather than isolated cybercrime. Notably, this represents one of the first concrete examples in which Russian actors appear to have materially assisted the Serbian authorities in suppressing critics of the government, beyond the previously observed sphere of propagandistic rhetoric. Such activities reinforce the conclusion that Russia has actively participated in suppressing democratic mobilisation inside Serbia.<sup>15</sup>

The involvement of Russia in the domestic stand-off in Serbia illustrates its enduring influence. While in foreign policy President Aleksandar Vucic has been threading a fine line balancing amongst the West, Russia and China<sup>16</sup>, he appears to have aligned more closely with Russia with regard of maintaining regime stability.

## | Energy Leverage and Resilience After 2022

Russia’s ability to project hard power into the Western Balkans is limited by geography and NATO/EU presence. Energy, however, remains a persistent channel of leverage.

Russia’s role as a destabilising actor is also reflected in the economic consequences of its entrenchment in Serbia’s energy sector. The United States imposed sanctions on Serbian Oil Industry (Naftna Industrija Srbije - NIS), majority-owned by Gazprom Neft, in 2025 as part of a broader effort to curtail Russian energy influence. Though the restrictions were imposed by the Biden administration just before leaving office, the Trump administration retained them after assuming power in January 2025.<sup>17</sup> Though Serbia managed to negotiate five extensions with the US through 2025, it has

reached agreement with Gazprom Neft that its 56% stake would be sold. Currently, Hungary's MOL and ADNOC are reported to be in negotiations to take NIS over. It is worth mentioning that another major Russian company placed under US sanctions, Lukoil, is also present on the Serbian market. In addition, the EU/G7 oil sanctions introduced in December 2022 have affected Serbia. The JANAF pipeline serving the NIS refinery in Pancevo cannot import Russian crude oil. Plans to build a connection to the Druzhba network via Hungary, which secured a carve out from the EU restrictions, have not made a great deal of headway.<sup>18</sup>

Overall, the Western sanctions disrupted oil supplies and increased Serbia's economic vulnerability. Fuel inflation in 2025 was considerably ahead of the general inflation rate, as a result of the problems faced by NIS. The government has had to deal with a crisis which threatens domestic stability, adding to its loss of legitimacy. As far as Serbia is concerned, energy ties with Russia have exposed the country to external pressure and economic instability, further complicating the EU alignment.

*"Serbia can no longer receive Russian oil via this route."<sup>19</sup>*

Oil is just the tip of the iceberg. Going forward, Serbia is facing a parallel challenge in the natural gas sector. The EU decision to phase out purchases of Russian gas till 1 November 2027 puts in question the deliveries through the TurkStream pipeline which has Serbia as one of its principal customers in addition to Hungary.<sup>20</sup> Srbijagas' hope has been to sign a new 10-year contract with Gazprom following the expiry of the previous three-year deal in 2025. With the negotiations still ongoing and Serbia supplied under short-term extensions, the prospect of a gas crunch in a year's time is real. Alternative suppliers such as Azerbaijan cannot pick up the slack because they lack capacity. Serbia might have to turn to Türkiye instead. Yet the EU has declared that it would consider Turkish-supplied volume as actually coming from Russia if not proven otherwise. This would result in further complications for Srbijagas and Serbian energy authorities.

Parallel research on energy security highlights how sanctions and dependency on Russia has put Serbia under strain. Though certain supplies have been diversified – e.g. thanks to the contract with Azerbaijan – and new connections built to reduce dependence, the challenges are considerable. External risk rooted in dependency on Russia adds to internal problems affecting the sector as illustrated by the ups and downs experienced by Serbia's state-owned electric power company, EPS. The focus on NIS and, to a lesser degree, Srbijagas diverts attention from long-term strategic priorities such as the decarbonisation of the energy system and the move away from lignite coal, which is at the heart of the sector. The EU's Carbon Border Adjustment Mechanism (CBAM) will have a disruptive effect as it will drive up the price of coal-generated electricity, for EPS exports to Serbia's EU neighbours might decline as a result of the extra duty.<sup>21</sup>

## Implications for EU Enlargement

On criterion 1 (EU prominence), Russia scores extremely high. The EU and NATO are the primary strategic constraints on Russian influence in Europe, and enlargement in the Western Balkans reduces the space for Russian leverage. Interviewees repeatedly framed Russia's regional policy through its intent to weaken the EU's credibility and keep accession processes politically contentious. A Kosovo-based expert summarised Russia's posture in the region as "malign, obstructionist, threatening."<sup>22</sup>

On criterion 2 (threat), Russia scores extremely high because its engagement frequently aligns with destabilising narratives, with Serbia's rejection of Western sanctions, and with a tough stance on unresolved disputes such as the one with Kosovo. Russia's approach is also amplified where local elites take advantage of identity politics for domestic gain.

