



EU Enlargement in the Western Balkans

The Effects of Chinese
Investment

Abstract

In 2018, the enlargement process was back as an EU policy focus, as the Commission recognised the Western Balkans as a geopolitical challenge due to the increased presence of external powers such as China. Five years after the adoption of the new Strategy Paper, the issue of China's impact in Europe is more relevant than ever due to its possible negative effects on good governance, regulatory enforcement, and national security, especially in the areas of transport infrastructure, power generation, and heavy industry. In this context, this Policy Paper offers a meta-analysis of the existing literature on Chinese investment and soft power in the region and presents the main issues and areas where Chinese governance could negatively affect the Western Balkans countries' efforts to fulfil the enlargement criteria and become EU Member States. It details the main standards and rules that are being countered by China's own governance norms and practices, and it offers policy recommendations to address the issue at hand.



Laia Comerma

Pompeu Fabra University

Introduction

The Western Balkans (WB) region is a geographical denomination that is used to refer to the countries in the Balkan region that were part of the former Yugoslavia, that is, Bosnia and Herzegovina (BiH), Kosovo, Serbia, Montenegro, Croatia, and North Macedonia, plus Albania. While they all have officially expressed their aspiration to become members of the European Union, of the seven only Croatia has achieved EU membership since 2013, while Montenegro and Serbia have started membership talks. The European Council agreed in March 2020 to open negotiation talks with Albania and North Macedonia, BiH was granted candidate status in December 2022 by the Council, and Kosovo is still a potential candidate. The WB has become an area of renewed interest since 2018, when the European Commission published a new Strategy Paper on EU Enlargement that recognised this region as an area of 'geopolitical self-interest' (Hahn, 2018; Petrović & Tzifakis, 2021). There, it identified 2025 as the year when the front runners – Serbia and Montenegro – should join the EU, and it provided a more detailed framework for six flagship initiatives that would be further refined,¹ through technical and political dialogue between the Commission and each country's government, into milestones to be fulfilled to align to EU governance standards.

However, while the geopolitical importance of this region for the EU has been recognised among policymakers since 2018, the EU has kept these countries at arm's length for decades, firstly by raising the bar for EU membership with the 'Copenhagen+ criteria', as will be further explained, and secondly by prolonging the process as a result of 'enlargement fatigue' among EU Member States after the 2004 enlargement round. This has resulted in a rise of Euroscepticism in the region, understood as popular opposition to the modes of EU integration and its national impacts, and behaviour ranging from apathy and detachment to active contestation (Belloni, 2016: 4).

The geopolitical challenge that the Commission identified in 2018 is due in particular to increased involvement of foreign powers in the WB, not only Russia and Turkey, which have a long-standing presence in the region, but also China and the Arab states (Jaćimović, Deichmann, & Tianping, 2023: 8). China in particular has become the subject of political discussion in EU circles, as its investment in the WB has increased significantly, as have its political contacts through the 17+1 platform and cooperation within the Belt and Road Initiative (BRI) (Zweers et al., 2020: 8), which has raised concerns about its level of real political influence in the region. Chinese involvement in the region has targeted the infrastructure and energy sectors, where the region suffered an investment gap of up to 12 per

¹ The six key areas are: the rule of law; security and migration; socio-economic development; transport and energy connectivity; the digital agenda; and reconciliation and good neighbourly relations.

cent of GDP per year in the period 2018–2022 in the Western Balkans (Grievson, Gruebler, & Holzner, 2018: 11). This gave China the opportunity to develop ‘a distribution network in this part of the world suitable for the further penetration of Chinese products into the European market, in which the WB countries play an intermediary role’ (Jaćimović et al., 2018: 1190). This has traditionally taken the form of infrastructure loans, provided mostly by Chinese state-owned banks, such as Exim Bank, who usually finance 85 per cent of the project, thus leaving 15 per cent to be co-financed through national sources (Hake & Radzyner, 2019). The main issue of concern has been the lack of transparency in and around these loans and the projects that they finance, which normally avoid a public tender, relying instead on intergovernmental agreements that open the door to *lex specialis* (special law) procedures that bypass public procurement law.