On criterion 3 (overlap), Russia scores very low. Tactical overlaps may exist in specific issue-areas (for example, limited cooperation on some security or energy arrangements), but the strategic direction is largely incompatible with the EU's conditionality and CFSP.

Taken together, these dynamics demonstrate that Russia's engagement in Western Balkans cannot be reduced to the projection of soft power, challenging Western narratives, or the exercise of economic leverage alone. Russia has been involved in the suppression of pro-democracy activism – through the transfer of ideas, institutionalised security cooperation, joint intelligence operations, and synchronized delegitimisation of the anti-Vucic protests. This awards Russia a unique place among external actors assessed in this publication: not merely as a spoiler of EU enlargement, but as an active enabler of authoritarian governance practices incompatible with membership conditionality and democratic norms. This is a role Russia has been performing in the post-Soviet space at least since mid-2000s, but the case of Serbia shows that other parts of wider Europe could be susceptible too.<sup>23</sup>

**Table 7: China**

Actor	EU prominence	Threat	Overlap
4. China	4 (High)	4 (High)	3 (Medium)

## Strategic Profile and Instruments

China's engagement in the Western Balkans is primarily driven by economic and industrial policy: infrastructure projects, industrial acquisitions, concessionary lending, and an expanding portfolio of technology-related cooperation. Interviews frequently described China as less ideologically confrontational than Russia, but more consequential over time, because of its ability to embed itself into domestic economies through large projects and elite-to-elite relations. The latter were highlighted by President Xi Jinping's visit to Belgrade during his European tour in May 2024. That was the Chinese leader's second time in the Serbian Capital, after 2016 when he also went to the town of Smederevo. Indeed, Serbia has been a keen participant in the 14+1 (formerly 17+1) Forum. It is also a top beneficiary of preferential loans extended by Chinese entities – e.g. the high-speed railway link between Belgrade and Budapest financed by China's Export-Import (Exim) Bank – as well as of FDI.<sup>24</sup>

Serbia is part of a larger story around China's growing economic footprint in Europe. Since the 2008 global financial crisis, Chinese involvement in trade, investment, and infrastructure has been on the rise. Chinese firms moved into European manufacturing (e.g. Volvo), energy (notably in the renewables sector), and logistics assets at a time when many countries were capital-constrained, while trade volumes between China and the EU grew rapidly. Through initiatives like the Belt and Road, China strengthened transport, port, and rail links connecting Europe to Asian supply chains. At the same time, this deeper economic presence has pushed European governments to balance openness with greater scrutiny over strategic dependence and competition. The COVID-19 pandemic, but also Beijing's coercive use of trade alerted policymakers about the perils of closer integration leading to vulnerability to critical supplies such as rare earths, pharmaceutical ingredients and chemicals, lithium-ion batteries, photovoltaic panels. Concerns about China's overcapacity and industrial policies' effect on European business, e.g. the automotive sector, which is now transitioning to electric vehicles, are mounting.<sup>25</sup> The sector is important in the Western Balkans too. According to rough estimates, automotive components account for up to 49% of North Macedonia's exports, 23% of Serbia's and 17% of Bosnia's.<sup>26</sup> On the positive side, the "near shoring" of supply chains away from China could benefit the region which enjoys preferential access and geographical proximity to the EU market.<sup>27</sup>

The EU is not always an explicit interlocutor in China's day-to-day regional dealings. However, the EU's single market, regulatory model and enlargement process shape both the opportunities China seeks (market access, logistics corridors, reputational legitimacy) and the constraints it tries to manage (EU standards, scrutiny of state subsidies, and rule-of-law expectations). In the context of greater scrutiny of Chinese economic outreach, countries like Serbia and its Western Balkan neighbours offer opportunities for establishing foothold in the antechamber of the EU market which enjoys preferential trade with the core European economy, but without the high governance standards that come along. Chinese construction companies have been successfully bidding EU-funded infrastructure projects too:<sup>28</sup> e.g. the Tivat-Budva highway backed by an EBRD loan (together, the Union and its member states hold a majority of shares in the bank); and, though Brussels is aware of the challenge - former Enlargement Commissioner Johannes Hahn famously remarked in 2019 that the EU had underestimated China while overestimating Russia's influence in the Balkans<sup>29</sup> - it too has to strike a fine balance between engagement and pushback.

## Governance Externalities of Large Projects

BCSP's field research on Chinese projects in Serbia emphasises that most EU-relevant effects often appear locally, through human security externalities (environment, labour rights, public health) and through governance arrangements that weaken transparency and oversight.<sup>30</sup>

*"A feature of Chinese projects is the influx of labour from Asia to Serbia, with exploitative practices recorded."<sup>31</sup>*

The same study documents environmental hazards and public health concerns in localities hosting major PRC investments, underscoring that the EU *acquis* on environment and labour becomes harder to implement when external projects are treated as exceptions rather than as part of a rules-based investment framework.

## Labour Rights, EU Conditionality, and Reputational Risk

The Linglong case in Zrenjanin and the Zijin mine in Bor became emblematic because it combined labour rights allegations, weak oversight, and high political sensitivity. Local and international NGOs have reported *serious* abuse of migrant workers from Vietnam, India and Bangladesh during both construction and early operation phases – including poor living conditions, passport withholding, excessive overtime, and other indicators of forced labour.<sup>32</sup> In response, the US Customs and Border Protection (CBP) issued a *withhold-release order*, effectively blocking imports of tyres from Zrenjanin. BCSP's case study<sup>33</sup> notes that the issue has reached the European Parliament and that parliamentary scrutiny has connected working conditions at the facility to wider concerns about the growing Chinese influence.

*“The European Parliament requested a complete investigation and voiced concern about the growing Chinese influence in Serbia.”<sup>34</sup>*

The European Parliament’s 2021 resolution on the Linglong factory explicitly linked alleged forced labour, corruption and a lack of transparency in environmental and social assessments to the obligations of EU candidates to uphold the EU values and align with EU law.<sup>35</sup>

## Implications for EU Enlargement

On criterion 1 (EU prominence), China scores high: even where the EU is not overtly targeted, the EU’s market and regulatory environment are central to China’s long-term economic logic in Europe, including through candidate states.

On criterion 2 (threat), China scores high because the most persistent risk is structural: where projects are implemented through opaque contracting, legal exemptions, or weak oversight, they can slow down the *acquis* alignment, deepen corruption risks, and create long-term dependencies that complicate the EU conditionality.

On criterion 3 (overlap), China scores medium. Overlap exists in connectivity and economic development objectives, but it is constrained by normative divergence on transparency, labour and environmental standards, and by geopolitical competition between the EU and China.

Recent bilateral developments also signal deeper institutionalisation of ties. For example, the China–Serbia Free Trade Agreement entered into force in July 2024, adding another layer to the economic relationship that the EU will need to monitor in light of the obligations a candidate country takes up with regards to the EU *acquis*.<sup>36</sup>

## Türkiye (Turkey)

**Table 8:** Türkiye (Turkey)

Actor	EU prominence	Threat	Overlap
5. Türkiye	3 (Medium)	3 (Medium)	4 (High)

### Strategic Profile and Instruments

Türkiye's role in the Western Balkans is multi-dimensional for two reasons. First, it is the sheer depth of the relationship which spans diplomacy, security, the economy, society and culture. Second, is Türkiye's ambivalent strategic posture: it acts *both* as a strategically autonomous middle power pursuing its own interests and priorities independent of the EU, and, on occasion, as a member of NATO, fellow traveller of the EU and top contributor to peacekeeping missions in Kosovo and Bosnia.

In comparison to Russia and China, Türkiye is not entirely external to the region. It is part of wider Southeast Europe and has been involved in regional multilateral organisations since the 1930s. There are substantial communities in the region – Bosniaks, Albanians, Turks and others – who have strong connections to Türkiye thanks to their large expat communities in the country. Ankara exerts influence over Islam in the Balkans through the Directorate of Religious Affairs (Diyanet), invests into the restoration and upkeep of historical sites dating back to the Ottoman period, and supports the construction of new mosques – e.g. the grand project in the downtown area of the Albanian capital Tirana.<sup>37</sup> The region has been exposed to Türkiye's soft power through popular culture (TV series, music), as well as through the attraction that such a global city as Istanbul and the Turkish tourist industry more broadly have.