Therefore, these agreements rely on governance standards and rules that go against the type of regulations that the EU aims to promote in the WB countries as part of the *acquis communautaire* necessary for joining the bloc as full members. Instead, they perpetuate practices of corruption and clientelism that reinforce their status as ‘stabilocracies’ (Bieber, 2020). This refers to ‘autocrats that capture the state, and claim to secure stability in the Western Balkans region by pretending to champion European integration’ while relying ‘on informal, clientelist structures, controlling the media, and regularly producing artificial political crises over EU conditionalities to undermine any true efforts in strengthening the rule of law’ (Hoxaj, 2021: 165) that govern the countries and their patronage networks. In this context, the relevant question to pose is whether and, if so, to what extent, or in which particular cases, Chinese investment in the region is preventing those countries from moving forward with their EU accession.

To answer this question, the article offers a meta-analysis of the literature on the state and effects of Chinese soft power and investment in the WB region. First, it presents the EU enlargement framework and the main criteria that WB countries need to fulfil to join the Union. It proceeds to expose the main characteristics and state of Chinese investment in the region and then to assess whether such investment is preventing the WB from fulfilling the enlargement criteria or making such a goal more difficult in any way, and if so, how. Finally, it provides recommendations for EU policymakers that could help minimise any perverse influence of Chinese investment governance standards and practices and promote dialogue and understanding among the various powers present in the region, for the benefit of the WB countries. The aim is to help them advance in their membership journey while at the same time addressing the investment and infrastructure shortages of their national economies.

EU accession: requirements for the Western Balkan countries

Prior to 2018, enlargement was treated as a predominantly technical process, requiring candidate countries to fully comply with the EU norms and rules – or *acquis communautaire* – as defined in the 1993 Copenhagen criteria, which outlines the conditions for EU membership. In contrast to previous enlargement rounds,² the Western Balkan countries, due to their unique historical and political conditions, are required to comply with additional conditionality, or ‘Copenhagen+’ criteria (Lilyanova, 2016: 2). These are outlined in two separate but interrelated policy frameworks: the Stability Pact (SP) and the Stabilisation and Association Process (SAP). They set up a double agenda of stabilisation and regional cooperation, and association with EU policies. This is complemented with the Stability and Association Agreements (SAA) signed bilaterally with each country, which allow for a more bilateral approach in which each country is allowed to proceed according to its own pace of progress and reforms (Elbasani, 2008).

Alongside bilateral cooperation, the regional dimension was deemed necessary as the WB countries have a history of armed conflict and unresolved bilateral disputes among them since the collapse of the Republic of Yugoslavia. Violent conflicts exploded in Croatia and Bosnia (1991–1995), Kosovo (1999), and North Macedonia (2001), and Albania’s state institutions collapsed in 1997. Thus, the EU needed to move beyond crisis management and introduce conflict prevention strategies, which materialised in regional cooperation and good neighbourly relations as prerequisites for EU membership for the first time. The stabilisation of relations between BiH and Kosovo is of primary importance to EU leaders concerning the integration of these countries. Moreover, for the first time the EU has introduced direct intervention mechanisms for when conditionality is not met; it can support certain parties, laws, actions, and persons directly and threaten to block further progress in the enlargement process or stop providing financial assistance (Keil, 2013). This aims to address the weak statehood of the WB countries, understood as ‘interrelated long-term structures or “deep conditions” that shape, if not determine, the range of possible elite choices, and might hence limit the scope of agency-driven Europeanization’, translating into the contestation of state sovereign authority, and the lack of bureaucratic capacities to logistically implement its decisions (Elbasani, 2013: 10).

Nonetheless, this framework has been criticised for the lack of voice that these candidate countries have in making the rules that are required for them to advance

² Since 2000, the main enlargement round took place in 2004, when ten new Member States joined the EU. This was intended to reunite the continent after the fall of the Berlin Wall and the collapse of the Soviet Union. In 2007, Bulgaria and Romania joined the EU. Their accession negotiations put special emphasis on judicial reform, the fight against corruption, and, in the case of Bulgaria, also against organised crime. The final accession was that of Croatia in 2013, already subject to stricter conditionality, as established in December 2006 by the European Council (European Parliament, n.d.).

in the accession process (Elbasani, 2013: 8). The EU holds asymmetrical power that has led to a top-down transfer of rules, resulting in intrusiveness and, ultimately, in 'EU-scepticism' in the Western Balkans, meaning 'a critical Europeanism which questions the methods, timing and rhetoric of the integration process but does not reject the European ideal altogether' (Belloni, 2016: 11). The EU's popularity in the Balkans is diminishing, giving way to a resurgence of national identities, disappointment, frustration, and polarisation between a Europeanised elite and non-Europeanised and alienated citizens. Meanwhile, there is an increasing inclination towards alternative geopolitical powers such as China to hedge the WB countries' options and get the necessary financing to fill their infrastructure gap.

In this light, on 6 February 2018 the European Commission published a new strategy called 'Credible Enlargement Perspective for an Enhanced EU Engagement with the Western Balkans'. Its goal is to address the so-called enlargement fatigue among EU Member States and the bloc's declining influence in the Western Balkans and to follow up appropriately on the Berlin process (2014–2018). This document gives an indicative 'best-case scenario' accession date for the front runners (i.e. 2025), and it includes stricter requirements for candidates and potential candidates such as urgently resolving bilateral disputes. So far, the new strategy has failed to translate into concrete results or transmit the Commission's sense of urgency to the Member States, who have frequently taken advantage of the enlargement procedures to advance their own national interest (Petrović & Tzifakis, 2021). Examples include Greece's dispute with North Macedonia regarding the latter's name, Slovenia's dispute with Croatia regarding the maritime border, and Spain's unwillingness to recognise Kosovo because of the secessionist threat at home.

In this regard, the Prespa agreement was signed in June 2018, resolving the issue over North Macedonia's name, and now Kosovo is the only country that has not been formally recognised as a candidate by the Council, having applied in December 2022. Increasingly, the Western Balkans enlargement process and the countries' integration into the EU is seen as a matter of geopolitical self-interest, if the EU is to avoid having its immediate neighbourhood shaped by others (EEAS, 2018). This arises from a context where the perceived or existing threat from other geostrategic players, such as Russia, China, and Turkey, has become more salient among EU stakeholders. These actors' investment and increased interest in the region have been welcomed by WB countries as, economically, they have been filling a gap in terms of investments, loans, and infrastructure projects, usually with less conditionality and more swiftness in the decision process. The next section will develop the specifics of China's involvement in the WB region, which have given rise to this perception of geopolitical threat and catalysed a renewed momentum in favour of enlargement among EU institutions.

Chinese investment in the Western Balkans

While China's engagement in the region as a percentage of total trade is less than 10 per cent, substantially lower than that of the EU, China has managed to offset other traditional partners of the region such as Russia or Turkey (Zweers et al., 2020). China's investment in the Western Balkan countries is concentrated in three main sectors: mining and heavy industry, transport infrastructure, and power generation (Tonchev, 2017). Chinese foreign direct investment in the region, however, remains limited and involves mainly acquisitions of existing companies rather than the creation of new companies through greenfield investment. This fits into the overall strategy of China's involvement in the region within the BRI framework, which is to develop the Land–Sea Express Corridor that aims at improving China–EU connectivity.

However, China does not follow a comprehensive regional strategy but has instead embedded its bilateral relationships, which are the fundamental component of its engagement in the WB, with the 17+1 platform, cooperation platforms linked to the BRI, the Confucius Institutes, and 'friendship associations'. In fact, the term 'Western Balkans' does not appear in Chinese official documents or statements; instead, China appears to adhere to a 'one country, one policy' tradition in relation to the Balkan region (Jaćimović, Deichmann, & Tianping, 2023: 3). Because the region is geographically far from China, its policy since 2012 has been one of pragmatic cooperation, refraining from becoming involved in regional geopolitical rivalries or intervening in their internal affairs. Its relations with the region are not institutionalised like the EU's are in the SAAs and the enlargement frameworks, while it aims to build a comprehensive partnership with the WB countries, specifically in the areas of diplomacy, trade, investment, science and technology, education, and tourism (Jaćimović, Deichmann, & Tianping, 2023: 14). That is, while China's economic presence in the region has become stronger, it is not paired with a higher level of political engagement.