Based on those links, Türkiye has projected an image of an alternative to the West and the EU in particular. President Recep Tayyip Erdogan stresses Ankara's reliability as a partner, while cultivating close ties to leaders in the Western Balkans, particularly the aspiring strongmen such as Aleksandar Vucic and Edi Rama. The Turkish construction business and other sectors have sought to profit from this engagement as have defence firms such as Baykar, manufacturer of the world-famous Bayraktar drones.

BCSP's research<sup>38</sup> argues that Türkiye is often analysed less than Russia or China, yet its influence is significant and operates through a distinctive combination of identity-linked narratives and pragmatic state interests.

*"Turkish foreign policy in the Balkans has two aspects ... emotions ... and traditional foreign policy realism."<sup>39</sup>*

The 'emotional' dimension draws on history, identity and social ties, while the 'realist' dimension emphasises markets, strategic influence, and security interests.

## Security Provider and Partner in the Defence Industrial Sector

Türkiye's security engagement goes back to the 1990s, marked by the violent disintegration of Yugoslavia. Turkish troops serve in the EUFOR Althea Peacekeeping mission in Bosnia and Herzegovina as well as in KFOR deployed in Kosovo. There have been close bilateral ties with such countries as Albania and North Macedonia too, which are now Ankara's allies in NATO along with Montenegro. In the 2010s, there were concerns that Türkiye security apparatus was interfering with domestic affairs of some Western Balkan states – e.g. seizure and transfer of individuals associated with the outlawed Gulen movement, conducted in dubious circumstances with the alleged cooperation of security officials in countries like Kosovo. However, the war in Ukraine and the cooperative turn of Türkiye's foreign and security policy in the early 2020s have had a positive downstream effect in the Balkans. Ankara has been highlighting its significance as a security provider rather than a challenger to the EU and the West. Türkiye's role has become more visible in recent years, including through cooperation with NATO partners, export of arms (e.g. Bayraktar drones), training and joint exercises. Ankara's growing defence industry and regional security anxieties create incentives for Türkiye to build political leverage through security cooperation.

*“Türkiye has become more assertive as a security provider in the Western Balkans ... building political leverage in the region.”<sup>40</sup>*

In practice, this security role can align with EU and NATO priorities (stability, deterrence, capacity-building), but it can also generate friction when security cooperation is interpreted locally through contested sovereignty issues. That has been clearly the case more recently, where Serbia-Türkiye relations suffered as a result of a potential sale of Bayraktar drones to Kosovo.

## Implications for EU Enlargement

On criterion 1 (EU prominence), Türkiye scores medium. The EU is a relevant external reference point through migration cooperation, trade ties, and Türkiye, EU political dynamics, but Türkiye's Western Balkans policy is not solely EU-centric and often operates through bilateral and identity-based channels.

On criterion 2 (threat), Türkiye scores medium. Interviews frequently characterised Türkiye as a 'mixed' actor: it can contribute to stability and security, yet it can also compete with the EU's normative agenda when local partners interpret Türkiye as offering an alternative model of governance or a shortcut to influence without strong conditionality.

On criterion 3 (overlap), Türkiye scores high. There is meaningful convergence on regional stability and (in several cases) security cooperation; the overlap is strongest where Türkiye's role complements EU/NATO objectives rather than replacing them.

# United Arab Emirates

**Table 9:** United Arab Emirates

Actor	EU prominence	Threat	Overlap
6. United Arab Emirates	3 (Medium)	4 (High)	2 (Low)

## Strategic Profile and Instruments

The UAE’s engagement in the Western Balkans is driven primarily by investment, real estate development, and strategic economic deals, typically negotiated through elite-to-elite channels. It has come into the spotlight thanks to landmark projects such as the Belgrade Waterfront complex of residential and commercial buildings. It has been followed by potential real estate developments in Montenegro and Albania. Other sectors include transportation – Air Serbia’s partnership with Emirati Airlines and pharmaceuticals. Dubai has become an attractive destination for tourists and business from the Western Balkans, as well as for the region’s organized crime thanks to the money laundering opportunities and the absence of extradition legislation. Thanks to its investment profile and active diplomacy, the UAE have overtaken its Gulf partner-cum-rival Saudi Arabia - involved for years in Bosnia and elsewhere - as a point of reference in the region.<sup>41</sup>

Interviewees emphasised that the UAE rarely operates through overt ideology or mass media ecosystems; its influence is usually structural and institutional, expressed through the governance arrangements underpinning large projects. One interviewee described the EU as present in the UAE’s calculus in a positive sense: “It features rather prominently, occupying a positive role.”<sup>42</sup>

## Corrosive Capital and Governance Risks

A major EU-relevant question is not whether the Western Balkans should receive foreign investment, but under what governance conditions the investment is negotiated and implemented. A 2025 Carnegie Europe paper on ‘corrosive capital’ argues that in systems with weak administrative capacity and strong political discretion, the race to attract capital can “erode rather than strengthen institutions.”<sup>43</sup>

*“In systems where administrative capacity is weak ... the race to attract capital can erode rather than strengthen institutions.”<sup>44</sup>*

The same paper highlights that large-scale real estate and tourism projects are particularly exposed to risks of discretionary exemptions, politicised zoning decisions, and limited public scrutiny, conditions that can undermine the EU’s rule-of-law and public procurement conditionality in candidate states.

Recent public controversies over UAE-linked projects (for example, the controversy surrounding the deal to develop the Velika Plaza beach in Montenegro’s coastal town of Ulcinj) underline the sensitivity of land-use, environmental standards and transparent tendering in the EU-accession contexts.<sup>45</sup>

## Implications for EU Enlargement

On criterion 1 (EU prominence), the UAE scores medium. The EU’s single market and political weight matter as a long-term horizon, but UAE projects are usually negotiated bilaterally and do not consistently target the EU as a central competitor.

On criterion 2 (threat), the UAE scores high because the main risk pathway runs through governance: if projects are implemented through exemptions, *ad hoc* legal regimes, or preferential treatment, they can deepen state capture dynamics and slow down the reforms demanded under the EU conditionality.

On criterion 3 (overlap), the UAE scores low. While some projects can contribute to economic development, overlap is limited where investment logic prioritises speed and political visibility over transparency, accountability, and long-term alignment to the EU standards.

## Israel

**Table 10:** Israel

Actor	EU prominence	Threat	Overlap
7. Israel	2 (Low)	2 (Low)	3 (Medium)

## Strategic Profile and Instruments

Israel’s engagement with the Western Balkans is comparatively narrower than that of Russia or China and is often anchored in bilateral diplomacy, security cooperation and, since 2023, conflict-related diplomatic positioning. It came to prominence in 2019-2020 with Trump administration’s push to resolve the Serbia-Kosovo dispute, which led to Prishtina’s controversial recognition of Jerusalem as Israel’s capital in return for Israeli recognition of Kosovo as a state. The Israeli diplomatic, commercial and security engagement with the region is part to ties with a broader set of countries in Southeast and Central Europe, including the Western Balkans immediate neighbours – Hungary, Greece, Romania and Bulgaria.<sup>46</sup> At the same time, the war in Gaza has fed into anti-Israeli sentiment in the Western Balkans, particularly among Muslim communities.<sup>47</sup> Interviews tended to treat Israel as an actor with limited structural influence over enlargement, but with episodic salience when regional governments position themselves on Middle East conflicts or when symbolic diplomatic decisions intersect with the EU CFSP.

## Conflict Diplomacy and Regional Spillovers

BCSP's analysis of Western Balkan diplomacy during the Gaza war<sup>48</sup> notes that the conflict created a political challenge for regional governments, forcing them to balance domestic public opinion, relations with Israel and the Islamic world, and alignment with EU and US partners.

*"Many countries in the Western Balkans are conflicted about what diplomatic stance to take on the Gaza war."<sup>49</sup>*

A separate BCSP brief warns that while security challenges are not inevitable, the Gaza conflict can generate possible ramifications for the Western Balkans, including risks of radicalisation or of external rivalry (for example between Israel and Iran) spilling into the region.<sup>50</sup>

## CFSP Alignment: Jerusalem as a Friction Point

Israel's relevance to the EU conditionality becomes most visible when Western Balkan governments take symbolic foreign-policy decisions that diverge from the EU CFSP. When Kosovo opened its embassy in Jerusalem, the EU went public with the statement that the decision "diverges Kosovo from the EU position on Jerusalem."<sup>51</sup>

## Implications for EU Enlargement

On criterion 1 (EU prominence), Israel scores low. The EU is not a primary driver of Israel's Western Balkans engagements, although the EU positions can shape the diplomatic space in which Balkan partners operate.