The most common form of Chinese engagement in the Western Balkans is through infrastructure loans, be it for transport or development infrastructure. State-owned banks such as Exim Bank are the main financiers of such loans, usually offering concessional loans provided for 20 to 30 years with a 2–3 per cent interest rate (Barisitz & Radzyner, 2017). The second major sector that Chinese loans have targeted is non-renewable energy, mostly coal-fired power plants (Garčević, 2021). Therefore, China's soft power stems fundamentally from its economic power, but there appears to be a sense of disappointment among regional governments regarding China's low level of greenfield investment and its unwillingness to contribute to the region's wider economic development. While they welcome the limited conditionality in economic cooperation with China and the limited transparency requirements, the slowly rising scrutiny from EU enlargement mechanisms and, potentially, EU membership will progressively hinder that temptation. While not based on the shared culture that comes from

their socialist past both in the Balkans and in China, China's only requirement for a good relationship is that the WB countries refrain from establishing diplomatic ties with or provide political support to Taiwan (Zweers et al., 2020).

Overall, China's interest and strategy in the region is based on the assumption that WB countries will catch up with and integrate into the EU, thereby building a bridge for Chinese companies to the main EU markets. Furthermore, the Balkans' purchasing power will increase as a result of EU integration, and Chinese manufacturers may find it cheaper to locate their production facilities in countries closer to the EU with lower labour costs than most EU economies. Politically, China is traditionally reluctant to get involved in highly politically unstable countries, usually taking up the role of a neutral power and reliable business partner (Hake & Radzyner, 2019). It will thus favour the stability and good neighbourly relations among WB countries themselves that the EU is trying to promote and that are a necessary condition for membership.

Is the Chinese presence keeping the Western Balkans from EU membership?

China's presence in the WB countries affects their chances to become Member States of the EU primarily because it obstructs norm diffusion in political, economic and security terms.³ Since Chinese investments do not require the same standards or conditionality that the EU's do, the fact that those economies have found in China an alternative to cover their investment and infrastructural needs allows them to avoid carrying out the reforms that the EU requires to access its funding and to at least postpone the reforms that EU membership demands. Moreover, China does not require that certain environmental or transparency standards are fulfilled, which perpetuates the networks of patronage and corruption that characterise the region's local and national governments. Finally, because China does not carry out the same types of feasibility studies that the EU does, in terms of financial viability it has financed infrastructure deemed unviable by the EU. One example of this is the Bar–Boljare highway connecting Montenegro and Serbia (see Grgić, 2019). These infrastructure loans put those countries at an indebtedness level against China that is deemed dangerous for their financial sustainability and solvency.

In terms of political influence, China has not exploited the narrow degree of post-socialist nostalgia in the Western Balkans by highlighting their socialist past, referring instead to their 'traditional friendship' or 'shared past'. Most political contacts have taken place bilaterally or through the 17+1 platform, which is now in crisis since Lithuania withdrew in 2021, and Estonia and Latvia in 2022. Therefore, its political influence has been limited to those countries abstaining from making

³ This section is based on the analysis in Zweers et al. (2020).

any political declaration against China and its government, for instance on the treatment of Uyghurs in Xinjiang or the crackdown on democracy in Hong Kong. They have rather shown a more positive inclination towards China, as illustrated by Serbian President Aleksandar Vucic's parading of Chinese medical equipment in March 2020, at the beginning of the COVID-19 pandemic, kissing the Chinese flag after stressing the importance of China as the only country able to provide aid, and rebuking European solidarity (Wang et al., 2023).

In terms of the security sector, it is again limited as most WB countries are NATO members, which determines many of their defence and security choices. Serbia is the only country with more extensive cooperation, including police cooperation, military equipment purchases, and certain telecommunications operations, and it has bought uninhabited aerial vehicles from China. Its cooperation with Huawei in its 'Safe City' project, with its mass video surveillance, has raised questions regarding its compatibility with the EU's General Data Protection Regulation (GDPR) in matters of privacy and data protection, even if it has transposed the GDPR into its own regulatory framework. This shows that in many cases, the challenge that Chinese investment and collaboration in the WB pose for EU rules and norms is not on matters of regulatory transposal, but instead of implementation. Large Chinese infrastructure projects are normally initiated through intergovernmental agreements, opening the door for *lex specialis* procedures to bypass public procurement law and many of the environmental, financial, and transparency requirements prescribed by EU regulation. These agreements permit the selection of Chinese contractors to implement the projects, as required by Chinese infrastructure development loans, instead of allowing for open market competition in a transparent way, open to all companies on the basis of non-discrimination and equal treatment (Jaćimović, Deichmann, & Tianping, 2023).

In the economic sector, Chinese investment has made it more difficult for the EU to bring the WB countries into full adherence to its standards, rules, and values by providing an alternative with lower adoption costs than the EU. This has materialised in various areas:

- Firstly, on good governance and corruption standards, Chinese economic engagement has allowed WB's strongmen to not comply with transparent tendering procedures, accountability, and other good governance practices that hinder corruption and undemocratic practices.
- Secondly, on fundamental human rights and freedom of expression standards, direct and indirect cooperation between media outlets and Chinese news agencies, or their ownership by Chinese entities, could negatively affect the respect of these standards, as Chinese standards on media freedom and human rights are very different from those of the EU.
- Thirdly, EU standards on macroeconomic stability are undermined by the level of debt distress and the dependency risks attached to many of the large infrastructure projects in the region financed by China, such as the Bar–Boljare highway, and result in a violation of EU rules on maximum debt and

budget deficits.

- Fourthly, environmental and energy standards are often harmed as those projects result in excessive air pollution and environmental damage, running against the EU's Industrial Emissions Directive (2010/75/EU) and its Emissions Trading System (ETS).
- Fifthly, while EU rules require WB governments to reduce state intervention in the economy, the more extensive state intervention that China's state-to-state loans bring has distorting impacts on WB markets.
- Sixthly, China's support for Serbia in its non-recognition of Kosovo does not help in finding the sustainable solution that the EU aims for, even if China is not expected to oppose a normalisation of relations between the two countries.
- Finally, it has already been mentioned that *lex specialis* agreements run against EU standards on public procurement and infrastructure development and do not guarantee the financial feasibility, environmental sustainability, and quality of the infrastructure.

Is EU integration the price to pay for Chinese money?

Overall, China represents a completely different governance model than the EU, which has a negative impact on the region's EU integration process, even if the general objectives that both China and the EU have for the region are not at odds. The economic and infrastructure development of the Western Balkans is in both powers' interest. China's involvement in the region's economic development will help in developing much needed infrastructure and thus reducing the substantial economic gap with current EU Member States. However, China's engagement with the WB offers an alternative development model that is incompatible with the harmonisation of the countries' legislation with the EU *acquis* and standards, undermining the impact of the EU conditionality mechanism.

Yet the EU's political ties and economic presence in the region are still substantially greater and more institutionalised than China's (Zweers et al., 2020). This, together with the fact that the countries of the region still see their future as being members of the European Union (CISR, 2020), suggests that this influence is unlikely to be decisive. Rather, it might cause a significant delay in their accession journey in terms of their absorption of key EU rules, standards, and practices.

All in all, China's interest in the Western Balkans lies in the region's proximity to the EU and its access to the EU market. Therefore, if those countries were to drift away from EU integration and lose those privileges, this would probably reduce China's own interest in the region. Still, its presence is – as shown in the previous analysis – at times detrimental to their absorption of the EU *acquis* and standards,

obstructing the mechanism of conditionality and their socialisation with EU norms. This would suggest that China is somehow interested in perpetuating the current status quo of privileged access to the EU market, but without all the requirements and conditionalities that come with being an EU Member State. Were the WB countries to join the EU, this would make China's investment in the region much more cumbersome and subject to EU standards, with a heightened level of oversight.

Nonetheless, this status quo is only viable as long as EU political leaders and Member States are not interested in segregating economically from China, as the enlargement requirement to align foreign policies would put these countries' interests' and those of the EU in opposition. Thus, in the context of increased talks within the EU of 'de-risking' or even 'decoupling' from China, the status quo seems increasingly unstable. In essence, the Western Balkans' current relationship with China is destined to change as their EU accession progresses. Even if Chinese involvement has the potential to prolong the process and thus delay the final outcome, their potential integration into the EU and the standards that will come with it will fundamentally change their deals and the style of their relationship with China.