On criterion 2 (threat), Israel scores low. The main risk is indirect: conflict diplomacy can create polarisation and CFSP divergence for candidates, and security spillovers can add pressure to already fragile social environments.

On criterion 3 (overlap), Israel scores medium. Overlap can exist in security cooperation and in certain technology and economic areas, but it is not a dominant or consistently institutionalised pattern across the region.

# Azerbaijan

**Table 11:** Azerbaijan

Actor	EU prominence	Threat	Overlap
8. Azerbaijan	4 (High)	2 (Low)	4 (High)

## Strategic Profile and Instruments

Azerbaijan’s influence in the Western Balkans is primarily related to the supply of natural gas. Azerbaijan and its state-owned company, SOCAR, is one of the principal stakeholders in the so-called Southern Gas Corridor connecting the Caspian to the EU. Serbia is currently receiving volumes through Bulgaria which, after long delays, constructed interconnector pipelines connecting it to the Greek and the Serbian grids. While SOCAR and its partners in the Shah Deniz consortium are unlikely to increase production and pump further volumes to Southeast Europe – where Greece, Bulgaria and Serbia are already customers - it has already provided a useful hedge against Russia.

In addition, Baku has cultivated ties with elites in the Western Balkans, which is reflected in the presence of a square named after Heydar Aliyev, Azerbaijan’s former president and father to the current head of state, Ilham Aliyev, and a landmark project, Porto Montenegro, on the eponymous country’s Adriatic coast. Political relations between Azerbaijan and Serbia have also been shaped by perceived parallels between territorial disputes in the post-Soviet and post-Yugoslav spaces. In particular, analogies drawn between Kosovo and Nagorno-Karabakh have contributed to closer ties between Belgrade and Baku since the presidency of Boris Tadić (2004–2012), with both governments emphasising principles of territorial integrity in international forums. Azerbaijan is likewise present in the region thanks to its special relationship with Türkiye.

The EU’s post-2022 diversification strategy increased the strategic salience of the Southern Gas Corridor and, by extension, of Azerbaijan as an energy partner.<sup>52</sup> That was underscored by the high-profile trip the European Commission President Ursula von der Leyen made to Baku in July 2022 as well as in the South Caucasus countries’ inclusion in the European Political Community (EPC), a loose political club encompassing all states in wider Europe apart from Russia and Belarus. Azerbaijan features prominently in connectivity schemes such as the so-called Middle Corridor, which aims to connect Europe and China via the Caspian and Central Asia. It is now involved in normalization talks with Armenia, backed by both the EU and the Trump administration, which – in the fullness of time – might bring benefits to both EU and the Western Balkans.

Despite these developments at the strategic level, Azerbaijan’s engagement with Western Balkan states is therefore more sector-specific than Russia’s or China’s and focused on energy and diplomatic outreach linked to gas.

## The EU–Azerbaijan Energy Partnership

The European Commission’s July 2022 press release on the EU–Azerbaijan Memorandum of Understanding describes Azerbaijan as “a key partner in our efforts to move away from Russian fossil fuels” and sets out a commitment to expand the Southern Gas Corridor’s capacity to deliver at least 20 billion cubic meters annually to the EU by 2027.<sup>53</sup>

*“A key partner in our efforts to move away from Russian fossil fuels.”<sup>54</sup>*

The EU views the Southern Gas Corridor as a major contribution to secure gas supplies in Southeastern Europe and potentially also the Western Balkans, via the Trans-Adriatic Pipeline (TAP). The completion of the Bulgaria-Greece interconnector (ICGB) between Komotini and Stara Zagora and the Bulgaria-Serbia (IBS) link between the border and the city of Nis have made the physical flow of gas possible. Apart from SOCAR’s shipments, the new connection enables imports from the new liquefied natural gas (LNG) terminal at the Northern Greek port of Alexandroupolis. Azeri gas might eventually supply Albania, Montenegro, Bosnia and Croatia, in case the long-discussed Ionian-Adriatic Pipeline (IAP), and extension of TAP - comes into being.<sup>55</sup>

## Implications for EU Enlargement

On criterion 1 (EU prominence), Azerbaijan scores high because the EU is the central market and diplomatic counterpart for the energy relationship that underpins Azerbaijan’s European engagement.