Most of all, a renewed sense of commitment is needed on the EU's side, based on mutual trust and enhanced credibility, to diminish the fear that those countries will end up 'parked' in a second or third tier of integration in a multi-speed Union, kept at a distance from the bloc's core activities and processes (Economides, 2020). However, this does not mean in any way that China will then disengage from the region, at least by its own initiative. Instead, their interactions will become analogous to those of the countries that have already progressed to membership, such as Greece, Bulgaria, and Romania, and become more dependent on those with the EU.

Overall, the EU needs to step up and advance the accession negotiations with the WB countries. While the latter envision their future as EU members, they are finding more and more political and financial opportunities outside of it, and they might get comfortable in this in-out position. Geographically close but not politically integrated, the WB could potentially decide that this hedging and balancing strategy gives them the 'best of both worlds', and, with this, the EU could eventually lose its Western Balkan neighbourhood.

Policy recommendations for the EU

- Promote constructive engagement with China and dialogue on enlargement in the region. This would make it possible to share the main challenges and objectives for the region regarding EU membership, which is a goal shared by China. This would involve China in helping to promote good neighbourly relations among WB countries, as well as political stability in the region.
- Offer economic incentives for good governance. The EU should recognise that economic incentives ('carrots') should accompany any initiative to counter negative environmental, labour, and governance effects of Chinese influence and promote good governance. These carrots need to address and reduce the attractiveness of the low conditionality of Chinese investment and its governance practices in a realistic way that does not come at the cost of economic development.
- Shift from government-to-government to government-to-people. The EU should put local communities and civil society organisations at the heart of its approach to the region, especially when aiming to address environmental and climate issues that stem from elites' unsound governance practices and Chinese influence. They can act as watchdogs, and at the same time this will empower a democratic spirit among WB citizens.
- Promote public debate on the growing discontent and the costs of the transition towards EU membership. In order to address the Balkans' own 'enlargement fatigue' and 'EU-scepticism', the EU should promote a public debate on the conditions and costs of the transition towards becoming a Member State. This would not only provide clarity and honesty but also make civil society a partner in a process that often seems too technical and convoluted.
- Prioritise the rule of law. Western Balkan governments have addressed the issue of rule of law as one of negotiation through intergovernmental agreements with Chinese state banks, violating several EU standards and regulations. The EU needs to insist on and promote rules-based engagement to help the region become immune to the disruptive aspects of Chinese engagement and prioritise the transfer of the *acquis* on public procurement, competition policy, the environment, and energy. To this end, it should make the WB governments a partner in the process and include them more fully to build self-confidence in their integration path.
- Support independent media. To avoid negative or biased influence on WB citizens, the EU should support free and independent media and help them secure access to independent information and content, to confront Chinese media outlets' partnerships with Balkan government-controlled ones, which usually promote a pro-China discourse, and even cases of direct or indirect ownership by Chinese entities of media outlets in the Western Balkans.

- Make EU unity a prerequisite. There needs to be a common position among all EU Member States on major issues related to enlargement in the WB, to avoid them being used or weaponised for national or political purposes. Bilateral disputes offer opportunities to external actors such as China to gain influence in the region; thus, a clear and coherent approach to enlargement will reduce the leverage of other actors.
- Focus on facts, not myths. In a context of growing suspicion of and rivalry with China, it is easy to be blinded by heightened rhetoric, fears, and myths about China's engagement and objectives in the region. The EU must follow a realistic and fact-based approach, governed by its strategic and geopolitical objectives, that addresses the pervasive consequences of Chinese engagement in the WB, while constructively bringing China in where it can be of mutual benefit to the region and the EU, such as on infrastructure development or promoting regional stability. ■

Author bio

Laia Comerma is a PhD candidate at Pompeu Fabra University in Barcelona and a predoctoral research fellow at the Barcelona Institute for International Studies (IBEI). Her PhD dissertation focuses on the foreign policy relationship of economic cooperation between China and the European Union. Laia is also Policy Officer at European Liberal Youth (LYMEC). She holds a Master's degree in International Relations from the London School of Economics (LSE), a postgraduate degree in International Economics and Commerce from the University of Barcelona (UB), and a Bachelor's degree in Philosophy, Politics, and Economics from UPF-UC3M-UAM.

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