On criterion 2 (threat), Azerbaijan scores low. The dominant interaction with EU policy is cooperative (energy diversification). Risks are primarily political and reputational, how the EU balances security-of-supply imperatives with its human-rights and rule-of-law commitments.

On criterion 3 (overlap), Azerbaijan scores high. Energy diversification and connectivity are explicit EU priorities; the overlap is the strongest where Balkan energy projects complement EU strategies rather than deepen new dependencies.

## Cross-Cutting Findings

### Influence is Sectoral and Conditional on Domestic Vulnerability

A consistent workshop and interview insight is that external influence is not uniform across domains. Russia's strongest channels are security-linked narratives and cooperation with Serbia, energy dependencies and information manipulation. China's channels of influence are industrial investment, infrastructure finance and technology partnerships, the impact of which becomes politically consequential when weak oversight allows opacity and human-security externalities. Türkiye combines identity-linked soft power with pragmatic interests in security and markets. The UAE operates mainly through investment and deal-making with governance effects. Israel and Azerbaijan matter mostly through niche diplomacy and sector-specific leverage (conflict diplomacy and energy).

### The Information Environment Amplifies Geopolitical Externalities

Information influence does not depend only on the origin of narratives, but on domestic media structure, concentration, and political incentives. In Serbia, pro-government media can selectively highlight cooperation with certain actors while downplaying others, shaping public perception and foreign-policy room for manoeuvre.

*"Such facts are largely absent from pro-government media ... which tend to highlight Serbia's military cooperation with Russia while downplaying ... its ties with NATO."<sup>56</sup>*

### Serbia as a Conduit: Regional Spillovers of Domestic Strategies

Several interviews described Serbia as a regional hub through which external narratives and political technologies can spill over into neighbouring states. This is reinforced by shared language media spaces and by political ties between elites. The narrative around the so-called 'Serbian World' blends nationalism and strategic influence to sustain regional leverage.

*"The idea functions as a powerful narrative tool, blending nationalism, historical revisionism, and strategic influence."<sup>57</sup>*

Although Serbia is not one of the external actors scored in the Threatometer, the finding matters methodologically: external actors can act through regional states and non-state networks that localise and 'launder' influence, complicating attribution and policy response.

## EU Leverage Hinges on Presence, Credibility and Enforcement

Across cases, the EU's normative influence remains strongest where it is backed by visible economic engagement, credible conditionality and domestic demand for reform. Where accession timelines are uncertain or the EU's presence is perceived as symbolic, external actors can offer faster capital or more emotionally resonant narratives, reducing the salience of EU rules. Research on "corrosive capital" argues that delayed accession can create space for investors to exploit the gap between the EU norms and domestic enforcement, particularly in politically sensitive sectors such as real estate and strategic infrastructure.<sup>58</sup>

# Annex

## Interview List

The following interviews informed the Threatometer scoring and qualitative narrative. Where anonymity was requested, the interviewee is referenced as 'Anonymous expert', with the interview date.

<b>Interviewee</b>	<b>Date</b>
Expert from Kosovo	November 27, 2025
Expert from North Macedonia	November 16, 2025
Expert from Bosnia and Herzegovina	November 27, 2025
Expert from North Macedonia	November 22, 2025
Expert from North Macedonia	November 28, 2025
Expert from Albania	November 10, 2025
Expert from Kosovo	November 28, 2025
Expert from Albania	December 24, 2025
Expert from Bosnia and Herzegovina	November 4, 2025
Expert from Serbia	November 7, 2025
Expert from Bosnia and Herzegovina	December 4, 2025
Expert from Montenegro	November 10, 2025
Expert from Bosnia and Herzegovina	November 17, 2025
Expert from Kosovo	December 1, 2025
Expert from Montenegro	November 7, 2025
Expert from Serbia	December 13, 2025
Expert from Serbia	November 17, 2025
Expert from Montenegro	November 16, 2025
Expert from Serbia	November 6, 2025
Expert from North Macedonia	December 12, 2025
Expert from Serbia	November 13, 2025
Expert from Croatia	December 16, 2025
Expert from Azerbaijan	November 10, 2025 and December 11, 2025
Expert from North Macedonia	December 12, 2025
Expert from Albania	November 13, 2025
Expert from Serbia	December 11, 2025

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